



MINUTES
Project Management Committee
Fall 2024 Meeting
July 9-11, 2024
Hybrid Meeting

MOTIONS AND ACTION ITEMS

Motions/Consensus Items:

1. A motion to approve the 2024 Summer PMC meeting minutes was made by Alvin Simmons, seconded by Liwei Gu; **unanimously approved.**
2. A motion to approve adding Laura Shumow from the American Spice Trade Association as a member of the Commodity Liaison Committee was made by Todd Scholz, seconded by Jerry Baron; **unanimously approved.**
3. A motion was made to maintain the Biopesticide Support Program made by Jerry Baron; seconded by Todd Scholz; **unanimously approved.**
4. A motion was made to approve the Process to Assess a New Request for Biopesticide Regulatory Assistance document, as proposed, was made by Todd Scholz, seconded by Matt Hengel; **unanimously approved.**
5. **Consensus:** Take the 12 project prioritized during the 2024 Food Use Workshop and develop protocols over the next 18 months and the projects would start in 2026, and resume reaching out with possible cooperators to discuss the project.
6. **Consensus:** Approval to remove the paper field databook from the website, if a copy is needed it will need to be presented to Dr. Debbie Carpenter.
7. A motion was made to adjourn the meeting at 11:26 am by Alvin Simons seconded by Todd Scholz; **unanimously approved.**

Action Items:

1. **Action Item:** (Chojnacki) Take back to management team to assign areas of responsibility to update the National Directory and bring forth at the NRPM the list each year for the RFCs to access; keep under secure system for internal use only.
2. **Action Item:** (Byrtus) Send out an email survey inquiring about priority setting workshop, tour and other aspects if people would want to attend the tour.
3. **Action Item:** (Dineen) The PMC empowers the SOP and Advisory committees to move forward with moving the advisories as presented into National SOPs.

Members:

Jerry Baron; IR-4 Executive Director
Liwei Gu; Regional Director-SOR
Mary Hausbeck; Regional Director - NCR
Matt Hengel; PMC Chair; Regional Director-WR
Joe Munyaneza; ARS AA

Christopher Philips, USDA NIFA
Todd Scholz; CLC Chair
Alvin Simmons; USDA-ARS
Simon Zebelo; Regional Director - NER

Presenters:

Alice Axtell, IR-4 HQ

Philip Moore; IR-4 HQ

Bill Barney; IR-4 HQ
David Beaudreau; DCLRS
Jimmy Byrtus, IR-4 HQ
Debbie Carpenter; IR-4 HQ
Krystal Chojnacki; IR-4 HQ
Christina Dineen; IR-4 HQ
Anna Gore; MUF
Cristina Marconi; IR-4 HQ
Johanna Mazlo; IR-4 HQ

Jaimin Patel; IR-4 HQ
Thomas Pike; IR-4 HQ
Hannah Ross; IR-4 HQ
Amy Upton; CLC
Robert Welker; IR-4 HQ

Wednesday October 23, 2024 3:00 pm to 4:30 pm ET

Matt Hengel called the meeting to order at 3:00 pm. –

1. Welcome and Introductions.
 - M. Hengel welcomed the group to the All Hands Meeting.
2. Program Successes (PowerPoint)
 - J. Baron reported: why the work of IR-4 matters; internal and external challenges to our work and that IR-4 is technology neutral; reviewed the work we do to assist the producers with pest management needs; accomplishments by-the-numbers; deliverables in the residue and integrated solutions platforms; and thanked the group for their work to bring forth these successes.
3. Introduction of new Environmental Horticulture Program Manager
 - J. Baron reported that unfortunately the hire fell through and the position would be reposted
4. eField Databook (Handout)
 - P. Moore reported:
 - That it has been a year since the full implementation of the eFDB; thanked the group for their efforts to adopt the eFDB and attend trainings;
 - Moving forward into 2025, paper field data notebooks will not be allowed and that change will be reflected in the new protocol with a few exceptions for retiring FRDs until 2026; PMC formal approval of changes will be requested;
 - We are testing a new system for facility files in 2025;
 - There are updated forms based on users requests to resolve issues;
 - New features are being reviewed including voice to test and adobe certificate;
 - Some additional changes that were discussed being made are being deferred for this year due to high cost and late implementation timeline;
 - Discussions on removing some data prompts that may not be necessary; and
 - The limits on license has been met with 100 users and how to manage that moving forward.
 - A discussion was held regarding how a retiring FRD will be defined; implementation communication efforts; new eFDB SOPs and handling the SOPs in Canada; whether the license limit was per user name or varied on access level; that we are not discouraging new FRDs; and in the future, reaching out to RFCs to review their list of users.
5. Technology Team (Handout)

- J. Byrtus reported: that the technology team has been meeting monthly; currently exploring eQA updates and testing; working to identify database options; and reviewed several database provider options and pros and cons of each system.
 - A discussion was held regarding no/low code options; timelines for potential implementation; and the opportunity to build and integrate an app.
6. New Protocol Template (Handout)
- C. Dineen reported that a finalized new residue template will be available for 2025 research; training is scheduled to review the template and the focus will be the field section; that the template is still long; and asked for feedback to resolve any issues as soon as possible.
7. IS Listening Session (Slides)
- A. Axtell reported that the PMC charged HQ to engage in listening sessions on the IS program; a survey went out and 14 responses were received; and reviewed the feedback received from both the survey and a listening session that took place at the 2024 Food Use Workshop.
8. Research Symposium Update
- A. Axtell reported that the 2024 Research Symposium will be deferred until 2025 and will be examined if this is the best way to distribute the information.
9. Communications Update (Handout)
- H. Ross reported:
 - Branding updates and refreshing of outreach materials;
 - Developing crop-specific handouts for regions;
 - A new outreach toolkit in a shared drive with materials that will be available in the intranet in the future;
 - A new PUP instructional video completed and tracking of video viewership;
 - Digital updates including news stories, social media posts, and newsletter; and
 - The status of the intranet build-out; and reviewed IR-4 Awards.
10. Educational and Training Committee Update/Preliminary Plans for the 2026 NEC (Handout)
- C. Dineen reported:
 - NEC date and location is set for February 3-5, 2026 in Charleston, SC;
 - The E&TC will be working to develop content and the agenda in the coming months;
 - A survey would be distributed early 2025 to submit ideas for training topics;
 - The NEC will include an optional field tour; and
 - E&TC are reviewing upcoming training opportunities that are being offered.
11. Reestablishment of National Directory on Website
- K. Chojnacki reported that the national directory was taken down for a 6-month period to assess how many folks made inquiries requesting contact information and the result was minimal. K. Chojnacki further reported that this agenda item was to discuss the necessity of keeping the contact listing or not and if so, a process for keeping updated lists.
 - A discussion was held regarding personnel who have noticed that it is gone; whether this should be on the intranet and not public facing; ownership of each section needs to be established; reaching out to people to update that list in a consolidated effort for one year; and updating the FRD list near protocol development.

- **Action Item:** (Chojnacki) Take back to management team to assign areas of responsibility to update the National Directory and bring forth at the NRPM the list each year for the RFCs to access; keep under secure system for internal use only.
- The FRD list would need to be sent out for review prior to the NRPM by a week.

12. Closing remarks

- Jerry thanked everyone from the regions and field offices for their many contributions.

The meeting recessed for the evening at 4:53 pm.

Thursday October 24, 2024 8:00 am to 5:00 pm ET

Matt Hengel reconvened the meeting at 8:00 am. --

13. Approval of minutes & new agenda items (Handout)

- M. Hengel initiated introductions around the room and on zoom.
- **A motion to approve the 2024 Summer PMC meeting minutes was made by Alvin Simmons, seconded by Liwei Gu; unanimously approved.**

14. Grant Items & CLC Update (Handouts)

- K. Chojnacki reported that all of the 2024 subawards and NC State researchers segments have been completed; reminded that the current grant's end date for subawards will be April 31, 2026 to ensure all funds have been spent; and reviewed components of the new forthcoming grant.
- A discussion was held regarding setting up meetings to discuss subaward language; whether or not the new award will be non-competitive or not.
- D. Beaudreau reported election results will impact what happens with the federal budget and/or continuing resolution beyond December; possibility for small omnibus package with small increase for IR-4; Farm Bill is still in play but it is not likely to get completed by the end of the year; outreach is underway to ask for increased funding as well as maintaining ARS funding; after election, the majority will control the meeting rooms for us to make requests for utilizing space for the reception; and meeting with the White House OMB to highlight the program in January and funding needs (NIFA/ARS).
- A discussion was held regarding election results for the House and Senate, potential advocates for IR-4 among those elected, and potential changes to the Secretary of Agriculture.
- T. Scholz provided an update on a new CLC member Laura Shumow, Executive Director of the American Spice Trade Association.
- **A motion to approve adding Laura Shumow from the American Spice Trade Association as a member of the Commodity Liaison Committee was made by Todd Scholz, seconded by Jerry Baron; unanimously approved.**

15. Management Reports

- Administrative Advisers
 - NCR: D. Buhler (written report submitted) reported that: the NRSP-4 renewal draft prepared by Jerry has been sent to the AA's and a set of stakeholders for review; he currently has five returned reviews and hope to get a couple more before he completes the review package and provide it to Jerry for incorporation into the final renewal request; that there is still time for additional input as my report to Jerry is due by December 1; that Jerry then has until January 15 to revise, prepare a response

to the reviews, and submit the final to the NRSP review committee chair; and that the reviews so far have been positive so I don't expect you will be looking at major revisions.

- NIFA Update
 - C. Phillips reported that he is working with Jesse Ostrander to gather information on grant options and that Drs. Samuel-Foo and Goswami both received promotions and this has resulted in staff shortage.
 - A discussion was held regarding past issues with RFA's and amendments.
- ARS Update
 - A. Simmons shared comments on behalf of J. Munyaneza: the national program for crop protection and quarantine, that includes IR-4 expires next year; and a review of the national program to renew it for an additional five years (excluding the IR-4 component which undertakes an internal review).
 - A discussion was held regarding the ARS budget cuts, programmatic impacts, and the positive impacts of advocacy for the IR-4 Program.
- Regional Updates
 - NER (Handout): S. Zebelo reported: that they are approving no cost extensions for researchers and extending subawards; UMES is changing electronic financial system on November 15; changing from Gmail to Outlook; the IR-4 greenhouse has been completed and trials are underway; USDA administrators visited the new greenhouse; and 2023 trials are almost complete and most reports are submitted.
 - NCR: M. Hausbeck reported: the submission of an extension article to recap the Food Use Workshop that will be widely distributed; worked on getting SLRs established in the region; working on the planning for the earlier grant deadline end date and issues with issuing PO's and subawards; new hires and researchers are more pesticide adverse; and new researcher's needing funding upfront to start the research.
 - A discussion was held regarding 50% funding to start but it still comes in after the research has started; funding comes in late and so often they pay 100% up front; issues with funding levels are too low for the research; and considerations of taking on less projects to adequately fund research.
 - SOR (Handout): L. Gu reported: the President of the University has resigned; there were 26 applications for the RFC position and the committee selected Kristen Seater-Jones for the permanent position; field program is progressing well; the field site in Homestead is not up and running until a new research coordinator is hired; the lab has submitted 8 ASRs and more are underway; the new zero-day stability requirement is causing some delays; there are five projects under backlog; they hired a new Chemist; and the QA team has finished 70% of their yearly assignments.
 - A discussion was held regarding the great job Kristen is doing as the Southern Region RFC and the zero day storage stability requirement.
 - WR: M. Hengel reported: they are still dealing with issues from the financial system update; reviewed retirements; field research is underway; Sherita retired and was hired at Headquarters; Laurel Hsieh has been hired as a QA auditor; lab has completed 8 ASRs with 4 being shipped to Headquarters; storage stability delays; the lab will shut down for a short time for seismic renovations; and reviewed retirements from the lab.
 - A discussion was held regarding the process for appointing a State Liaison Representative.
 - ARS: A. Simmons reported: the EHC program at ARS is doing excellent; current concerns about funding; reviewed staff vacancies and updates on filling those

vacancies; ARS's transition updates to the eFDB; the two recent hurricane's impact was minimal to operations; the ARS five cooperative agreement expires on July 31, 2025; and the current Undersecretary for REE visited Charleston and was invited to come to the 2026 National Education Conference in Charleston, SC.

- A discussion was held regarding and ARS grant to the Western Region.

- Headquarters report
 - J. Baron reported: on senior leadership changes at NC State; on personnel changes at IR-4 Headquarters; a failed Environmental Horticulture Program Manager search and steps to move forward; the ARS 5 year agreement leaving; Jerry has rejoined the Minor Use Foundation Board; and Jerry was interviewed on a "I see Dead Plants" and "World of Blueberries" podcasts

Break at 10:10 am. The meeting reconvened at 10:25 am.—

16. Program Reports

- Food Program
 - Field Residue Studies (Handout)
 - C. Marconi reported: on the residue program by the numbers for 2023-2025; reviewed outstanding field data notebooks overall and by region; there are about sixty studies in final report processing; there are more than 100 studies held up for submission for various reasons;
 - C. Marconi and T. Pike reported on challenges including: the analytical backlog and delayed field data books; and the result being we miss a submission window and it can be delayed by years; the Endangered Species Act; registration statuses in Europe and impact on how active ingredients move forward; delays by registrants; and the need for pollinator data.
 - A discussion was held regarding the new pollinator data requirement; if any studies have been made to repeat the analytical testing of residues; in Europe established MRLs are being reduced; and outstanding field data books.
 - Submissions (Handout)
 - T. Pike reported: there have been 7 tolerance actions to date this year with 930 new uses; there have been 6 submission to date; and crop group updates including revisions waiting to be published.
 - Laboratory activities (Handout)
 - D. Carpenter reported: that there has been discussion of the status of each analytical laboratory and its backlogged studies; concerns of viability of samples; issues with the Wapato lab, corrective measures taken and that there will be no future assignments right now; and reviewed plans for moving forward with each lab on their backlogged studies.
 - Quality Assurance (Slides)
 - J. Mazlo provided updates: that Dan Myers is the new EPA OECD representative; Del Monte research site decommissioning; recent inspections; audit and inspection data for 2022-2024; new QA staff; efforts to support lab and field research directors; moving to a new version of eQA; efforts in the roll-out of the eFDB; and participation in various headquarter initiatives.
 - Results of Food Use Workshop& NRPM (Handout)
 - A. Axtell reported: that there were 13 residue projects, 24 residue and performance component projects prioritized at the Food Use Workshop; there were 11 H+ performance projects prioritized; 8 priority upgrade proposals/regional upgrades were prioritized; there were 13 integrated

solutions projects prioritized by using combined funding from NIFA, CDFA, and a third part funder; and that Integrated Solutions trial assignments have been halted until PMC discussion.

- Integrated Solutions Platform (Handout)
 - A. Axtell provided an overview of the 2023-2024 Integrated Solutions activities, successes, and challenges including: carryover trials, identifying researchers, protocol timelines, CDFA funding, programs operating in siloes, and a current review of the program underway.
 - A discussion was held regarding: tracking deliverables from researchers (papers/presentation) at the time the report is submitted; including extension deliverables; merging Integrated Solutions and Biopesticide Platforms, and issues with that.

- Biopesticide Regulatory Support Platform (Handout)
 - B. Barney reviewed: projects submitted to EPA and that they generally take 2 years to go through approval; submission packages in development; recent regulatory requests.
 - J. Baron reported: he reached out to several biopesticide stakeholders to gather comments as to whether to maintain the platform and the response was positive; on the new assessment protocol for Biopesticide Regulatory Assistance; feedback from stakeholder on secondary vetting points assigned and changes made as a result; and asked two questions for consideration of the PMC: Should IR-4 maintain a Biopesticide Regulatory Support Platform? and Should we accept the proposed screening process.
 - **A motion was made to maintain the Biopesticide Support Program made by Jerry Baron; seconded by Todd Scholz; unanimously approved.**
 - A discussion was held regarding merging the Integrated Solutions and Biopesticide programs; the biologist's workload and missing expertise with regulatory; merging the Biopesticide program with the residue program; using the Integrates Solutions Platform for efficacy of registered Biopesticide products; how many submissions we get each year for the Biopesticide program (1-3); and considering the quality of the proposal.
 - **A motion was made to approve the *Process to Assess a New Request for Biopesticide Regulatory Assistance* document, as proposed, was made by Todd Scholz, seconded by Matt Hengel; unanimously approved.**

Break at 12:15 pm. The meeting reconvened at 1:00 pm.—

- Environmental Horticulture
 - J. Baron reported: that headquarters is maintaining the forward progression of the Environmental Horticulture (EHC) program; continuing to receive reports and working to navigate the database; and at end of November a portal will be opened for researchers to sign up to perform 2025 research.
 - A discussion was held regarding: putting out a positive update to current researchers on where we are at in the process; the 2025 Environmental Horticulture Priority setting session being held virtually versus in-person; if in person Charlotte may be too far for travel for western region; enlisting scientists to help facilitate sessions; teaching schedules preventing stakeholders from attending (How important is the tour to you – scale); and determining if we need to have a tour.
 - **Action Item:** (Byrtus) Send out an email survey inquiring about priority setting workshop, tour and other aspects if people would want to attend the tour.

17. International/ Minor Use Foundation (Slides)

- A. Gore reported: on the status of Archive Studies with 13 studies (17 trials); new award from USDA FAS ASCE, that IR-4 will be a collaborator and what a collaboration could look like; and that they will be holding their global priority setting process in January 2025.
- A discussion was held regarding IR-4's role in the grant, the scope of work for several other ASCE funded projects, generating an MOU for future collaborative work, and if there was a need for efficacy/crop safety work.

18. Sponsored Research Policy (Handout)

- J. Baron reported: that IR-4 has had a sponsored research program since 1992; that an updated version has been created to share with the PMC;
- A discussion was held regarding cost accounting, IDC rates, funding required upfront, and unrestricted donations to NC State. A further discussion was held regarding the need for such a policy and it was determined that the group would provide feedback but no formal adoption was necessary as this was an informal process unique to each institution.

19. IS Program Changes (Handout)

- J. Baron reported on the original Integrated Solutions (IS) goals; the definition of success for the program; the idea of decoupling the IS workshop from the food workshop; Staging "fast track" or "Normal Track" IS projects; guardrails for the program that allows our input into the work; cost recovery for analytical lab work; while there is a lot of interest in IS, there is not adequate funding for the projects; shared a proposed plan for moving forward this year; potential cooperation with Western Growers Platform 10 or the Canadian Pest Management Centre; and presented pressing questions about the IS reboot.

Break at 3:01 pm. The meeting reconvened at 3:10 pm. –

Discussion continued on item #19.

- An in-depth discussion was held regarding: considerations to our backlog in making IS decisions; that mission creep is being talked about for projects that don't proceed to registrations; that IS is a space for research and development for IR-4; each IS project is a small applied research project that before would have been funded by USDA (but not longer) so IR-4 is the only current funder; how to measure the success rate and to ensure a rigorous selection process; protocols could also be more rigorous and involve companies (regulatory groups and biology groups); the simple form is advantageous because we received requests from not just researchers but also growers and commodity groups; two tracks could address this with a vetted proposal by a researcher and normal track for ideas that require more information; OK to put CDFA projects on normal track; and that IS projects should resubmit each year rather than carrying them over.
- A further discussion as held to delay the 2025 IS projects, bank the funding until 2026.
- **Consensus:** Take the 12 project prioritized during the 2024 Food Use Workshop and develop protocols over the next 18 months and the projects would start in 2026, and resume reaching out with possible cooperators to discuss the project.

20. National SOPs (Handout)

- C. Dineen reported on: four national SOPs currently in progress; once SOPs are completed there will be a webinar, along with QA to discuss them and the implementation of them and retiring their old SOPs; two advisories that are currently being updated; there is a

potential to move advisories to National SOPs and the pros of doing that; and asked if the PMC would be supportive of moving identified advisories to National SOPs.

- A discussion was held regarding the age of the advisories, the ease of transferring those to National SOPs in the eQA system, if we would require CRO's to adopt the National SOPs, and if the SOP and Advisory committee's need to come back to the PMC for review of these items each time they produce one or could it be delegated to Testing Facility Management.
- **Action Item:** (Dineen) The PMC empowers the SOP and Advisory committees to move forward with moving the advisories as presented into National SOPs.

21. New Employee orientation module(s) (Handout)

- R. Welker reported: that the outline of training topics has been completed; training presentation draft will be available for review mid-February 2025; the training committee will review the presentation; and that it will be broken up into several modules.

22. Network Expansion Project (Handout)

- J. Patel reported: on monthly meetings underway; a recent publication submission; resources developed for engaging new researchers; an upcoming Small Farmers conference at UMES; and presentations that have been made by the IR-4 Biology team.
- A discussion was held regarding how to join the Network Expansion Team.

23. Ways of working – Update (Slides)

- J. Baron reported: on challenges presented by registrants; timeline constraints on workload for study directors, RFCs and biologists; limitations on research by the registrants; incomplete directions for use; growing complexity of getting test and reference substances; and improvements to simultaneously submitting protocols with residue and performance work to registrants.
- A discussion was held regarding jointly sending over residue and performance protocol drafts and final versions.

24. eField Databook (Handout)

- P. Moore reported: on eField Databook (eFDB) usage by the numbers; reviewed current status and the future plans for eFDB 2.0; in 2025 IR-4 will move to full eFDB implementation (no more paper); plans to remove the old paper FDB from the website in 2025; and that we are at the limit for users on the license.
- A discussion was held regarding the availability of HQ staff for training and support, if the drench application can be included (yes), the high number of Canadian users, the data loss event, ways to back-up data, and if HQ will continue to QC.
- **Consensus:** Approval to remove the paper field databook from the website, if a copy is needed it will need to be presented to Dr. Debbie Carpenter.

25. Future Meetings

- M. Hengel reminded members to add these dates to their calendars.
 - Spring PMC/CLC Meeting: March 4-6
 - Summer 2025 PMC Meeting: July 8-10 (Canada)
 - Food Use Workshop: Sept. 9-11
 - Environmental Horticulture Workshop: October 7-9
 - NRPM/Fall 2025 PMC Meeting: October 20-24
 - 2026 National Education Conference: Feb. 3-5

The meeting recessed for the evening at 5:38 pm.

Friday October 25, 2024 8:00 am to 12:00 noon ET

Matt Hengel reconvened the meeting at 8:00 am. –

26. Executive Session I

- The Members convened to executive session at 8:00am.

Break at 9:45 am. The meeting reconvened at 10:00 am into general session. –

27. Environmental Horticulture Program Review (Slides)

- A. Upton shared slides reporting: the last EH Program assessment was performed in 2008; conducted listening sessions across the country as well as developed a survey; and review committee will be in-person at the next EHC Priority setting workshop with a final report being submitted to the PMC at the March 2026 meeting.
- A discussion was held regarding feedback received about the IR-4 EH program from other events, holding an in-person or virtual workshop in 2025, and potentially changing the review panel in-person discussion to an earlier time.

28. Executive Session II

- The Members reconvened to executive session at 10:21.

The members reconvened into regular session at 3:09 pm with no reportable actions.

29. Adjourn

A motion was made to adjourn the meeting at 11:26 am by Alvin Simons seconded by Todd Scholz; unanimously approved.