



MINUTES
Project Management Committee
Fall 2023 Meeting
October 23-25, 2023
Raleigh, NC

MOTIONS AND ACTION ITEMS

Motions/Consensus Items:

1. A motion to approve the minutes of the Summer 2023 PMC Meeting of July 11-12, 2023 with the correction to the spelling of Joon Park's name, was made by Todd Scholz, seconded by Alvin Simmons. **Unanimously approved.**
2. A motion to allow the National Education and Training committee to proceed with development of national SOPs using the same process as with advisories was made by Alvin Simmons; seconded by John Wise. **Unanimously approved.**
3. A motion that the PMC empowers the Executive Director to move funds to cover a deficit in Product Performance funding during the National Research Planning Meeting, if good residue field trials are not available, was made by Alvin Simmons; seconded by Simon Zebelo. **Unanimously approved.**
4. **Consensus:** To move forward with the full transition to the eField Data Notebook during the 2024 field season. Understanding the importance of the eField Data Notebook's full rollout to the future success of the IR-4 Project, and in response to the feedback and concerns that the PMC heard regarding the full transition, the PMC has decided to add trainings for the Regional Field Coordinator's and Field Research Director's to boost familiarity with the software, with the goal of full transition to this system during the 2024 field season. The PMC has full confidence in the leadership and capabilities of the RFCs, FRDs, Headquarters, and the IR-4 team as a whole, to ensure the successful rollout.
5. A motion was made to adjourn the meeting at 11:58 am by Alvin Simmons, seconded by Todd Scholz. **Unanimously approved.**

Motions/Consensus Votes Made Via Email In-Between Regular Meetings:

1. The PMC voted via email for approval of the following new members to join and fill vacancies in the IR-4 Project Education and Training Committee: Nicole Soldan, Johanna Mazlo, Kristen Searer-Jones, Chanz Robbins, and Faradeh Rehfield. **Unanimously approved by written consent.**

Action Items:

1. **Action Items:** 1) Provide eField Data Notebook training for the Regional Field Coordinators and solicit feedback for regional training and information exchange with Field Research Directors; 2) Solicit support from Field Research Directors who have already piloted the eField Data Notebook and serve as train the trainers; 3) Hold in-person National Education Trainings in California and Florida (due to the field seasons in these regions approaching more rapidly); and

- 4) Offer enhanced online training, weekly office hours and open lines of communication to provide support from Headquarters.
2. **Action Item:** Michael Braverman, by the March CLC/PMC Joint Meeting, to provide an accounting of what work has been done (successes and failures) in the past five years on the spreadsheet supplied, include what projects are in the queue to be completed as well as requests that have come in (including notes on why a project was not advanced), what criteria is used for evaluation of projects and to assess the ability of the submitter to meet the data demands, and an accounting of IR-4 FTE's spent on biopesticide projects.
3. **Action Item:** Jerry Baron to initiate a Technology Committee led by Jimmy Byrtus, that is representative of the regions, headquarters and the various fields of work of the IR-4 Project.
4. **Action Item:** Jerry Baron to add a standing agenda item to PMC meeting agenda's to review changes to regional field capacity.

Members:

Jerry Baron; IR-4 Executive Director
 Doug Buhler; Administrative Advisor-NCR
 Rubella Goswami; USDA- NIFA
 Liwei Gu; Regional Director-SOR
 Mary Hausbeck; Incoming Regional Director - NCR
 Matt Hengel; PMC Chair; Regional Director-WR
 Marcel Holyoak; Administrative Adviser – WR
 Steve Lommel; Administrative Adviser- HQ

Todd Scholz; CLC Vice- Chair
 Alvin Simmons; USDA-ARS
 John Wise; Outgoing Regional Director-NCR
 Simon Zebelo; Regional Director - NER

Presenters:

Alice Axtell, IR-4 HQ
 David Beaudreau; DCLRS
 Michael Braverman; IR-4 HQ
 Jimmy Byrtus; IR-4 HQ
 Debbie Carpenter; IR-4 HQ
 Krystal Chojnacki; IR-4 HQ
 Christina Dineen; IR-4 HQ
 Anna Gore; Minor Use Foundation

Johanna Mazlo; IR-4 HQ
 Philip Moore; IR-4 HQ
 Cristi Palmer; IR-4 HQ
 Hannah Ross; IR-4 HQ
 Amy Upton; CLC Member

Monday, October 23, 2023 1:00 pm to 5:00 pm ET

Matt Hengel called the meeting to order at 1:11 PM–

1. Welcome and comments: (Lommel)
 - Introductions
 - M. Hengel welcomed the group and initiated introductions around the room and on zoom.
 - S. Lommel welcomed the group to NC State and reported: that IR-4 Headquarters is settled at its new home here at NC State; updated on the delay in the passage of the State of North Carolina budget that included a salary increase for employees both this year (4%) and next (3%) across the board; there will be \$1 billion worth of construction projects on campus starting this year; our State Agriculture research station also received some one-time and continuous funding allocations to upgrade the research sites; updated about NC State's new research enterprise data system transition and issues; that NC State is growing (particularly STEM fields) and admissions is continuing to be competitive; and that Dr. Garey Fox has moved into the Dean position at CALS.

- A discussion was held about the student enrollment at NC State, out-of-state tuition, and J. Baron thanked Dr. Lommel and the college for all of their support.
2. Approval of minutes, new agenda items (Hengel)
- A. Simmons noted a correction needed to be made to the spelling of Joon Park's name.
 - **A motion to approve the minutes of the Summer 2023 PMC Meeting of July 11-12, 2023, with the correction to the spelling of Joon Park's name, was made by Todd Scholz, seconded by Alvin Simmons; unanimously approved.**
3. Funding Update
- Delays in distribution of 2023 funds (Chojnacki)
 - K. Chojnacki provided a timeline of events related to grant award issuance and the implementation of the new NC State RED system.
 - A discussion was held regarding impacts of delays in funding on research, personnel turnover in the awards management division at NIFA, and working toward improvement for next year.
 - Status/expectations with 2024 Appropriations (Beaudreau)
 - D. Beaudreau reported: that the US House of Representatives is currently without a Speaker; November 17 is the forthcoming government shutdown date without passage of a continuing resolution; Friends of IR-4 will schedule a meeting with OMB to provide a background of the IR-4 in early January; and a Lunch and Learn is being scheduled on the Hill in early March along with Hill visits to increase authorization for IR-4 and also work on the Farm Bill.
 - A discussion was held regarding the success of the Lunch and Learn that happened last year, that two Congressmen visited Dr. Zebelo's lab at the University of Maryland Eastern Shore, and if any of the nominees for Speaker of the House serve on the Agriculture Committee.
4. AA Update
- NRSP-4 funding and potential plans for 2024
 - D. Buhler reported that previous messaging that stated there would be a 50% cut in NRSP-4 funds was a mistake; the proposed reduction is 15%. This is not ideal so they are working to identify what they can do to avert the reduction in funding, including an educational tour.
 - A discussion was held regarding the philosophy of funding programs long term versus novel project, and two categories of NRSP: specific topic funding and long term programs funded by NRSP and historic policies.
5. Unit updates
- USDA
 - NIFA
 - R. Goswami reported: on several leadership transitions at NIFA including a new director Dr. Manjit Misra who started in May and that there is a potential to meet with him in Washington DC in March; NIFA is working to carryout Executive Orders coming down focused on DEI efforts; NIFA's climate adaptation plan was well recognized and they are now releasing accompanying climate roadmap; new rapid response program at NIFA to aid with natural disasters; the NIFA Plant Protection group is now fully staffed; RFA's will be receiving an updated look and NIFA is undertaking a grant management system upgrade.
 - A discussion was held regarding the work the IR-4 Project is undertaking to better engage minority serving institutions.

- ARS
 - A. Simmons presented on behalf of Dr. Joseph Munyaneza reporting: ARS has prepared for the potential government shutdown of offices/labs. They will be sending updates to IR-4 HQ on where they are at with trials and labs ahead of the potential shutdown; ARS continues to work within a flat budget; the new facility at the Salinas location will have a ribbon cutting ceremony; reviewed vacancies and noted that hiring challenges and delays remain but the team continues to work as best as they can to support the research.
 - J. Baron commended the efforts of the ARS staff in their work to finalize field trials prior to shut down. A discussion was held regarding spending restrictions for ARS during a shutdown.
- CLC
 - T. Scholz reported on: three pending new CLC members from Crop Life, Cover Cress, and The American Floral Endowment; Arkansas and Florida restrictions on working with Syngenta and how it might impact the grower community; an effort to prepare a new look at IPM strategy – via a whitepaper- supported by the Foundation of Food and Agriculture Research; Natural Resource Conservation Service potential funding opportunities for training for climate smart technologies; and the Endangered Species Act herbicide strategy released and forthcoming insecticides and fungicide strategies including zones.
 - A discussion was held regarding the mitigation measures proposed under the pre-determined ESA timelines and the relative ability (or not) for producers to implement the measures.

Break at 3:05 pm and reconvene at 3:22 pm.

- North Central Region (Buhler and Wise)
 - J. Wise reported: the field season was mostly good in the NCR; this year saw pests that they know exist in the mid-west but that they typically don't see; Nicole Soldan is doing a great job reaching out to new researchers and FRDs in the region and has established additional collaborative supportive relationships; and that Mary Hausback is moving into the role of Regional Director of the NCR.
 - M. Hausbeck noted that she is very committed to IR-4 and its' mission and D. Buhler thanked Mary for her willingness to step up and thanked John for all he had done from the IR-4 Project. The group welcomed Mary to the PMC.
- Northeast Region (Kairo and Zebelo) (Handout)
 - S. Zebelo thanked the RFC's in his region and reported: on the progress of field trials (food and EHC) and the associated reports submitted; funding distribution to subawards underway and processing of no cost extensions; there is excitement and commitment to the environmental horticulture research funded by the ARS Cooperative Service Agreement; NER will present on IR-4 at a regional small farm forum; and that the International Symposium on Black Entomologists is having an upcoming event that S. Zebelo will present on IR-4.
- Southern Region (Davis and Gu) (Handout)
 - L. Gu reported: on recent restrictions on Florida Public institutions of higher education collaborating with countries of concern and it was determined that Syngenta and ADAMA were impacted. Through the efforts of AA John Davis, IR-4 requested and received a waiver that removes the limits of collobration with Syngenta/ADAMA in

- Florida. L. Gu reported that he met with his new Department Chair about the IR-4 Project and expects continued support.
- L. Gu further reported: that field trials are moving along and Janine is monitoring these; the lab team is young but stable and will continue to get better; QA is moving forward well and Kathleen is auditing many books.
 - Western Region (Holyoak and Hengel)
 - M. Hengel reported: on working toward a resolution to get money out to partner universities; the need to vacate the laboratory for seismic renovation in Spring and that may impact productivity; the field data notebooks for 2022 have been submitted and 2023 is on track; working toward hiring Sherita Normington's replacement; that a new instrument has been installed in the laboratory; the final project received from the closing lab in MSU is being processed; and they have hosted and trained several international groups over the past several months.
 - A discussion was held regarding succession planning for retirements in the Region.
 - Headquarters (Lommel and Baron)
 - J. Baron reported: the status of position searches, new hires and staff transitions at HQ; that in 2023 we have broken the 1,500 new project clearance request threshold; the success of the FUW's over the years due to all of the ground work put in by the Regional Field Coordinators; that the residue and product performance programs are on track for the new season and Integrated Solutions; and that the EHC priorities were set for the next few years in spite of some challenges with the event venue.
 - A discussion was held regarding how to measure impact and deliverables with the Integrated Solutions program, as well as residue, product performance, EHC and Biopesticides, and how to leverage the successes to receive additional funding for research.

The meeting recessed for the evening at 4:29 pm.

Tuesday, October 24 9:00 am to 5:00 pm

Matt Hengel reconvened the meeting at 9:00 am.

- J. Baron continued his HQ report and provided background on the existing contract archive file storage company takeover and issues as a result.
- A discussion was held regarding: trials in archives that still may be registered; worst case scenario if boxes are lost; the future involvement of legal counsel; the length of time they have held our boxes since we could retrieve them; that this might be a file storage industry issue; how this might impact us in an audit; and how sure we are that Storr Records won't be bought out and the same thing happen.

6. Research Program Updates/Reports

- Food Program
 - Residue Research Program
 - Field (Presentation)
 - D. Carpenter reported: that there were 1,564 new uses and 207 tolerances through September; on 9 submissions through September; on the status of crop grouping; and on the status of the 2023 and 2024 residue program.
 - D. Carpenter further reported: on the need for the timely return of field data books from the regions; that this issue becomes more critical as the

analytical backlog is being addressed; that one book can hold up a whole study; that if a submission is missed, it can be years before it can be submitted; and additional internal and external regulatory challenges.

- A discussion was held regarding the delay of field data books and how it impacts QA and audits, and how violators are being notified.
- Analytical Laboratories (Presentation)
 - D. Carpenter reported on the current status of the laboratory backlog in each lab and plans of addressing the backlog at each facility (if any) and reviewed the studies currently in contract labs.
 - A discussion was held regarding the time and difficulty for developing methods for difficult chemistries (ex. Triazoles) and the progress of the contract labs in analyzing the backlogged studies.
- Quality Assurance Unit (Presentation)
 - J. Mazlo reported: on EPA compliance monitoring; updated on QA staff, work on the electronic field notebooks, and scoping out a new system to replace eQA; on the 2022 and 2023 Audit/Inspection Data; on eQA trainings conducted and audit packages managed; and eDocs Update.

Break at 10:29 am and reconvene at 10:45 am.

- Product Performance Research & Integrated Solutions Research (Presentation)
 - A. Axtell reported: on the 2024 budget allocation for the field program; the priorities for each research area that came out of the Food Use Workshop including 43 “A” Priorities, 11 “H+,” 8 upgrades, and 14 Integrated Solutions Projects; and that they have worked to identify funds to cover some carryover projects from 2023.
- Environmental Horticulture (Presentation)
 - C. Palmer reported: on outcomes and impacts on registrations for 2023 to date; reviewed historic successes since the Environmental Horticulture Program started in 1977; the results of the Grower & Extension Survey; reviewed the outcomes of the Biennial Priority Setting session in early October; and historic program funding.
 - A discussion was held regarding a forthcoming publication.
- Biopesticide Regulatory Support (Presentation)
 - M. Braverman reported: on the status of active submissions to EPA; reviewed new projects including Cucumber Green Mottled Mosaic Virus and RNAi of Red Palm Weevil; on several potential future projects; on an emerging new pest the Tropi Mite; and reported on new regulations issued from APHIS-Biotechnology Regulatory Service.
 - A discussion was held regarding PRIA fee exemptions and issues encountered with prior projects.

7. International/Minor Use Foundation (Gore) (Presentation)

- A. Gore gave an overview of the Minor Use Foundation, the work they do and problems they address, their priority setting process, and their training program. A. Gore shared information on the upcoming Global Minor Use Summit February 5-9, 2024 in Madrid, Spain.
- A discussion was held regarding whether new registrations are benefitting smallholder farmers throughout the world or just large scale farms and funding opportunities.

Break at 12:05 pm and reconvene at 12:35 pm.

8. Electronic Field Data Notebook(eFDN) (Moore and Byrtus) (Presentation)
 - P. Moore reported on: the status of the launch, that 16 applications have been conducted and 1,679 data points loaded into the system; shared early results and nuisances of the system specific to IR-4; feedback from the FRD's; limitations and downstream considerations; looking forward to 2024; and discussions with regional offices.
 - A discussion was held regarding flags for researchers shown in the system; workarounds; concerns from RFC's that researchers are not ready to fully transition into the eFDN due to the quick ramp up; the training and roll out that has taken place since the eFDN was approved; strategies to enhance comfort with use of the software including use of a "buddy system;" implementing a mock trial all together using the eFDN; and a culture shift to embrace new technology as called for in the Path Forward 2.0 Implementation plan. This item was deferred for further discussion in Executive Session.

9. Training Committee (Dineen) (Presentation)
 - C. Dineen reported: on membership updates to the committee; planning underway for the 2026 National Education Conference, including site selection; distributing National SOPs via eQA; upcoming SOPS in the queue to be written; and asked for guidance on whether or not the PMC wanted to approve work on SOPs or to manage them as we do advisories.
 - A discussion was held regarding the composition of the training committee being representative of the regions.
 - **A motion to allow the National Education and Training committee to proceed with development of national SOPs using the same process as with advisories was made by Alvin Simmons; seconded by John Wise; unanimously approved.**
 - C. Dineen further reported: on a protocol template revision draft that will be prepared by July 2024; and updated on the advisory for shipping dry ice.

10. Future workload in residue research (Baron and Carpenter) (Presentation)
 - J. Baron introduced the item, reporting: the reduction in the number of good residue studies coming through the 2022 and 2023 FUW's; adding studies in the NRPM of questionable value to fill up specific research sites as opposed to covering the deficit in performance funding; and new proposed funding models to help sustain GLP research sites.
 - A discussion as held regarding how each region manages funding at field sites; if GLP researchers can also do performance work; researchers diversifying the crops they do research on to stay competitive; the benefits of having multiple sites in a region to hedge against weather and other unforeseen issues; if there is a criteria we use to select FRDs or researchers; and whether or not the extension of funds could extend to Environmental Horticulture. This discussion were deferred for further discussion in Executive Session.
 - **A motion that the PMC empowers the Executive Director to move funds to cover a deficit in Product Performance funding during the National Research Planning Meeting, if good residue field trials are not available, was made by Alvin Simmons; seconded by Simon Zebelo; unanimously approved.**

11. Environmental Horticulture Review Update (Baron and Scholz)
 - A. Upton reported: that she and Michael Martin would co-chair the review; outlined the timeline of the review; there are 24 participants interested in serving in some capacity with 6-8 serving on the actual review panel; and the final report would be presented at the 2024 Fall PMC Meeting.

Break at 2:57 pm and reconvene at 3:15 pm.

12. Examination of IR-4's Biopesticide Regulatory Support activities (Presentation)

- J. Baron reported: that there had been some inquiries to understand if IR-4 should provide regulatory support for new biopesticide products and if they provide a good return on investment; on the focus of the biopesticide regulatory support program and work performed over the years; the increase of requests for assistance from the program over the last few years; on data waivers and the role they play in IR-4 projects ability to provide regulatory support; the need to improve transparency and the biopesticide database; that successes are not the issue but rather items that EPA has rejected; and considerations for becoming more selective with what projects we work on.
- A discussion was held regarding: prior discussions about keeping and bolstering biopesticides and reluctance to retract; the fact that EPA forwards potential registrants to IR-4 for guidance; the benefit of EPA generating a stop light analysis for biopesticide projects; and considerations (and not) for charging for services. This item was deferred for further discussion in Executive Session.

13. Workshop Debrief

- Food Program (Presentation)
 - K. Chojnacki reported: statistics of attendance and registration fees over the last few years; and reviewed the feedback from the post meeting surveys.
- EH Program (Presentation)
 - C. Palmer reported: on challenges including AV at the venue; reduced number of registrants attending due to cut travel budgets, and personnel shifts; on positives including workshop format, location, swag, support from HQ staff, and discussions; and outcomes were identified for the next two years.

14. Discussion of Path Forward 2.0 Implementation

- J. Baron reported: that performance expectations that are being drafted for Study Directors and Biologists and how to turn these into useful tools for employees; field funding reimbursements were increased and now include indirect but should be an area that is revisited to align with inflation; reviewed implementation objectives related to communications nationally and regionally; working to increase visits to the regions; new models for residue and product performance; training enhancements internal to IR-4; initiating the technology team; and the analytical backlog discussions.
- H. Ross further reported on the intranet site groundwork that has been conducted thus far.

15. Engaging a larger research/extension community (Patel)

- J. Patel reported: that the taskforce is comprised of 9 members and is meeting every month; roadblocks to engaging with scientists of 1994 tribal university stakeholders; on recruited new scientists; and a forthcoming publication in Plant Pathology News.

16. "All Hands" Meeting Preview (Baron)

- J. Baron reviewed the agenda for the "All Hands" meeting tomorrow and items that will be discussed with the larger group.

The meeting recessed for the evening at 5:11 pm.

Wednesday, October 25 9:00 am to 12:00 pm

Matt Hengel reconvened the meeting at 9:04 am and the members convened to Executive Session.

17. Executive Session

Break at 10:18 am and the members convened to Executive Session at 10:25 am.

The members reconvened from Executive Session at 11:58 am with the following motions or actions out of Executive Session:

- **Consensus:** To move forward with the full transition to the eField Data Notebook during the 2024 field season. Understanding the importance of the eField Data Notebook's full rollout to the future success of the IR-4 Project, and in response to the feedback and concerns that the PMC heard regarding the full transition, the PMC has decided to add trainings for the Regional Field Coordinator's and Field Research Director's to boost familiarity with the software, with the goal of full transition to this system during the 2024 field season. The PMC has full confidence in the leadership and capabilities of the RFCs, FRDs, Headquarters, and the IR-4 team as a whole, to ensure the successful rollout.
- **Action Items:** 1) Provide eField Data Notebook training for the Regional Field Coordinators and solicit feedback for regional training and information exchange with Field Research Directors; 2) Solicit support from Field Research Directors who have already piloted the eField Data Notebook and serve as train the trainers; 3) Hold in-person National Education Trainings in California and Florida (due to the field seasons in these regions approaching more rapidly); and 4) Offer enhanced online training, weekly office hours and open lines of communication to provide support from Headquarters.
- **Action Item:** Michael Braverman, by the March CLC/PMC Joint Meeting, to provide an accounting of what work has been done (successes and failures) in the past five years on the spreadsheet supplied, include what projects are in the queue to be completed as well as requests that have come in (including notes on why a project was not advanced), what criteria is used for evaluation of projects and to assess the ability of the submitter to meet the data demands, and an accounting of IR-4 FTE's spent on biopesticide projects.
- **Action Item:** Jerry Baron to initiate a Technology Committee led by Jimmy Byrtus, that is representative of the regions, headquarters and the various fields of work of the IR-4 Project.
- **Action Item:** Jerry Baron to add a standing agenda item to PMC meeting agenda's to review changes to regional field capacity.

18. Adjourn

A motion was made to adjourn the meeting at 11:58 am by Alvin Simmons, seconded by Todd Scholz; unanimously approved.