



Mid-Atlantic Fishery Management Council

Scientific & Statistical Committee

OFL CV Sub-Group

August 24, 2023 from 1:00 – 3:00

Meeting Summary

Attendees: O. Jensen, S. Gaichas, P. Rago, J. Boreman, B. Muffley

The OFL CV sub-group met to review and develop a plan, timeline, and strawman ideas to address a number of issues assigned to the group (details can be found [here](#)). The set of issues focuses on the continued review of the OFL CV guidance document that would consider potential updates to the document to refine, clarify, and improve the OFL CV decision process. The second set of issues focuses on potentially new tasks for the sub-group to address that were identified during the July 2023 SSC meeting.

Background materials considered by the group included:

- [OFL CV review spreadsheet](#) that summarizes all of the OFL CV decisions for each species and criteria bins since the SSC started this OFL process (through July 2023)
- [OFL CV comments document](#) that summarizes SSC comments/questions/issues raised over the last 2 years (through July 2023)

OFL CV Guidance Document Updates

Decision Criteria

- The group agreed that, in addition to updating/revising criteria based on previous SSC feedback, reviewing the overall criteria to see what can be dropped and or added should be part of this process.
 - For example, possibly dropping the **Informed by Simulation Analysis or Full MSE** (criterion #9) or possibly adding within the **Model Appropriateness and Identification Process** (criterion #2)
 - Criterion #9 was initially intended to consider an MSE or simulation analysis that might directly evaluate uncertainty of OFLs under different estimation approaches without the policy overlay.
 - Getting the research track assessment work groups to conduct this type of analysis might be challenging, but the more specificity that can be developed for this criterion and/or what an MSE or simulation analysis should consider, the more likely it will be to get picked up and supported.

- **Sub-Group Task** – develop a proposal of what this MSE/simulation work would entail and include as an addendum to the full OFL CV document. Could help provide insight onto Control Rule levels defined/selected by SSC.
 - Look for potential funding opportunities to support this work outside of the assessment process
 - Raise with SSC and see what the group thinks about the need/priority to do this simulation work
- **Sub-Group Task** - each work group member take a criteria or two, read through comments/issues and come up suggested modifications to bring back to group
 - Sarah - #5, #6,; Olaf - #3, #7, Mike W - #8; John - #1; Paul - #4
- There was also a suggestion to map the existing criteria to generic research track stock assessment Terms of Reference to see where these might fit, or not.

Broader Guidance Document Considerations

- Similar to the discussion during the [March 2023 sub-group meeting](#), any revisions to the guidance document should include messaging about the current bin levels (60-100-150). While these look like a large range, recent analysis indicates they are within range that other Councils/SSCs are considering. Need to communicate these findings to the Council and stakeholders.
- The group recommended holding off on considering potentially new CV bins levels and see if the Wilberg lab paper supports the conclusions and findings of [Bi et al. 2023](#). If consistent, maybe the sub-group/SSC need to reconsider bin levels; if not, maybe we need to stay put and reevaluate
- The group was generally supportive of recent SSC decisions to include two bins/range for a particular criterion (e.g., 60-100) when there is some lack of clarity or consensus for one level. Including the range helps provide some additional context. The group hoped these decisions were due to true uncertainty issues versus interpretation issues within the bins.
- The group also discussed whether or not revisions to the guidance document were needed to account for the greater use of state-space models for Mid-Atlantic stocks. Are state-space models sufficient to capture uncertainties to take the CV directly from the assessment?
 - While these models could provide for less uncertainty, it's not necessarily universal and state-space models could still have inherent data issues.
 - The group recommended parking this particular issue until the outcomes and results of the forthcoming research track peer review on state-space models are available (peer review scheduled for November 2023).
- For stocks at really high abundance ($B/B_{msy} > 1.5$) and a $P^* = 0.49$, the group suggested considering the development of an expedited process to set OFL CV. For example, setting the OFL CV value to the default of 100% given the limited difference in ABC recommendations (see [this figure](#)). This approach could save a lot of time and energy at SSC meetings, particularly when multiple species need to be addressed.

Other Tasks Identified for Group (not specific to OFL guidance document)

For these topics, the group agreed to develop some strawman ideas and bring these back to the full SSC to weigh in, discuss, and recommend at the September 12-13 SSC meeting.

Short-Term Projection Assumptions and Interim ABC Reviews

- The group suggested linking the short-term ABC projection and the interim year ABC reviews.
 - For species in which an updated management track assessment is provided every two years to make ABC recommendations (i.e., Summer Flounder, Scup, Black Sea Bass, Bluefish, Atlantic Mackerel, and Butterfish), the group suggested not conducting an interim ABC review. Given the frequency of updated information, the time saved could be utilized (by the SSC, Council staff, NMFS assessment leads, stakeholders) for other needs.
 - This approach would not apply to species under a rebuilding plan.
 - Provide for opportunity to revisit if information suggests an issue or change (e.g., AP feedback, significant increase/decline in catch, abnormal survey results).
 - For species in which an updated management track assessment is provided every 3-6 years (i.e., Atlantic Surfclam, Ocean Quahog, Spiny Dogfish, Golden Tilefish, Illex Squid, and Longfin Squid), interim ABC reviews would continue; however, the group suggested requesting/obtaining alternative short-term projections when initially making ABC recommendations.
 - Alternative projections would include – 1) assuming full ABC, 2) assuming either over/under ABC based on recent performance, and/or 3) assuming long-term average recruitment or if recent deviations, taking a shorter time period.
 - The group suggested conducting a Mohn’s Rho type analysis on recent catch and recruitment to evaluate recent performance to determine possible deviations and which projection approach(es) should be considered.
 - During the interim ABC reviews, the SSC could use the alternative ABC projection runs to potentially modify the previous ABC recommendations. For example, if recent catch has been below the ABC – use the alternative projections that considered ABC underages.

ABC Recommendations Without an Assessment Update

- There have been circumstances when an assessment has been delayed and no/limited new information is available, but ABC recommendations are still required because the current specifications end. When this occurs, the SSC typically considers *status quo* ABC recommendations (i.e., rolling over the most recent ABC recommendation into the following year). The most recent example of this situation was for Black Sea Bass at the July 2023 SSC meeting.
- In these situations, the group suggested the following:
 - If a stock is at high abundance ($B/B_{msy} > 1.5$), a status quo recommendation is likely ok and not spending a lot of time considering other factors or issues.
 - When stocks are around and below B_{msy} , a more formal process and data considerations (e.g., recent catch, surveys) is likely warranted in order to evaluate if *status quo* or some alternative recommendation might be more appropriate. In addition, looking at projections, historical retrospective patterns in SSB and F, stability in model prediction error (criterion #7), and evaluating the rate of decline could also provide useful information to determine a recommendation.
 - The group agreed that under these circumstances, the ABC cannot increase when you don’t have new information and for those stocks that are projected to increase.

Next Steps

- Deadline for updates to the OFL CV guidance document will be March 2024
- In order to meet this deadline, the group will need to meet 3-4 times between the September 2023 and March 2024 meetings.
 - Target the next sub-group meeting for Oct/Nov – draft revisions for assignments due 1 week prior.