STOCK ASSESSMENT TERMS OF REFERENCE FOR 2027-28

This agenda item covers consideration of a detailed outline for the Terms of Reference (TOR) associated with the stock assessment review process anticipated for the 2027-2028 biennial cycle. Adoption of the detailed outline will guide development of the final TOR, which is scheduled for Pacific Fishery Management Council (Council) adoption in November 2026. There are three TOR that guide the stock assessment process: a.) one specifies how stock assessment reviews should occur and defines the roles and responsibilities of various entities contributing to this process, with a supplemental accepted practices guidelines document; b.) one guides the development of rebuilding analyses used to develop harvest specifications and rebuilding plans for overfished and rebuilding species; and c.) one guides how new methodologies that inform analyses used in groundfish and coastal pelagic species management decision-making are reviewed.

In the past, the distinction between TORs and Fishery Management Plans (FMPs) have become blurred unintentionally. It is important that a clear delineation be made between the two types of documents in order to foster sound decision making. Conceptually, the delineation between the two types of documents can be described in this way:

- **Terms of Reference** is helpful for identifying (among other things) the scope, objectives, expectations, roles, responsibilities, and review criteria for the development and evaluation of a scientific product. It can be considered a framework for scientists and reviewers for identifying required analyses, assumptions, data considerations, and expectations for documenting and characterizing scientific products. A TOR guides how scientific information is developed and assessed and promotes transparency, consistency, and scientific rigor in the review process.
- **A Fishery Management Plan** is a legally authorized framework developed under the Magnuson–Stevens Fishery Conservation and Management Act that establishes management objectives, management structure, and measures that govern a fishery. It defines how scientific information will be translated into management action by establishing management goals, harvest control rules, risk-management approaches, status determination criteria, and other measures (e.g. accountability measures). An FMP is the framework through which science products get used for management, and is the vehicle through which the Council responds to biological, ecological, economic, and social considerations

The Council is asked to consider and adopt the detailed outline of the TOR that specifies how stock assessment reviews should occur and defines the roles and responsibilities of various entities contributing to this process, which will guide the development of a final TOR for adoption in November 2026 (Attachment 1). There are no proposed changes for the rebuilding analysis and methodology review TORs.

Unlike past cycles, revisions to the TORs are a three-meeting process rather than a two-meeting process due to the broader scope of proposed changes based on comments from those who participated in the last cycle under the 2025-26 TOR (Attachment 2), the NOAA Stock Assessment Report Guidelines (Attachment 3), and recommendations from the Stock Assessment Review

Process (Agenda Item E.3, Attachment 1), described below. The first meeting in this process was the March 2026 meeting where the Council provided guidance to Council and Science Center staff to consider comments from the Scientific and Statistical Committee (SSC), the Groundfish Advisory Subpanel (GAP), and the Groundfish Management Team (GMT) in development of materials for this meeting.

The detailed TOR outline in Attachment 1 was developed by Science Center staff, Groundfish Subcommittee leadership, and Council staff based on the guidance provided by the Council at the March 2026 Council meeting. It also incorporates comments from the SSC, GAP, and GMT during the scoping phase of this three-meeting process. Finally, it includes some recommendations from the Evaluation of the Pacific Fishery Management Council Stock Assessment Review Process (Agenda Item E.3, Attachment 1), prepared by Lynker, which was an external review of the groundfish stock assessment process that has been occurring over the last year. There may also be additional changes that could be integrated to the TOR from the discussion during Agenda Item E.3 depending on Council action.

There are four main topics that may help guide Council discussion on this agenda item: the inclusion and adaptation of one-page stock assessment at-a-glance summaries, the refinement of the stock assessment executive summary, the integration of risk tables (moving the instructions from the Accepted Practices to the TOR), and the addition of a GAP-led appendix. The one page at-a-glance summary is not currently required by the TOR and Council should provide guidance on their continued production or changes for improvement. Similarly, the Council should provide guidance on the adaptation of the executive summary in the stock assessment document with regard to what sections or information should be the focus if shortened to align with the national guidelines (Attachment 3). Regarding risk tables, the Council should provide guidance on their inclusion in the TOR, with the understanding that a broader discussion of risk management is scheduled for November 2026. That discussion is expected to focus on the Council's overall risk management framework, including lessons learned from evaluating the risk tables through the parallel process during development of the 2027–28 harvest specifications and plans and process for future application. Finally, the Council should provide guidance on the proposed GAP-led appendix, which would document their feedback throughout the assessment cycle and be included with the stock assessment document.

At this meeting, the Council will provide its final action on its stock assessment recommendations for 2027 (under Agenda Item E.4 at this meeting). This will be followed by November 2026 final action for the TORs so that the documents are in place for the 2027 stock assessment cycle.

Council Tasks:

1. **Consider key outcomes from Agenda Item E.3 Stock Assessment Process Review and proposed process revisions for inclusion in the TOR.**
2. **Provide guidance on whether one-page, at-a-glance assessment summaries are a desired TOR component, request feedback on Center capacity and the appropriate stage(s) in the stock assessment process for producing these summaries.**
3. **Provide guidance on the inclusion of risk tables in stock assessment documents as part of the TOR (moved from the Accepted Practices document).**
4. **Provide guidance on the expectations for a GAP-led appendix.**
5. **Adopt a detailed outline of TOR for groundfish stock assessments which will guide the development of a final TOR for adoption in November 2026.**

Reference Materials:

1. Agenda Item E.7, Attachment 1: Detailed Outline of Terms of Reference for the Groundfish Stock Assessment Process for 2027-2028.
2. Agenda Item E.7, Attachment 2: Terms of Reference for the Groundfish Stock Assessment Process for 2025-2026 (***Electronic Only***).
3. Agenda Item E.7, Attachment 3: NOAA Stock Assessment Report Guidelines.
4. If received, Public Comments are electronic only (see e-portal).

Agenda Order:

E.7 Stock Assessment Terms of Reference for 2027-28 – Preliminary — Diana Perry
   a. Reports and Comments of Management Entities and Advisory Bodies
   b. Public Comment
   c. **Council Action:** Adopt an Outline to Guide Development of the Final Terms of Reference for Stock Assessment Reviews; Provide Other Guidance, as appropriate

PFMC
05/26/26