

SEDAR 58: Atlantic Cobia Stock ID

DRAFT: 9/7/2017

Cobia Stock ID will be resolved using the Stock ID Resolution Process developed by the SEDAR Steering Committee in September 2016. Details of this process are found in Appendix 1 (pgs. 8-9).

Planning and Organization

A Cobia Stock ID Organizing Committee (OC) has been established with representatives from each of the Cooperators who could be affected by stock ID decisions (membership list below). OC members were appointed by their relevant SEDAR Steering Committee representatives. The MAFMC did not appoint a representative to the Organizing Committee.

The OC will convene via webinar to develop Terms of Reference, identify potential data sources and potential workshop participants, and discuss workshop approach and timing. The role of the Cobia Stock ID Organizing Committee is administrative and planning.

Organizing Committee:

- John Carmichael, SAFMC
- Kevin Craig, SEFSC
- Dan Goethel, SEFSC
- Jeff Isely, SEFSC
- Mike Larkin, SERO
- Ryan Rindone, GMFMC
- Mike Schmidtke, ASMFC
- Julia Byrd, SEDAR

DRAFT Workshop Terms of Reference

DRAFT Cobia Stock ID Terms of Reference were developed by the Cobia Stock ID OC (see below). SEDAR staff are working with OC members to get feedback on the ToRs from the ASMFC, SAFMC SSC, and GMFMC SSC in advance of the Sept 2017 SEDAR Steering Committee meeting. The recent cancellation of the Sept 2017 GMFMC SSC meeting due to Hurricane Irma, will likely make it more difficult to get feedback from the Gulf SSC prior to the SEDAR Steering Committee meeting. Any feedback received from these groups will be shared at the Sept meeting.

Stock ID Workshop

Workshop Goal: Review cobia stock structure and unit stock definitions and consider whether changes are required.

1. Review information including, genetic studies, growth patterns, movement and migration, existing stock definitions, otolith chemistry, oceanographic and habitat characteristics, prior SEDAR stock ID recommendations and any other relevant information on stock structure.
2. Make recommendations on biological stock structure and the assessment unit stock or stocks to be addressed through SEDAR 58 and document the rationale behind the recommendations.
3. Discuss the strength of evidence in support of stock ID recommendations with particular attention on those that result in a mismatch of biological stock structure, assessment unit stock recommendations, and existing management unit boundaries.
4. If biological stock structure recommendations, assessment stock unit recommendations, and existing management units (state and federal) do not align, provide guidance to address the relative risks (biological and management) and consequences of managing based on existing Council or prior assessment boundaries.
5. Provide recommendations for future research on stock structure.
6. Prepare a report providing complete documentation of workshop recommendations and decisions.

Stock ID Review Workshop

- 1) Review the recommendations of the SEDAR 58 Stock ID workshop.
- 2) Determine whether the stock structure recommended by the SEDAR 58 Stock ID Workshop is reasonable and appropriate to use for the SEDAR 58 assessment unit stock. In making this determination consider whether available scientific data have been taken into account and analyzed properly, and whether conclusions based on those data are reasonable given the current fisheries data. The Review Panel should consider the following in making its conclusions: 1) inclusion of data, 2) data analysis, and 3) appropriateness of conclusions regarding recommended stock unit(s) and associated spatial structure.

- 3) Prepare a report documenting the Review Panel’s findings and recommendations regarding the SEDAR 58 assessment unit stock.

Schedule

A DRAFT Cobia Stock ID Schedule was developed by the Organizing Committee (see below) using the general timeline provided by the SEDAR Steering Committee at their May 2017 meeting. The Stock ID Workshop and Stock ID Review Workshop dates overlap MAFMC meeting dates. However, MAFMC staff were consulted and indicated this overlap was not problematic. An initial planning call has tentatively been scheduled for Fall 2017. This call would provide potential participants, who have not typically participated in SEDAR assessments, an opportunity to learn more about the SEDAR process (in particular Stock ID) and what to expect when participating in SEDAR workshops.

**SEDAR 58
Atlantic Cobia Stock ID
Schedule of Events
DRAFT: September 6, 2017**

ToRs & Schedule Approved Fall 2017
 Planning Call with Potential Participants..... Oct/Nov 2017
 Workshop Appointments Complete by December 2017

Data Scoping Webinar (Stock ID workshop participants)..... *week of Jan 15th, 2018*
 Raw Data Deadline (for all datasets that need to be combined for analyses) March 2, 2018
 Stock ID Working papers..... March 27, 2018
Stock ID Work Group Meeting (Raleigh, NC)..... April 10-12, 2018
 1st Draft of Stock ID Workshop Report April 12, 2018 (end of workshop)
 Post Stock ID Webinar (if necessary) *week of Apr 23rd, 2018*
 Draft Stock ID Report Sections to Panel for review Apr 27, 2018
 Report Comments due to Chair/Editors May 11, 2018
Final Stock ID report sections due to Chair/SEDAR May 16, 2018
 Stock ID Workshop report distribution..... May 18, 2018

Stock ID Review Working Paper Submission May 18, 2017
Pre-RW Conference Call (Analytical team, RW Chair & Panel) week of May 28th, 2018
Stock ID Review Workshop (Location TBD) June 5-7, 2018
 Draft Review Report Sections due to Chair June 22, 2018
 Report Comments due to Chair..... June 29, 2018
 Review Workshop Reports due to SEDAR Staff..... July 6, 2018
 Stock ID Review Workshop Report Distribution July 11, 2018

SSC/TC Review per Step 3 in Stock ID Resolution Process late July/Aug 2018

- *Task: Review Stock ID Workshop & Review Workshop information and recommend the cobia assessment unit stock for SEDAR 58 ToRs*

SEDAR Staff Recommendation: To address Step 3, hold a joint meeting via webinar with representatives from each Cooperator SSC/TC, similar to what was done for Blueline Tilefish.

Science & Management Leadership Call per Step 4 in Stock ID Resolution Process.... August 2018

- *Task: If change in stock ID is recommended that causes a stock to cross cooperator jurisdictions, the Leadership Group will determine how to resolve the discrepancy and provide guidance on the appropriate TORs to provide the necessary and appropriate management parameters*

Final Stock ID Resolution (per Data Best Practice timeline)..... August 31, 2018

- *The SEDAR 58 Data Workshop has tentatively been scheduled for late November 2018. If Stock ID is not resolved by August 31, it is likely the Data Workshop will be delayed until early 2019.*

Workshop Location

The Organizing Committee discussed potential workshop locations and recommends holding the Stock ID Workshop in Raleigh, NC. Three locations were discussed for the Stock ID Review Workshop: Raleigh, NC; Charleston, SC; and Tampa, FL (at GMFMC office). SEDAR staff recommend holding the Stock ID Review Workshop in either Raleigh, NC or Charleston, SC.

Workshop Approach

The Organizing Committee has started to discuss the Stock ID workshop approach and participant roles. Below are initial recommendations from the Organizing Committee for the SEDAR Steering Committee's consideration.

Stock ID Workshop

- Participant Roles
 - Workshop chair is needed. Chair would be responsible for facilitating meeting and compiling workshop report. Chair should be familiar with SEDAR process and work closely with the analytical team(s) – could be SEFSC or SSC/TC representative, should NOT be lead analyst.
 - Topical Work Group Leaders are needed. Role would be similar to that of a Data Workshop Work Group Leader – would be responsible for leading breakout group discussions, presenting findings to plenary sessions, and compiling/assigning report sections. OC recommended having broader representation (not just SEFSC) for WG leader roles as much of the cobia data and expertise are spread between state, university, and federal agencies. OC also noted it would be helpful to spread WG leads across geographic regions (Gulf, South Atlantic, and Mid-Atlantic).

- Work Group members' roles would be similar to that of Data Workshop Panel. Members would likely include state, federal, and university representatives.
- OC supported having fishermen and Council staff participate as appointed observers (would not participate in consensus decision making).
- Decision Making Process
 - OC discussed two potential options for the decision making process
 - Operate similar to SEDAR Data Workshop: work groups would meet separately and then present findings/recommendations in plenary sessions where all work group panel members participate in consensus decision making
 - Work Groups & Smaller Panel: work groups would meet separately and then present findings/recommendations in plenary sessions; all participants would serve on working groups, but smaller Panel would participate in the consensus decision making; this idea discussed because there will likely be a large number of workshop participants and it could be more manageable to have a smaller group participate in decision making
 - **OC's preference is to have Stock ID decision making process similar to SEDAR Data Workshop**
 - If Steering Committee prefers other option (smaller Panel makes decisions), OC noted it will be important to allow all work group members to participate in plenary session discussions
- Key Participants: OC members have begun to discuss potential workshop participants and have noted it will be important to have key data providers and assessment representatives participate in the workshop, as well as, outside experts who could help provide insight on biological, assessment, and management unit stock mismatches should they occur.

Stock ID Review Workshop

- Review Panel Composition
 - OC supported having Review Panel chair. Role would be to facilitate meeting and compile report; would not be a reviewer.
 - OC supported Review Panel including CIE representatives, SSC/Other Technical Body representatives from each Cooperator, and outside experts with Stock ID expertise
- Other Workshop Participants
 - OC supported having the Stock ID Workshop Chair present findings to the Review Panel; also supported having the WG leaders available to help

- present findings and/or address questions; WG leaders could be available in-person or remotely
- OC supported have fishermen and Council staff participate as appointed observers.

Participants

Stock ID Workshop and Review Workshop participants will be appointed by the Cooperator with which they are affiliated. The Cobia Stock ID Organizing Committee has started to develop a draft list of data sources and potential workshop participants that will be shared with Cooperators when memos requesting appointments are distributed.

Below are initial SEDAR staff recommended appointees counts for each Cooperator. Numbers in each cell indicate the estimated number of appointments for each Cooperator that SEDAR will be able to support travel. X's indicate other representatives that are anticipated at the workshop where SEDAR will not be able to support travel. Numbers in the 'Other' columns represent participants needed for the workshop, but additional guidance is needed from the SEDAR Steering Committee on who should serve in these roles. In the Stock ID Workshop table, estimates of data providers are based on the Organizing Committee's initial efforts to identify potential data sources.

Stock ID Workshop

Category	SEFSC	SERO	SAFMC	ASMFC	GMFMC	MAFMC	Other
Stock ID Workshop Chair (SEFSC, SSC, Other?)							1
SSC/TC			1	1	1	1	
Data provider	X		5	5	3		
Analyst	X						
Other Expert	X		1	1	1	1	
Appointed Observers							
AP/Constituent Observer			1	1	1	1	
Staff Observer		X	X	X	X	X	
Mgmt Observer		X	X	X	X	X	

Stock ID Review Workshop

Category	SEFSC	SERO	SAFMC	ASMFC	GMFMC	MAFMC	CIE	Other
Review Workshop Chair (SSC, Other?)								1
Review Panel								
SSC			1	1	1	1		
CIE							X	
Other experts								1
Stock ID Workshop Representatives (will present Stock ID Workshop findings)								
Stock ID Workshop Chair								1
Stock ID Workshop Group Leaders (could participate in-person or be available remotely)								4
Appointed Observers								
AP/Constituent Observer			1	1	1	1		
Staff Observer		X	X	X	X	X		
Mgmt Observer		X	X	X	X	X		

Appendix – Stock ID resolution guidance from September 2016 Steering Committee Meeting.

- Committee agreed that stock ID decisions have management impacts and should include review and consideration by managers (e.g., SEDAR Steering Committee, Cooperators)
- Default recommendation is that stocks are assessed along existing management boundaries or established assessment boundaries. Adequate evidence is required to divide stocks in other ways.

Stock ID Resolution Process, Step by Step

1. Stock ID workshop to evaluate available data and develop stock ID recommendations. Include participation by all potentially impacted jurisdictions.
 - Reviewed TORs for proposed workshop, suggested changes as follows:
 - RE: addressing the discussion of stock & management units
 - Add language to consider strength of evidence for any stock ID recommendations that result in mismatch between biological and management boundaries
 - Add language to address the risks (biological and management) & consequences of managing based on existing council or prior assessment boundaries if evidence suggests a change in boundaries should be considered
 - Workshop participants
 - SSC
 - Management: Council and regional office
 - Science: SEFSC & state: data, life history, surveys, spatial, tagging/movements
 - Specialized experts: genetics
 2. Independent Peer Review of the workshop recommendations
 - Participants
 - 2 CIE reviewers (request genetics & ID expertise)
 - SSC reps – 2 per cooperator to include 1 as chair
 - Management representative – regional office
 - Assessment representative – SEFSC
 - Optional slot for additional expertise if required
 3. Workshop Report and Peer review findings reviewed by the SSC (or appropriate technical review body) of all cooperators/jurisdictions affected by the stock ID recommendations
 - Note that SSC representation is also provided at the workshop
 - Each Cooperator will conduct its own review, according to its own policies. Joint meetings may be convened if deemed necessary by the affected Cooperators or the Steering Committee.
 4. If a change in stock ID is recommended that causes a stock to cross cooperator jurisdictions, then steps will be taken to involve all cooperators, management (Regional Office) and Science entities (Science Center) in the decision on how to resolve the discrepancy and in providing guidance on the appropriate TORs to provide the necessary and appropriate management parameters
 - Will consider a joint SSC meeting, via webinar, with subset of reps from affected SSCs to provide technical review and efficiently develop consistent, compatible recommendations by technical advisors.
 - A conference call meeting will be convened of regional and cooperator leadership to develop guidance on TORS for addressing the management-stock unit overlap, similar to what was held for Blueline Tilefish with the SE and NE parties
- Summarized steps in the Stock ID process:

- Workshop
- Peer review of workshop findings
- SSC review of findings
- Resolution of mismatch and overlap by jurisdictions; guidance for assessment TORs
- Assessment proceeds