Workshop Milestones and Timelines

Gulf Transition Team Workshop
February 23-25, 2022
Workshop Goals

A. Present Work Group's list of Milestones that are to be addressed in a Transition Plan;
   1. Include description of a “hybrid” approach that puts the transition on two parallel tracks:
      a) initiate transition using available data;
      b) complete research plan and revise data collection designs/calibration/integration as indicated by the results;

B. Group discussion facilitated by Workshop chair. Intent is to achieve a general consensus of the Transition Team Subgroup members on the content of the transition plan, and timing for completion of the various milestones.
Congressional Directives

The intent is that the roadmap (milestones/timelines) will outline a program that, when executed, will enable a well-informed and final independent review that addresses the following questions posed in the Joint Explanatory Statement for Division, B--Commerce, Justice, Science, and Related Agencies Appropriations Act, 2021:

(1) an independent assessment of the accuracy and precision of both the Federal and State recreational catch data programs in the Gulf of Mexico;
(2) recommended improvements to be made to the Federal and State recreational catch data programs in the Gulf of Mexico to improve accuracy and precision;
(3) an independent assessment, based on the results of the two prior items, to how best to calibrate the Federal and State recreational catch data programs in the Gulf of Mexico to a common currency.
Milestones

I. Develop a research plan for understanding the drivers of differing catch estimates and the sources and effects of non-sampling error among the Gulf red snapper surveys.

II. Continue to work toward finalizing calibration.

III. Transitional or interim Measures Until Step IV is Completed

IV. Determine and resolve unmet Certification requirements for use of estimates from State (and federal?) Surveys

V. To increase transparency and assure data access, establish a common database for storing state survey data and estimates that meets the needs of stock assessments and management uses

VI. Prepare and execute a communications plan for sharing status/progress information across the Transition Team Subgroup member agencies and externally.

VII. Make final decisions on survey and calibration method changes going forward permanently.
I. Develop a research plan for understanding the drivers of differing catch estimates and the sources and effects of non-sampling error among the Gulf red snapper surveys

A. Evaluate survey error, conduct nonsampling error studies, identify possible survey improvements to reduce error.

B. Following the Workshop, release the research and analysis plan, including content that discusses the purpose and need for the research program (including the “why now”? question), and identifies the partners that will lead and coordinate the research and evaluation of research products.

C. Contract for an independent expert review of survey and calibration methods once sufficient information on sources and magnitude of non-sampling and other survey error is available.
II. Continue to work toward finalizing calibration

At this workshop:
A. **Determine requirements for an integrated single Gulf-wide estimate** for the affected species (keeping in mind that several species are not gulfwide in their distribution)
B. Determine whether we will continue to **use the ratio-based calibration method or develop an acceptable model-based method**.
   - Consider questions of **scalability and stability of calibrated estimates** and any other potential unintended consequences of calibration choice(s).
   - Important considerations related to the choice of calibration approach and how accomplished
   - Ratio vs Model - pros and cons
     - Timeline for model, **Need for interim methods**, Consistency/efficiency needs
     - Impacts on the assessment process (i.e. SEDAR 74, 72)
       - State specific vs Multi-state or Gulfwide
       - Progression to preferred option (1a - 1c)
     - Accessibility of the data and calibrations (who does the calibrations?)
III. Transitional or interim Measures Until Step IV (resolving any unmet requirements) is Completed

A. Data management and storage requirements:
   Process, Role of partners, and funding considerations

B. Data use for:
   1. Management
   2. Stock Assessments
      ● How assessment related decisions impact interaction

C. Complete studies/analyses flowing from Milestone I
IV. Determine and resolve unmet Certification requirements for use of estimates from State (and federal?) Surveys

I. Determine and resolve unmet requirements for use of estimates from State Survey Certification Decision Memos

A. Generally, these include the following for each survey:
   - Integration
   - calibration
   - peer review
   - apply to time series

B. Also address any individual, specific next steps from Certification Memos
V. To increase transparency and assure data access, establish a common database that meets the needs of stock assessments and management

A. All relevant state survey data/estimates to be made available through GulfFIN will include:

Immediate Term needs -

- raw intercept data (e.g., trip-level catch, biological samples) and all survey estimates (e.g., strata-level estimates of catch and effort);
- all survey variables and associated metadata (of the variable list);

Longer Term needs -

- standardized field names and allowable values
- a comparison of state variables to those in other surveys;
- decisions on the finest “possible” resolution at which state variables can be defined
- all necessary metadata to be submitted as a SEDAR reference document(s),
  - “Recreational Landings Data Consideration” document, circulated to regional partners as part of SEDAR 74
V cont’d. To increase transparency and assure data access, establish a common database that meets the needs of stock assessments and management uses

B. Additional analyses will be needed to inform BSIA determinations related to SEDAR assessments:

C. For those cases in the future where state surveys are determined to be BSIA, develop appropriate calibrations, species specific calibrations, address missing information

D. Assure that there are appropriate quality control processes in place as needed:
VI. Prepare and execute a communications plan for sharing status/progress information across the Transition Team Subgroup member agencies and externally.

The MRIP CET would be the lead for preparing the plan in consultation with the MRIP Southeast Communications Working Group.

A. **Transition Team members:** The plan will include regular (bimonthly?) meetings of the Transition Team Subgroup to monitor progress, revise and update partner and consultant tasks as needed, and to assure **all partners are fully informed** about the status and timeline of the Transition.

B. **State communications:** actively work with state partner members of the Transition Team Subgroup to plan meeting outcomes, **set expectations**, and create the workshop and meeting agendas, and actively and **regularly communicate with state directors throughout** the process.
VII. Make final decisions on survey and calibration method changes going forward permanently.

Complete the Transition Plan reflecting these decisions. Consider a FINAL (hopefully!) Transition Team Workshop for this purpose.

- Possible phased implementation, i.e. calibration and data use prior to and following completion of independent survey review.
  - Include consideration of:
    - “hybrid” approach that puts the transition on two tracks: (1) initiate transition using available data; (2) complete research plan. **ALL available data would be considered in the assessment process until research is completed.**
    - Sector allocations of catch going forward;
    - Potential need for further transition planning and calibration for use of estimates derived from other methods including SEFHIER.
Long Term Goals

1. **Identify any needed design changes** to improve the accuracy of all survey programs, thereby minimizing differences in estimates. *(Milestones I, III, IV and VII)*

2. **Incorporate state data into the federal science and management process** while maintaining the needed consistent, regional time series. *(Milestones I, II, IV, and VII)*

3. Develop a single, **publicly accessible, standardized database** to house all the recreational fishing data streams in the Gulf of Mexico. *(Milestones III and V)*

4. **Develop guidelines to inform future decision-making regarding BSIA** when overlapping statistically valid data streams exist *(Milestone V)*

5. **Maintain lines of communication** between the Transition Team and all affected stakeholders about progress toward the above goals. *(Milestone VI)*