

## **Assessment Working Group - Report for August 2025 NRCC Meeting Recommendations on Stock Assessment Schedule and Process Simplification**

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### **Overview**

At its Spring 2025 meeting, the Northeast Region Coordinating Council (NRCC) tasked the Assessment Working Group (AWG) to develop the following for the Summer 2025 Intersessional Meeting:

- Recommendation for a 2026 assessment schedule;
- Guidance/plan for a 2027-forward assessment schedule; and
- Recommendations to simplify the assessment process.

The AWG considered NRCC guidance from the Spring 2025 meeting. Key topics the NRCC identified for the AWG to consider included:

- Adjusting Management Track (MT) frequency and complexity;
- Considering a balance of Research Track (RT) vs. MT;
- Building in flexibility (not scheduling all of the capacity);
- Focusing on assessments over process; and
- Deconflicting timing of review schedules.

The AWG met five times (June 6 and 12, July 2, 17, and 29) to work on these tasks. Additionally, Atlantic State Marine Fisheries Commission (ASMFC), Mid-Atlantic Fishery Management Council (MAFMC), New England Fishery Management Council (NEFMC), and NOAA Fisheries Greater Atlantic Regional Fisheries Office (GARFO) representatives met several times (including June 18 and July 2) to discuss 2026 schedule prioritization. Per NRCC guidance, the AWG prioritized development of the 2026 schedule, and we report progress on all action items. These tasks were challenging given the complexity and interconnectedness of data collection, assessments, and management needs in a resource-constrained environment. The AWG was able to digest a large amount of information, develop and apply priorities, and form difficult, but we believe productive, recommendations.

### **2026 Assessment Schedule Development Process**

In its development of the proposed 2026 schedule revision, the AWG considered science constraints and management priorities. Our overall objective was to meet the prioritized needs of the NRCC members to support regional fisheries management, while maintaining/improving scientific quality and providing flexibility to adapt to emerging needs.

## Science constraints

Northeast Fisheries Science Center (NEFSC) ability to provide science advice has declined. These declines have occurred across NEFSC activities. Based on these factors, the NEFSC recommended planning for reduced assessment workload, focusing on priority species and stocks while providing for emerging needs. This regional prioritization may be linked to a national prioritization effort to ensure NMFS science and management resources are being used for the nation's highest priorities. In developing the 2026 schedule recommendation, the AWG focused on near-term regional priorities with recognition of cumulative constraints and longer term planning needs beyond 2026, in line with the plans for national prioritization. The AWG also considered ways to simplify the NRCC assessment process.

## Management Track prioritization

The AWG discussed and considered both long-term priorities and short-term needs in building the proposed revision to the 2026 schedule. Although the initial focus was on developing the 2026 schedule, AWG members were also well aware of the need for longer-term prioritization and, to various degrees, factored that into their individual thinking and recommendations. The AWG will focus more on longer-term priorities after the intersessional, as the AWG works to develop the assessment schedule from 2027 forward.

To prioritize among stock assessments, the AWG applied two controls: 1) reducing the frequency of assessments (number/year) and 2) reducing the net complexity of assessments (balance of complex age/length-based analytical assessments to data moderate/limited assessments to data update products). For 2026, these controls boiled down to reducing the overall number of complex age/length-based analytical assessments to be conducted.

For the proposed 2026 assessment schedule, the AWG arranged assessments into four categories based on the scientific products that are delivered for management use.

Complex assessments - Statistical catch-at-age or catch-at-size models (e.g., WHAM, ASAP, CASA) are used to conduct the assessment and a full range of management support is provided (e.g., biological reference points, status determinations, short-term projections, catch advice). This essentially reflects carrying out these assessments using the established size-/age-based methodologies.

Data moderate/data limited assessments - Data-moderate and data-limited (DM/DL) assessment approaches to conduct assessments could use a range of approaches, including but not limited to, catch-only, index-based, age-structured production models, and aggregate biomass dynamics models. Specific DM/DL methodologies provide a range of management products, and determination of appropriate methods likely will be on a case-by-case basis related to data availability, data quality, stock importance, and management needs. Full implementation of DM/DL methods for stocks in the Northeast Region will take effort to develop expertise and implement methods for individual stocks. For the proposed 2026 schedule, the

longfin squid MT assessment falls into this category.

Data update - A standardized data update template that includes total U.S. catch (landings and discards) by commercial and recreational sector, as appropriate, and any aggregated survey indices that are readily available from NEFSC databases.

Projection update - For a few stocks, the AWG proposed providing a data update (see above) as well as updating projections using the existing model. Projections would be updated by adding realized catch for recent years (through 2025) instead of assumed catch and running the projections out for a specified number of years. It is important to note that the updated projections do not update the assessment model or the terminal year of the assessment.

## AWG 2026 Management Track Schedule Recommendation

The AWG recommends the proposed 2026 NRCC stock assessment schedule as revised in Table 1. The proposed 2026 management track assessment schedule includes five complex stock assessments, one data moderate/data limited assessment, three data updates and projection updates, and six data updates. The proposed schedule purposefully leaves capacity for work on important transition tasks, which could include: 1) transitioning stock assessments to new leads; 2) developing data moderate/limited approaches; and 3) developing automated data updates and processes for their effective use in management.

The AWG is not proposing that any of the Atlantic cod stocks be assessed in 2026. The specifications recently proposed by the NEFMC for the cod stocks would not expire until 2027. Therefore, an assessment may not need to be completed in 2026. The AWG sees benefit to conducting the cod assessments in 2027, when we will likely have a clearer picture of cod management related to stock structure, allocations, and updated Marine Recreational Information Program (MRIP) data.

The AWG is also not proposing to conduct the striped bass assessment in 2026. Instead, the striped bass RT that is scheduled to be completed in 2027 will be used for management advice.

Table 1. Proposed 2026 NRCC MT Assessment Schedule

<b>Stock</b>	<b>Product(s)</b>	<b>Delivery Timing</b>	<b>Rationale/Notes</b>
Atlantic herring	Complex Assessment	June MT	Need to apply the new RT in an MT for rebuilding progress and stock status. Bulk of aging done by states.
Butterfish	Data Update & Projection Update	June MT	Specifications expire in 2026. Recent low fishery utilization.
Haddock (Georges Bank)	Complex Assessment	June MT	Supports U.S.-Canada process.
Ocean quahog	Data Update & Projection Update	June MT	Specifications expire in 2026. Update projections to 2030 to align with surfclam.
Longfin squid	Data Moderate/Limited Assessment	June MT	Applying new data moderate/limited approach with additional data following RT (pending peer review).
Atlantic sea scallop	Complex Assessment	Summer	Maintain annual scallop setting in 2026.
Atlantic halibut	Data Update	August 3	In a rebuilding plan but the target date is not until 2055.
Red hake (Northern)	Data Update	August 3	Specifications expire in 2027.
Red hake (Southern)	Data Update	August 3	Specifications expire in 2027. In a rebuilding plan.
Silver hake (Northern)	Data Update	August 3	Specifications expire in 2027.
Silver hake (Southern)	Data Update	August 3	Specifications expire in 2027.
Witch flounder	Data Update	August 3	Specifications expire in 2027. In rebuilding plan but the target date is not until 2043.
American plaice	Complex Assessment	September MT	Complete MT to resolve data issue from prior MTs and update with new data.
Haddock (Gulf of Maine)	Complex Assessment	September MT	Keep haddock stocks together in same year.
Pollock	Data Update & Projection Update	September MT	Use 2024 MT model, update bridge year catch data, 5-year projections.

## Longfin Squid

At its Spring 2025 meeting, the NRCC suggested the AWG consider combining the longfin squid RT and MT in 2026 as an approach that may increase efficiency. The AWG considered options to optimize the scientific information that can be provided in 2026 in the most efficient manner while minimizing scheduling disruptions and impacts on management timelines.

The following is the resulting AWG recommendation, which was approved by the NRCC via correspondence. The longfin squid Research Track Working Group (RTWG) plans to complete its work on time in February/March 2026 with a terminal year of 2023 for data. The RT will produce two models - a more complex model with monthly timesteps and more data requirements, as well as a less complex approach with half-year timesteps and fewer data requirements. Both models would be peer reviewed by the panel, with the intention that both will be approved for use in providing scientific advice for management. The longfin squid MT will follow in June 2026, updating the less complex approach with data through 2025. This approach provides the results of both RT (both models through 2023) and MT (less complex approach through 2025) for Scientific and Statistical Committee (SSC) and management consideration on standard management timelines. Updating the more complex model with data through 2025 would require an extension of either the MT or RT, resulting in associated inefficiencies and challenges for management timelines, with limited added benefit to the suite of information that will be provided with the on-time approach described here. To implement these changes, the AWG considered just directing the peer review panel to do a robust review of both models, or making the changes to TOR 8. For clarity and transparency, the AWG recommended revising TOR 8 to read as follows.

8. Develop an alternative assessment approach to providing scientific advice to managers, including providing BRPs if possible. The alternative approach could be used if the primary assessment approach is not feasible (e.g., due to data or resource limitations), or if it does not pass peer review either now or in a future Management Track assessment.

## 2026 Assessment Schedule - Feasibility and Tradeoffs

The NEFSC evaluated the AWG-proposed schedule for 2026 and believes that it can support the requested assessments, projection updates, and data updates based on its understanding of the likely resources available in 2026. The AWG recognized that if the situation changes substantially (e.g., substantial additional reductions in resources), we would have to rethink the schedule together. The AWG also discussed several known tradeoffs with the proposed 2026 products, which we describe below for awareness and consideration.

Projections - Extending projections comes with risks as projection performance declines rapidly with time. Projections carry increasing uncertainty the further we look ahead, especially beyond

three years. Brooks & Legault (2016)<sup>1</sup> and Perretti & Legault (2024)<sup>2</sup> have shown that predictive skill declines rapidly, primarily due to compounding uncertainty in future recruitment along with uncertainty in growth, selectivity, and environmental variability. This issue is particularly acute for those stocks with high recruitment variability. While NEFSC can update and extend projections, the AWG wants to be clear that their reliability diminishes quickly with time, so longer-term projections must be interpreted with appropriate caution.

Data updates - NEFSC can provide the requested data updates by August 3, 2026, recognizing that the catch data (particularly discards) likely will not be stable at that point for stocks with May 1 fishing years. In other words, a data update provided a month later may indicate different discards and total catch - as the data from the prior fishing year come in and are processed in the cumulative discard estimation procedure for the prior calendar year.

June assessments - The NEFSC can continue to conduct June assessments, and data provision will continue to be a major challenge for those assessments, even more so for stocks with fishing years that start on May 1. These challenges are likely to increase as resource challenges strain NEFSC and partners' data collection systems. These data provision issues impact assessments in a variety of ways, including but not limited to instability in terminal year estimates, ability to use the most recent data, missing data series, errors in data, changes to terminal year, increased uncertainty in model results, and reductions in modeling investigations that can be completed.

Timing conflicts - The AWG has not yet considered the timing of the assessment reviews in 2026 in the context of any possible conflicts. The AWG does recognize that the proposed schedule for 2026 includes fewer assessments that would require peer review, so there may be more opportunities for deconflicting given likely shorter peer review meetings. The AWG intends to consider and address any conflicts following the NRCC Interseasonal and in advance of the NRCC fall meeting.

## AWG 2026 Research Track Schedule Recommendation

With respect to RTs, we recommend continuing the pause on the winter flounder, monkfish, and projections RTs through 2026 to focus capacity on MT assessments, transition efforts, and emerging issues (Table 2). We recommend continuing work on the longfin nearshore squid (Spring 2026) and striped bass (Spring 2027) RTs as scheduled.

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<sup>1</sup> Elizabeth N. Brooks and Christopher M. Legault. 2016. Retrospective forecasting — evaluating performance of stock projections for New England groundfish stocks. *Canadian Journal of Fisheries and Aquatic Sciences*. 73(6): 935-950. <https://doi.org/10.1139/cjfas-2015-0163>

<sup>2</sup> Perretti, C.T. and Legault, C.M. (2024) 'Retrospective forecast performance as a diagnostic tool for state-space stock assessment models'. Working Paper prepared for the ICES Methods Working Group (MGWG) meeting, 18-22 November.

Table 2. Proposed 2026 NRCC RT Assessment Schedule

<b>Stocks/Topic</b>	<b>Management Organization(s)</b>	<b>Proposed 2026 Status</b>
Longfin Squid (Spring 2026)	MAFMC	Continue as planned
Winter Flounder (Fall 2026)	NEFMC, ASMFC	Continue to pause working group
Monkfish (Spring 2027)	NEFMC, MAFMC	Continue to pause working group
Striped Bass (Spring 2027)	ASMFC	ASMFC-led; Continue as planned
Projections (Fall 2027)	NEFMC, MAFMC, ASMFC	Continue to pause working group
2028 Research Tracks	NEFMC, MAFMC, ASMFC	Pause (do not recruit in 2026)

## 2027-Forward Assessment Schedule

The AWG had preliminary discussions of longer-term assessment priorities and schedule, considering the need to prioritize assessments both in terms of frequency and complexity. With respect to complexity, the AWG discussed both the workload associated with complex catch-at-length/age assessments as well as the sampling requirements. The sampling requirements, in particular, call for longer-term prioritization of assessments, so that an appropriate sampling plan can be developed and implemented to ensure that high-priority assessments are able to be successfully executed in the future, supported by sufficient sampling. AWG members started thinking about those longer-term priorities, but focused most attention on the immediate needs of 2026.

The AWG plans to revisit longer-term assessment prioritization, considering target frequency and complexity for each assessment for the medium to long term. The AWG recognizes the tradeoff between the sustainability of assessment (and management) workload and the combination of frequency and complexity of assessments. Less frequent and less complex assessments reduce workload and sampling needs and support sustainability at the cost of longer time frames between scientific advice and, in some cases, less precise advice. On the other hand, more frequent and complex assessments provide scientific advice with as much precision as feasible with shorter time gaps between, but do so at the cost of sustainability of workload and run the risk of increased uncertainty in assessment results and even assessment model failure with insufficient sampling. As the AWG develops longer-term assessment priorities and schedule, we will consider the previous NRCC suggestion of 4 years as an upper limit on the assessment period. The AWG will also work to match priorities for complexity of specific assessments to sampling and analytical capacity. Time permitting, the AWG also will consider or explore other avenues to decrease assessment workload or improve efficiency.

## Assessment Process Simplification

The current MT and RT assessment process is complicated and has a lot of overhead. While the process and its overhead were designed with valid reasons, a reevaluation is needed to reduce the complexity of the assessment process and align it with current capabilities. The

AWG had initial discussions regarding both RT and MT processes, and a summary of progress and initial recommendations is shared below, organized loosely by broad steps within each process. The AWG intends to complete its deliberations regarding assessment process simplification and provide recommendations for the fall NRCC meeting.

## Research Track Process Simplification

The AWG supports the current pause in RT assessments during this transition, recognizing that RTs require extensive resource investment across NRCC partners. The AWG, however, values keeping RT assessments in the process for the future as they provide a formal space to advance assessment science.

RT assessments focus either on (a) assessments of individual stocks with comprehensive evaluation of new data streams and model changes (RT stock assessments), or (b) research topics that apply to assessments of several stocks (RT topical assessments). The AWG agreed both types of RT assessments could continue to be in the process, but the AWG strongly recommends a focus on topical RTs for the near future. RTs focused on specific stocks seem to have less immediate value in current circumstances, and the AWG recognized that there may be more flexibility to improve assessments in the MT if there are fewer high-priority, complex MT assessments and if there is more time between MT assessments.

The AWG had an initial discussion regarding the frequency of RT assessments and the need to balance RT and MT workload appropriately given constraints. Generally speaking, the AWG recommends prioritizing MT over RT for the near future, as the NRCC has done with the initial RT pause. The AWG will discuss further to develop a recommendation regarding RT frequency, but initial discussions clearly point to significant reductions in RT frequency from the recent pattern that had 5 to 9 research track assessments (7-12 stocks/topics) underway at once. The AWG saw that recent pattern as highly unsustainable.

### Research Track Steering Committee (RTSC)

The RTSC is a relatively new addition to the NRCC assessment process. The RTSC is tasked with identifying research needs, monitoring progress on research, developing RT proposals, considering stock structure issues, and communicating assessment research outcomes and findings. The RTSC convenes public meetings at least once a year, during which it can solicit feedback on research priorities as well as request updates on ongoing research.

Given a likely reduction in RT frequency and the fact that the RTSC is a new committee and process that hasn't fully matured yet, the AWG recommends dissolving the RTSC to save resources and simplify the process. The AWG could go back to prioritizing and proposing RT assessments as it did in the past. Time permitting before the fall NRCC meeting, the AWG may explore other ways to receive input for prioritizing RT assessments and consider other means to foster the research needed to inform those assessments.



### Assessment/Research Track Working Groups

The AWG supports the RTWG process and continuation of AWG oversight as needed. The AWG emphasized the need to have Terms of Reference (TORs) that are realistically achievable within an RT's timeline, currently 2 years.

### Comprehensive Peer Review

The AWG has not discussed the peer review process in detail yet. However, the AWG supports comprehensive, expert, external peer review for RTs. Time permitting before the NRCC fall meeting, the AWG will consider the RT peer review process to see if there are ways to simplify or improve it.

### Translate into Management

RT assessments are currently designed to directly inform future MT assessments, but typically do not immediately inform management decisions. The AWG is well aware of the challenges that have occurred in this translation process, but was only able to discuss this topic briefly. The AWG did recognize that, if the RT focuses more on topics than stocks for the near future, then this translation process is less challenging. The AWG also recognized that, with fewer complex analytical assessments and more time between them, there may be more opportunity to improve assessments within the MT without relying on an RT and subsequent RT to MT translation. As with other topics, time permitting, the AWG will consider this further for the fall NRCC meeting.

## Management Track Process Simplification

The AWG discussed the management track process holistically and identified that the "Assessment Level" system and Assessment Oversight Panel (AOP) process involves a lot of overhead. The AWG recognized that the assessment level system was intended primarily to manage the large number of assessments conducted and reviewed each year, and to make sure that each assessment received the appropriate amount of peer review time, while ensuring the overall amount of review time was feasible within a reasonable peer review meeting timeframe. With reductions in the number of assessments to be peer reviewed each year, the primary driver for the level process goes away. With the likely longer periods between assessments, the AWG expects that most, if not all, assessments would require review each time they are updated, as data and other changes are likely to accrue over those longer periods between assessments.

The AWG recommends eliminating the assessment level process and dissolving the AOP. This would dramatically reduce the overhead within the MT process and allow more focus on the actual development and delivery of assessments. The AWG recognizes the value of the work that has been invested in the level guidelines and will continue to discuss if/how retention of that information could inform peer review planning.

## Input

The AWG is aware of the challenges the NRCC has faced in engaging stakeholders and gathering input for MT assessments. Most recently, the NRCC tried an engagement meeting associated with an existing AOP meeting. If the AOP is dissolved, then a different approach will be needed for engagement and input. The AWG has not yet had time to develop recommendations for ways to improve engagement or input, but the AWG did highlight that this is a high priority for development and improvement, regardless of what other changes are made to the MT process. The AWG also noted that the AOP process, though intended in part to provide an opportunity for transparency and engagement, has not met the desired goals for engagement or input. The AWG will explore new approaches based on process changes and capacity.

## Assessment Planning

Currently, the assessment lead proposes to the AOP the extent of assessment changes to be explored and the associated level of peer review. The assessment lead also provides proposals for assessment complexity under lower levels of peer review, to provide options for AOP consideration. The AWG felt the workload and complexity of the plans and backup plans, reviews, etc., was excessive and should be reduced. The AWG also noted that there were common misconceptions about “assessment levels” as representing the value or complexity of the assessment, when they were really focused on just informing peer review durations. The AWG did appreciate the value of providing NRCC partners with information in advance regarding upcoming assessments and anticipated changes/improvements. The AWG found the AOP process to be inefficient in that regard, and the AWG intends to discuss further to develop ideas or recommendations regarding a more efficient process for communication and coordination.

## AOP and NRCC review

As mentioned above under ‘Assessment Planning,’ the current process requires AOP review of assessment plans, recommendation of levels, reopening consultation if there are significant changes to the plan while the assessment is being conducted, and an opportunity for the NRCC to weigh in if there are more, or more complex, assessments scheduled for review than can be addressed in one review meeting (that hypothetical situation has never occurred). Again, the AWG finds this process to be overly complex and recommends removing this step entirely.

## Assessment Conducted

The AWG did not identify changes to the assessment steps, other than recommending elimination of the consultation with the AOP if an assessment plan changes during the execution of the assessment. Clearly, the assessment lead will need to inform the peer review coordinator, but there would be no need to consult with the AOP. As mentioned above, the AWG does see value in sharing information about significant changes in an assessment, and the

AWG intends to discuss further to develop recommendations for improving communication and coordination.

### Peer Review

For MT assessments, the peer reviews are currently conducted by a panel of SSC and Assessment Science Committee (ASC) members with additional external experts if needed. Two MT peer reviews are conducted each year. The peer reviews typically occur in June and September to accommodate the variation in fishing year among stocks and minimize the time lag between the final year of the assessment model and the subsequent implementation of new specifications. Outputs of peer reviews are provided as expeditiously as possible to inform management action.

The AWG values peer review of MT assessments, but was only able to discuss briefly prior to the NRCC Intersessional. The AWG suggested that it is likely that most, if not all, MT assessments would be peer reviewed going forward, particularly if they occur with longer time gaps between them. Time permitting, the AWG will explore options for efficiencies in the peer review process. As requested by the NRCC, the NRCC Deputies also plan to develop a plan for expanding the pool of peer reviewers for the fall NRCC meeting. This could include a solicitation process. Consideration may also be given to training, as the experience of the panelists (especially the Chair) is critical for success.

### Next steps

For the fall NRCC meeting the AWG will:

- Consider and address any conflicts on the timing of the 2026 assessment reviews;
- Develop a recommendation on the 2027-forward stock assessment schedule, including the timing of review schedules;
- Explore other avenues to decrease assessment workload or enhance efficiency. This may include identifying stocks that could be removed from management, and assessments that could be done outside of NEFSC;
- Develop further recommendations to simplify the RT and MT assessment process; and
- Develop a plan for expanding the pool of MT peer reviewers (NRCC Deputies).