



INTERNATIONAL PACIFIC
HALIBUT COMMISSION

IPHC–2022–SS012–00
Last Update: 18 February 2022

12th Special Session of the IPHC (SS012) – *Compendium of meeting documents*

25 February 2022, Seattle, WA, USA

Commissioners

Canada	United States of America
Paul Ryall	Glenn Merrill
Neil Davis	Robert Alverson
Peter DeGreef	Richard Yamada

Executive Director

David T. Wilson, Ph.D.



INTERNATIONAL PACIFIC
HALIBUT COMMISSION

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Contact details:

International Pacific Halibut Commission
2320 W. Commodore Way, Suite 300
Seattle, WA, 98199-1287, U.S.A.
Phone: +1 206 634 1838
Fax: +1 206 632 2983
Email: secretariat@iphc.int
Website: <http://iphc.int/>



**DRAFT: AGENDA FOR THE 12th SPECIAL SESSION OF THE IPHC
(SS012)**

Date: 25 February 2022

Location and Venue: Electronic: Adobe Connect

Time: 13:00-16:00 (PDT)

Chairperson: Mr Paul Ryall (Canada)

Vice-Chairperson: Mr Glenn Merrill (United States of America)

1. **OPENING OF THE SESSION** (*Chairperson*)
2. **ADOPTION OF THE AGENDA AND ARRANGEMENTS FOR THE SPECIAL SESSION**
(*Chairperson*)
3. **BUDGET ESTIMATES: FY2023 (for approval)** (*IPHC Secretariat*)
 - *IPHC-2022-SS012-03: Budget Estimates: FY2023 (for approval) (Wilson D)*
4. **MANAGEMENT STRATEGY EVALUATION**
 - *IPHC-2022-SS012-04: Management Strategy Evaluation Procedures and Milestones for 2022 (Hicks A & Stewart I)*
5. **IPHC FISHERY REGULATIONS (2022)**
 - *IPHC-2022-SS012-PropB4: Daily bag limit in IPHC Regulatory Area 2B (Sect. 28) (Canada).*
6. **ADOPTION OF THE REPORT OF THE 12TH SPECIAL SESSION OF THE IPHC
(SS012)** (*Chairperson*)



**LIST OF DOCUMENTS FOR THE 12th SPECIAL SESSION OF THE IPHC
(SS012)**

Last update: 18 February 2022

Document	Title	Availability
IPHC-2022-SS012-01	Agenda for the 12 th Special Session of the IPHC (SS012)	✓ 7 Feb 2022
IPHC-2022-SS012-02	List of Documents for the 12 th Special Session of the IPHC (SS012)	✓ 7 Feb 2022
IPHC-2022-SS012-03 Rev_1	Budget estimates: FY2023 (for approval) (Wilson D)	✓ 14 Feb 2022 ✓ 18 Feb 2022
IPHC-2022-SS012-04	Management Strategy Evaluation Procedures and Milestones for 2022 (Hicks A & Stewart I)	✓ 14 Feb 2022
<i>Contracting Party Fishery Regulation proposals for 2022</i>		
IPHC-2022-SS012-PropB4	Recreational (sport) fishing for Pacific halibut—IPHC Regulatory Area 2B (Sect. 28) – <i>Daily bag limit</i> (Canada: DFO)	✓ 8 Feb 2022



Budget Estimates: FY2023 (for approval)

PREPARED BY: IPHC SECRETARIAT (D. WILSON, 14 & 18 FEBRUARY 2022)

PURPOSE

To provide the Commission with the budget estimates for FY2023 (1 October 2022 to 30 September 2023) for approval.

BACKGROUND

In accordance with Regulation 5, para. 3, of the IPHC Financial Regulations (2021) (shown below), the next three (3) fiscal years consist of FY2023, FY2024, and FY2025, noting that we are in the 2nd quarter of FY2022. These budgets were provided to the FAC via paper [IPHC-2022-FAC098-07 Rev 1](#).

*(Para. 3) "The Executive Director shall prepare and submit to the FAC, Contracting Parties, and Commissioners, no later than **30 days before** the FAC meeting, budget estimates for the next three fiscal years."*

At AM098 in January 2022, the Commission:

*"(Para. **pending adoption**) The Commission **AGREED** that the two Contracting Parties would engage in inter-sessional discussions over the coming month/s to adopt a budget for FY2023 and the associated Contributions. In doing so, the Contracting Parties may consult with, and have requested assistance from the IPHC Secretariat who have been tasked with providing options, including likely impacts, of a frozen FY2023 budget:*

- a) **Option 1:** Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget;*
- b) **Option 2:** Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget, however, freeze the contributions to the general fund, while utilizing the current carryover which stands at US\$1,476,626 (for general fund use).*
- c) **Option 3:** Freeze the FY2023 budget at FY2021/FY2022 levels - Contracting Party contributions to the general operation funds."*

February 2021: At the 97th Session of the IPHC Annual Meeting (AM097: February 2021), the Commission did not agree to a proposed 5% increase in the FY2022 budget to accommodate the broad range of tasking set by the Commission, including MSE activities. The proposed **5%** increase from FY2021 levels for both Contracting Parties would have resulted in base contributions of US\$945,427 and US\$4,365,648 for Canada and the USA, respectively. The combined total dollar value of the increase would have been **US\$252,908**.

Noting that the Commission did not have a budget in place for FY2022 at the close of AM097, and that the indication was that it intended on freezing the FY2022 budget to FY2021 levels,

the short-term contracts (2 years) with an MSE programmer and MSE researcher were unable to be renewed in March and April of 2021, respectively. These two positions had been funded through carry-over funds and could only continue with an increase in contributions to the general fund.

June 2021: Budget adoption was deferred to the 11th Special Session of the IPHC (SS011) which was held in June of 2021, and where the Commission took the decision to freeze the FY2022 budget at FY2021 levels. The base contributions for each Contracting Party were adopted at **US\$900,407** and **US\$4,157,760** for Canada and the USA, respectively.

To further accommodate this budget freeze, and so as not to commit the Commission to longer-term salary and wage liabilities, the decision was made in 2021 not to fill two (2) vacant HQ positions (1 x Branch Manager - Finance and Personnel Services; and 1 x Fisheries Data Specialist - HQ). In addition, one (1) field position in Juneau (Fisheries Data Specialist (F)) was held vacant for all of 2021, as the budget freeze for FY2022 was paired with a concurrent budget reduction from the NOAA port-sampling grant of **US\$103,941**.

January 2022: At the 98th Session of the IPHC Annual Meeting (AM098: January 2022), the Commission did not agree to the proposed **3%** increase in the FY2023 budget to cover the range of expected increases in expenditures. The proposed 3% increase from FY2022 and FY2021 level, for both Contracting Parties would have resulted in base contributions of US\$927,419.21 and US\$4,282,492.80 for Canada and the USA, respectively. The combined total dollar value of the proposed increase was **US\$151,745**.

February 2022: Three (3) options are provided below at the Commission's request. There are benefits and risks associated with each option and these will be further discussed at the 12th Special Session of the Commission on 25th February 2022.

PROPOSED EXPENDITURES FOR THE FY2023 BUDGET (US\$)

OPTION 1: “Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget”

FY2023 INCOME AND EXPENSES – The IPHC financial budget for FY2023 is proposed at [Appendix Ia](#).

Base Contributions:

The base contributions include an overall ~3% increase from FY2022 levels for both Contracting Parties for general operations (Funds 10, 20 and 30):

Canada: US\$927,419.21

USA: US\$4,282,492.80

Assumptions:

1) Staffing (key points of note):

- a. 5 Managerial staff (Executive Director, Assistant Director, and 3 Branch Managers). This assumption rolls over from FY2022 with the removal of 1 Branch Manager position (Finance and Personnel Services) from the organisational structure. The Assistant Director will continue to cover this role and its responsibilities.
- b. Continue to hold vacant for FY2023, one position at an IPHC-GS-8/9 level within the Fisheries Data Services Branch (FDSB) at headquarters. This position was held vacant for FY2022 to accommodate the FY2022 budget freeze.

2) Grant funding:

- a. 20 – Research: ~\$232K (in-line with recent years);
- b. 30 - Statistics: ~\$664K for FY2023 (return to pre-COVID-19 funding levels for the NOAA port-sampling grant).

3) Budget lines with an estimated 3% increase, but may be higher:

- a. Salaries and Wages: A 2.5% increase in salaries and wages is included in the budget estimate. The actual increase is not known until early each calendar year. In FY2022, the budgeted increase was 2.5%, while the actual increase was 3.21% (Ref. Executive Order 14061) and the Office of Personnel Management;
- b. Benefits, including ‘*Health care premiums*’: Annual health care premiums continue to increase annually and are not controlled by the IPHC. For example, from 2021 to 2022, the Kaiser Permanente Access PPO Platinum composite rate for ages 21+ increased by ~4.7%, from \$712.58/mo, to \$746.00/mo. We have budgeted for a 3% increase in FY2023, however the rate may be higher. An additional variable is the number of dependents for each staff member. We budget for an employee, spouse and 1.5 dependent children;

- c. Retiree Medical Reimbursement: Medicare premiums and associated fees are expected to increase again for 2023. For 2022, the medical and medicare premiums increased by **5.11%** for ages 55-65, and **4.25%** for ages 65+, respectively. These are not under the control of the IPHC but are determined by our healthcare provider (Kaiser Permanente – medical premiums) and the US Social Security Administration (SSA) (for medicare);
- d. All other budget lines represent a nominal 3% increase from FY2022 levels to offset a forecasted inflation level of **2.3-3.3%**, noting that the actual level may be higher. As an example, in January 2022, the US inflation rate increased to **7.5%**, which was the highest level since 1982.

4) Budget lines with 0% increase (frozen):

- a. Scholarship Awards: The award is fixed at \$4,000 per year, per student (2 students maximum in any given year);
- b. Meetings and Conference Expenses: The original proposed budget did not include an increase in meeting and conference expenses as we strive for an improved meeting series format with both in-person and electronic meetings in 2023.

Other notes: Travel

FY2020: US\$209,570 - The General Operating travel budget (pre-pandemic level).

FY2021: US\$209,570 – Held at FY2020 level. Approved pre-pandemic at AM096 (Jan/Feb 2020). Reduced in FY to \$152,749.

FY2022: US\$84,450 – Approved at SS011 noting pandemic travel restrictions. Updated at AM098 to US\$120,450 noting potential for travel reopening post-pandemic and increases in travel costs, being experienced in the first half of FY2022.

FY2023 proposed: \$128,125, still substantially below pre-pandemic levels.

Fund 40 - FISS: Income (and expenses) for the IPHC Fishery-Independent Setline Survey (FISS) are tentative as they are based on the design endorsed at the 97th Session of the IPHC Interim Meeting (IM097) in November 2022. Contracting Party contributions are not allocated to 40 – FISS.

Extra-budgetary contributions:

Headquarters Lease and Maintenance: The headquarters costs to the USA will increase to \$489,250 in FY2023 in accordance with the five-year building lease approved by the two Contracting Parties in 2020 and signed accordingly.

Deficit payments to the IFC Pension Fund: The extra-budgetary deficit payments to the IFC Pension Fund (closed in 2001 to new participants), remain at \$127,848 annually for each Contracting Party. This amount is based on a 10-year deficit payment schedule which is updated/recalculated every three years. The next review is scheduled to occur in 2023 for FY2024.

OPTION 2: “Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget, however, freeze the contributions to the general fund, while utilizing the current carryover which stands at US\$1,476,626 (for general fund use).”

FY2023 INCOME AND EXPENSES – The IPHC financial budget for FY2023 is proposed at [Appendix Ib](#).

Base Contributions:

The base contributions for FY2023 would be frozen at FY2021 and FY2022 levels for both Contracting Parties for general operations (Funds 10, 20 and 30):

However, a nominal ~3% increase (US\$151,745) in the general operating expenses would be accommodated via utilization of the current carryover in the Reserve fund which stands at US\$1,476,626 and is for usage solely for funds 10, 20 and 30. Note that the IPHC also has cash in bank to cover all other long-term liabilities, meaning the IPHC financial position is substantially better than the funds available in 50-Reserve. Cash in bank at the end of the previous fiscal year totaled **US\$3,477,277**.

Canada: US\$900,407.00

USA: US\$4,157,760.00

50 Reserve Fund: US\$151,745

Expense budget lines and assumptions in Option 2 would be the same as Option 1.

An inter-fund transfer from 50-Reserve to 10-General, totaling **US\$151,745** would be made to cover the nominal ~3% increase in expenditures.

Fund 40 - FISS: Income (and expenses) for the IPHC Fishery-Independent Setline Survey (FISS) are tentative as they are based on the design endorsed at the 97th Session of the IPHC Interim Meeting (IM097) in November 2022. Contracting Party contributions are not allocated to 40 – FISS.

Extra-budgetary contributions:

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OPTION 3: “Freeze the FY2023 budget at FY2021/FY2022 levels, including Contracting Party contributions to the general operation fund.”

FY2023 INCOME AND EXPENSES – The IPHC financial budget for FY2023 is proposed at [Appendix Ic](#).

Base Contributions: The base contributions for FY2023 would be frozen at FY2021 and FY2022 levels for both Contracting Parties for general operations (Funds 10, 20 and 30):

Canada: US\$900,407.00

USA: US\$4,157,760.00

Expense budget lines and assumptions in Option 3 would be the same as Option 1, with the following cost savings totaling **US\$151,745**:

Cost assumptions requiring Commission acknowledgment/approval include:

1) **Staffing:**

- a. Removal of one (1) Fisheries Data Specialist (Field) for FY2023.

In FY2021 we did not fill a FDS(F) for the port of Juneau to accommodate the overall budget freeze, and reduction in the NOAA port-sampling grant. The IPHC generally staff 8 ports in the USA and 2 in Canada each year. Cost saving: **US\$60,000**;

- i. *Alternative:* Reduce non-essential services within this Branch. This branch provides the Commission’s fisheries data collection (in-port) and database activities (at HQ), as well as servicing the Port Sampling ‘grant’ agreement with NOAA fisheries to collect and database the sablefish fishery logbooks for the USA (NOAA-Fisheries). The Commission may wish to cut services for non-Pacific halibut data collection where not fully cost-recovered up to an amount of **US\$60,000**.

- ii. Implications of holding positions vacant for another fiscal year would include continued strain on existing staff in the Fisheries Data Services Branch, potentially resulting in slower delivery of Branch tasks and/or staff turnover/retention issues.

- b. Hold vacant any other position that becomes vacant in FY2023, until there has been a cost saving of **US\$53,000**; (This is not a guaranteed saving)

- 2) **Meetings/Conferences:** Agreement to hold the October 2022 (FY2023) MSAB meeting electronically. Cost saving: **US\$30,000**; Implications would be reduced collaboration and consultation within the MSAB and with the IPHC Secretariat.
- 3) **Meetings/Conferences:** Agreement to hold one of the two SRB meetings in FY2023 electronically. Cost saving: **US\$5,000**; Implications would be reduced collaboration and consultation within the SRB and with the IPHC Secretariat.
- 4) **Scholarship Awards:** Defer the next round of scholarship awards until FY2024. Cost saving: **US\$4,000**;

Fund 40 - FISS: Income (and expenses) for the IPHC Fishery-Independent Setline Survey (FISS) are tentative as they are based on the design endorsed at the 97th Session of the IPHC Interim Meeting (IM097) in November 2022. Contracting Party contributions are not allocated to 40 – FISS.

Extra-budgetary contributions:

Headquarters Lease and Maintenance: The headquarters costs to the USA will increase to \$489,250 in FY2023 in accordance with the five-year building lease approved by the two Contracting Parties in 2020 and signed accordingly.

Deficit payments to the IFC Pension Fund: The extra-budgetary deficit payments to the IFC Pension Fund (closed in 2001 to new participants), remain at \$127,848 annually for each Contracting Party. This amount is based on a 10-year deficit payment schedule which is updated/recalculated every three years. The next review is scheduled to occur in 2023 for FY2024.

RECOMMENDATION/S

That the Commission:

- 1) **NOTE** paper IPHC-2022-SS012-03 Rev_1 which provided three (3) budget estimates for FY2023 (1 October 2022 to 30 September 2023), for consideration, and approval of one.
- 2) **ADOPT** a FY2023 budget (1 October 2022 to 30 September 2023).

APPENDICES (FY2023 Financial Budget)

Appendix Ia: Option 1: Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget;

Appendix Ib: Option 2: Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget, however, freeze the contributions to the general fund, while utilizing the current carryover which stands at US\$1,476,626 (for general fund use).

Appendix Ic: Option 3: Freeze the FY2023 budget at FY2021/FY2022 levels - Contracting Party contributions to the general operation fund.

Appendix Ia FY2023 Financial Budget – Option 1

Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget

		10 - General	20 - Research	30 - Statistics	10,20,30 - TOTAL	40 - FISS	10,20,30, 40 - TOTAL
Account Number	Account Name	FY2023	FY2023	FY2023	FY2023	FY2023	FY2023
Income							
40000	Contracting Party Contributions						
40000.01	Canada	\$ -	\$ -	\$ -	\$ 927,419.21	\$ -	\$ 927,419.21
40000.02	United States of America	\$ -	\$ -	\$ -	\$ 4,282,492.80	\$ -	\$ 4,282,492.80
	Total 40000 - Contracting Party Contributions	\$ 3,105,330.20	\$ 912,193.05	\$ 1,192,388.80	\$ 5,209,912.01	\$ -	\$ 5,209,912.01
40055	Headquarters (Lease & Maintenance)	\$ 489,250.00	\$ -	\$ -	\$ 489,250.00	\$ -	\$ 489,250.00
40060	Other Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40100	Grants, Contracts & Agreements	\$ -	\$ 232,140.37	\$ 664,458.64	\$ 896,599.01	\$ 34,289.00	\$ 930,888.01
40200	Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40200.01	Bank Interest	\$ 772.50	\$ -	\$ -	\$ 772.50	\$ -	\$ 772.50
40200.02	CD Interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total - Other Income	\$ 490,022.50	\$ 232,140.37	\$ 664,458.64	\$ 1,386,621.51	\$ 34,289.00	\$ 1,420,910.51
40350	Fish Sales						
40350.01	Fish Sales - Pacific Halibut	\$ -	\$ -	\$ -	\$ -	\$ 4,886,450.04	\$ 4,886,450.04
40350.02	Fish Sales - Byproduct	\$ -	\$ -	\$ -	\$ -	\$ 60,564.00	\$ 60,564.00
	Total 40350 - Fish Sales	\$ -	\$ -	\$ -	\$ -	\$ 4,947,014.04	\$ 4,947,014.04
	Total Income	\$ 3,595,352.70	\$ 1,144,333.42	\$ 1,856,847.44	\$ 6,596,533.56	\$ 4,981,303.04	\$ 11,577,836.60
Expense							
Personnel Expenses							
50000	Salaries & Wages	\$ 1,875,645.50	\$ 667,739.10	\$ 1,269,265.54	\$ 3,812,650.14	\$ 1,056,809.36	\$ 4,869,459.50
50100	Benefits	\$ 658,594.56	\$ 244,966.32	\$ 461,888.94	\$ 1,365,449.82	\$ 289,124.08	\$ 1,654,573.90
50100.09	Medical Reimbursement - Retiree	\$ 93,263.37	\$ -	\$ -	\$ 93,263.37	\$ -	\$ 93,263.37
50200	Training & Education	\$ 36,050.00	\$ 18,477.00	\$ 21,630.00	\$ 76,157.00	\$ 56,238.00	\$ 132,395.00
50300	Personnel Related Expenses	\$ 5,665.00	\$ -	\$ 10,300.00	\$ 15,965.00	\$ 37,467.28	\$ 53,432.28
50300.01	Scholarship Awards	\$ 8,000.00	\$ -	\$ -	\$ 8,000.00	\$ -	\$ 8,000.00
	Total Personnel Expenses	\$ 2,677,218.43	\$ 931,182.42	\$ 1,763,084.48	\$ 5,371,485.33	\$ 1,439,638.72	\$ 6,811,124.05
Operational Expenses							
51000	Publications	\$ 5,150.00	\$ 7,500.00	\$ 9,270.00	\$ 21,920.00	\$ -	\$ 21,920.00
51100	Mailing and Shipping	\$ 6,180.00	\$ 7,000.00	\$ 5,150.00	\$ 18,330.00	\$ 128,750.00	\$ 147,080.00
51200	Travel	\$ 92,700.00	\$ 14,825.00	\$ 20,600.00	\$ 128,125.00	\$ 121,041.48	\$ 249,166.48
51300	Meeting and Conference Expenses	\$ 170,000.00	\$ -	\$ -	\$ 170,000.00	\$ -	\$ 170,000.00
51400	Technology	\$ 139,050.00	\$ -	\$ 2,163.00	\$ 141,213.00	\$ -	\$ 141,213.00
	Total Operational Expenses	\$ 413,080.00	\$ 29,325.00	\$ 37,183.00	\$ 479,588.00	\$ 249,791.48	\$ 729,379.48
Fees and Contract Expenses							
52000	Professional Fees	\$ 226,600.00	\$ -	\$ 1,458.48	\$ 228,058.48	\$ -	\$ 228,058.48
52200	Other Fees and Charges	\$ 51,500.00	\$ -	\$ -	\$ 51,500.00	\$ 10,300.00	\$ 61,800.00
52300	Leases and Contracts	\$ 25,750.00	\$ 39,019.00	\$ 36,050.00	\$ 100,819.00	\$ 1,996,487.11	\$ 2,097,306.11
54000	Communications	\$ 30,900.00	\$ -	\$ 3,605.00	\$ 34,505.00	\$ 20,600.00	\$ 55,105.00
	Total Fees and Contract Expenses	\$ 334,750.00	\$ 39,019.00	\$ 41,113.48	\$ 414,882.48	\$ 2,027,387.11	\$ 2,442,269.59
Facilities and Equipment Expenses							
53000	Equipment Expense	\$ 20,600.00	\$ -	\$ 4,120.00	\$ 24,720.00	\$ 15,450.00	\$ 40,170.00
53100	Supplies Expense	\$ 25,750.00	\$ 144,807.00	\$ 2,678.00	\$ 173,235.00	\$ 772,500.00	\$ 945,735.00
53200	Maintenance and Utilities	\$ 113,300.00	\$ -	\$ 2,488.48	\$ 115,788.48	\$ 10,300.00	\$ 126,088.48
53300	Facility Rentals	\$ 463,500.00	\$ -	\$ 6,180.00	\$ 469,680.00	\$ 13,390.00	\$ 483,070.00
	Total Facilities and Equipment Expenses	\$ 623,150.00	\$ 144,807.00	\$ 15,466.48	\$ 783,423.48	\$ 811,640.00	\$ 1,595,063.48
Other Expenses							
55000	Budget Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total Other Expenses	\$ -					
	Total Expense	\$ 4,048,198.43	\$ 1,144,333.42	\$ 1,856,847.44	\$ 7,049,379.29	\$ 4,528,457.31	\$ 11,577,836.60
	FISS cost-recovery (10% overhead)	\$ (452,845.73)	\$ -	\$ -	\$ (452,845.73)	\$ 452,845.73	\$ -
	Net Income (Loss)	\$ 0.00					
60 - IFCPF Deficit							
40050	IFC Pension						
40050.01	IFC Pension - Canada	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
40050.02	IFC Pension - United States of America	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
	Total 40050 - IFC Pension	\$ 255,696.00	\$ -	\$ -	\$ 255,696.00	\$ -	\$ 255,696.00

Appendix Ib

FY2023 Financial Budget – Option 2

Maintain and approve the nominal increase of 3% (US\$151,745) for the FY2023 budget, however, freeze the contributions to the general fund, while utilizing the current carryover which stands at US\$1,476,626 (for general fund use).

Account Number	Account Name	10 - General	20 - Research	30 - Statistics	10,20,30 - TOTAL	40 - FISS	10,20,30, 40 - TOTAL
		FY2023	FY2023	FY2023	FY2023	FY2023	FY2023
Income							
40000	Contracting Party Contributions						
40000.01	Canada	\$ -	\$ -	\$ -	\$ 900,407.00	\$ -	\$ 900,407.00
40000.02	United States of America	\$ -	\$ -	\$ -	\$ 4,157,760.00	\$ -	\$ 4,157,760.00
	Total 40000 - Contracting Party Contributions	\$ 2,953,585.20	\$ 912,193.05	\$ 1,192,388.80	\$ 5,058,167.00	\$ -	\$ 5,058,167.00
40055	Headquarters (Lease & Maintenance)	\$ 489,250.00	\$ -	\$ -	\$ 489,250.00	\$ -	\$ 489,250.00
40060	Other Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40100	Grants, Contracts & Agreements	\$ -	\$ 232,140.37	\$ 664,458.64	\$ 896,599.01	\$ 34,289.00	\$ 930,888.01
40200	Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40200.01	Bank Interest	\$ 772.50	\$ -	\$ -	\$ 772.50	\$ -	\$ 772.50
40200.02	CD Interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total - Other Income	\$ 490,022.50	\$ 232,140.37	\$ 664,458.64	\$ 1,386,621.51	\$ 34,289.00	\$ 1,420,910.51
40350	Fish Sales						
40350.01	Fish Sales - Pacific Halibut	\$ -	\$ -	\$ -	\$ -	\$ 4,886,450.04	\$ 4,886,450.04
40350.02	Fish Sales - Byproduct	\$ -	\$ -	\$ -	\$ -	\$ 60,564.00	\$ 60,564.00
	Total 40350 - Fish Sales	\$ -	\$ -	\$ -	\$ -	\$ 4,947,014.04	\$ 4,947,014.04
	Total Income	\$ 3,443,607.70	\$ 1,144,333.42	\$ 1,856,847.44	\$ 6,444,788.56	\$ 4,981,303.04	\$ 11,426,091.60
Expense							
Personnel Expenses							
50000	Salaries & Wages	\$ 1,875,645.50	\$ 667,739.10	\$ 1,269,265.54	\$ 3,812,650.14	\$ 1,056,809.36	\$ 4,869,459.50
50100	Benefits	\$ 658,594.56	\$ 244,966.32	\$ 461,888.94	\$ 1,365,449.82	\$ 289,124.08	\$ 1,654,573.90
50100.09	Medical Reimbursement - Retiree	\$ 93,263.37	\$ -	\$ -	\$ 93,263.37	\$ -	\$ 93,263.37
50200	Training & Education	\$ 36,050.00	\$ 18,477.00	\$ 21,630.00	\$ 76,157.00	\$ 56,238.00	\$ 132,395.00
50300	Personnel Related Expenses	\$ 5,665.00	\$ -	\$ 10,300.00	\$ 15,965.00	\$ 37,467.28	\$ 53,432.28
50300.01	Scholarship Awards	\$ 8,000.00	\$ -	\$ -	\$ 8,000.00	\$ -	\$ 8,000.00
	Total Personnel Expenses	\$ 2,677,218.43	\$ 931,182.42	\$ 1,763,084.48	\$ 5,371,485.33	\$ 1,439,638.72	\$ 6,811,124.05
Operational Expenses							
51000	Publications	\$ 5,150.00	\$ 7,500.00	\$ 9,270.00	\$ 21,920.00	\$ -	\$ 21,920.00
51100	Mailing and Shipping	\$ 6,180.00	\$ 7,000.00	\$ 5,150.00	\$ 18,330.00	\$ 128,750.00	\$ 147,080.00
51200	Travel	\$ 92,700.00	\$ 14,825.00	\$ 20,600.00	\$ 128,125.00	\$ 121,041.48	\$ 249,166.48
51300	Meeting and Conference Expenses	\$ 170,000.00	\$ -	\$ -	\$ 170,000.00	\$ -	\$ 170,000.00
51400	Technology	\$ 139,050.00	\$ -	\$ 2,163.00	\$ 141,213.00	\$ -	\$ 141,213.00
	Total Operational Expenses	\$ 413,080.00	\$ 29,325.00	\$ 37,183.00	\$ 479,588.00	\$ 249,791.48	\$ 729,379.48
Fees and Contract Expenses							
52000	Professional Fees	\$ 226,600.00	\$ -	\$ 1,458.48	\$ 228,058.48	\$ -	\$ 228,058.48
52200	Other Fees and Charges	\$ 51,500.00	\$ -	\$ -	\$ 51,500.00	\$ 10,300.00	\$ 61,800.00
52300	Leases and Contracts	\$ 25,750.00	\$ 39,019.00	\$ 36,050.00	\$ 100,819.00	\$ 1,996,487.11	\$ 2,097,306.11
54000	Communications	\$ 30,900.00	\$ -	\$ 3,605.00	\$ 34,505.00	\$ 20,600.00	\$ 55,105.00
	Total Fees and Contract Expenses	\$ 334,750.00	\$ 39,019.00	\$ 41,113.48	\$ 414,882.48	\$ 2,027,387.11	\$ 2,442,269.59
Facilities and Equipment Expenses							
53000	Equipment Expense	\$ 20,600.00	\$ -	\$ 4,120.00	\$ 24,720.00	\$ 15,450.00	\$ 40,170.00
53100	Supplies Expense	\$ 25,750.00	\$ 144,807.00	\$ 2,678.00	\$ 173,235.00	\$ 772,500.00	\$ 945,735.00
53200	Maintenance and Utilities	\$ 113,300.00	\$ -	\$ 2,488.48	\$ 115,788.48	\$ 10,300.00	\$ 126,088.48
53300	Facility Rentals	\$ 463,500.00	\$ -	\$ 6,180.00	\$ 469,680.00	\$ 13,390.00	\$ 483,070.00
	Total Facilities and Equipment Expenses	\$ 623,150.00	\$ 144,807.00	\$ 15,466.48	\$ 783,423.48	\$ 811,640.00	\$ 1,595,063.48
Other Expenses							
55000	Budget Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total Other Expenses	\$ -					
	Total Expense	\$ 4,048,198.43	\$ 1,144,333.42	\$ 1,856,847.44	\$ 7,049,379.29	\$ 4,528,457.31	\$ 11,577,836.60
	FISS cost-recovery (10% overhead)	\$ (452,845.73)	\$ -	\$ -	\$ (452,845.73)	\$ 452,845.73	\$ -
	Net Income (Loss)	-\$151,745.00	\$0.00	\$0.00	-\$151,745.00	\$0.00	-\$151,745.00
60 - IFCPF Deficit							
40050	IFC Pension						
40050.01	IFC Pension - Canada	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
40050.02	IFC Pension - United States of America	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
	Total 40050 - IFC Pension	\$ 255,696.00	\$ -	\$ -	\$ 255,696.00	\$ -	\$ 255,696.00

Appendix Ic

FY2023 Financial Budget – Option 3

Freeze the FY2023 budget at FY2021/FY2022 levels - Contracting Party contributions to the general operation fund

Account Number	Account Name	10 - General	20 - Research	30 - Statistics	10,20,30 - TOTAL	40 - FISS	10,20,30, 40 - TOTAL
		FY2023	FY2023	FY2023	FY2023	FY2023	FY2023
Income							
40000	Contracting Party Contributions						
40000.01	Canada	\$ -	\$ -	\$ -	\$ 900,407.00	\$ -	\$ 900,407.00
40000.02	United States of America	\$ -	\$ -	\$ -	\$ 4,157,760.00	\$ -	\$ 4,157,760.00
	Total 40000 - Contracting Party Contributions	\$ 3,013,585.20	\$ 912,193.05	\$ 1,132,388.80	\$ 5,058,167.00	\$ -	\$ 5,058,167.00
40055	Headquarters (Lease & Maintenance)	\$ 489,250.00	\$ -	\$ -	\$ 489,250.00	\$ -	\$ 489,250.00
40060	Other Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40100	Grants, Contracts & Agreements	\$ -	\$ 232,140.37	\$ 664,458.64	\$ 896,599.01	\$ 34,289.00	\$ 930,888.01
40200	Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40200.01	Bank Interest	\$ 772.50	\$ -	\$ -	\$ 772.50	\$ -	\$ 772.50
40200.02	CD Interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total - Other Income	\$ 490,022.50	\$ 232,140.37	\$ 664,458.64	\$ 1,386,621.51	\$ 34,289.00	\$ 1,420,910.51
40350	Fish Sales						
40350.01	Fish Sales - Pacific Halibut	\$ -	\$ -	\$ -	\$ -	\$ 4,886,450.04	\$ 4,886,450.04
40350.02	Fish Sales - Byproduct	\$ -	\$ -	\$ -	\$ -	\$ 60,564.00	\$ 60,564.00
	Total 40350 - Fish Sales	\$ -	\$ -	\$ -	\$ -	\$ 4,947,014.04	\$ 4,947,014.04
	Total Income	\$ 3,503,607.70	\$ 1,144,333.42	\$ 1,796,847.44	\$ 6,444,788.56	\$ 4,981,303.04	\$ 11,426,091.60
Expense							
Personnel Expenses							
50000	Salaries & Wages	\$ 1,822,900.50	\$ 667,739.10	\$ 1,225,265.54	\$ 3,715,905.14	\$ 1,056,809.36	\$ 4,772,714.50
50100	Benefits	\$ 658,594.56	\$ 244,966.32	\$ 445,888.94	\$ 1,349,449.82	\$ 289,124.08	\$ 1,638,573.90
50100.09	Medical Reimbursement - Retiree	\$ 93,263.37	\$ -	\$ -	\$ 93,263.37	\$ -	\$ 93,263.37
50200	Training & Education	\$ 36,050.00	\$ 18,477.00	\$ 21,630.00	\$ 76,157.00	\$ 56,238.00	\$ 132,395.00
50300	Personnel Related Expenses	\$ 5,665.00	\$ -	\$ 10,300.00	\$ 15,965.00	\$ 37,467.28	\$ 53,432.28
50300.01	Scholarship Awards	\$ 4,000.00	\$ -	\$ -	\$ 4,000.00	\$ -	\$ 4,000.00
	Total Personnel Expenses	\$ 2,620,473.43	\$ 931,182.42	\$ 1,703,084.48	\$ 5,254,740.33	\$ 1,439,638.72	\$ 6,694,379.05
Operational Expenses							
51000	Publications	\$ 5,150.00	\$ 7,500.00	\$ 9,270.00	\$ 21,920.00	\$ -	\$ 21,920.00
51100	Mailing and Shipping	\$ 6,180.00	\$ 7,000.00	\$ 5,150.00	\$ 18,330.00	\$ 128,750.00	\$ 147,080.00
51200	Travel	\$ 92,700.00	\$ 14,825.00	\$ 20,600.00	\$ 128,125.00	\$ 121,041.48	\$ 249,166.48
51300	Meeting and Conference Expenses	\$ 135,000.00	\$ -	\$ -	\$ 135,000.00	\$ -	\$ 135,000.00
51400	Technology	\$ 139,050.00	\$ -	\$ 2,163.00	\$ 141,213.00	\$ -	\$ 141,213.00
	Total Operational Expenses	\$ 378,080.00	\$ 29,325.00	\$ 37,183.00	\$ 444,588.00	\$ 249,791.48	\$ 694,379.48
Fees and Contract Expenses							
52000	Professional Fees	\$ 226,600.00	\$ -	\$ 1,458.48	\$ 228,058.48	\$ -	\$ 228,058.48
52200	Other Fees and Charges	\$ 51,500.00	\$ -	\$ -	\$ 51,500.00	\$ 10,300.00	\$ 61,800.00
52300	Leases and Contracts	\$ 25,750.00	\$ 39,019.00	\$ 36,050.00	\$ 100,819.00	\$ 1,996,487.11	\$ 2,097,306.11
54000	Communications	\$ 30,900.00	\$ -	\$ 3,605.00	\$ 34,505.00	\$ 20,600.00	\$ 55,105.00
	Total Fees and Contract Expenses	\$ 334,750.00	\$ 39,019.00	\$ 41,113.48	\$ 414,882.48	\$ 2,027,387.11	\$ 2,442,269.59
Facilities and Equipment Expenses							
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53100	Supplies Expense	\$ 25,750.00	\$ 144,807.00	\$ 2,678.00	\$ 173,235.00	\$ 772,500.00	\$ 945,735.00
53200	Maintenance and Utilities	\$ 113,300.00	\$ -	\$ 2,488.48	\$ 115,788.48	\$ 10,300.00	\$ 126,088.48
53300	Facility Rentals	\$ 463,500.00	\$ -	\$ 6,180.00	\$ 469,680.00	\$ 13,390.00	\$ 483,070.00
	Total Facilities and Equipment Expenses	\$ 623,150.00	\$ 144,807.00	\$ 15,466.48	\$ 783,423.48	\$ 811,640.00	\$ 1,595,063.48
Other Expenses							
55000	Budget Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Total Other Expenses	\$ -					
	Total Expense	\$ 3,956,453.43	\$ 1,144,333.42	\$ 1,796,847.44	\$ 6,897,634.29	\$ 4,528,457.31	\$ 11,426,091.60
	FISS cost-recovery (10% overhead)	\$ (452,845.73)	\$ -	\$ -	\$ (452,845.73)	\$ 452,845.73	\$ -
	Net Income (Loss)	\$ 0.00					
60 - IFCPF Deficit							
40050	IFC Pension						
40050.01	IFC Pension - Canada	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
40050.02	IFC Pension - United States of America	\$ 127,848.00	\$ -	\$ -	\$ 127,848.00	\$ -	\$ 127,848.00
	Total 40050 - IFC Pension	\$ 255,696.00	\$ -	\$ -	\$ 255,696.00	\$ -	\$ 255,696.00



Management Strategy Evaluation Procedures and Milestones for 2022

Prepared by: IPHC Secretariat (Hicks A, Stewart I; 14 February 2022)

PURPOSE

To provide the Commission with milestones throughout 2022 and potential management procedures to investigate as part of the Management Strategy Evaluation (MSE) for presentation at the 99th Session of the IPHC Annual Meeting (AM099).

BACKGROUND

This document presents a list of candidate management procedures representing distribution of the TCEY as well as size limits and multi-year stock assessments that are part of the MSE Program of Work for 2021–2023 ([IPHC-2021-MSE-02](#)). Milestones for various elements of the MSE Program of Work are also provided followed by potential methods to present and evaluate MSE results.

MANAGEMENT PROCEDURES

A management procedure (MP) is a defined set of elements that specifically determines mortality limits (i.e. TCEY) for each IPHC Regulatory Area. Size limits and multi-year stock assessments are the two MP elements defined in the MSE Program of Work for 2021–2023. However, these are only part of a management procedure which contains other aspects such as data collection, estimation models, and harvest rules (Figure 1). Simulating all of the elements of a management procedure is necessary to evaluate any single element. Data collection and estimation models are not currently under investigation and are simulated to mimic the current IPHC paradigm. However, the frequency of estimation models (i.e. multi-year stock assessments) will be simulated and evaluated. TCEY distribution procedures are also not currently being investigated but are required to appropriately distribute the fishing mortality which may affect the performance of other MP elements.

The harvest rule elements (Figure 2) consist of the coastwide scale (SPR value and the control rule) and the TCEY distribution (O32 distribution from FISS data, relative harvest rates, and current interim agreements). SPR values will be varied within the range of 40–46% and only the 30:20 control rule will be considered. However, the distribution of the TCEY in the current interim management procedure contains elements that are set to expire at the end of 2022. Multiple distribution procedures will be used to capture the range of potential TCEY distribution procedures considered in the future, noting that these distribution procedures are not necessarily intended for evaluation, but instead are simply representing the range of possibilities. Various size limits for legally retaining Pacific halibut will be evaluated.

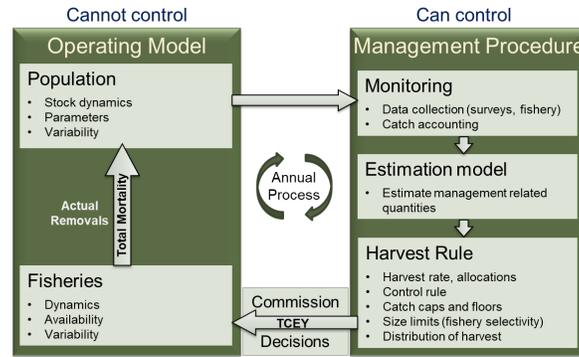


Figure 1. The relationship between the operating model (OM) and management procedure (MP) in the simulation of the annual process of setting mortality limits.

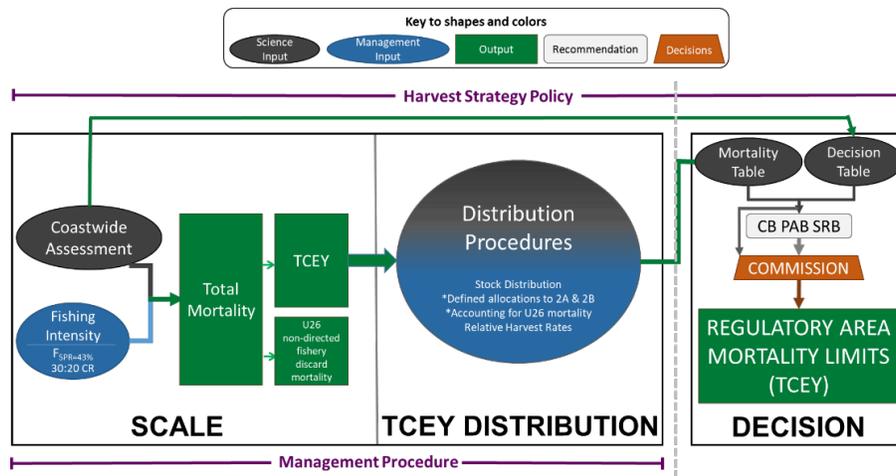


Figure 2. Illustration of the Commission interim IPHC harvest strategy policy (reflecting paragraph ID002 in [IPHC-2020-CR-007](#)) showing the coastwide scale and TCEY distribution components that comprise the management procedure. Items with an asterisk are interim agreements in place through 2022. The decision component is the Commission decision-making procedure, which considers inputs from many sources.

Multi-year stock assessments

There are two components to multi-year assessment approaches to consider. First is the frequency of the stock assessment, which is currently completed annually. A biennial assessment will be simulated and, if time allows, and triennial assessment will be included. The second component is the determination of the mortality limits in the non-assessment years. Options here include retaining the same mortality limits from the previous year in which an assessment occurred (i.e. constant), applying an empirical rule using FISS results to the coastwide TCEY and distributing that TCEY using the previous year’s distribution proportions, applying an empirical rule using FISS data to the coastwide TCEY and updating the distribution with the distribution procedure using annual FISS data, or applying an empirical rule using FISS results at the IPHC Regulatory Area level (Table 1).

Table 1. Multi-year stock assessment management procedures for simulation and evaluation in 2022. MPs with a triennial frequency or empirical rules applied to IPHC Regulatory Areas individually (in italics) are lower priority and will be simulated as time allows.

Frequency	Non-assessment years
Biennial	Constant
	Empirical coastwide TCEY with no change to distribution proportions
	Empirical coastwide TCEY, updated distribution with distribution procedure* <i>Empirical rule in each IPHC Regulatory Area</i>
Triennial	<i>Constant</i>
	<i>Empirical coastwide TCEY with no change to distribution proportions</i>
	<i>Empirical coastwide TCEY updated distribution with distribution procedure</i>
	<i>IPHC Regulatory Area empirical rule</i>

*Only the elements of the distribution procedure that do not need a stock assessment will be applied

Many fisheries agencies operate with multi-year stock assessments, and use a variety of methods for intervening years. For example, the U.S.A. Pacific Fisheries Management Council (PFMC) sets most groundfish catch limits with a biennial process, and some stocks are assessed less frequently depending on priority and time available (PFMC 2020).

There are many benefits to multi-year stock assessments, including short-term stability in mortality limits, transparency in the mortality limit setting process, time for analysts to conduct research on stock assessment models and management procedures, and the possibility of additional collaboration between quantitative scientists and research biologists. The key benefits to multi-year stock assessments are stability and transparency. One possible MP is to set mortality for all years until the next stock assessment, which offers short-term stability. If the MP operates with an empirical rule in intervening years (a procedure based on data alone), the process is transparent, based on observed data, and does not require the interpretation of a complex stock assessment. However, the Commission may still exercise the decision-making step in Figure 2 and deviate from the management procedure.

Size limits

Evaluating size limits can be as simple as implementing various size limits that are the same across IPHC Regulatory Areas, or implementing size limits that are different across IPHC Regulatory Areas. The current MSE framework was developed to be congruous with the stock assessment and utilize the understanding of the Pacific halibut population and fisheries in the most efficient and parsimonious way possible. Growth of Pacific halibut is inherently variable and uncertain, thus the stock assessment bypasses length-at-age modelling to avoid this uncertainty and instead use observed weight-at-age to translate from numbers-at-age to biomass. The MSE framework also does not model length, thus approximations are necessary to simulate length-based size limits.

This MSE will investigate three size limits (no size limit, 26 inches, and 32 inches) that are the same across IPHC Regulatory Areas. The specifications of the MSE operating model (OM) make it simple to investigate the current size limit and no size limit, but approximations of length-at-age associated with

any other size limits are necessary. Additional time is necessary to code and test these approximations, thus the 32 inch and no size limit options will be given priority. It is expected that the 26 inch size limit will be completed in time for the 21st Session of the Scientific Review Board in September 2022. However, Pacific halibut under 26 inches are a very small component of the directed commercial catch (< 2%), thus results simulating a 26 inch size limit may not differ much from no size limit.

Distribution procedures

The distribution procedure (TCEY distribution in Figure 2) is used to distribute the TCEY among IPHC Regulatory Areas. The current baseline interim distribution procedure consists of using the estimated O32 stock distribution from FISS recent observations and applying relative harvest rates of 0.75 to IPHC Regulatory Area 3B, 4A, 4CDE, and 4B. Current agreements for IPHC Regulatory Areas 2A and 2B (paragraph 97 of [IPHC-2020-AM096-R](#)), set to expire at the end of 2022, consist of a fixed 1.65 Mlbs for 2A, and a percentage of the coastwide TCEY for IPHC Regulatory Area 2B based on 20% (with a weight of 0.7) and O32 stock distribution and relative harvest rate (with a weight of 0.3). Furthermore, an additional component is added to the IPHC Regulatory Area 2B TCEY accounting for 50% of the estimated yield lost due to projected U26 discard mortality in non-directed fisheries (aka ‘bycatch’) in waters off Alaska, U.S.A.

The distribution element of the MP is not specifically being investigated in the current MSE Program of Work but is necessary to define when investigating other elements of the MP. For example, when investigating size limits, the TCEY still must be distributed across regions and fisheries and removed from the population appropriately. Furthermore, simulating the fisheries in each IPHC Regulatory Area allows for the calculation of performance metrics for those specific fisheries and IPHC Regulatory Area combinations. If the distribution procedure that will be used in the future is uncertain, multiple distribution procedures representing a range of options is necessary. Results can then be integrated across these distribution procedures to capture the uncertainty and provide a robust analysis of the MP elements being investigated.

Potential distribution procedures for consideration are listed in Table 2 and include distribution to IPHC Regulatory Areas as well as an alternative paradigm of distribution to Biological Regions. Distribution to Biological Regions may remove the complications of choosing specific distribution procedures to IPHC Regulatory Areas, while maintaining the general distribution of the TCEY (options 3 & 4). The OM is spatially defined by Biological Regions with fisheries occurring within a Biological Region. However, allocation between sectors within a Biological Region is specifically defined by IPHC Regulatory Area (e.g. directed commercial and recreational fishery catch sharing plans) and would need approximations. Additionally, regional distribution would not be able to capture specific agreements for specific IPHC Regulatory Areas, although those could be somewhat captured using fixed amounts for distribution (option 7). Finally, fishery performance metrics specific to IPHC Regulatory Areas would not be available, although fishery performance metrics in each Biological Region could be calculated.

The distribution procedures for IPHC Regulatory Areas (options 1a-1 in Table 2) use different elements from MPs investigated previously (see Table 4 in [IPHC-2021-AM097-11](#)) and were intended to bracket the potential range of future distribution procedures. A fourth category is presented (option 2) that uses

fixed proportions across IPHC Regulatory Areas, and those fixed proportions can bracket any desired range. However, the distribution would not scale appropriately with shifts in distribution among IPHC Regulatory Areas. Table 3 shows the proportion of TCEY in each IPHC Regulatory Area or Biological Region over a range of years.

Table 2. Potential distribution procedures for bracketing future possible distribution of the TCEY for investigating size limits and multi-year assessment management procedures.

	Stock distribution Relative harvest rates	Years in stock distribution	2A & 2B Agreements	Elements from
1a	Baseline O32	Recent year	None	MP-G
1b	Baseline O32	Recent year	Interim	MP-A
1c	Baseline All Sizes	Recent year	None	MP-G, MP-I
1d	Baseline All Sizes	Recent year	Interim	MP-A, MP-I
1e	Baseline O32	5-year moving average	None	MP-J
1f	Baseline O32	5-year moving average	Interim	MP-B, MP-J
1g	Baseline All Sizes	5-year moving average	None	MP-I, MP-J
1h	Baseline All Sizes	5-year moving average	Interim	MP-A, MP-I, MP-J
1i	Baseline O32 for AK	Recent year	2A 1.65, 2B 20%	MP-A, MP-F
1j	Baseline O32 for AK	5-year moving average	2A 1.65, 2B 20%	MP-A, MP-F, MP-J
1k	Baseline All Sizes for AK	Recent year	2A 1.65, 2B 20%	MP-A, MP-F, MP-I
1l	Baseline All Sizes for AK	5-year moving average	2A 1.65, 2B 20%	MP-A, MP-F, MP-I, MP-J
2	Regulatory Area Fixed	NA	Possible	
3a	Regional O32	Recent year	None	MP-C, MP-G
3b	Regional All Sizes	Recent year	None	MP-C, MP-G, MP-I
3c	Regional O32	5-year moving average	None	MP-C, MP-G, MP-J
3d	Regional All Sizes	5-year moving average	None	MP-C, MP-G, MP-I, MP-J
4	Regional Fixed	NA	Implied	

Table 3. Average proportion of TCEY distributed to each IPHC Regulatory Area or Biological Region over various ranges of years.

Year	2A	2B	2C	3A	3B	4A	4CDE	4B
2020-2022	4.3%	18.3%	15.1%	34.8%	8.7%	5.0%	10.3%	3.6%
		37.6%		43.5%		15.3%		3.6%
2019-2022	4.3%	18.7%	15.4%	34.9%	8.4%	5.0%	10.3%	3.6%
		37.8%		43.2%		15.3%		3.6%
2014-2017	3.1%	20.5%	16.1%	32.4%	9.5%	4.6%	10.1%	3.7%
		39.7%		41.9%		14.7%		3.7%

Table 4. Easily implemented and representative distribution procedures for bracketing and integrating future possible distribution of the TCEY for investigating size limits and multi-year assessment management procedures.

	Stock distribution Relative harvest rates	Years in stock distribution	2A & 2B Agreements	Elements from
1a	Baseline O32	Recent year	None	MP-G
1b	Baseline O32	Recent year	Interim	MP-A
1i	Baseline O32 for AK	Recent year	2A 1.65, 2B 20%	MP-A, MP-F

Table 4 presents three distribution procedures from Table 2 that can be easily implemented in the MSE simulations and would represent a range of potential distribution procedures. Any may be chosen from Table 2 and other distribution procedures could be developed to represent future possibilities. These distribution procedures are not specifically under evaluation but would be integrated into the results to represent the uncertainty in the future distribution of the TCEY.

Implementation uncertainty will also be included in these simulations. In particular, decision-making uncertainty will be an additional source of variability in the distribution of the TCEY.

A summary of management procedures

There are at least three multi-year stock assessment MPs and three size limit MPs to investigate. These do not need to be investigated simultaneously, but it may be useful to combine them into one or two MPs for a complete look at these options and how they may interact. Therefore, there will likely be eight or more MPs to simulate and evaluate. Combining these with the distribution procedures and various SPR values between 40% and 46% will be a full workload of simulations to conduct and summarize for 2022. If a specific MP is desired for a combination of size limit and multi-year assessment that is not in the simulated set, it may be possible to fulfill requests of the Commission in late 2022 for one or two specific combinations.

MILESTONES

A draft MSE Program of Work was developed for 2021-2023 (Table 5) describing activities related to the Management Strategy Evaluation (MSE). It presents and describes priority tasks categorized by topic. As per the established IPHC peer review process, all MSE products would be reviewed by the Scientific Review Board (SRB). In addition, relevant tasks would be considered by the Management Strategy Advisory Board (MSAB).

The meeting schedule for 2022 relevant to the MSE tasks is shown in Table 6. The MSE framework tasks and preliminary simulation of MPs will be finished before the MSE Info Session (Spring 2022), the simulations will be completed before SRB021 (Fall 2022), and the tasks related to evaluation and presentation will be worked on throughout 2022. Results will be presented to the Commission at the 99th Session of the IPHC Annual Meeting (AM099).

Table 5. Tasks recommended by the Commission at SS011 ([IPHC-2021-SS011-R](#) para 7) for inclusion in the IPhC Secretariat MSE Program of Work for 2021–2023.

ID	Category	Task	Deliverable
F.1	Framework	Develop migration scenarios	Develop OMs with alternative migration scenarios
F.2	Framework	Implementation variability	Incorporate additional sources of implementation variability in the framework
F.3	Framework	Develop more realistic simulations of estimation error	Improve the estimation model to more adequately mimic the ensemble stock assessment
F.5	Framework	Develop alternative OMs	Code alternative OMs in addition to the one already under evaluation.
M.1	MPs	Size limits	Identification, evaluation of size limits
M.3	MPs	Multi-year assessments	Evaluation of multi-year assessments
E.3	Evaluation	Presentation of results	Develop methods and outputs that are useful for presenting outcomes to stakeholders and Commissioners

Table 6. Meeting schedule relevant to the MSE program of work for 2022

Jan	Feb-Apr	May	June	Jul-Aug	Sep	Oct	Nov
AM098		MSE Info Session	SRB020		SRB021	MSAB018	IM098
<i>MSE PoW update</i>		<i>OMs MPs Presentation</i>	<i>Framework OMs MPs Presentation</i>		<i>Results Evaluation</i>	<i>Results Evaluation</i>	<i>Results Evaluation</i>

PRESENTATION AND EVALUATION OF RESULTS

Many methods of presenting and evaluating MSE simulation results have been developed with input from the Management Strategy Advisory Board (MSAB) and the Commission. This includes the MSE Explorer online tool (<http://shiny.westus.cloudapp.azure.com/shiny/sample-apps/MSE-Explorer/>) which allows a user to investigate specified MPs through tables and plots. In 2020, a simple ranking procedure was implemented in the MSE Explorer to quickly identify MPs that performed well relative to the set of MPs.

Throughout 2022, the presentation and evaluation of MSE simulation results will be improved to provide methods that are useful to inform the Commission. This includes clear descriptions of the performance metrics and how they relate to objectives, improved plots, and alternative methods for quickly evaluating MPs which may or may not include ranking procedures.

REFERENCES

PFMC. 2020. Pacific coast groundfish fishery management plan for the California, Oregon, and Washington groundfish fishery. Pacific Fishery Management Council. Portland. OR. <https://www.pcouncil.org/documents/2016/08/pacific-coast-groundfish-fishery-management-plan.pdf/>

RECOMMENDATIONS

That the Commission **NOTE** paper IPHC-2022-SS012-04 which describes elements of management procedures to be used in MSE simulations in 2022 including TCEY distribution procedures representing a range of future potential future states, milestones in 2022, and improvements to be made on the presentation and evaluation of results.

That the Commission **RECOMMEND** integrating the following distribution procedures into the MSE simulations investigating size limits and multi-year assessments.

- Baseline based on recent year O32 FISS results with no agreements for IPHC Regulatory Areas 2A and 2B,
- Baseline based on recent year O32 FISS results with current interim agreements for IPHC Regulatory Areas 2A and 2B,
- Baseline based on recent year O32 FISS results with 1.65 Mlbs to 2A and 20% national share of the coastwide TCEY to IPHC Regulatory Area 2B.

APPENDICES

Nil



FISHERY REGULATORY PROPOSAL 2022

**TITLE: RECREATIONAL (SPORT) FISHING FOR PACIFIC HALIBUT—IPHC REGULATORY
AREA 2B (SECT. 28) – DAILY BAG LIMIT**

SUBMITTED BY:
CANADA

FISHERIES AND OCEANS CANADA

All Regulatory Areas All Alaska Regulatory Areas All U.S. Regulatory Areas

2A 2B 2C 3A 3B 4A 4B 4C 4D 4E

Fishery Sectors

Directed Commercial Recreational Subsistence Non-directed Commercial All

Canada is proposing changes to Section 28 of the IPHC Fisheries Regulations (Recreational (Sport) Fishing for Pacific Halibut – IPHC Regulatory Area 2B) to allow daily bag limit of three fish per person.

Justification provided:

Canada is proposing changes to section 28 (Recreational (Sport) Fishing for Pacific Halibut – IPHC Regulatory Area 2B) of the IPHC Fishery Regulations to allow a maximum daily bag limit of three (3) fish per day, per person. The purpose of the proposed change is to align IPHC fishery regulations with Canada’s domestic sportfishing regulations, to simplify unnecessary regulatory complexity, and to retain Canada’s ability and autonomy to manage its domestic fishery.

The Commission previously supported and approved an increase in the Canadian daily bag limit from two (2) per day, to three (3) per day, on a one-year basis from 1 April 2021 and 31 March 2022 only. When mid-season catch monitoring showed that the recreational sector was unlikely to reach its allocated TAC, Canada used this conditional flexibility and implemented an increase to the daily bag limit from two (2) fish per day to three (3) fish day in August of 2021. This flexibility increased Canadian domestic benefits, whilst ensuring that the recreational sector fished well within its Total Allowable Catch (TAC).

The default IPHC daily bag limit of two (2) fish per day constrains Canada’s flexibility to make critical in-season changes to the fishing plan to support meeting TAC goals and Canadian domestic fishery objectives.

Canadian Sport Fishing Advisory Board (SFAB) has a long history of collaborating with Fisheries and Oceans Canada (DFO) in Canada’s endeavors to achieve IPHC objectives, while maximizing Canadian domestic objectives. DFO and SFAB meet monthly in-season to review timely and robust recreational catch estimates to consider and evaluate appropriate fishery management measures. Increased regulatory

flexibility would augment the existing successful management tool kit to achieve improved fishery performance.

The suggested modifications to the IPHC Fishery Regulations are provided in red text, at [Appendix I](#).

APPENDIX I

*Suggested Regulatory Language***28. Recreational (Sport) Fishing for Pacific Halibut—IPHC Regulatory Area 2B**

- (1) In all waters off British Columbia: ^{6,7}
- (a) the recreational (sport) fishing season will open on 1 February unless more restrictive regulations are in place;
 - (b) the recreational (sport) fishing season will close when the recreational (sport) fishery limit allocated by DFO is taken, or 31 December, whichever is earlier; and
 - ~~(e) the daily bag limit is two (2) Pacific halibut of any size per day, per person, except that between 1 April 2021 and 31 March 2022 only, DFO may implement a daily bag limit of three (3) Pacific halibut per day, per person.~~
 - (c) the daily bag limit is three (3) Pacific Halibut of any size per day, per person ^{6,7}.**
- (2) In British Columbia, no person shall fillet, mutilate, or otherwise disfigure a Pacific halibut in any manner that prevents the determination of minimum size or the number of fish caught, possessed, or landed.
- (3) The possession limit for Pacific halibut in the waters off the coast of British Columbia is three Pacific halibut ^{6,7}.

⁶ DFO could implement more restrictive regulations for the recreational (sport) fishery, therefore anglers are advised to check the current Federal or Provincial regulations prior to fishing.

⁷ For regulations on the experimental recreational fishery implemented by DFO check the current Federal or Provincial regulations.