

Caribbean Strategic Planning | Summary of Efforts

SEFSC local project (LP) working group accomplishments



This document contains summaries of the work accomplished for each completed LP from the SEFSC working groups. The names of the project leads were underlined.

This is a living document that will continue to be updated as projects come to completion.

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LP1: Train staff in desired project management tools

Team: Rachel Banton, Vivian Matter, Adyan Rios

Last updated: March, 2024

Status: Complete

Our overall project objective was to train staff involved in the strategic planning initiative how to use identified project management tool to remain organized while maintaining progress

- Goal 1 - Identify the desired project management tool
 - Github was identified as the desired project management tool because it is an open source development platform that allows users to host code, management projects, and build software
 - Other benefits of Github were identified: collaboration with team members; documentation of activity, accomplishments, and current tasks; track changes and version control; showcase current projects; integration with other applications like R, microsoft teams, Jira, and slack
- Goal 2 - Create Github organizations, repositories, teams, and project boards
 - The [SEFSC/SEFSC-Carib-Strategic-Planning](#) organization was built in Github to host project repositories and project boards
 - Repositories were created to represent ongoing local projects (LPs)
 - Teams were created to represent ongoing local projects (LPs) and necessary access permissions were granted (e.g., admin, write, read)
 - An overall project board was created which contains progress reports for each LP
 - Kanban project boards were created for each LP which contain meeting notes and action items
 - This repository acts as an organized hub for strategic planning members to view progress and engage in discussions as well as for regional partners to be informed of ongoing efforts
- Goal 3 - Prepare training materials and demo and implement the use of the tool
 - [Github organization demo](#) was created and presented to the strategic planning team
 - This demo presentation acts as the initiation of using the Github organization, repositories, and project boards as our primary method of communication, note-taking, and recording of action items for the ongoing strategic planning efforts
 - [Github and project management resources](#) were compiled and shared with the strategic planning team

LP2: Create a slide deck portfolio of who we are and what projects we work on

Team: Rachel Banton, [Adyan Rios](#), Skyler Sagarese, Steve Smith

Last updated: March, 2024

Status: Complete

Our objective was to build a slide deck explaining the SEFSC's efforts in US Caribbean research, including strategic planning and data collection, processing, and analysis, to share among SEFSC staff and regional partners.

- Accomplished Goal 1 - Identified the best format for the deliverable product
 - Reveal.js was the preferred deliverable format because it is an open-source HTML presentation framework. The slide creation integrates Quarto, R, and GitHub.
 - The files were organized into the [SEFSC-Caribbean-Strategic-Plan](#) version-controlled repository, hosted on the SEFSC Github organization.
- Accomplished Goal 2 - Developed a working product
 - 2a - Compiled information
 - Our [working spreadsheet](#) organizes efforts by their status as “in progress,” “completed,” and “planned”. Details for each record depend on the status type.
 - 2b - Built the slide deck
 - The code for the slide deck was created with automation in mind. Changes to the spreadsheet initiate a semi-automated process to update the [working slide deck](#).
- Accomplished Goal 3 - Shared deliverables and demonstrated current best practices for maintenance
 - Update the spreadsheet with the required information regarding title, contact name, contact email, region where the effort takes place (or island platform), category (e.g., planning or data), partition (i.e., fishery-dependent, fishery-independent, life history), collaborating organizations, start year, and, if the status is completed, end year. If available, include goals, fleet (i.e., commercial or recreational), mode (i.e., vessel or shoreline), metrics (i.e., catch, effort, size composition), target species, and depth range
 - Access an up-to-date local copy of the GitHub repository and overwrite the working spreadsheet
 - Render Quarto, commit, and push changes (new version of the working spreadsheet and Quarto outputs)
 - Leverage monthly Cross-agency Caribbean Updates to review, update, or create new records periodically
 - Schedule Quarto coworking hours to implement new features, such as incorporating a branded color scheme, images, hyperlinks, and automated time stamps, and ensure 508 compliance (alt text)

LP3: Year 2 strategic planning workshop to include SEFSC and regional partners

Team: Rachel Banton, Larry Beerkircher, Vivian Matter, Kevin McCarthy

Last updated: December, 2023

Status: Complete

Our overall project objective was to organize and plan the second-year strategic planning workshop to include SEFSC staff as well as regional partners

- Goal 1 - Identify workshop date and location
 - 1a - Plan workshop dates
 - Preferred workshop dates were identified based on ongoing sampling, the SEDAR calendar, and hurricane season; these were May 22-25, 2023, with travel on May 21 and 26
 - 1b - Identify and contract workshop location
 - The team reviewed proposals and [cost estimates](#) from hotels in Miami, FL, San Juan, Puerto Rico, St. Thomas, and St. Croix
 - The selected location, the Verdanza Hotel in San Juan, Puerto Rico, had availability for the preferred dates, was within budget, had meeting space to accommodate the workshop, and was easily accessible for participants (~10 minutes from the San Juan airport)
 - To contract the hotel under Task I, CIMAS reviewed and approved of the proposal and provided signed contract documentation
- Goal 2 - Identify and contract workshop facilitator
 - Due to the success of previous workshops hosted by the SEFSC, the team suggested Richard Maclin of CI Solutions as the workshop facilitator
 - To contract the facilitator under Task I, CIMAS reviewed and approved of the proposal and provided signed contract documentation
 - A member from the NOAA Quality Management and Continuous Improvement Professional Specialty Group was also invited to co-facilitate the workshop
- Goal 3 - Identify and invite participating groups and workshop participants
 - 3a - Identify participating groups and participants
 - The following groups were identified to participate to ensure diversity of participants, expertise, and opinions during workshop discussions: SEFSC, SERO, NOAA HQ, CFMC, PR DRNA, USVI DFW, NPS, UPR, UVI, USC-A
 - Due to the limitations set forth by the facilitator, 20 people were identified as active participants and 15 were identified as observer participants with active roles reserved for regional partners and SEFSC staff performing research in the region
 - 3b - Invite participants
 - Invitations for the participants were sent to supervisors, with a copy to the participant, requesting their attendance, expected time commitment in the workshop and subsequent working groups, brief agenda of discussion topics, and summary of the overall strategic planning project

- Goal 4 - Plan logistics and workshop details including informational materials and document processes for future workshops
 - 4a- Plan catering menu and logistics with hotel
 - Breakfast, lunch, and afternoon snacks were provided during the workshop to maintain progress during the week and reduce extended breaks due to local travel
 - A variety of meals were selected to accommodate dietary restrictions and preferences
 - 4b - Plan daily workshop details and information materials with facilitator
 - Informational materials were created and compiled including a summary of previous efforts, scope of work for current efforts, other relevant strategic plans (e.g., CFMC, SERO, SEFSC, etc.), and Hoshin Kanri training
 - A pre-workshop briefing was presented to all participants and facilitators describing the scope of work, daily agenda, expected time commitment, hotel booking and travel logistics, and informational materials
 - 4c - Document planning process
 - The process for organizing a workshop/event through UM/CIMAS (Task I) with federal and non-federal participants was documented [here](#)

LP4: Pass Center-wide strategic initiatives to relevant Center objective owners

Team: Rachel Banton, Shannon Cass-Calay, Adyan Rios

Last updated: December, 2023

Status: Complete

Our overall project objective was to ensure our strategic planning projects and accomplishments were part of SEFSC priorities

- Goal 1 – Identify linkages between Caribbean strategic objectives and SEFSC priorities
 - The [Center scorecard](#) and Caribbean LPs were reviewed for overlap (minimal) or related efforts; relation was indicated in column E-CC of [Local Projects and Center Objectives spreadsheet](#)
- Goal 2 – Communicate linkages with objective owners and LP leads
 - When linkages were apparent for in progress Center objectives, the owners were informed of ongoing Caribbean LP efforts
 - When linkages were apparent to completed Center objectives, the Center strategic planning team was informed of ongoing Caribbean LP efforts
- Goal 3 – Build an easily maintainable communication system that ensures relevant updates to either strategic plan is communicated to objective owners and LP leads
 - Future linkages with in progress Center objectives will be communicated to leads when upcoming Caribbean LPs are started
 - This LP lead attends the quarterly strategic review of Center objectives and will inform the Caribbean strategic planning team of relevant changes to the Center's plan

LP5: Identify regional data sources with emphasis on federal funding

Team: Rachel Banton, Larry Beerkircher, Stephanie Martinez, Kate Overly

Last updated: December, 2023

Status: Complete

Our overall project objective was to identify, inventory, and make accessible ongoing and historical federally funded data collection, data analysis, and data processing efforts involving Caribbean fisheries data

- Goal 1 – Identify and inventory ongoing and historical Caribbean data efforts with federal funding
 - 1a – Build preliminary inventory template
 - The following columns/headers were included in a preliminary [Google Sheets version of the inventory](#): line entry type (e.g., book, conference proceeding, publication, thesis, etc.), title, URL, sampling location (e.g., Puerto Rico), sampling sublocation (e.g., Mona Island), sampling zone (e.g., Mona Island Preserve), publication year (if report), start date (year, month, day), end date (year, month, day), sampling frequency, sampling seasonality, study type (i.e., FD, FI, hybrid), focus (fish, shellfish, coral, habitat), target species (scientific and common names linked to ITIS code), data category (e.g., age composition, habitat, life history, management, outreach and education, social science, take, etc.), subcategory (i.e., key words), funding source, funding amount, grant number, research objectives, data summary, experimental design, sampling method, sampling unit, dataset use, dataset limitations and reviewer, POC information, dataset location, affiliated publications, affiliated projects, citation (if report), author (if report), author affiliation (if report)
 - 2a – Identify and input data efforts
 - The following repositories were reviewed and searched to obtain relevant efforts for the inventory: [2020 NOAA Caribbean Inventory](#), [Caribbean Projects Tracking](#), [project list 05162019](#), SEDAR46 data triage, Caribbean ESR indicator work
 - The following websites were reviewed and searched to obtain relevant efforts for the inventory: previously awarded grants (e.g., S-K, MARFIN, CRP, FIS, MRIP, Sea Grant), InPort,
- Goal 2 – Make accessible an online data repository
 - 2a – Build the repository in ODM: Caribbean Research Inventory
 - The web-based inventory (requiring credentials) was designed and created by Yanet Jimenez of the SEFSC application development OMI team
 - Data from the Google Sheets inventory template were uploaded to the web-based repository
 - Edit and upload functionality were created and allowed to ensure the inventory remains up-to-date

- The inventory can be searched by the following terms: species, sampling location, sampling years, study type, data category, and line entry type\
 - 2b – The Disclaimer and Metadata document were created to share important details of this inventory including descriptions of the columns and types of information compiled, the process for compilation, and the intended uses of the inventory
 - 2c – A publicly accessible, searchable, and downloadable version of the inventory was published here in a [view-only mode](#) for regional partners and SEFSC staff without credentials to access the ODM inventory
- Goal 3 – Document best practices for maintenance
 - Best practices can be found in the Disclaimer and Metadata
 - Suggestions for adding to or editing existing lines in the inventory can be filed using this Google Form
 - The Caribbean Strategic Planning project Research Associate (Rachel Banton) will be responsible for periodically reviewing the Google Form entries and making necessary changes to the inventory

LP6: Improve logbook information to better estimate removals of managed species

Team: Kim Johnson

Last updated: March, 2025

Status: In progress

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP7: Identify internal sources of funding for US Caribbean stock assessment and EBFM

Team: Rachel Banton, Shannon Cass-Calay, Christian Jones, Mandy Karnauskas, Kevin McCarthy, Kate Overly, Steve Smith

Last updated: December, 2023

Status: Complete

Our overall project objective was to identify federal funding sources and document decision points and leverage opportunities to accomplish necessary Caribbean fisheries research relevant to stock assessment and EBFM

- Goal 1 – Build spreadsheet template
 - The following information was collected for each funding program: program name, program description, estimated RFP timeline or LOI deadline, estimated proposal deadline, target funding recipient, original source of funds, decisions for overall program budget, decisions for regional program budget, decisions for project priorities, SEFSC leverage, known associated challenges
- Goal 2 – Identify funding sources and compile information
 - Funding sources for data collection were included that pertain to fishery-dependent information, fishery-independent information, and life history information
 - Those sources were: CRP, CSP, CRCP, ECSAI, FIS, GSMFC, S&T, MARFIN, MRIP, MSA, NCCOS, NOAA Coastal Resilience Grants, NOAA Heritage Program, programmatic funding, NOAA International Fellowship, NOAA International Science Program, NOAA OAR, OMAO, S-K, Sea Grant, SEAMAP-C, TI
 - Information was compiled by reviewing the program website and RFP notices
- Goal 3 – Document and share results
 - The [funding program spreadsheet](#) was distributed to strategic planning members and SEFSC staff involved in survey design for the US Caribbean

LP8: Match ongoing and planned projects and funding programs to link funding sources to projects

Team: Rachel Banton, Christian Jones, Kevin McCarthy, Kate Overly, Steve Smith

Last updated: December, 2023

Status: Complete

Our overall project objective was to match funding programs identified in LP7 to planned fishery-dependent sampling projects for catch, effort, and size composition in USVI

- Goal 1 – Identify personnel needed for each phase of the planned fishery-dependent sampling project in USVI from survey design to implementation and data management
 - The following personnel are needed to develop and implement the sampling program: PIs, data manager, CIMAS associates, fisheries chief in DFW, field coordinator, port samplers on each island, graduate students
- Goal 2 – identify and match funding programs from LP7 to the phases of the project for the next few years, to cover development to implementation
 - The following funding programs were identified as potential sources to support the sampling project: SEFSC base funds, DFW base funds, CSP, FIS, MARFIN, FIS supplemental, TI, MRIP
- Goal 3 – Develop a general plan and timeline to submit proposals for identified fishery-dependent sampling projects and necessary personnel
 - A timeline was created based on the estimated RFP timeline, including the LOI and proposal deadlines for each funding program
- Goal 4 - Document and share results
 - The [fishery dependent survey funding spreadsheet](#) was distributed to strategic planning members and SEFSC staff involved in survey design for the US Caribbean

LP9: Develop a plan to identify funding and resources needed to develop and implement recreational data collection programs for spiny lobster and queen conch

Team: NA

Last updated: March, 2025

Status: Complete

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP10: Develop and implement a survey for commercial port sampling to be run by the territories with SEFSC support and guidance

Team: NA

Last updated: March, 2025

Status: In progress

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP11: Develop synoptic fishery-independent surveys to estimate abundance indices and size compositions for all exploited reef fishes, spiny lobster, and conch

Team: NA

Last updated: March, 2025

Status: In progress

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP12: Develop and implement life history studies to obtain reliable information for all exploited reef fishes, spiny lobster, and conch

Team: NA

Last updated: March, 2025

Status: In progress

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP13: Establish an effective coordination strategy among working groups, branches, divisions, other NMFS offices, and Caribbean partners

Team: Rachel Banton, Larry Beerkircher, [Shannon Cass-Calay](#), Mandy Karnauskas, Kevin McCarthy, Kate Overly

Last updated: November, 2023

Status: Complete

Our overall project objective was to identify ways to better coordinate communication among SEFSC branches and divisions engaged in Caribbean work

- Goal 1 - Identify staff with US Caribbean institutional knowledge
 - 1a - Current (ongoing or completed in the past year) US Caribbean efforts by SEFSC personnel were identified
 - 1b - Previous (completed before the last calendar year, i.e., 2022) US Caribbean efforts by SEFSC personnel were identified
 - 1a and 1b were addressed through a [survey \(Google Form\)](#) which was sent to and completed by SEFSC staff
 - Those results act as a tool for collaborations and for directing questions and data requests (within SEFSC)
 - [SEFSC Caribbean Coordination](#) - the survey results were distributed in a searchable format, with a link to the survey to add or edit responses. The team will distribute the survey and results at the start of calendar year to capture changes in personnel and programs
- Goal 2 - Identify existing standing meetings to improve efficiency and streamline efforts
 - A list of standing meeting was compiled by reviewing SEFSC staff calendars and receiving input from those involved in Caribbean work
 - This list acts as a tool to better streamline meetings and communication by considering the following questions:
 - Can similar meetings be combined to reduce redundancy?
 - Should new meetings be started to cover gaps in communication?
 - Should some meetings be reformatted to include additional people?
 - Should some meetings be refocused?
 - Is the meeting frequency appropriate given the purpose of that meeting?
 - [SEFSC Standing Meetings for Caribbean Work](#) - the list was distributed to branch chiefs involved in Caribbean work
- Goal 3 - Widely share this information with SEFSC personnel to not duplicate effort
 - Survey results were shared at an SEFSC All Hands and distributed to the SEFSC via email
 - Survey results will be accessible via the Caribbean Fisheries Branch Quarto webpage (coming soon)
 - Survey results will be accessible via the SEFSC Intranet site
 - The team will work with OMI to achieve this goal
 - Standing meeting list was shared with branch chiefs involved in Caribbean work via email

LP14: Establish a protocol to have formal and informal communications with stakeholders in the language of their choice (e.g., Spanish translation)

Team: Rachel Banton, Larry Beerkircher, Lisa Belskis, Stephanie Martinez

Last updated: January, 2024

Status: Complete

Our overall project objective was to increase communication with stakeholders in their primary language (Spanish), encouraging inclusion and equitable access to information

- Goal 1 – Identify resources for document and video translation services
 - NOAA-specific translation services were identified, reviewed, and documented as resources including a pilot project with the NOAA Fisheries Communications team and an AI translation project for the Southeast region
 - Example fisheries documents and videos that should be translated into various languages to increase accessibility were identified and documented
 - These included SEDAR documents, Fisheries 101 videos, outreach and education materials, strategic planning documents, and executive summaries relevant to regional partners
- Goal 2 – Identify resources for live simultaneous translation in meetings
 - Various types of simultaneous translation avenues were identified and reviewed for benefits and disadvantages for agency personnel, outside professional, and local/regional personnel
 - Outside professionals that provide Spanish translation services, including cost estimations, were investigated and documented
 - Translation policies and closed-caption capabilities for meeting platforms utilized by SEFSC staff were reviewed and documented including Google Meet, Zoom, and GoToWebinar
- Goal 3 – Identify other similar efforts, and communicate progress to ensure mutual goals are reached and effort is not duplicated
 - The DEIA, Latinos at NOAA, and NOAA in the Caribbean were identified as similar efforts; these groups were notified of our efforts
- Goal 4 – Document and share recommendations
 - [Recommendations for Spanish translations](#) were shared with SEFSC staff during an All-Hands call, posted on the SEFSC intranet site under the [Communications tab](#), and will permanently be located on the Caribbean Fisheries Branch webpage hosted in Quarto

LP15: Identify those environmental data that are most promising to be informative for stock assessment and EBFM in the US Caribbean

Team: Nicole Angeli (USVI DFW), Rachel Banton, Graciela Garcia-Moliner (CFMC), Joy Merino, Liajay Rivera (CFMC), Jennifer Au (NCCOS), Laughlin Siceloff (NCCOS)

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the Habitat/environmental data gap group. See [Environmental Data Recommendations](#) for a summary of what was accomplished under this working group.

LP16: Prioritize among research gaps, e.g., using cost-benefit analysis

Team: Rachel Banton, Larry Beerkircher, Kate Overly, Noemi Pena, Tarsila Seara, Liajay Rivera

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the data gap working groups. See below for summaries of what was accomplished under each working group

- Fishery dependent data gap group - [CSP_FD_Recommendations_2025](#)
- Fishery independent data gap group - [FI Data Needs for US Caribbean](#)
- Habitat/environmental data gap group - [Environmental Data Recommendations](#)
- Socio-economic data gap group - [CSP SocioeconomicRecommendations 2024](#)
- Life history data gap group - [CSP LifeHistory Recommendations 2025](#)

LP17: Perform gap analysis leveraging the Caribbean Research Inventory

Team: Rachel Banton, Larry Beerkircher, Kate Overly, Noemi Pena, Tarsila Seara, Liajay Rivera

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the data gap working groups. See below for summaries of what was accomplished under each working group

- Fishery dependent data gap group - [CSP_FD_Recommendations_2025](#)
- Fishery independent data gap group - [FI Data Needs for US Caribbean](#)
- Habitat/environmental data gap group - [Environmental Data Recommendations](#)
- Socio-economic data gap group - [CSP SocioeconomicRecommendations 2024](#)
- Life history data gap group - [CSP LifeHistory Recommendations 2025](#)

LP18: Test and validate approaches to manage stocks using data-limited approaches

Team: Rachel Banton, Shannon Cass-Calay, Juan J. Cruz-Mota, Sennai Habtes, Mandy Karnauskas, Kevin McCarthy

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the toolbox group. Check back for a summary of what was accomplished under this working group.

LP19: Strategically organize access to past internal work

Team: Rachel Banton, David Behringer, Carly Daiek, Katherine Godwin, Stephanie Martinez, Kevin McCarthy, Refik Orhun, Adyan Rios

Last updated: March, 2025

Status: Complete

Our overall project objective was to identify and make available for future use, with the intention of standardization, previous data provisioning, data requests, and stock assessment work performed by SEFSC staff for the Caribbean prior to the establishment of the Caribbean Fisheries Branch

- Goal 1
- Goal 2
- Goal 3

LP20: Document best practices for reproducible, standardized workflows

Team: Rachel Banton, David Behringer, Carly Daiek, Katherine Godwin, Stephanie Martinez, Kevin McCarthy, Refik Orhun, Adyan Rios

Last updated: January, 2024

Status: Complete

Our overall project objective was to develop a best practices document for the Caribbean Fisheries Branch that would lead to effective, efficient, and standardized workflows

- Goal 1 - Organize access to shared files
 - 1a - Important Google Drive folders that are relevant for CFB members to be aware of and have access to based on current working groups and ongoing projects were identified and compiled
 - 1b - Files from the old R Drive folder “Caribbean work” were transferred and reorganized in the new CFB M Drive folder
 - 1c - Decide on a file naming convention and folder structure
- Goal 2 - Define file naming, working, and storing structure
 - 2a - A file naming structure and abbreviations for regions were developed and will be used to name all files (in-progress and deliverables) maintained by CFB members
 - 2b - A folder organization structure was developed and will be used to store all CFB files on the Google Drive and M Drive
 - 2c - Describe workflows depending on the collaborators and project needs
 - M Drive will be used for ongoing projects, data requests, and other work performed by CFB members
 - Google Drive will be used as the primary file storage for projects that involve regional partners, SEFSC staff from divisions other than Sustainable Fisheries, or when live editing of documents is required
 - GitHub will be used for in-progress projects that are of interest to NMFS and require code sharing
- Goal 3 - Identify resources for efficient use of tools and Google Workspace
 - Best practices for individual vs. shared Google calendar use were defined and documented
 - Best practices for email use were defined and documented including individual email, group email, and subscription email
 - SEFSC resources were identified and compiled including organizational chart, OMI service portal, and intranet site
 - CIMAS resources were identified and compiled including handbook, travel forms, and pay schedules
- Goal 4 - Document the decisions and protocols in a best practices document and share with CFB members
 - All decisions up to this point were documented in [CFB Best Practices](#) and made accessible to all CFB members
 - The living document will continue to be updated as workflows evolve

LP21: Identify the best practices for working openly and inclusively

Team: Rachel Banton, David Behringer, Carly Daiek, Katherine Godwin, Stephanie Martinez, Kevin McCarthy, Refik Orhun, Adyan Rios

Last updated: March, 2025

Status: Complete

Our overall project objective was to identify best practices for the Caribbean Fisheries Branch to work openly and inclusively

- Goal 1 -
- Goal 2 -
- Goal 3 -

LP22: Complete the Ecosystem Status Report

Team: Mandy Karnauskas

Last updated: March, 2025

Status: Complete

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action. [See here](#) for the results of the Caribbean-ESR.

LP23: Collaborate between the SEFSC Sustainable Fisheries Division Caribbean Fisheries Branch (CFB) and Data Analysis & Assessment Support (DAAS) Branch on standardized length composition

Team: Rachel Banton, Sarah Beggerly, Samantha Binion-Rock, Andrew Cathey, Kyle Dettloff, Katherine Godwin, Stephanie Martinez, Vivian Matter, Michaela Pawluk, Adyan Rios, Steve Smith

Last updated: March, 2025

Status: Complete

Our overall project objectives were to standardize the length composition data provision and analysis processes between SEFSC branches and divisions by sharing scripts, resources, and resolutions to previously or commonly faced challenges

- Goal 1 - Identify and define current processes for data provision in CFB and DAAS
 - Processes for TIP data exploration and QAQC, morphometric conversions, and outlier removals were defined by CFB for the Caribbean and DAAS for the Gulf and South Atlantic regions
- Goal 2 - Investigate the use of a shiny app for standardized data exploration and composition analysis
 - Resources for shiny app development were identified and a separate group was formed to continue this investigation
- Goal 3 - Finalize a standardized exploratory data analysis (EDA) protocol for use in the Caribbean, Gulf, and South Atlantic TIP data provision processes
 - Resources and scripts were shared among branches
 - Processes that work across regions were identified with notes on when and why region-specific differences must occur due to data availability
 - A standardized template for TIP variables and EDA best practices document were produced and approved for use across all southeast regions by all necessary branch chiefs: Vivian (DAAS), Kevin (CFB), Larry (CVBS)
- Goal 4 - Identify opportunities for continued collaboration to ensure standardization of data processes
 - Stephanie (CFB) is invited to attend DAAS working meetings on data provision to remain in communication on necessary protocol changes and to continue the collaborations across regions
 - Potential next steps or additional projects beyond the scope of LP23 were identified. Those projects are to investigate broad uses of TIP data (including species proportions/compositions and how samples are collected through time) and identification of confidential data by gear and year

Major accomplishments completed during this working group are standardized TIP data pulls and checks, shared institutional knowledge and building professional networks across branches, identified opportunities for continued collaboration and connection, consolidated workflows across branches, and streamlined data provision processes.

LP24: Create back pocket plans -- we can expect emergencies or random funding so we should have plans in place to use these funds when they become available

Team: NA

Last updated: March, 2025

Status: Complete

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP25: Identify funding to analyze benthic habitat data (depth, substrate hardness, substrate complexity) from high-resolution mapping data for depths 0-500 m

Team: NA

Last updated: March, 2025

Status: Complete

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP26: Address the issue of subsistence fishing and its impact on the health of the fisheries (especially inshore areas)

Team: NA

Last updated: March, 2025

Status: Complete

A working group was not formed for this LP. The objectives of this project were already underway when the strategic planning workshop identified this as a needed action.

LP27: Integrate Local Ecological Knowledge (LEK) and Traditional Ecological Knowledge (TEK) in the research process

Team: Tarsila, Shannon, Mandy, Juan, Matthew

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the socioeconomic data gap group. See [CSP SocioeconomicRecommendations 2024](#) for a summary of what was accomplished under this working group.

LP28: Identify mechanisms to better leverage stakeholder local knowledge, e.g., catchability

Team: Tarsila, Shannon, Mandy, Juan, Matthew

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the socioeconomic data gap group. See [CSP SocioeconomicRecommendations 2024](#) for a summary of what was accomplished under this working group.

LP29: Integrate key socio-economic information to inform the management process

Team: Tarsila, Shannon, Mandy, Juan, Matthew

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the socioeconomic data gap group. See [CSP SocioeconomicRecommendations 2024](#) for a summary of what was accomplished under this working group.

LP30: Test stock assessment “alternatives” - e.g., management procedures, portfolio approach, to see if they can provide robust management advice

Team: Mandy, Kevin, JJ, Sennai, Matt

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the toolbox group. Check back for a summary of what was accomplished under this working group.

LP31: Establish an appropriate suite of existing fishery dependent indices to monitor key stocks, as well as ecosystem indicators and/or objectives

Team: Mandy, Kevin, JJ, Sennai, Matt, Shannon

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the toolbox group. Check back for a summary of what was accomplished under this working group.

LP32: Identify those genomics initiatives that are most promising for use in the US Caribbean

Team: Mandy, Kate

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the toolbox group and the fishery independent data gap group. See below for a summary of what was accomplished under those working groups

- Fishery independent data gap group - [FI Data Needs for US Caribbean](#)
- Toolbox group - check back

LP33: Collaborate with local universities to collect data and provide projects for students

Team: Nicole, Kevin, Steve, Sarah, Maureen, Joy

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the funding governance group. Check back for a summary of what was accomplished under this working group.

LP34: Conduct a collaborative data/assessment/management scoping with FishPath

Team: Mandy, Kevin, JJ, Sennai, Matt, Shannon

Last updated: March, 2025

Status: Complete

This LP was delegated to the regional working groups, specifically the toolbox group. Check back for a summary of what was accomplished under this working group.

LP35: Revisit and tailor SEDAR process to fit the needs of the Caribbean

Team: Kevin, Adyan, Matt, Rachel

Last updated: March, 2025

Status: In progress

Our overall project objective was to

- Goal 1
- Goal 2
- Goal 3