

THE HAMPSHIRE BIODIVERSITY INFORMATION CENTRE

BUSINESS PLAN 2015-2018



www.hants.gov.uk/biodiversity/hbic

November 2015



PURPOSE OF THE PLAN

- To guide the future running of the Centre between April 2015 and March 2018
- To update the management structure and operational framework for the Centre
- To set out the work programme of the Centre
- To demonstrate the viability and long term financial security of the Centre
- To aid communication with Partners & other stakeholders, data suppliers, users etc. to encourage new partners to enter into Service Level Agreements, Data Exchange Agreements and Data supply Agreements and to generate new sources of income to help cover costs.

The Hampshire Biodiversity Information Centre is grateful for the support, funding and data received from the following partner organisations and particularly wishes to acknowledge the support and time given by members and officers of these organisations, especially the voluntary groups, not only on the HBIC Steering Group but also at Advisory Group meetings and the annual HBIC Recorders Forum.

Basingstoke & Deane Borough Council
 Botanical Society of the British Isles
 Butterfly Conservation
 East Hampshire District Council
 Eastleigh Borough Council
 Natural England
 Environment Agency
 Fareham Borough Council,
 Forestry Commission
 Gosport Borough Council
 Hampshire Amphibian & Reptile Group
 Hampshire Bat Group
 Hampshire County Council Economy, Transport & Environment Department (ETE)
 Hampshire County Council Countryside Service
 Hampshire Cultural Trust – previously the HCC Museums Service
 Hampshire Mammal Group
 Hampshire Ornithological Society
 Hampshire & Isle of Wight Wildlife Trust
 Hart District Council
 Havant Borough Council
 New Forest District Council
 New Forest National Park Authority
 Portsmouth City Council
 Portsmouth Water
 Rushmoor Borough Council
 Southampton City Council
 South Downs National Park Authority
 Southern Water
 Test Valley Borough Council
 Thames Water
 Wessex Water
 Winchester City Council

ACHIEVEMENTS

Although the Business Plan is forward-looking it is worthwhile reflecting on the achievements of the Hampshire Biodiversity Information Centre over the past 13 years since its establishment in 2002 in order to show how far it has developed in terms of its work programme and demand for its services.

Local biological records centres differ, not only in their structure, size, funding and hosting arrangements, but also in the services they carry out and the products they deliver. The following summary of HBIC's key **achievements and outputs** during the **2002-2015** period provides an overview of its primary areas of work and service delivery.

HBIC has maintained **Service Level Agreements** with **25** funding partners. On behalf of those funding partners it has, over the **past thirteen years** since it was established:

- Carried out **detailed ecological surveys** of **4,231 sites**, averaging 325 sites/year using in-house field ecologists, and occasionally consultant ecologists where funding allows.
- Re-evaluated over **1880 Sites of Importance for Nature Conservation** and identified a further **690** SINCs from a review of surveys carried out during that period, plus recommended 49 SINCs for deletion – bringing the total number of SINCs in Hampshire to **over 4,000** - for which HBIC has responsibility for monitoring & reviewing.
- Maintained and updated a detailed GIS habitat/**land use map** of Hampshire from which **UK Priority habitats** can be extracted. This GIS dataset has now been translated into the OS MasterMap framework, increasing the number of habitat polygons from 80,000 to several million.
- Handled over **6,680 data enquiries**, from consultants, developers, land managers, community groups, students etc. bringing in an income of over £325K over the 13 year period to contribute towards the costs of staff time.

Screened over **105,800 planning applications** to flag potential impact on designated sites, priority habitats and notable species (since 2008).

Maintained a **Recorder 6** database which now holds details of over **930,000 species records** and **38,806 habitat observations** from the Habitat Survey Programme.

Obtained the agreement of the species recording groups to hold copies of their data on **MapMate**, covering an additional **4,360,000** species records, of which **22%** are deemed **notable species records**.

Held a successful **HBIC Recorders Forum annually for 13 years** and contributed to a number of **workshops, training days, conferences, bioblitzs** and other meetings benefiting recording groups, environmental professionals, naturalists, community groups and the wider public.

Ensured all HBIC staff are members of the **Chartered Institute of Ecology & Environmental Management** or working towards membership

Nicky Court, HBIC Centre Manager
July 2015

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1. OVERVIEW

Hampshire is a county of great biodiversity interest with more than 22% of its area covered by some form of nature conservation designation.

There is a large body of UK and European legislation and planning guidance that requires local authorities and other organisations to take account of biodiversity in order to satisfy a range of statutory and non-statutory duties; including the Natural Environment and Rural Communities Act 2006 which places a statutory duty on all public bodies, including local authorities, **to have a regard for biodiversity**. Defra, in partnership with a number of organisations including Natural England and the Local Government Association has produced specific guidance¹ for local authorities on implementing the biodiversity duty. Supporting local environmental records centres was identified in the guidance as an important aspect of integrating biodiversity into local authority services as reliable up-to-date biodiversity information is essential to underpin and inform these services.

Based on recommendations in the UK Biodiversity Steering Group Report Volume 1 (1995)² the Hampshire Biodiversity Action Plan (1998)³ proposed “the development of a partnership-led Hampshire Biological Records Centre to service the data needs of the Hampshire Biodiversity Partnership, and contribute to the National Biodiversity Network”.

The Hampshire Biodiversity Information Centre was established in April 2002. It is hosted by Hampshire County Council (the Lead partner) and supported by a Partnership comprising those organisations requiring data and those supplying data. The Centre is managed by a Steering Group representing the key Partners. The Steering Group sets the overall aims and priorities of the Centre and agrees the Business plan

Hampshire is privileged in that there are many knowledgeable individuals and organisations recording its wildlife and habitats and their combined expertise and data holdings contribute towards the sound foundation upon which the Hampshire Biodiversity Information Centre is based.

The benefits gained from a partnership approach to maintaining & supporting HBIC include; economies of scale, a ‘one-stop shop’, improved data acquisition, reduced duplication of effort, thus leading to a greater availability and range of data that can be used by many different audiences, resulting in more informed decision-making and greater protection and conservation of Hampshire’s rich wildlife.

On establishment the minimum staffing level for the Centre had been set at 7.5 full-time equivalents but due to ongoing government cutbacks since 2011 has now been reduced to 6.0FTEs with a greater reliance on volunteer graduates requiring work experience, and temporary posts where additional funding allows.

The Centre acts as a local ‘node’ within the National Biodiversity Network (www.nbn.org.uk). Whilst the NBN Gateway has become an important means of gaining access to nationally held datasets (including those gathered locally) it is important that locally held data about wildlife in Hampshire is made more accessible as it is more recent, more detailed and available at a finer resolution.

¹ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/69287/pb12584-la-guid-english-070510.pdf

² http://jncc.defra.gov.uk/PDF/UKBAP_BiodivUKSGRep-Vol1-MeetRioChallenge-1995.pdf

³ <http://www3.hants.gov.uk/hampshirebiodiversity/hants-bap.htm>

2 AIMS & OBJECTIVES OF HBIC

2.1 The definition of a local biological records centre as agreed by the Association of Local Environmental Records Centre in 2015 is:

Local Environmental Records Centres (LERCs) are not-for-profit organisations that collect, collate and manage information on the natural environment for a defined geographic area. LERCs support and collaborate with a network of experts to ensure information is robust, and make information products and services accessible to a range of audiences including decision-makers, the public, and researchers.

2.2 Reflecting this definition, the purpose of HBIC is :

'To collect, collate, manage and disseminate information of known quality on Hampshire's biodiversity to those who require it, to increase knowledge and understanding, and to enable informed decisions to be made about factors affecting the environment'

2.3 Guiding principles (agreed on establishment of HBIC in 2002)

The main principles guiding the Hampshire Biodiversity Information are that it;

- is the focus of a local partnership represented by a Steering Group, and should be independent from the undue influence of any one partner
- is a non-profit making, service-providing business, accountable to the Steering Group
- acts as an independent and impartial source of biological data
- conforms to NBN standards through agreed policies and procedures
- is responsive to user needs and data suppliers
- has the ability to enter into contracts so that it can enter into service level agreements and data supply or exchange agreements with its partners
- is soundly managed
- is accountable and transparent for its business and financial performance

2.4 Functions

For the Centre to act as a node in the National Biodiversity Network and meet the needs of its partners it is expected to;

- act as a focus for biodiversity records management in the area (to including geodiversity records where available)
- act as a contact point for access to datasets by local and national users
- manage specified key datasets on behalf of participating organisations and individuals
- co-ordinate and manage a habitat survey and monitoring programme
- support the collection, validation and maintenance of other key datasets

- make data available to all those that require it including local authorities, government and non-government bodies, consultants, students and the public, subject to agreed policies on charging and access.
- research the availability of data sources at an appropriate level
- provide a link for local users and suppliers to other local records centres and national data centres
- provide support and guidance for recorders
- encourage more people to gain enjoyment from, and understanding of, biological recording
- meet the criteria established for accreditation by the Association of Environmental Records centres (ALERC) as endorsed by Natural England, to comply with standards for data management and access.

A more complete list of functions and qualifying criteria as set out in 'A Local Records Centre Accreditation System' produced for Natural England and the Association for Environmental Records Centres (ALERC) can be found in Appendix 3 and at:

<http://www.alerc.org.uk/accreditation.html>

3. KEY ELEMENTS OF THE CENTRE

3.1 The Partnership

Hampshire County Council and those organisations representing key data users and suppliers have formed a partnership known as the Hampshire Biodiversity Information Centre Partnership. A HBIC partner is defined as an organisation, group or individual who contributes essential services, funding or useful data to the Centre set through Service Level Agreements or Data Exchange Agreements.

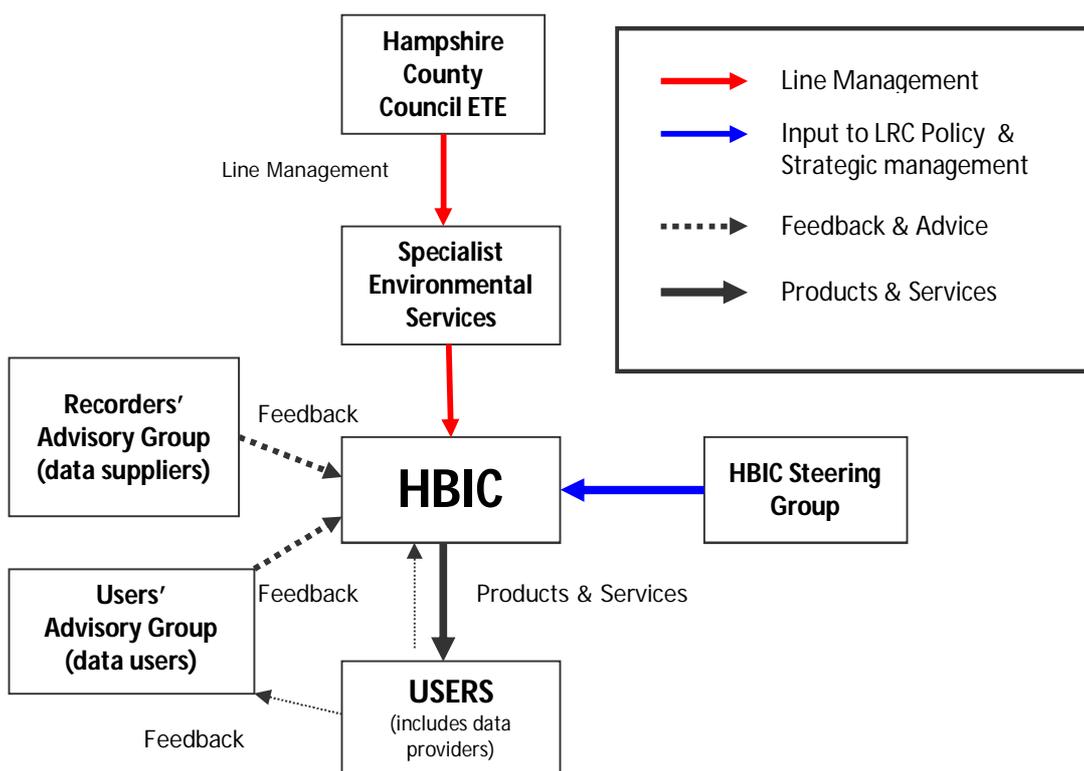
A Memorandum of Understanding has been drawn up which defines the roles and responsibilities of the key Partners. The Partnership includes those organisations listed on Page 2.

3.2 The Management Framework (Fig 1 below)

The management framework is as follows:

- HBIC is hosted by Hampshire County Council (Lead Partner), and sits within the Economy, Transport & Environment Department (ETE). It is steered by the HBIC Steering Group who has the task of agreeing the overall aims, policies and priorities of the Centre, set within the context of the priorities of the funding partners.
- The Centre Manager is accountable to Hampshire County Council and the funding partners for delivering the services of the Centre and reports to the Head of Waste and Environment within ETE who also provides line management support.
- Advisory groups for recorders and users have been set up to enable them to provide input and receive feedback from the Centre, and to ensure the Centre serves the needs of all those involved in the collection and use of biological data.

Figure 1 The Management Framework



3.3 Hosting arrangements

As mentioned earlier HBIC is hosted by Hampshire County Council and is embedded within the Economy, Transport and Environment department within the Specialist Environmental Services Group (SES) which includes Ecology and Archaeology teams which the Centre manager also manages. Approximately 40% of county records centres are based within local authorities, 32% within Wildlife Trusts and 28% are independent not for profit (CIC/Charity). The benefits of working within a local authority include close working relationships with LA ecologists, and valuable IT and business support.

It is possible however, given the significant uncertainty around future public finances, that HBIC may have to consider alternative delivery models during this Plan period.

For now, the host, Hampshire County Council, will

- Continue to employ the Centre staff who are therefore covered by HCC's terms and conditions of employment. Support from HCC includes payroll and other financial and administration services (including a separate accounting stream to clarify costs and funding proportions), personnel and recruitment services, legal services, and provision of some relevant in-house training.
- Continue to provide office space, services and equipment
- Continue to provide IT technical support for the maintenance of the databases, GIS & web pages, in accordance with HCC IT protocols and NBN standards. Any development work will be subject to the usual bids for internal/external funding.
- Provide line management and administrative support to the Centre Manager.

The cost of all these services/overheads will be expected to be covered by HBIC during the Plan period. See Section 6

3.4 The HBIC Steering Group

The Steering Group comprises up to 13 representatives drawn from the following partners:

HCC ETE Department (1), Hampshire Cultural Trust (1), District Councils/Unitary Authorities (3), New Forest National Park Authority (1), South Downs National Park Authority (1), Natural England (1), Hampshire & Isle of Wight Wildlife Trust (1), Environment Agency (1), Hampshire Ornithological Society (1), Butterfly Conservation (Hampshire Branch) (1), Botanical Society of the British Isles (1).

The Group meets twice a year in January and July and the Chair changes annually as agreed by the Group. The Centre Manager is not part of the Steering Group but reports to the Group.

Each member of the Steering Group is a partner and has an Agreement with the Centre, as described in 3.1. Each organisation selects its own representative although the 3 District/Unitary Council representatives will rotate yearly to represent the views of all District and Unitary Councils. All local Authorities with service level agreements with HBIC are also represented on the Users Advisory Group which also meets biannually in May and October.

Composition of the Steering Group may be changed from time to time to reflect changing issues, emphasis, or contribution, but any changes will be decided by the Group by consensus

The remit of the Steering Group is to:

- Agree the Memorandum of Understanding which defines the roles and responsibilities of the Partners
- Agree the Business Plan for the Centre
- Support the Centre Manager in securing finances for the Centre
- In the light of the above & the work programme (Section 6) agree the staff numbers & roles, and participate in the recruitment process where relevant.
- Develop and maintain a set of policies and standards, in accordance with NBN model policies and standards, HCC policies and ALERC Accreditation criteria.
- Agree data exchange agreements with data custodians and data producers
- Agree, monitor and develop the Centre's Work Programme in line with products and services required of the service agreements.
- Agree, monitor and keep under review budgets and other resources.
- Promote the Centre and its activities
- Engage proactively with the NBN and ALERC and progress accreditation of HBIC at the earliest opportunity

3.5 The Role of the Centre Manager is to:

- Prepare and implement the Centre's Business Plan and Work Programme
- Secure finances for the centre, aiming to become self financing over this plan period
- Report to the Steering Group and be accountable to them for the implementation and delivery of the Work Programme.
- Recruit and manage staff and resources in line with the Business Plan and Work Programme
- Establish and sustain agreements with data suppliers and data custodians
- Establish and sustain Service Level Agreements with funding partners (data users)
- Service the HBIC Users Advisory Group and HBIC Recorders Advisory Group
- Develop & and maintain the Centre's IT systems, network and website in line with the agreed operational framework, policies & standards, and HCC IT protocols.
- Develop and implement a training programme for staff
- Carry out annual performance appraisals of all staff where job conditions, work performance and personal development (inc. training) are discussed.
- Liaise closely with the Local Nature Partnership in order to take forward actions relevant to the Centre where resources permit
- Apply for accreditation (ALERC/NE)

3.6 The HBIC Users and Recorders Advisory Groups

Two bodies have been set up to represent the interests and needs of the key funding/user groups and all those contributing data to the centre. These groups play an important part in the on-going development of the Centre and provide vital feedback to the Centre on how well it is performing. Both Groups provide representatives on the Steering Group.

The HBIC Users Advisory Group comprises all those organisations with service level agreements with the Centre. The Group meets twice a year to enable them to track progress of the agreements and contribute to the Centre work programme, policies, priorities etc.

The HBIC Recorders Advisory Group comprises representatives from the key recording Groups or Societies plus a range of recorders drawn from the national schemes operating in Hampshire, all of whom are willing to contribute data or services to the Centre. It meets on an ad hoc basis or by email to discuss Centre policies, data exchange agreements, software needs, data flow etc. and more formally in the Spring, as a much wider "Forum" open to all, to promote the activities of recorders needs, and to share experiences and ideas.

3.7 The Operational Framework

It is important to note that the Hampshire Biodiversity Information Centre is not the sole custodian of biological data in the County. The Hampshire species recording groups continue to own & manage their own datasets, and through agreed data exchange agreements they pass on non-editable copies of their data to HBIC on a regular basis in exchange for support from HBIC along with a small % of the income derived from HBIC providing data to commercial requesters, and to enable their data to be used to inform decision making.

Figure 2 overleaf demonstrates the relationship between data custodians, suppliers and users and HBIC. The following applies to this operational model:

- HBIC manages two main databases (Recorder 6 and MapMate) and provides data management services to its partners. It also services the data and information requirements of the funding partners set through Service Level Agreements.
- HBIC also provides data and information to many other data requesters, working to agreed standards and policies covering access and charging.
- All species recording groups & individuals (data custodians) are responsible for ensuring the validation of their own datasets before passing copies on to HBIC. Co-ordination of the supply of data and data flow network is managed between HBIC and the Species Groups, with data exchange agreements being used to control use of data by HBIC and to enable HBIC to offer a range of services to the Groups to support their recording activities.
- Where possible records passed to HBIC from volunteer recorders, consultants etc. on an *ad hoc* basis are re-directed to the appropriate species groups for validation and input, and to prevent duplication of records on databases.
- HBIC also maintain various GIS datasets on behalf of the funding partners.
- The Hampshire Cultural Trust provides facilities for the care and preservation of voucher specimens as well as a biological identification and public enquiry service, the provision of specialist library resources and a number of specialist identification training days for recorders. A standard clause covering the collection of voucher material to be deposited with the Trust is included in contracts set by HBIC for species surveys.
- For the operational model to be effective it is important that data custodians and data suppliers use, wherever possible, compatible software capable of seamless data exchange. HBIC uses Recorder 6 for its own site, habitat and species data and MapMate for data exchange with the species groups. Notable species records are then exported from Recorder and MapMate and are displayed in GIS for data searches and analysis with other datasets (such as habitats, site designations etc.) HBIC will support species groups in the digitisation of their data and transfer to MapMate where resources allow.

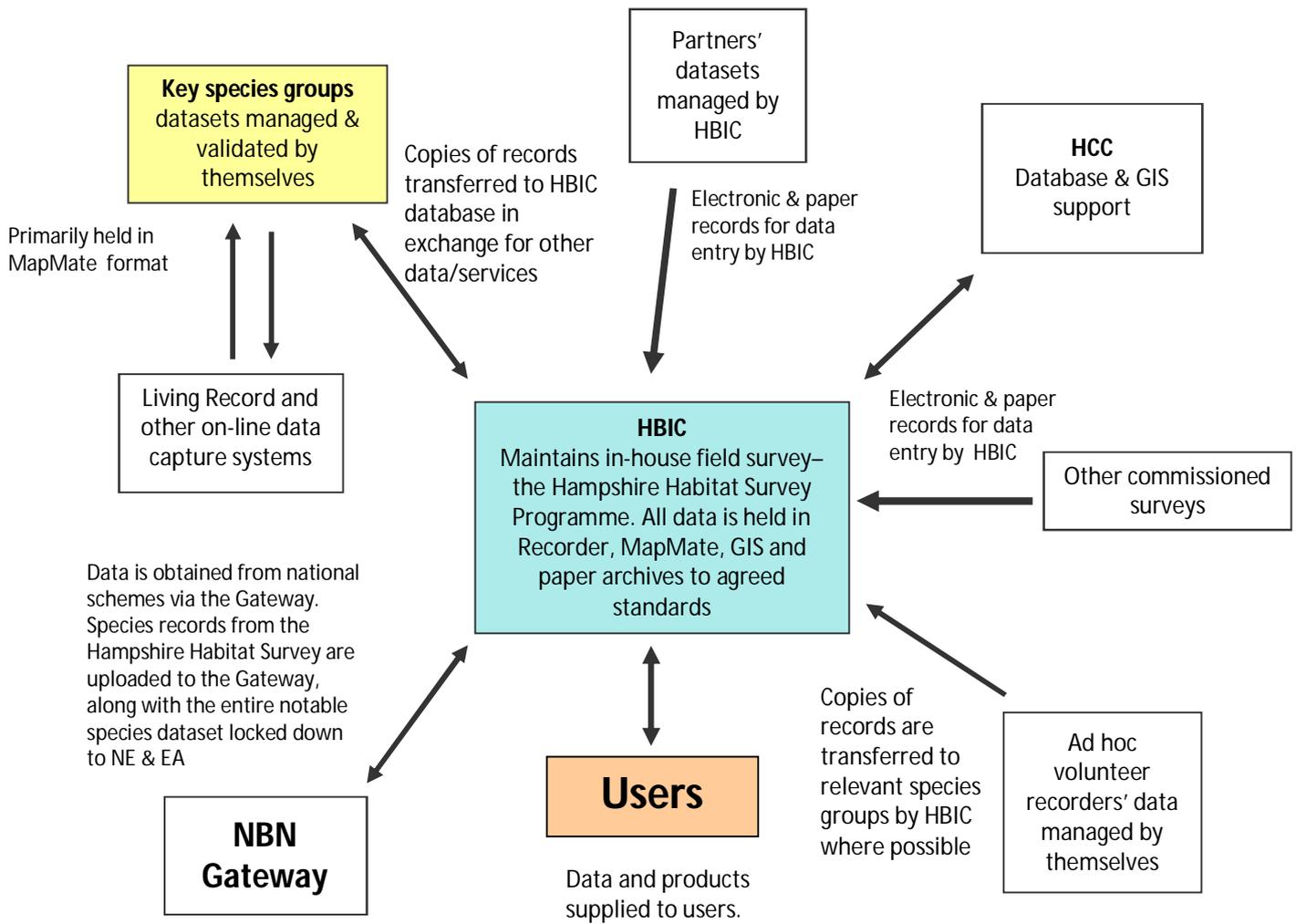


Figure 2 Data flow in Hampshire

3.8 Arrangements with stakeholders: Data users and suppliers

All major stakeholders in the Centre, from local authorities, government agencies through to the voluntary sector, are partners in the Centre and are invited to sign up to a Memorandum of Understanding which is a collaborative agreement enabling them to have a say on the running of the Centre. To do this they must have signed up to Service Level Agreements or Data Exchange Agreements with the Centre.

Representatives of the major data users and suppliers are also represented on the HBIC Steering Group which guides the work of the Centre. Those recorders and data users without a presence on the Steering are able to influence the work of the Centre through the Users & Recorders Advisory Groups.

Key data users entering into Agreements with the Centre comprise all Hampshire's local planning authorities including the two National Park Authorities, Natural England, the Environment Agency and the Hampshire & Isle of Wight Wildlife Trust.

HBIC has negotiated Data Exchange Agreements with many of the key species recording groups including the Hampshire Mammal Group and the Hampshire Amphibian & Reptile Group under the 'umbrella' of a Hampshire & Isle of Wight Wildlife Trust agreement, the Hampshire Ornithological Society, the Hampshire Branch of Butterfly Conservation, the Hampshire Bat Group and the Botanical Society of the British Isles (for VCs 11 & 12). These agreements involve 'data for data', support in other ways to assist their recording activities and a small % of the income derived from commercial data requests handled by HBIC as a contribution towards their recording activities, and to off-set any loss of income they may incur from providing data themselves.

3.9 Staffing

Together the Centre manager and staff encompass a range of skills including general ecology, habitat survey and conservation management, taxonomic expertise, biodiversity data management, and use of GIS, database and other IT systems. The minimum staffing level for the Centre was set at 7.5 in 2002 and this has been maintained until government cutbacks in 2011 resulted in the loss of 1 FTE. More recently the HBIC manager has also taken on the role of Specialist Environmental Services Manager which oversees Archaeology Team and the Ecology Team. The current 6 staff therefore now comprises 0.5 dedicated manager, 2 field ecologists and 3.5 ecologists responsible for all aspects of data collation, validation & evaluation, the servicing of enquiries, IT development, management of the SINC's system and community engagement. HBIC also take on a number of volunteers throughout the year to help with data management tasks, giving them valuable skills in ecological data handling and GIS. Estimated value of £10,000/year at grade D (technical assistant level)

Section 5.1 gives a summary of the work programme and a breakdown of the main tasks.

3.10 Funding - See Section 6 and the Appendices for detailed financial projections

The approximate running costs of the Centre amount to around £310,000 for 2015/16 which includes salaries, travel, training, equipment, and HCC corporate overheads estimated at 40% of salaries/on-costs for 5.5 FTE posts and 0.5 FTE manager. These costs are comparable to those of other Record Centres of a similar size

Data users are expected to contribute towards the full cost of data collection, management, dissemination and investment, and not just the 'end product'.

Funding of the Centre is largely arranged through Service Level Agreements between the Centre and the key data users, with Hampshire County Council previously (2002-2014) funding the salaries/on costs of the Centre Manager and the Senior Ecologist, and the partnership funding the other 4.5 posts, offset by income from commercial data requests. The County Council has also (up to 2104) contributed the full departmental & corporate overheads.

From 2015, with the County Council having to continue to make unprecedented savings over the next 3 years, HBIC, along with other specialist environmental services, are required to become 'self financing' during the Plan period.

SLAs mostly run for three years at a time with each agreement specifying a number of survey days and number of hours to be spent on a variety of services and outputs. The Agreements also set out the response times and mechanisms for service delivery.

The fees paid by the majority of the SLA holders cover the direct costs of the services provided but have not contributed towards the office overheads, management, IT or administration costs of the Centre. Agreements with Natural England and the Environment Agency contribute to some of the core costs as these organisations benefit from the survey data collected under the local authority SLAs.

For public sector organisations not entering into SLAs with HBIC then any request for data is charged on a 'pay-as-you go' basis to cover all reasonable staff costs, similar to all commercial users. Requests for additional habitat survey outside SLAs are charged at full cost recovery. Such requests will be given lower priority than requests set through service agreements and will be subject to available time and capacity.

3.11 Accommodation and access to data

HBIC staff are based within the County Council HQ in Winchester. The data collected and managed by HBIC underpins much of the work of the ETE Department and can be readily accessed by HCC ecologists who provide advice to the District Councils as well as HCC.

Most of HBIC's paper (survey) records have now been scanned to enable 100% digital dissemination of data and to reduce storage. Original copies of all survey data have been archived and all digital data is backed up daily.

It is important that the data and staff are accessible to as wide an audience as possible, particularly the funding bodies. With email and the internet physical access has become less essential but visitors (including the public, students, recorders, consultants etc.) are able to visit the offices in person if they wish. The office in Winchester is easily accessible from road and rail, however visitors are encouraged to make appointments to ensure that the appropriate member of staff is available to assist them.

A letterhead and web pages give HBIC a clear identity so that people with no previous knowledge of biological recording know where to come for information. Most people prefer to contact HBIC by phone, letter or email, and most data requests come into HBIC via an on-line data request form.

3.12 Information Technology

IT support is essential for the smooth running of the Centre, particularly for the development and maintenance of the biological databases and geographic information system (GIS) datasets. For the Centre to be an effective node in the National Biodiversity Network it is important that it uses databases which are compatible with the software being used nationally, particularly for the NBN Gateway. For that reason HBIC's main database is Recorder 6.

The Centre also exchanges data regularly with the species recording groups via MapMate.

IT support for database & GIS maintenance and access to other software is provided by IT Services (HCC) although much of the maintenance and development of HBIC's databases and interface with the GIS is now done by HBIC. Issues likely to arise over the plan period which will need addressing include a review nationally of Recorder 6 and its likely successor, similarly for MapMate locally which is becoming increasingly difficult to manage due to the sheer volume of data held within it.

4 PRODUCTS AND SERVICES REQUIRED OF HBIC

4.1 Core Products and Services

The services required of the Centre go beyond collecting and providing raw habitat & species data. Without the collation and management of all data it would be impossible to provide interpreted or contextual data, or to monitor losses, trends etc.

The following list summarises the main services and products which the Centre provides to help partners & others meet their information needs:

- Provision of original and interpreted (factual) habitat and species data and other supportive material for use when making decisions and giving advice, including use in development management, forward planning, land management schemes, local biodiversity plans and other initiatives. The presence of UK Priority Habitats and Priority Species and other notable species is a key factor in all the above.

Data is released in accordance with HBIC's Data Access Policy, with particular attention being paid to the release of sensitive species data.

- Provision of new habitat survey and re-survey to meet the needs of partner organisations. As part of this process HBIC always seeks landowners' permission and particularly for surveys of Sites of Importance for Nature Conservation (SINCs) for monitoring purposes.
- Evaluation of habitat and species data for the identification & review of SINCs, for submission to the SINCs Advisory Panel.

As new surveys are undertaken and evaluated HBIC will, on behalf of the local planning authorities, notify landowners where their land has been identified as meeting the SINC criteria.

- Assessment of the weekly planning lists to highlight any development proposal which may affect a SINC or other habitat/species of conservation value.
- Survey and assessment of hedgerows affected by Removal Notices under the Hedgerow Regulations, and by development proposals
- Provision and maintenance of several GIS layers, particularly of boundary and attribute information, covering nature conservation designations, habitat/land use, notable species records, invasive species records, surveyed sites etc. HBIC will provide all funding organisations with updated copies of these GIS layers at least once a year.
- Production of the Annual Biodiversity Monitoring report which highlights changes in extent and status of Priority habitats, species and designated sites on an annual basis.
- Validation and management of all habitat and species data collected in order to achieve the above.
- Provision of a secure archive for all original & copied survey material collected.

- Provision of data to consultants, students, the public and others on behalf of the partners within a target of 10 working days.
- Support for local volunteer recording groups and individuals who provide valuable species data in support of all the above.

The Centre is able to discharge the duties of its 'public authority' partners under the Environmental Information Regulations - by making data available to others on their behalf as part of the service.

4.2 Supporting the Local Nature Partnership

HBIC played a key role supporting the Hampshire Biodiversity Action Plan Partnership which has since been succeeded by the Hampshire & Isle of Wight Local Nature Partnership hosted by the Hampshire and Isle of Wight Wildlife Trust. HBIC is keen to support the work of the LNP subject to available capacity and funding streams, particularly in the mapping of ecological networks and ecosystem services. The LNP has three high level priorities:

- Protect and improve the natural environment on land and at sea – creating bigger, better and more joined up places for nature.
- Promote a sustainable green economy – in which economic prosperity and the health of our natural resources sustain each other.
- Reconnect people and nature – strengthening the connections between people and nature and improving the health of both.

5. WORK PROGRAMME

- 5.1 The detailed and anticipated work programme of the Hampshire Biodiversity Information Centre for 2015-18 is set out below. The main difference compared to previous years is slightly less field survey and a greater focus on new markets, externally funded projects & data collation from other sources, to deliver an increased range of products to the data user alongside more efficient IT delivery, and to maximise income generation.

Management & development of HBIC	Responsibility of:	Timescale	Additional funding?	Priority
1. Produce new 3 yr Business Plan and review annually	HBIC Manager in consultation with Steering Group (SG)	April 2015	No	High
2. Secure finances for 2015-18 at UAG & 1:1 meetings Feb 2015	HBIC Manager & funding partners	March 2015	Yes - see section 7	High
3. Revise & renew Service Level Agreements	HBIC Manager & funding partners	April 2015	SLA funding	High
4. Service & Report to the HBIC Steering Group	HBIC Manager	Jan & July each year	No	High
5. Service & report to the HBIC Users Advisory Group	HBIC Manager	May & Oct each year	No	High
6. Continue to prepare & update procedures & policies as set out in Appendix 2 - in preparation for accreditation – early 2016	HBIC Manager in consultation with SG & HBIC staff	Feb.2016	No	High
7. Continue to develop HBIC's services & profile to attract new partners & clients	HBIC Staff in consultation with SG	On-going	No	Medium
8. Continue to maintain & develop a web presence.	HBIC staff	On-going	No	High
9. Continue to provide work experience for graduate volunteers, aligned to HCC Volunteer Strategy.	HBIC staff	On-going	No	Medium
10. Produce Annual Report	HBIC Manager/staff	July/ yr	No	High
11. Bid for funding to increase capacity/data availability, and develop staff skills, backfilling where necessary.	HBIC Staff	If & when opportunities arise	Yes – external	Medium
Initiatives & Projects	Responsibility of:	Timescale	Additional	Priority

			funding?	
12. Update the habitat opportunity mapping to support GI, ecological networks, land use decisions, mitigation & offsetting	HBIC staff – with Partners & consultants (Geodata)	2016/17	£20K ring fenced	Low
13. Take advantage of any new funding to continue review of Ancient Woodland Inventory	HBIC in partnership with NE & FC		Yes	Medium
14. Contribute to the successor of South Downs Way Ahead NIA project through targeted survey/ monitoring	HBIC in partnership with SxBRC & SDNPA	2015	Subject to funding bid	Medium
15. Provide support to the Local Nature Partnership through the mapping of ecological networks	HBIC staff	2015	Yes - subject to resources – NE funding	High
16. Explore the mapping of ecosystem services to demonstrate the value of nature	HBIC staff & partners	?	Yes	Medium
17. Provide support to HCC's Traded services Initiative –provision of environmental planning advice & data early on in the planning process to organisations outside SLAs	HBIC Staff	2015	Yes	High
Working with Recorders	Responsibility of:	Timescale	Additional funding?	Priority
18. Organise the Annual HBIC Recorders Forum & maintain the Recorders Advisory Group for networking/resolving issues	HBIC Manager & County Recorders	March of each year and on-going	No	High
19. Continue to enter into Data Exchange Agreements with key data custodians, and establish mechanisms for downloading copies of other datasets held nationally e.g. through the NBN Gateway.	HBIC staff & County Recorders, and ALERC	On-going	Possibly - for digitising projects	High
20. Manage data flow and collation of species data in Hampshire	HBIC Staff & County Recorders	On-going	No	High
21. Assist recording groups with database development and collation compatible with national standards. Promote Living Record as the on-line data capture tool of choice	HBIC staff & County Recorders	On-going	Possibly	High
22. Administer the HBIC Local Recording Fund to encourage new recorders & increase data collection.	HBIC staff in consultation with SG	On-going	No	Medium

Data Management & Key Outputs	Responsibility of:	Timescale	Additional funding?	Priority
23. Manage a programme of field survey & assessment to meet needs of funding partners.	HBIC staff	On-going	No	High
24. Maintain SINC system of survey, evaluation & notification. Provide an updated GIS layer to funding partners at least once a year.	HBIC staff & SINC Advisory Panel	On-going	No	High
25. Continue to promote/use the simplified condition assessment methodology for priority habitats within SINC	HBIC staff	On-going	Yes	Medium
26. Maintain lists of notable species & non-native invasive species and provide GIS layers annually to funding partners	HBIC staff in consultation with County Recorders	On-going	No - except for one-off County lists & atlases	High
27. Update the Habitat GIS layer from HBIC surveys and provide annually to funding Partners. Updating from other datasets will require additional funding	HBIC Staff	On-going	No, except for habitat data collected elsewhere	High
28. Provide data to all who require it, subject to access and charging policies. Expand depth and range of products to meet the needs of various audiences where possible	HBIC Staff	On-going	Charging commercial requesters	High
29. Continue to provide selected data to the NBN Gateway & signpost to HBIC & local species group websites	HBIC Manager in consultation with Species Groups	On-going	No	High
30. Development template for reporting priority habitats, species and designated sites into WGS schemes	HBIC staff in consultation with FC	New work	No – charging landowners/agents	High
31. Maintain input & validation of data coming in from survey programme. Clearing other data backlogs will require additional capacity inc. volunteers	HBIC staff	On-going	Possibly	High
32. Produce biodiversity statistics for Annual Monitoring Report to all local authorities partners	HBIC staff	Deadline October	No (only where LAs want detailed District stats)	High
33. Review & update SINC criteria inc species assemblages & thresholds	HBIC Manager in consultation with partners/sp. groups	2015/16	Need for consultant	High

Planning related activities	Responsibility of:	Timescale	Additional funding?	Priority
34. Screen planning lists & road works, and advise where they might impact on designated sites, notable species & priority habitats.	HBIC staff	On-going	No	High
35. Investigate tools for screening applications, or as a minimum explore use of an 'ALERT' layers for planners to screen applications before validation	HBIC Manager & staff		Yes - extra capacity/funding needed	Medium
IT Development work				
36. Continue to upgrade Recorder & MapMate and input into national programme for development of Recorder and Mapmate	HBIC staff, JNCC and recording groups	On-going	Yes – for new development	High
37. Continue to integrate/ improve databases for increased efficiency	HBIC Senior Ecologist & IT Services	On-going	Possibly	High
38. Look to develop the website & web services to facilitate data sharing & sign-posting with the recording groups.	HBIC staff, the recording groups, IT Services		Possibly	High
39. Enhance the Habitat and Land Use (HLU) GIS data capture tool to improve functionality/efficiency	HBIC Senior Ecologist and the SELRC forum	On-going	Yes - external consultant being used	High

5.2 Projected allocation of key tasks for 2015-16

Largely based on 14/15 time recording stats, taking into account changes in staff going part-time and manager reducing time spent on HBIC management, and looking ahead. 20% = 1 day

Post	Primary tasks	% FTE
Centre Manager (NC) 0.5 FTE	Management of HBIC & Partnership	22
	SINCs & planning related	5
	Data output, analysis & reporting	4
	Community engagement/recorders	3
	Special projects	2
	Regional/national work	6
	Leave, professional development etc.	8
		50%
Senior Ecologist (WR) 1.0 FTE	Centre Management/staff supervision	8
	IT Development work	20
	Data output, analysis & research	30
	Data validation & management	25
	Special projects	2
	Leave, professional development etc.	15
		100%
Ecologist (SC) 0.85 FTE	Centre management/SLA liaison	18
	Management of Survey Programme	15
	Evaluate SINCs, update datasets & notify owners	20
	Data validation & management	20
	Leave, professional development etc.	12
		85%
Field Ecologist (IR & JM) 1.0 FTE x2	Field Survey	35 x 2
	Organisation of survey programme	12 x 2
	Write-up/Data entry	35 x 2
	SINC evaluation	2 x 2
	Leave, professional development etc	15 x 2
		200%
Ecologist (BC) 0.65 FTE	Data output	20
	Data validation/GIS/IHS	15
	Planning lists	15
	SINC evaluation	5
	Leave, professional development, organisation etc	10
		65%
Ecologist (LP) 1.0 FTE	Data output	50
	Data validation/GIS/supervising volunteers	10
	Planning lists	15
	Community engagement (Recorders/forum)	10
	Leave, professional development, organisation etc	15
		100%
Total		600%

5.3 BREAKDOWN BY KEY TASK:

Task	FTE 2012-15	FTE 2015/16	Explanation for change
Management & development of HBIC & managing staff	0.4	0.5	Has always been nearer 50%, but manager now spending time on wider management duties with backfill from SC & WR on staff management, reporting and SLA liaison.
Regional/National work – liaising with SE LRCs and Association of Local Env Records Centres (chair)		0.04	Will decrease when NC steps down as ALERC Chair in Oct 2015 but important to work with gov. agencies (funding) and other LRCs (best practice/efficiencies)
Special Projects	0.2	0.04	Less time available to bid for projects
Management of SINCs system	0.2	0.35	Increased consultation with Panel and landowners
Data output/analysis	1.15	1.00	Although enquiries have increased the time spent has decreased slightly due to efficiencies in IT
Field Survey & write up	1.4	1.4	Stable following reduction in survey programme in 2010/11
Survey programme (organisation)	0.55	0.4	Settled down following survey reduction in 2010/11 & transfer of some tasks to IR/JM
Screening Planning lists & road works	0.35	0.3	3 districts no longer requiring service but now includes SDNPA screening plus general increase in planning applications.
Data management/validation/GIS/IHS/supervising volunteers	0.95	0.7	On-going, habitat GIS backlog mostly cleared – but may struggle to keep on top of it with BC now part-time. Opportunities for volunteers to do more.
IT Development work	0.2	0.22	On-going, new tools and keeping abreast of upgrades
Community engagement; working with recorders, plus Recorders Forum	0.15	0.15	Would like to do more but core tasks take precedent due to funding requirements
Leave, professional development, personal organisation etc.	1.0	0.9	Less time for training and as much time as possible e.g. 'meetings' is charged to actual tasks (where appropriate)
Total	6.30	6.00¹	

¹ When HBIC was established the number of FTEs was 7.5

6. FINANCIAL ASSUMPTIONS, REQUIREMENTS AND PROJECTIONS

6.1 Previous history & revenue sources

The first Business Plan (**2002-2005**) projected the set-up and running costs of the Centre over the three year period to cover the salaries of 7.5 staff, ending with a small deficit of £13, 000. At the end of the three year period the Centre had instead managed to carry over a surplus of £36,188 mainly due to an establishment grant from Natural England, savings through staff vacancies, and additional partners coming in. HCC funded 3 staff and all office overheads.

For **2005-2008** the Centre was projected to continue to run at a deficit of c£10,000/yr due to continuing salary increments. There was also a need to put aside a small cash reserve for any possible future redundancy payments. The funding partners agreed to a one-off 20% increase in their contributions in year 2005/6 to reduce the deficit.

With the wholesale review of salaries in 2007 by Hampshire County Council most staff in HBIC benefited from a pay rise which placed them at the bottom of the next pay scale. This put further pressure on the budgets and so the charge for data requests was increased by 20%. At the end of this three year period HBIC had managed to carry forward a surplus of c£70K through careful management, vacancy savings, and additional external income from projects.

HCC cutbacks in **2011/12** year proposed a loss of 1 FTE ecologist and 0.5 FTE admin post. It was agreed to increase the hourly rate for data requests by a further 50% to retain 0.5FTE ecologist and to reduce field survey by 20% in order to reduce the workload across the team to offset the loss of the 0.5 FTE ecologist. This allowed SLA fees to remain at the 2010/11 level. Natural England also reduced its fee from £15K to £10K but HBIC gained two new customers; the South Downs National Park Authority and the Forestry Commission (New Forest) to offset the loss.

For the **2012-2015** period it was agreed to maintain fee level at the 2011/12 rate due to a reduction in NI/Pension costs from around 25% of salary costs to 20%. This would then cover any salary increments of 3% per year. Any potential pay award was covered by the SLAs of up to 1% per year. At the end of March 2015, through careful management and additional income from data requests and external projects/surveys HBIC's surplus now stands at c£239,000. At least 60% of this is ring fenced for various projects and a contingency of 6 months running costs. The remainder could be used to offset the small deficit that will arise each year of the 2015-18 plan period as HBIC strives to maximise income generation in order to cover all overheads. See Section 6.2

6.2 Financial assumptions and requirements for 2015-18

HBIC is a partnership/collaboration where individual partners "get more out than they put in" through economies of scale and data sharing. HBIC data is also essential to the work of the HCC Ecology Team and the ecological advice they provide to HCC, local planning authorities through SLAs and 'traded services'.

The requirement from HCC is that HBIC is to be "**self-funding within the 2015-18 period**" which means covering departmental and corporate overheads (c40%) of all posts excluding 0.7 FTE (mixed E/F/H grade) delivering direct HCC ETE work and 0.5 FTE manager covering other management responsibilities within the Specialist Environmental Services teams.

Income from commercial data requests can be considered as 'traded services' which contributes towards overheads and posts, thereby offsetting HCC costs and fees from SLAs.

- 6.2.1 **Under the previous business plan periods** the local authority SLA partners have only been charged salaries/NI/Pension to cover cost of direct service provision. They have not contributed towards core data management or other overheads however they pay for much of the habitat survey which HCC, the government agencies and the utilities etc. also benefit from.

Core project management and data management costs have been covered by HCC, government agencies and utilities, along with income from commercial data requests. However, income from the government agencies is fixed and unlikely to be increased in the foreseeable future. In fact Natural England has now cut its fee by 50%.

In addition 20% of income from data requests has previously been allocated to the species recording groups with 14% going to the 6 species groups with whom HBIC has data exchange agreements. The remainder can be bid for. As income has gone up so has the % to the Groups.

- 6.2.2 **Under proposals for 2015-2018** it has been agreed that for 2015/16 HBIC would recover departmental overheads on top of the cost of salaries/NI/Pension for all posts, excluding the 0.7FTE cost of the service to HCC ETE and 0.5 FTE manager post. For 2016/17 & 2017/18 the aim would be to recover corporate overheads.

Therefore from April 2015 the local public sector partners will be charged at the level which includes departmental overheads. The annual 3% increase to cover inflation/pay awards will also be re-established to help close the corporate overheads gap.

The cost of the service which HBIC delivers to HCC ETE has been calculated at £28,000/year (salary/on-costs for 0.7 FTE at mixed E/F/H grade) and is to be excluded from the costs to be recovered from external sources. Services provided to ETE include survey, screening HCC planning applications & road works, responding to data requests which are of a county/strategic nature, minor SINC work, the road verge project and a contribution towards core data management costs and compilation of the GIS layers required by the Ecology Team.

HBIC will also look to start charging HCC Property Services for provision of data to inform HCC development, and similarly HCC Highways for road schemes. This will be done via a 'levy' that the Ecology Team will charge Property Services and Highways for each project where ecological advice is sought and data is needed.

Income from commercial data requests contributes to the costs of running the centre. It is proposed to increase the rate to £200 per standard search from 2015. Also, if more planning applications can be encouraged to incorporate a HBIC data search (on the basis that an 'NBN only' data search is inadequate and breaches copyright) then this could raise an extra £10K.

Of the 20% income redirected to the species groups it is has been agreed to cut it to 15% leaving 14% to the 6 key species groups and 1% (c £1000/year) to be bid for recording projects.

With regard to HBIC's 'spare survey' capacity it is proposed to increase the daily rate to £285/day in 2015/16 (from £250/day in 2014/15) to include costs of all overheads

Other potential additional/new areas of income include:

- Marketing HBIC products to land/forestry agencies re new requirements for the WGS
- Offering a 'premier' service to regular consultancies through a data supply agreement

- Offering formal training courses in habitat survey/ID for CIEEM or by ourselves
- Seeking potential SLAs with other government agencies such as the Highways Agency, and other water companies.

6.3 Projected Costs and Income

The following financial projections cover a three year period starting on 1st April 2015 and ending on the 31st March 2018. The 2014-15 accounts are also shown for comparison/ completeness although from 2015 onwards there are important differences in how overheads and staff costs are to be apportioned. The assumptions upon which the financial projections are based are summarised above but the key point is that from **April 2015** the staff costs will include salaries, 20% NI/Pension and 40% corporate_overheads which will need to be covered by; Partnership fees, income from data requests and external projects minus the cost of 0.5 FTE manager (H grade) and 0.7 FTE (mixed E, F, H) direct delivery to HCC ETE (calculated at £28,000).

Both income & expenditure are summarised below. Salaries are based on a 1% pay award per year over the three year period although an increase of 3% per year has been built into the SLAs. The projected SLA income for the 2015/16 is shown in detail in Appendix 1.

	2014/15 Actual	2015/16 Projected	2016/17 Projected	2017/18 Projected
EXPENDITURE				
Staff salaries/NI/pension	£230,968 ¹	£216,942 ²	£219,111	£221,302
Corporate overheads (40%)	£0.00	£86,777	£87,644	£88,520
Travel/Training/Equipment etc.	£8,549	£7,000	£7,000	£7,000
Living Record support costs		£1,000	£1,000	£1,000
Income to species groups ³	£13,829	£11,912	£13,500	£14,250
Miscellaneous	£1,009			
Total expenditure	£254,355	£323,631	£328,255	£332,072
INCOME (see Fig 3 & Appendix 1)				
From Partnership SLAs	£120,854	£126,630	£130,429	£134,342
Data Request Service	£79,411	£90,000	£95,000	£100,000
Staff salaries & on-costs paid by HCC (recharged to HBIC) ⁴	£59,998	£39,606	£40,002	£40,402
Income from spare survey capacity	£15,435	£17,100	£17,700	£18,300
Additional income(projects) ⁵	£6,788	£10,000	£15,000	£20,000
Total income	£282,486	£283,336	£298,131	£313,044
SURPLUS/DEFICIT	+ £28,131	- £40,295	- £30,124	- £19,028
CUM.SURPLUS c/f from 2014/15 ⁶	£239,854			

¹ All staff salaries and 20% for NI/Pension including maternity 'overlap'

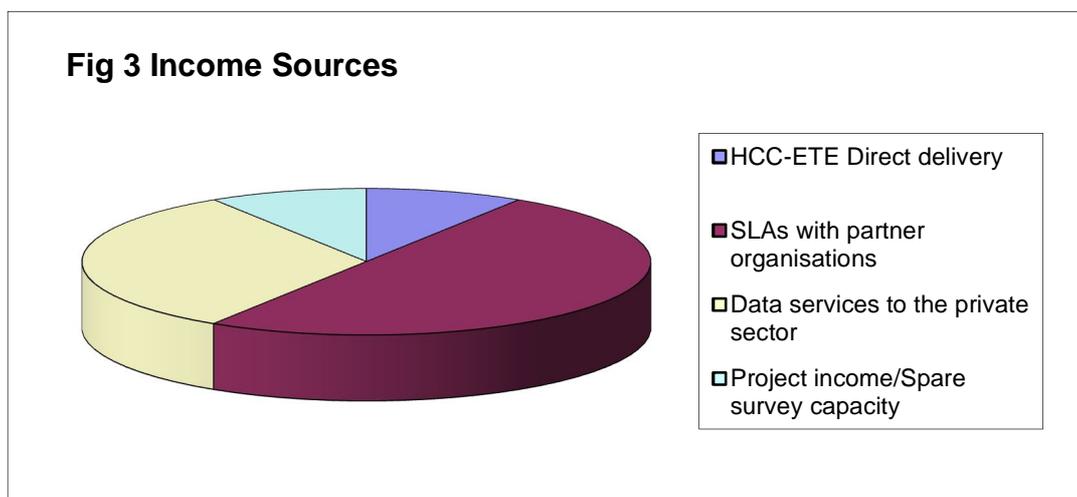
² All staff salaries/20% NI/Pension, **minus 0.5 FTE Manager**

³ Based on 20% income from data requests from previous year, will drop to 15% from 2015

⁴ For 2014/15 = cost of HBIC Manager.. For 2015/16 onwards = cost of 0.7 FTE delivering ETE work £28,290 + 40% overheads

⁵ Also includes anticipated £5,000 from HCC Property Services/Highways

⁶ Includes £20,000 ring fenced for further habitat suitability mapping, £3,000 remaining from Ancient Woodland Inventory Review, and contingency fund for 6 months running costs of c£150,000.

Fig 3: Income (%)

6.4 Summary

Given the direction of travel it is anticipated HBIC should be able to cover all its costs by 2018-19 and as a minimum will cover all salaries and at least 80% of corporate overheads by the end of the Business Plan period, with any shortfall being drawn from the surplus that has built up over the previous years. This forecast is dependant on:

- All partners continuing with their SLAs including the 3% increase per year
- A continued modest increase in income from data requests and external projects
- HCC ETE continuing to meet costs of direct delivery to ETE

6.5 Contingency plan in the event of reduced funding

Most Partners with 3 year Service Level Agreements are required to give six months notice before withdrawing from their SLA. In the event of a drop in funding from any of the partners (including host) or income from data requests, there will be a period of time to seek out new funding or revisit existing fees before deciding whether or not to reduce staff posts, reduce services or review set-up/host arrangements. HBIC has reached critical mass to provide the required service. Any drop in funding and potential loss in staff will undoubtedly have adverse implications on service delivery for the remaining funding partners and ultimately on the viability of the Centre to continue in its current form.

It would be prudent therefore, given the significant uncertainty around future public finances, particularly with regard to the continued reduction in public funding during 2017-2019, for HBIC to consider alternative delivery models during this Plan period.

APPENDIX 1: External Income projected for 2015-16

Partner	Field Survey/ write up days ¹	Hours (data requests, screening planning lists, SINC evaluation, survey organisation) plus GIS datasets	Fee ⁴
Basingstoke/Deane Borough Council	26	145	
East Hants District Council	28	190	
Eastleigh Borough Council	10	75	
Fareham Borough Council	14	95	
Gosport Borough Council	8	65	
Hampshire & Isle of Wight WT	15	85	
Hampshire County Council - C'side	15	75	
Hart District Council	20	95	
Havant Borough Council	14	95	
New Forest District Council	14	105	
New Forest National Park Authority	14	125	
Portsmouth City Council	6	35	
Rushmoor Borough Council	10	45	
South Downs National Park Authority	-	80hr + 10 days ²	
SDNPA (West Sussex) SLA - management			
Southampton City Council	10	60	
Test Valley Borough Council	28	185	
Winchester City Council	28	215	
Natural England	-	GIS datasets+20 hrs	
Environment Agency	-	GIS datasets + 37 hours	
Forestry Commission (New Forest)	-	GIS datasets+5 hrs	
Southern Water	-	GIS datasets+5 hrs	
Wessex Water	-	GIS datasets+5 hrs	
Portsmouth Water	-	GIS Datasets + 5hrs	
Thames Water	-	SINCS GIS +5hrs	
Sub Total	260 days	1,926 hours	£126,630
Hampshire County Council - ETE	20	270	In-kind ³
Spare survey capacity @ £285/day	60	150	£17,100
Total	340	2,346 hours	

¹ Field survey is based on 2 full-time field ecologists working c170 days/year each on habitat survey (50%) and write-up (50%)

⁴ Figures available on request

² 10 days = time spent on data integration across the South Downs National Park

³ Reflects the 0.7 FTE mixed grade direct delivery to ETE

APPENDIX 2: Policies & Procedures

The written policies, agreements and procedures held by the Centre require updating and should align with the ALERC accreditation criteria (Appendix 3). They include (not exhaustive):

1 Organisation

- ◇ A Memorandum of Understanding setting out roles and responsibilities of partner organisations
- ◇ Staffing structure + role profiles
- ◇ Pay policy*
- ◇ Equal opportunity policy*
- ◇ Health & Safety policy including lone working*
- ◇ Training policy - to cover staff, volunteers and recorders

2 Data Collection and exchange

- ◇ Data Collection policy (including geographic and taxonomic scope of collection)
- ◇ Fieldwork and survey policy
- ◇ Definition of sites
- ◇ Data Ownership and Confidentiality policy
- ◇ Data transfer/exchange procedures & agreements

3 Data Supply

- ◇ Metadata
- ◇ Data Supply and Services to be provided
- ◇ Data Access Policy
- ◇ Charging Policy
- ◇ Privacy Policy

4 Data Management

- ◇ Data Management policy
- ◇ Data Standards (Reference to NBN model, taxon and habitat dictionaries)
- ◇ Data validation procedures
- ◇ Data entry procedures - paper & computer systems
- ◇ Data update and maintenance procedures
- ◇ Data version control procedures (internal and supply)
- ◇ Data security procedures
- ◇ Working manuals for paper and computerised systems

5 Quality Assurance

- ◇ Quality Assurance Policy
- ◇ Document control and product identification

6 Disaster Recovery/Succession Plan – including re-distribution of data and assets in event of closure

* = Policy of the host/Lead Partner, Hampshire County Council

APPENDIX 3: Accreditation Criteria

Natural England, working closely with the Association of Local Environmental Records Centres (ALERC), commissioned the development of an Accreditation System for Local Records Centres across the UK. The project ran over the period February to August 2010 and included consultation workshops at the ALERC conference in Birmingham in April, followed by wider consultation in May/June 2010.

The aims of LRC Accreditation are to identify a minimum level of standards, to build confidence in LRCs as bodies which hold biodiversity information in trust for society and manage public resources well. Specifically, the system:

- Provides a set of objective criteria against which LRC operation can be assessed to demonstrate that it is effective and efficient.
- Outlines core levels of products and services that an LRC should provide to assist key users.
- Ensures the LRC is actively working with data holders to improve the availability and quality of data.
- Provides guidance and examples of best practice to assist LRCs in their application.
- Recognises the existing range of business models that LRCs operate under.

The criteria have been tested and several LRCs have now successfully completed the process.

Criteria :

Organisation fundamentals

1. The LRC is Stakeholder led.
2. Engaged stakeholders, as a minimum include, local authorities, statutory agencies, conservation NGOs and voluntary recorders.
3. Impartiality is demonstrated in its constitution and policies.
4. The LRC complies with all relevant legislation and regulations
5. The LRC has the legal status to be able to enter contractual agreements, either as an independent incorporated body or a part of a larger organisation.
6. The LRC is accountable and transparent for its business and financial performance.
7. The terrestrial area covered does not overlap with any other LRC.
8. The LRC proactively engages with its users and providers.
9. The LRC employs sufficient staff, including a manager or equivalent, to maintain efficient and effective service to its users and providers.
10. The LRC is a Process Orientated Organisation
 - 10.1 The LRC has documented procedures for its routine processes
 - 10.2 Tasks, responsibilities and authority of individuals are known
 - 10.3 All staff undertake continuing professional development

Data Custodianship

11. The LRC manages species and habitat data for its area.
12. The LRC is responsible for datasets custodianship, and management of dataset copies, by agreement with its partners and data providers.
13. In its custodianship responsibilities, the LRC observes the Data Exchange Principles of the National Biodiversity Network.

14. The LRC ensures quality control of its species and habitat data through validation and verification systems.
15. The LRC acts as a secure archive for the data in its care in perpetuity.

Products and Services

16. The LRC offers a basic suite of products and services to its users, defined as follows
 - 16.1 Geospatial data search of a project area showing statutory and non-statutory sites and recorded BAP/ legally protected species
 - 16.2 Geospatial data search of a project area showing recorded habitats
 - 16.3 List of all recorded BAP priority and legally protected species in a defined area
 - 16.4 List of all recorded BAP priority habitats in a defined area
 - 16.5 Records distribution map of any recorded species for area
 - 16.6 Statistics and commentary on coverage, currency, accuracy and precision of species and habitat records

In delivering these products and services, the following standards are met:

17. Species

- 17.1 Species reporting naming conforms to NBN Species Dictionary, while retaining recorded name
- 17.2 Records are available at variable precision spatially, but held electronically at most geographically precise level recorded
- 17.3 Records are linked with a source

18. Habitats

- 18.1 Habitat reporting includes Habitats in GIS, while retaining original records in any classification recognised by the NBN Habitats Dictionary
- 18.2 Habitats are mapped in GIS following recognised mapping standards
- 18.3 Habitat records are available at variable precision, having been digitised at the most geographically precise level available
- 18.4 Records are linked with a source

19. Sites

- 19.1 The LRC holds and reports on a current copy of the Local Wildlife Sites (Local Nature Conservation Sites in Scotland) boundaries and short descriptions for its area.
- 19.2 If the LRC is the agreed custodian of the Local Wildlife Site (Local Nature Conservation Sites in Scotland) dataset for its area, it complies with the principal national guidelines for Local Wildlife Sites Systems.
- 19.3 If the LRC is the agreed custodian of the Local Geological Site dataset for its area, it complies with the principal national guidelines for Local Geological Sites. (not applicable to Scotland)

20. **The LRC** promotes and supports high quality species and habitat recording