

# THE HAMPSHIRE BIODIVERSITY INFORMATION CENTRE

## BUSINESS PLAN 2008 – 2011



[www.hants.gov.uk/biodiversity/hbic](http://www.hants.gov.uk/biodiversity/hbic)



**PURPOSE OF THE PLAN**

- To guide the future running of the Centre between April 2008 and March 2011
- To set out the management structure and operational framework for the Centre
- To set out the work programme of the Centre for the next three years
- To aid communication with Partners & other stakeholders; data suppliers, users etc.
- To demonstrate the viability and continuing long term financial security of the Centre
- To continue to seek external funding and encourage new partners to enter into Service Level Agreements and Data Exchange Agreements.

**The Hampshire Biodiversity Information Centre is grateful for the support, funding and data received from the following organisations :**

Basingstoke & Deane Borough Council  
Botanical Society of the British Isles  
British Dragonfly Society  
Butterfly Conservation  
East Hampshire District Council  
Eastleigh Borough Council  
Natural England  
Environment Agency (Southern, Thames & Wessex)  
Fareham Borough Council,  
Gosport Borough Council  
Hampshire Amphibian & Reptile Group  
Hampshire Bat Group  
Hampshire County Council Environment Department  
Hampshire County Council Countryside Service  
Hampshire County Council 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  
Rushmoor Borough Council  
Southampton City Council  
Southern Water  
Test Valley Borough Council  
Wessex Water  
Winchester City Council

HBIC particularly wishes to acknowledge the support and time given by members and officers of the above organisations, especially the voluntary groups, not only on the Strategic Management Group but also at Advisory Group meetings, HLF sub-group meetings and the annual HBIC Recorders Forum.

## FOREWORD

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Although the Business Plan is forward looking it is useful to reflect on the achievements of the Hampshire Biodiversity Information Centre over the past six years since its establishment in order to demonstrate how far it has developed in terms of its work programme and service delivery.

Local biological records centres differ widely, not only in their structure, size, hosting arrangements and funding, 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 2002-2008 period provides an overview of its primary areas of work and service delivery.

HBIC has been able to establish and maintain **Service Level Agreements** with 22 funding partners.

On behalf of those funding partners it has :

- ❑ Carried out **detailed ecological surveys** of **2,173 sites**, using in-house field ecologists and the occasional consultant ecologist.
- ❑ Re-evaluated over **1000** existing **Sites of Importance for Nature Conservation** and identified a further **403** SINC's from a review of the surveys carried out during that period– bringing the total number of SINC's in Hampshire to 3,753 - for which HBIC has responsibility for monitoring & reviewing.
- ❑ Maintained and updated (daily) a detailed and seamless GIS **habitat/landuse map** of Hampshire from which most of the UK **BAP Priority habitats** can be extracted. This map contains **80,080** habitat polygons
- ❑ Handled over **2,400 detailed data enquiries**, from consultants, developers, land managers, local groups, student etc., bringing in an income of over £50,000 to contribute towards the costs of staff time spent.
- ❑ Migrated to the **Recorder 6** database which now holds details of over **521,346 species records** and **27,947 habitat observations** from over **9000** site surveys carried out between 1979 and 2008
- ❑ Obtained the agreement of the species recording groups) to hold copies of their data on **MapMate**, covering an additional **1,532,515** species records of which **246,687** are deemed **notable species records**.
- ❑ Have held a successful **HBIC Annual Recorders Forum** for six years running and contributed to a number of **workshops, training days, conferences** and other meetings benefiting recording groups, landowners, countryside staff, community groups and the wider public.
- ❑ Ensured all HBIC staff are members of the **Institute of Ecology & Environmental Management**

Nicky Court  
HBIC Centre Manager

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## 1. OVERVIEW

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Hampshire is an county of great biodiversity interest with more than twenty one per cent of its area covered by some form of nature conservation designation.

There is an increasing body of UK and European legislation and planning guidance that requires local authorities and other organisations to take account of biodiversity in order to fulfil a range of statutory and non-statutory duties, the most recent being the Natural Environment and Rural Communities Act 2006 which places a 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 guidance aimed at the needs of local authorities. It provides advice on different activities and functions of public sector organisations and includes case studies which illustrate what organisations can do to have regard to biodiversity. Supporting LRCs 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.

The Hampshire Biodiversity Action Plan (1998) recommended '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 formal Partnership comprising those organisations supplying additional essential funding and vital data. A Partnership Agreement gives legal status to the Partnership and defines the roles and responsibilities of the Partners. The Centre is managed by a Strategic Management Group (SMG) representing the key Partners. SMG has the task of setting the overall aims and priorities of the Centre and agreeing the Business plan

Hampshire is fortunate in that there are many 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 to be gained from a partnership approach to maintaining & supporting HBIC include; economies of scale, a 'one-stop shop', improved data acquisition, reduced duplication of effort, greater availability of data that can be used many times by many different audiences, a wider range of products, an improved service to users, and ultimately, more informed decision-making leading to greater protection and conservation of Hampshire's rich wildlife.

The minimum staffing level for the Centre has been set at 7.5 full-time equivalents and continues at this level, with the help of a number of valuable volunteers, mainly students & graduates requiring work experience, and casual employees & contractors where additional funding allows.

The Centre acts as a 'node' within the National Biodiversity Network ([www.nbn.org.uk](http://www.nbn.org.uk)). The NBN has become an important means of gaining access to nationally held data and it is important that locally held data about wildlife in Hampshire is also made available in this way. HBIC regards data accessibility over the internet as a high priority over the next 3 years.

## 2. CONTEXT

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### 2.1 The National Biodiversity Network

One of the recommendations of the 1995 UK Steering Group Report on Biodiversity was to establish a national network of local biological records centres which would be linked to nationally held databases and be called the National Biodiversity Network (NBN).

The Report recommended that the development of each local records centre would be best achieved through the establishment of a consortium, led by those organisations already involved, and that the 'whole-hearted co-operation' of local authorities would be essential because of their need for biodiversity information for planning and other purposes. A national network is now nearing completion and can be viewed at <http://www.nbn-nfbr.org.uk/nbn.php>

### 2.2 Local biodiversity data needs

There is a large body of UK and European legislation and planning guidance that requires local authorities and government agencies to take account of habitats and species in order to fulfil a range of statutory and non-statutory duties; including preparing local development frameworks, assessing planning applications, designating and monitoring SACs, SPAs, SSSIs & SINCs, guiding habitat management work, evaluating 'important' hedgerows etc. It is essential therefore that good quality, up-to-date and comprehensive biodiversity data is available to inform this work.

**Planning Policy Statement 9 on Biodiversity & Geological Conservation 2005 : Key Principle One** states that: Plan policies and planning decisions should be based upon up-to-date information about the environmental characteristics of their areas. These characteristics should include the relevant biodiversity and geological resources of the area. In seeking to keep environmental characteristics under review local authorities should assess the potential to sustain and enhance those resources.

**Planning Policy Statement 12 : Local Development Frameworks** states that : The policies prepared by the local planning authority should be founded on a thorough understanding of the needs of their area and the opportunities and constraints which operate within that area. Local planning authorities should prepare and maintain an up-to-date information base on key aspects of the social, economic and environmental characteristics of their area, to enable the preparation of a sound spatial plan meeting the objectives of sustainable development. Local planning authorities are required to keep under review the following matters: i.e. the principal physical, economic, social and environmental characteristics of their area

**The Hampshire Biodiversity Action Plan** states that : The collection of data on habitats and species is fundamental to the development and implementation of a local biodiversity action plan

**Environmental Stewardship** - this agri-environmental Scheme requires all landowners wishing to enter the Scheme to prepare a Farm Environment Record or Plan which identifies the important environmental features on their farm. Information on important habitats and species held by HBIC is essential to ensuring that the scheme targets the right areas for maximum benefit to wildlife.

### 2.3 Strengths and weaknesses of HBIC

Most of the functions expected of a local biological records centre are now being carried out by HBIC, in partnership with a number of well established & successful species recording groups. One of the great strengths of the Hampshire network is the large scale involvement of so many local naturalists involved in collecting, validating & digitising their own data, much of which is now being made available to HBIC through data exchange agreements, enabling HBIC to act as

a one-stop-shop in responding to a data requests, particularly on planning and land management issues.

**Strengths** - the most encouraging features are:

- ❑ The degree of involvement and level of financial support coming from Hampshire County Council, the District, Unitary and National park Authorities, the Hampshire Wildlife Trust, Natural England and the Environment Agency.
- ❑ The strong contributions that the many species groups make to recording biodiversity in Hampshire; birds, vascular plants, mammals, amphibians & reptiles, butterflies & moths, dragonflies and many other invertebrate groups.
- ❑ The ever improving baseline of data to work from and the many valuable products that are derived from these datasets (e.g. habitat maps, atlases and reports)
- ❑ The strong rapport between the organisations, groups and individuals that create the main network and a willingness for individuals to cooperate with each other. HBIC now organise regular meetings of the (Data) Users Advisory Group and the Recorders Forum, to seek the views of both recorders and data users.
- ❑ The way in which important projects such as the Hampshire Biodiversity Action Plan have been tackled through successful partnerships.

**Weaknesses** -the major weaknesses in the current system are:

- ❑ Some datasets held at the local level are still not available for HBIC to use, either because data has not been digitised or the datasets are incompatible with Recorder or MapMate, making it difficult to exchange or import data, or because of concerns over loss of income, control etc. This can make it difficult to fully audit & check for any individual enquiry or project without forwarding enquirers on to other data holders. Many data requesters do not have the time to follow these up, leading to a real concern that some important species are still being lost through lack of knowledge of what's on a site. HBIC is overcoming this by holding datasets from the species recording groups on MapMate, and using the GIS to hold & display the notable species for data searches. The data exchange agreements cover exactly what uses can be made of the data by HBIC and data requesters, and talks are on-going with several groups, particularly those who are concerned about loss of income from dealing with data enquiries themselves
- ❑ There are also many datasets held at the national level where the mechanics of dataflow are such that records are bypassing local 'nodes'. Where these datasets are available via the NBN Gateway at a 'public' resolution of 10km<sup>2</sup> then it is possible via a password to receive permission from the data custodian to access and download the data at the original resolution it was collected at.
- ❑ One final weakness is the insecurity of yearly funding from the majority of the funding partners, making it difficult to plan ahead long term. Several posts within HBIC have to be kept on temporary contracts which is far from satisfactory. The 3-year SLAs help to some extent in that they have a one year's notice of withdrawal.

### 3 AIMS & OBJECTIVES OF THE CENTRE

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**3.1 The definition of a local biological records centre** , as defined by the National Federation for Biological Recording (NFBR) and agreed by the National Biodiversity Network Trust in February 2004 is as follows:

“A Local Records Centre is a not-for-profit service run in partnership for the public benefit, which collects, collates, manages and disseminates information of known quality relating to the wildlife, wildlife sites<sup>1</sup> and habitats for a defined geographical area”.

**3.2 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’

**3.3 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 Strategic Management Group, and should be independent from the undue influence of any one partner
- ❑ is a non-profit making, service-providing business, accountable to the Strategic Management Group
- ❑ acts as an independent and impartial source of biological data
- ❑ conform 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

### 3.4 Functions

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

- ❑ act as a focus for biological records management in the area (with a view to including earth science records in the future)
- ❑ act as a contact point for access to datasets by local and national users

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<sup>1</sup> The use of the term “wildlife sites” here is NOT restricted to sites of recognised nature conservation importance

- ❑ 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 biological datasets
- ❑ make data available to all those that require it including local authorities, government and non-government bodies, consultants, educational establishments 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
- ❑ ensure the Centre meets the criteria established for accreditation within the NBN (e.g. comply with standards for data management and access)

A more complete list of functions, as agreed with the NBN Trust, is set out in Appendix 5. Those functions which the Centre is already achieving or working towards are highlighted by a symbol in the 3<sup>rd</sup> column.

## 4. KEY ELEMENTS OF THE CENTRE

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### 4.1 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 Partner is defined as an organisation, group or individual who contributes essential services, funding and/or useful data to the Centre set through Service Level Agreements and/or Data Exchange Agreements.

A Partnership Agreement has been drawn up which gives legal status to the HBIC Partnership and defines the roles and responsibilities of the Partners. The Partnership includes many of those organisations listed on Page 2.

### 4.2 The Management Framework

The management framework is as follows :

- ❑ HBIC is hosted by Hampshire County Council (Lead Partner), via the Environment Department and delegates certain powers to a Strategic Management Group who have the task of setting the overall aims and priorities of the Centre
- ❑ The Centre Manager is accountable to the Strategic Management Group for delivering the services of the Centre but reports to the HCC County Ecologist for administrative and line management support.
- ❑ Advisory groups for recorders and users have been set up to provide a mechanism for them to give 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.

See Figure 1 overleaf.

#### Roles and Responsibilities

### 4.2a The host, Hampshire County Council

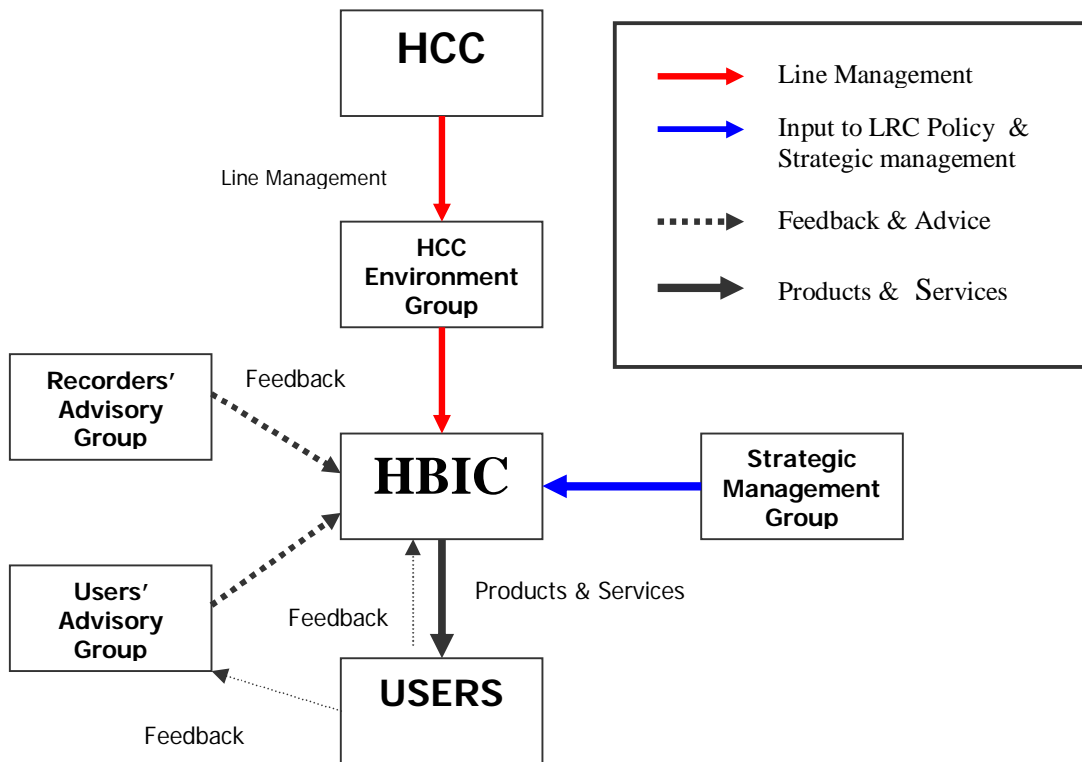
Hampshire County Council will:

- ❑ Continue to employ the Centre staff. Staff are therefore covered by HCC's terms and conditions of employment. It is also possible that staff may be seconded from other organisations from time to time. Support from HCC will include 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 such as H&S and IT.
- ❑ Continue to provide office space, services and equipment, although some of it may be charged to the HBIC Holding Account, as set out in Section 6 Financial Information.
- ❑ Continue to provide IT technical support for the maintenance of the database, GIS & web pages, in accordance with HCC IT protocols and NBN standards. Any development work will be subject to the usual bids for internal funding, and any external funding.

- Provide line management and administrative support to the Centre Manager. This will include the carrying out of Individual Performance Appraisals (IPPs) with feedback sought from the Strategic Management Group

Figure 1

The Management Framework



#### 4.2b The Strategic Management Group

The Strategic Management Group comprises up to 12 representatives drawn from the Partnership as follows :

- HCC Environment Department (1),
- HCC Museums Service (1),
- District Councils/Unitary Authorities (2-3),
- New Forest National Park Authority (1)
- Natural England (1),
- Hampshire & Isle of Wight Wildlife Trust (1),
- Environment Agency (Southern Region) (1),
- Hampshire Ornithological Society (1)
- Butterfly Conservation (Hampshire Branch) (1)
- Botanical Society of the British Isles (1).

The Group meets three times a year and the Chair changes annually as agreed by the Group. The Centre Manager is not part of the Strategic Management Group but reports to the Group.

Each members of SMG is a Partner and should have an Agreement with the Centre, as described in 4.1. Each organisation selects its own representative on SMG although the 3 District/Unitary Council representatives on SMG need to represent the views of all District and Unitary Councils, and therefore rotate yearly so that each Authority is represented on SMG once every three-four years. All local Authorities with service level agreements with HBIC are also represented on a separate Users Advisory Group.

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

**The remit of the Strategic Management Group is to :**

- ❑ Draw up and administer (where relevant to SMG) the Partnership Agreement which gives legal status to the Partnership and defines the roles and responsibilities of the Partners
- ❑ Agree the Business Plan for the Centre to cover the period 2008-2011
- ❑ Support the Centre Manager in securing finances for the period 2008-2011 through service level agreements and a HLF bid.
- ❑ In the light of the above & the work programme (Section 6) agree the staff numbers, roles & job descriptions, 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, and HCC policies. See Appendix 4 for list of policies and procedures which the Centre needs to subscribe.
- ❑ Agree data exchange agreements with data custodians and data producers
- ❑ Agree, monitor and develop the Centre's Work Programme for 2008-2011, 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 to become a key node in the Network

**4.2c The Role of the Centre Manager**

The Centre Manager will :

- ❑ Prepare and implement the Centre's Business Plan and Work Programme (including any HLF contract)
- ❑ Service the Strategic Management 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 (the latter jointly with the Hampshire Wildlife Trust)
- ❑ 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 in agreement with the Strategic Management Group.
- ❑ Carry out annual performance appraisals of all staff where job conditions, work performance and personal development (inc. training) are discussed.
- ❑ Liaise closely with the Hampshire Biodiversity Partnership in order to take forward actions relevant to the Centre
- ❑ Apply for and implement NBN accreditation

#### **4.2d The HBIC Users and Recorders Advisory Groups**

Two bodies have been set up to represent the interests and needs of the key 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 Strategic Management Group.

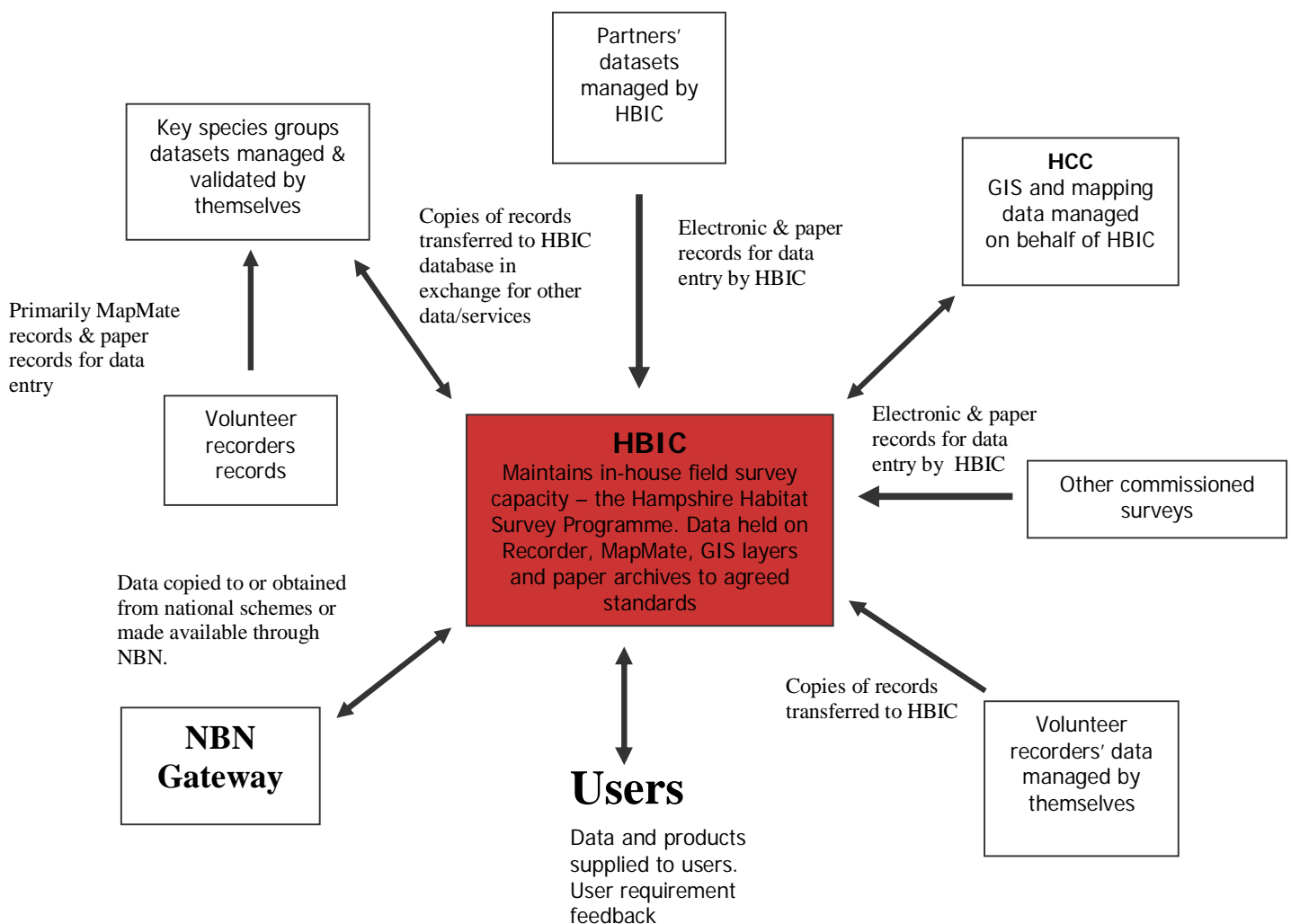
The HBIC Users Advisory Group comprises all those organisations with service level agreements with the Centre. The Group meets twice a year to enable them to track progress of the agreements and have a say on the Centre work programme, policies, priorities etc.

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. This Group is run in association with HWT and their species recording networks. It meets in the Autumn to discuss Centre policies, data exchange agreements, software needs, work programmes, data flow etc. and again in the Spring, as a much wider "Forum" open to all, to promote the activities of recorders needs, to share experiences and ideas.

#### **4.3 The Operational Framework**

Firstly, it must be emphasised that the Hampshire Biodiversity Information Centre is not the sole manager of biological data in the County. There are a number of well established recording groups/individuals (data custodians) who continue to own & manage large datasets usually on behalf of their recorders; including the Hampshire & Isle of Wight Wildlife Trust, the Hampshire Ornithological Society The Hampshire Branch of Butterfly Conservation, Hampshire Mammal Group, Hampshire Amphibian & Reptile Group, Hampshire Bat Group etc. Through agreed data exchange agreements these groups have been invited to pass non-editable copies of their data to HBIC on a regular basis in exchange for services & data from HBIC and to enable their data to be used to further conservation in Hampshire.

Figure 2 The relationship between data custodians, suppliers and users and HBIC :



The following applies to the operational model :

- ❑ HBIC manages two main databases (Recorder 6 and MapMate) and provides data entry and data management services to partners for data collected by partners or by HBIC on behalf of partners. It also services the data and information requirements of many of the partner organisations. These services are set and funded through Service Level Agreements which incorporate both NBN and locally agreed standards and policies.
- ❑ HBIC also services the data and information requirements of many other data requesters, working to a set of agreed standards and policies covering access and charging
- ❑ All Species groups & individuals (data custodians) collecting data within Hampshire are responsible for ensuring the validation of their own datasets before being invited to pass 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 data gathering and data management activities.
- ❑ Where possible records passed to HBIC from volunteer recorders on an *ad hoc* basis are re-directed to the appropriate species groups for validation and input, to prevent duplication of

records on databases.

- ❑ HBIC also maintain various GIS datasets on behalf of the funding partners.
- ❑ The HCC Museums Service provides facilities for the care and preservation of voucher specimens. It also provides 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 Museums Service is included in contracts set by HBIC for species surveys. The services provided by the Museums Service will be set through an agreement with HBIC in return for access to other HBIC services and products and possible additional resources to enhance the service (although this would depend on increased funding through partners and/or HLF or other funding).
- ❑ 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 on SQL Server for its own 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 on GIS (ArcView 9.2) for data searches and for 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.

#### **4.4 Arrangements with stakeholders : Data users and suppliers**

All major stakeholders in the Centre, from local authorities, government agencies through to the voluntary sector, have become partners in the Centre and will have signed up to a Partnership Agreement which gives legal status to the Partnership and enables them to have a say on the running of the Centre. To do this however they must have signed up Service Level Agreements or Data Exchange Agreements with the Centre. Many of the major data users and suppliers are also represented on SMG which oversees the work of the Centre. Those recorders and data users without a physical presence on SMG are able to influence the work of the Centre through the Users & Recorders Advisory Groups.

Key data users entering into Service Level Agreements with the Centre include 15 local authorities (including Hampshire County Council as Lead Partner, and the New Forest National Park Authority), Natural England, Hampshire Wildlife Trust, Environment Agency (Southern, Thames and South West), plus Southern Water & Wessex Water.

HBIC have negotiated Data Exchange Agreements with many of the data-holding organisations including the Hampshire Wildlife Trust & its affiliated species groups; the Hampshire Mammal group and the Hampshire Amphibian & reptile Group, plus the Hampshire Ornithological Society, the Hampshire Branch of Butterfly Conservation and the Botanical Society of the British Isles (for VCs 11 & 12). These agreements involve 'data for data' and/or support in other ways to assist their recording activities. From 2008 twenty per cent of income derived from data requests handled by HBIC will be forwarded to the species groups on a trial basis as an acknowledgement of the valuable contribution their data makes, and to off-set any loss of income they may suffer.

#### **4.5 Staffing**

Together the Centre manager and staff encompass a range of skills including staff management, biological data management, IT, taxonomic expertise and communications. The minimum staffing level for the Centre has been set at 7.5 and this has been maintained over the past six years despite the Centre projected to run at a small loss over that period. The 7.5 staff comprises one manager/ecologist, four ecologists responsible for data collation, entry, validation & evaluation and the servicing of enquiries, 2 full-time field ecologists and one part-time administrative assistant.

Section 6.2 gives an approximate breakdown of the main duties of the Centre staff.

#### 4.6 Funding - See Section 7 and the Appendices for detailed financial projections

The average annual running costs of the Centre now comes to around £240,000 (salaries/travel/training/equipment etc.) with additional 'in-kind' office overheads of c£50,000. 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 and dissemination, and not just the collection of habitat survey data. The actual costs of data management, evaluation and dissemination tend to equal the cost of data collection i.e. habitat survey.

Funding of the Centre is arranged through Service Level Agreements between the Centre and the key data users, with Hampshire County Council funding the salaries & on costs of the Centre Manager, the Senior Ecologist and the Ecologist posts, plus, the full office overheads for the Centre.

SLAs mostly run for three years at a time and, to date, have been based on the costs of maintaining similar pre-2002 levels of habitat survey plus an additional contribution towards data management, interpretation and dissemination. Each Service Level Agreement specifies a number of survey days and number of hours to be spent on data management, interpretation and dissemination for and on behalf of each user body. The Agreement also set out the products required during the year with response times and mechanisms for delivery specified. From 2008/9 it has been agreed that there will be a c15% drop in survey capacity across all funding partners to enable the field ecologists to spend more time on SINC evaluation and condition assessment, and to free up more staff time for greater analysis of data (e.g. Annual Monitoring Reports) and IT development.

The district and unitary authorities have been mostly divided into two main categories according to land area, which equates well to land covered by nature conservation designations. The smaller districts on the whole tend to have a slightly higher than average proportion of land covered by nature conservation designations and face greater pressures for development.

For the first three years the level was set at £6000 per year<sup>2</sup> for the large and predominantly rural districts and £3000 per year for the smaller more urban authorities. It was then agreed that as from 2005/6 this fee would increase by 20% to £7,600 for the larger Districts and £3,800 for the smaller ones, to reduce an increasing deficit arising from salary increments. These levels equated to approximately 85% of the cost of the service specified but did not contribute towards office overheads, management or administration of the Centre, costs of collating other relevant datasets, or time spent on leave, sick or training.

For those organisations not covered by service agreements any request for data will be charged on a 'pay-as-you go' basis to cover reasonable staff costs, similar to any other commercial *ad hoc* user. Requests for new habitat survey will be charged at full economic cost as additional survey capacity may have to be 'bought in'. Such requests will be given lower priority than requests set through service agreements and will be subject to available time.

In the past the Rural Development Service (Defra) have received a limited free service for agri-environment schemes via provision of data to land management advisors who were supported by the County Council (e.g. FWAG), or the Wildlife Trust. With the establishment of Natural England and a substantial increase in funding data will now go to Natural England to support all aspects of its work including agri-environment schemes.

Additional funding needed towards further development costs (particularly for the database

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<sup>2</sup> Plus inflation at 3% for the 2<sup>nd</sup> and 3<sup>rd</sup> years

network, internet gateway, GIS links and other public outreach) will be sought from the County Council, the Heritage Lottery Fund and other funding bodies.

#### **4.7 Accommodation**

HBIC is housed with the Ecology Group within the Environment Department at Hampshire County Council and is temporarily housed at Eastleigh for two years (2007-2009) whilst the Winchester offices are undergoing a major refurbishment. HCC are the employing body and the County Ecologist line-manages the Centre Manager. The data collected and managed by HBIC underpins much of the work of the Department and can be easily accessed by HCC staff. Back-up copies of all data also reside at the Hampshire Wildlife Trust

It is vitally 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 offices in Eastleigh are 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 leaflet, letterhead and website have given 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.

The accommodation itself meets the needs of HBIC and is invaluable as an 'in-kind' contribution from HCC. Other benefits to staying embedded within the County Council include office security, Payroll and IT support

#### **4.8 Information Technology**

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

The Centre is also working with other data custodians and recorders to facilitate in the exchange of data from their databases (predominantly MapMate) to a copy of MapMate held by HBIC in order that data from the species groups can be used by HBIC via GIS for data searches etc.

IT support for database maintenance and access to Hantsnet and other software is carried out by IT Services(HCC) through an agreement with the Environment Department. Each PC also carries an annual lease/service charge which for four of the seven PCs was charged to HBIC. However it has been agreed that in exchange for HBIC financing the travel costs and professional fees for all 7 members of staff (as opposed to just the 4 partnership funded posts) then HCC will carry the cost of all the PCs.

#### **4.8 Legal status**

The HBIC Partnership has legal status of a partnership as defined in the HBIC Partnership Agreement

## 5. PRODUCTS AND SERVICES REQUIRED OF HBIC

### 5.1 Core Products and Services

The services required of the Centre go beyond simply 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 Centre is also able to discharge the duties of its 'public authority' Partners under the Environmental Information Regulations - by making data available to others on their behalf

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

- Provision of original and interpreted (impartial) habitat and species data and other supportive material, on request, for use when making decisions and giving advice, including use in development control, land use planning, land management, and the preparation/ implementation of Biodiversity Action Plans. The presence of UK BAP Priority habitats and species and other notable species is a key factor in all the above.

Data is released in accordance with the Environmental Information Regulations and 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 will seek landowners' permission for surveys of SINCs for monitoring purposes.
- Evaluation of habitat and species data for the identification of Sites of Importance for Nature Conservation (SINCs), in consultation with the relevant bodies. This includes defining notable species for each taxonomic group to underpin the SINC designation on many sites.

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, and draft local development framework documents to highlight any development proposal or allocation 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 polygons, notable species data, surveyed sites etc. HBIC will provide organisations with updated copies of these GIS layers at least once a year.
- 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.

- Support from HBIC for local volunteer recording groups and individuals who provide valuable species data in support of all the above. This will however remain outside the scope of service level agreements with the key data users.

## 5.2 Implementing the Hampshire Biodiversity Action Plan

In addition to the above the Centre plays a key role in the implementation of the Hampshire Biodiversity Action Plan and sits on the HBAP Partnership Steering Group, the HBAP Monitoring & Reporting Group and the HBAP Research Forum.

The most relevant actions which HBIC lead on behalf of the HBAP Partnership have been condensed from all the Action Plans as follows :

<b>DATA MANAGEMENT</b>
Progress the development of a Hampshire Biological Record Centre to service the Hampshire Biodiversity Partnership and individual partners, the Biodiversity Action Plan for Hampshire, and contribute to the National Biodiversity Network
Ensure that all relevant biological data on habitats and species is centralised and incorporated into the Hampshire Biodiversity Information Centre.
Ensure that relevant data from the Hampshire Biodiversity Information Centre is fed into the National Biodiversity Network (NBN)
Develop and maintain databases for the collation of records of priority species in Hampshire.
Promote the Hampshire Biological Record and the proposed Biodiversity Information Centre as the key source of information on the biodiversity of Hampshire
Ensure that data on Hampshire's biodiversity is accessible to schools.
Establish an index identifying sources of surveys, records and information on priority habitats and species, possibly involving a web site.
Produce and update inventories of priority habitats in Hampshire
<b>SITE EVALUATION AND DESIGNATION</b>
Review SINC selection criteria for priority habitats and ensure that these also take account of priority species.
Refine SINC criteria to take account of the particular social value of sites in urban areas.
Ensure that all sites meeting SINC criteria are identified, recorded and listed in local plans or associated schedules.
<b>SURVEY</b>
Continue to undertake detailed habitat survey of Hampshire in support of biodiversity conservation, using the Hampshire Habitat Survey Project
Identify other areas of value or potential value for biodiversity and include these in planning/land management strategies
Encourage, support and co-ordinate a voluntary network of recorders to assist in providing data on biodiversity
Implement a rolling re-survey programme for SINC's at 10 yearly intervals

Undertake survey of priority habitats in Hampshire to establish extent, distribution and condition, with particular regard to arable land, chalk grassland, neutral grassland, wet grassland, standing open water and riverine woodland.
<b>MONITORING</b>
Use the HBIC database for monitoring progress in biodiversity action
Establish a programme to monitor land-use and habitat change using the digitised habitat and land-use mapping of the County as a baseline.
Develop and implement a protocol for and programme of site quality monitoring for all non-statutory sites of importance to nature conservation (SINCs and RIGS)
Design and implement a monitoring scheme to assess favourable condition of priority habitats, in particular lowland wet grassland, lowland calcareous grassland, neutral grassland and standing open water.
Select and monitor 'flagship species' to act as indicators of the success of conservation action.

### 5.3 Reporting and Monitoring the Hampshire Biodiversity Action Plan

The Reporting & Monitoring Group of the Hampshire Biodiversity Partnership Steering Group have produced a simplified system for reporting progress in achieving biodiversity actions. After reviewing the hundreds of actions across all the Action Plans it was agreed that they would be grouped into 4 main themes ; Land Management Planning, Plans & Strategies, Data & Information, and Education, Awareness & Communication, and assimilated into 21 key objectives against which each Partner and Lead Agency can report. Some of the objectives can be measured quantitatively and have been given 'headline indicators'. HBIC are responsible for providing/collecting data for several of the following headline indicators :

Key Objective	Headline Indicator
Ensure all priority habitats & species assemblages not already designated as SSSI are designated as SINCs	% of Hampshire Priority Habitat designated
Develop the Hampshire Biodiversity Information Centre to share data and make more widely available	Number of data exchange agreements in force
Encourage and support a voluntary network of recorders and recording groups	Numbers of recorders providing data
Survey/monitor extent & condition of key habitats and species	Amount of Priority habitat surveyed each year. % SINCs in active management No. of species records collected

## 6. WORK PROGRAMME

**6.1** The work programme of the Hampshire Biodiversity Information Centre covers the period 2008 - 2011 and is set out below. The main differences compared to the 2005-2008 period is slightly less field survey (& therefore data entry, evaluation and other associated activities) and a greater focus on special projects & data collation from other sources, to deliver an increased range of products to data user; such as opportunity mapping, biodiversity monitoring, increased range of notable species data etc., alongside more efficient IT delivery. The work programme also delivers many of the actions within the Hampshire Biodiversity Action Plan, the County Council's Corporate Biodiversity Action Plan, and other local BAPs.

Activity	Responsibility of:	Timescale Milestone	Additional funding?	Priority
<b>Management &amp; development of HBIC</b>				
1. Produce new Business Plan every three years and review annually	HBIC Manager in consultation with SMG & HBIC staff	May 2008	No	Core - High
2. Secure finances for 2008-11	HBIC Manager in consultation with funding partners	May 2008	Yes – Pay Review costs	Core - High
3. Revise & renew Service Level Agreements	HBIC Manager in consult. with SMG/UAG	May 2008	3% per annum	Core - High
4. Service & Report to the Strategic Management Group	HBIC Manager	3 times/yr	No	Core - High
5. Service & report to the HBIC Users Advisory Group	HBIC Manager	May & Oct of each year	No	Core - High
6. Continue to prepare & review policies & agreements as set out in Appendix 4	HBIC Manager in consultation with SMG & HBIC staff	On-going	No	Core - High
7. Continue to develop HBIC's services & profile to attract new partners & clients, and encourage more people to make use of it's services	HBIC Staff	On-going Plus HLF Project	No	Core - High
8. Continue to maintain & develop a web-site presence. See also task 40	HBIC staff in consultation with SMG	On-going & HLF project	Part of full HLF bid	Core - High
9. Continue to provide work experience for students and volunteers	HBIC staff	On-going	No	Core - Med
10. Produce 3 year Report 2005-8	HBIC Manager & staff	July 2008	No	Core - Med
11. Specifically, bid for projects, to attract new funding.	HBIC Staff	£5-20K per year	Yes – external funds	High
12. Develop network of contacts able to backfill centre staff, enabling greater opportunity to undertake external projects to utilise and develop staff skills	HBIC staff	On-going	No	Medium

<b>New Initiatives</b>				
13. Identify areas of opportunity to restore habitat networks – to feed into LDFs, BAP and land management projects	HBIC Manager & staff – with Partners & possibly consultants	Mid-2008	Funding from NE & HCC available, possibly others	High
14. Using the HLF funded Audience Development plan & IT Development plan prepare a full bid to the HLF. Implement if successful	HBIC Manager, HWT, HOS, BC, BSBI and Museums Service in consultation with rest of SMG	By April 2008  Full Project 2009-2011	Bid to HCC for match funding plus in-kind from vol. groups	High
15. Undertake an IT Integration review to identify and develop solutions for increased IT efficiency and more integrated working practices	HBIC Senior Ecologist in consultation with HBIC, Ecology Group & IT Services	By April 2008	Yes – Ecology Group & EnvIT budgets	High
16. Develop further a suite of core biodiversity indicators in line with UK & Local BAP reporting and UK/Local performance measures	HBIC staff in consultation with HBIC & Hants BAP Partnerships	2008-9	No	High
17. Produce a 5 yearly State of Biodiversity Report for Hampshire 2006-11	HBIC staff with co-operation of BAP/HBIC Partnerships	2011	Yes	High
18. Develop further and promote condition assessment methodology for SINC. Integrate with survey programme	HBIC staff in consultation with specialists	2008-9	Yes	Medium
19. Develop a 'package' of information for landowners for Environmental Stewardship	HBIC staff in liaison with Natural England	2006-9	Defra funding or standard fee to landowners	Low
<b>Working with Recorders</b>				
20. Service & maintain the HBIC Recorders Advisory Forum	HBIC Manager and HWT	Autumn of each year	No	Core - High
21. Organise the Annual HBIC Recorders Forum	HBIC staff working with HWT	March of each year	Yes - to cover catering	Core - High
22. Continue the process of setting up Data Exchange Agreements with key data custodians.	HBIC staff	On-going	Help may be needed digitising data	Core - High
23. Manage data flow and collation of species data in Hampshire	HBIC Staff in consultation with recording groups	On-going	Ditto	Core - High
24. Assist recording groups with database development compatible with MapMate and national requirements	HBIC staff and recording groups	On-going	Yes (will form part of full HLF bid)	High

25. Work with the local recording groups to establish mechanisms for obtaining copies of relevant datasets held nationally (possibly via NBN Gateway)	HBIC staff and recording groups	On-going	No	Medium
<b>Key Products &amp; Outputs</b>				
26. Co-ordinate and maintain a programme of field survey & monitoring to meet needs of funding partners	HBIC staff	On-going	No	Core- High
27. Maintain & develop the SINCS system of evaluation and notification, and provide an updated GIS layer to funding partners at least twice a year	HBIC staff with HCC, EN, HWT & LAs	On-going	No	Core - High
28. Continue process of drawing up notable species lists for the key groups. Maintain a GIS layer and provide annually to funding partners	HBIC Senior Ecologist in consultation with species groups	On-going	No -may want to print a Hants Red Data Book	Core - High
29. Complete & maintain the mapping of UK BAP Priority habitats on the GIS using IHS, and provide GIS layer annually to funding Partners, and regional partners	HBIC Staff	On-going	Yes – may need to employ casual staff to refine data	Core- High
30. Provide data and information to all who require it, subject to access and charging policies. Look to expand depth and range of products to meet the needs of the various audiences.	HBIC Staff	On-going	No	Core - High
31. Maintain input & validation of data coming in	HBIC staff	On-going	No	Core - High
32. Produce biodiversity element of Annual Monitoring Report to all funding local authorities	HBIC staff	On-going	No	Core - High
33. Review & update SINC criteria inc species assemblages & thresholds	HBIC Manager in consultation with all partners/sp. groups	By end of 2008	No	High
<b>On-going planning related activities</b>				
34. Advise on planning lists where they might impact on SINCS, SSSIs, notable species etc	HBIC staff	On-going	No	Core - High
35. Provide input into the Regional Plan, Sub-regional strategies & the SE England Biodiversity Forum	HBIC Manager & staff	On-going	No	Core - High
36. Provide input (inc. written statements, advice on allocations etc. into local development frameworks	HBIC Manager & staff	On-going	No	Core - High

37. Provide input into Biodiversity Checklist and monitor impact on workloads. Explore BioPlan	HBIC Manager & staff	During 2008	No	Medium
<b>IT Development work – see also task 15</b>				
38. Continue to upgrade/develop Recorder to meet the needs of HBIC	HBIC staff & JNCC	On-going	Yes – for any new changes	Core - High
39. Manage & develop the SINC Landownership database as part of a larger project to manage 'Sites' and 'Contacts' in a more integrated way see task 15	HBIC staff	By end of 2008	No	High
40. Develop the HBIC website along the lines recommended in the IT Development Plan to make information more widely available and to facilitate data sharing/signposting with the species groups, and greater online recording.	HBIC staff, the recording groups, IT Services and consultants	2008-2011	Part of full HLF bid & HCC egov. targets	High
41. Develop HBIC as part of the NBN, providing selected data to the Gateway & signposting to HBIC & species group websites	HBIC Manager in consultation with SMG, & assistance from the NBN Gateway Team	Part of IT work planned in HLF bid	Yes - may need to bid for funds/will form part of HLF bid.	High

6.2 **Staff duties and projected allocation of tasks for 2008-11** (assumes c15% drop in survey capacity to accommodate more work on data collation & products, and special projects)

Post	Primary tasks	2005-2008 % Time	2008-2011 %Time
Centre Manager	Management & development of the Centre	70	<b>50</b>
	SINCs/LDFs/Regional/National work	5	<b>10</b>
	Data output, analysis & reporting (inc. BAP)	5	<b>10</b>
	Special projects (inc. HLF)	-	<b>10</b>
	Leave, professional development, organisation etc.	20	<b>20</b>
Senior Ecologist (& IT)	Development work/Special projects	5	<b>25</b>
	IT Development work	-	<b>30</b>
	Data collation/working with recorders	10	<b>5</b>
	SINCs – development work – e.g. criteria	50	-
	Hedgerow Regs & other survey	5	-
	Data output, analysis & research (inc. BAP )	5	<b>15</b>
	Supervision of data management staff	-	<b>5</b>
	Road Verge Project (survey & monitoring)	5	-
	Leave, professional development, organisation etc.	20	<b>20</b>
Ecologist (Survey Prog.)	Co-ordinate Survey Programme	50	<b>45</b>
	Evaluate SINCs, update layer/database & notify owners		<b>25</b>
	Data Output	20	<b>5</b>
	Data entry/validation	5	-
	Policy and development work/projects	3	<b>5</b>
	Leave, professional development, organisation etc.	20	<b>20</b>
Field Ecologists (x2)	Field Survey & Condition Assessment	40	<b>35x2</b>
	Organisation of survey	5	<b>5x2</b>
	Write-up/Data entry	35	<b>35x2</b>
	SINC evaluation		<b>5x2</b>
	Leave, professional development, organisation etc	20	<b>20x2</b>
Assistant Ecologist	Data entry/validation/GIS-IHS/supervising volunteers	45	<b>25</b>
	Data analysis/output inc. BAP & Planning lists	25	<b>35</b>
	Data collation/outreach - Recorders	5	<b>10</b>
	IT/IHS development work		<b>3</b>
	Promotional work (web/forum/newsletter)	3	<b>5</b>
	Hedgerow Regs & other survey	2	<b>2</b>
	Leave, professional development, organisation etc	20	<b>20</b>
Assistant Ecologist	Data entry/validation/GIS/supervising volunteers	45	<b>20</b>
	Data analysis/output inc. BAP & Planning lists	25	<b>35</b>
	IT Development Work	3	<b>3</b>
	Data collation/outreach - Recorders	5	<b>20</b>
	Hedgerow Regs.& other survey	2	<b>2</b>
	Leave, professional development, organisation etc	20	<b>20</b>
Admin. Assist. 0.5	Administrative support & routine GIS support	40	<b>40</b>
	Leave, professional development, organisation etc	10	<b>10</b>

## 6.3 BREAKDOWN BY TASK :

Task	% FTE 2005-8	% FTE 2008-11	Explanation for change
Management & development of Centre & managing staff	80%	60%	Projects such as HLF previously hidden in here
Special Projects	0%	35%	Not previously accounted for plus to be increased
Review of SINC s & planning work	55%	45%	Fewer sites surveyed & more efficient use of time, using field ecologists
Data output/analysis etc.	80%	100%	More 'products' & analysis required
Field Survey & write up	160%	140%	Fewer sites (15% decrease)
Hedgerow Survey & other survey	5%	5%	Unchanged ('office' staff)
Survey programme (organisation)	60%	55%	Slightly fewer sites
Data entry/validation/GIS/supervising volunteers <sup>3</sup>	95%	45%	Fewer sites plus bulk of new data entered by field ecologists as part of write-up. More focus on supervising volunteers, validation & habitat layer
IT Development work		35%	More focus on this as a separate area of work instead of hidden within 'HBIC development'
Data collation/outreach/working with Recorders	20%	35%	Need to work more closely supporting Recording Groups on data exchange
Promotional Work		5%	More time spent on website, newsletter, forum etc.
Road Verge Project	5%	0%	Project passed to Ecology Group
Administrative Support	40%	40%	Unchanged whilst funding allows
Leave, professional development, organisation etc.	150%	150%	Unchanged
Total (7.5 FTE)	750%	750%	

<sup>3</sup> % also carried out by volunteers equivalent to 20% FTE

## 7. FINANCIAL PROJECTIONS

The following financial projections cover a new three year period starting on 1<sup>st</sup> April 2008 and ending on the 31<sup>st</sup> March 2011. The financial year 2007-2008 accounts are also shown for completeness. All costs have been rounded up to the nearest £1 and the assumptions upon which the financial projections are based are summarised below

### 7.1 Core Costs provided in-kind by Hampshire County Council are shown as follows :

	Year 6 2007/8	Year 7 2008/9	Year 8 2009/10	Year 9 2010/11
All office overheads - all staff (nominally 21.9% salaries)	£50,124	£52,920	£55,888	£58,910

### 7.2 Projected Cash Flow Statements

The projected income for the three years ending the 31<sup>st</sup> March 2011 is shown in detail in Appendix 1 and both income & expenditure are summarised as follows:

	Year 6 2007/8	Year 7 2008/9	Year 8 2009/10	Year 9 2010/11
<b>EXPENDITURE</b>				
All Staff salaries & on-costs	<b>228,879</b>	<b>241,643</b>	<b>255,198</b>	<b>268,995</b>
Travel/Training/mobile phones	£7,000	£7,500	£7,500	£7,500
Home workers Allowance	£1,400	£1,400	£1,400	£1,400
Equipment	£500	£500	£500	£500
Promotional activities	£500	£500	£500	£500
<b>Total expenditure</b>	<b>£238,279</b>	<b>£251,543</b>	<b>£265,098</b>	<b>£278,895</b>
<b>INCOME(see Appendix A )</b>				
From Partnership SLAs <sup>4</sup>	<b>£130,978</b>	<b>£107,946</b>	<b>£110,659</b>	<b>£113,457</b>
Income from provision of data	£20,000	£25,000	£25,000	£25,000
Staff salaries & on-costs for 3 staff <sup>1</sup> paid by HCC (recharged to HBIC account)	£88,256	119,014	125,649	132,653
Recharge initial costs of 2007 pay awards for partnership funded posts <sup>5</sup>	c£8,000	c£8,000	c£8,000	c£8,000
<b>Total income</b>	<b>£247,234</b>	<b>£259,960</b>	<b>£269,308</b>	<b>£279,110</b>
<b>SURPLUS/DEFICIT</b>	<b>+£8,995</b>	<b>+£8,417</b>	<b>+£4,210</b>	<b>+£215</b>
CUM.SURPLUS/DEFICIT (£75,869 <sup>6</sup> c/f from 2002/3 to 2006/7)	+84,864	+£93,281	+£97,491	+£97,706

<sup>4</sup> From 2008/9 HCC withdraws the £24,400 'SLA' payment and instead pays the full costs of the 3 'pre-HBIC' staff.

<sup>1</sup> For the three pre-HBIC staff posts at their previous grades for 2007/8 and at their current grades from 2008/9.

<sup>5</sup> Not confirmed for each year

<sup>6</sup> Over the 5 year period this includes £20,000 EN legacy grant, £10500 HCC legacy funding, £14,500 additional income from data enquiries, £10,000 savings on travel, equipment etc., £13,800 from projects, £3,200 Moth Atlas royalties plus the difference between salaries and partnership funding taking into account £13,000 in vacancy savings, of £2,600 (totalling £74,600)

### 7.3 Previous history

The first Business Plan (2002-2005) projected the set-up and running costs of the Centre over the three year period to total £777,000, ending with a small deficit of £13,000. The deficit was due partly to staff salary increments not being able to be included within the service level agreements. In fact the Centre managed to carry over a surplus of £36,188 mainly due to savings through staff vacancies and several extra funding partners coming in.

However, the Centre was projected to continue to run at a deficit of c£10,000/yr which was expected due to continuing increases with salary increments. There was also a need to put aside a small cash reserve for any possible future redundancy payments. The funding partners (through SMG) therefore agreed to a one-off 20% increase in their contributions<sup>1</sup> from year 2005/6 to reduce the deficit and contribute more fully towards the overall costs of their SLAs. Unfortunately salary 'on-costs' also rose sharply during that time from c19% of salary to c25.5% of salary. This has meant that the deficit whilst not increasing (as most staff were now at the top of their pay scales) has still been running at about £10,000 per year, meaning that HBIC was projected to have only a small reserve of £5,000 surplus at the end of the 2<sup>nd</sup> three year period (end of 2007/8).

However, with the recent review of salaries in 2007 by Hampshire County Council (Pay & Benefits) most staff in HBIC have benefited from a pay rise which has placed them at the bottom of the next pay scale. This means that for the next 3 years salary costs will increase on average by £13K a year (comprising increments, 3% cost of living awards and 25.5% on-costs on the increases). Some of this will be offset by the County Council fully funding the three 'pre-HBIC' posts & possibly the initial pay increases of the four partnership funded posts. The remainder will need to be met from Partner SLAs and income from data requests etc.

Continuing to bring in new funding partners (if they can be found) will help reduce the deficit that will start to appear in 2011/2012 but will lead to an increased work load within existing staff resources.

### 7.4 Other revenue sources

Most 'key data users' are now committed to an annual financial contribution with HBIC. The New Forest National Park Authority has signed up but no extra revenue is coming in as the previous fee is now split 50:50 between NFDC & NFNPA. Gosport BC & Portsmouth PC have also come in but the amounts are relatively small given their size and number of sites to survey and monitor. Natural England have agreed to fund all local records centres to the tune of c£15,000/year each for 'core services' (not including survey). Talks are on-going with the Forestry Commission at the national level but nothing is happening at the local level. HBIC will continue to carry out the occasional survey for FC where there is funding available via the England Woodland Grant Scheme.

### 7.5 Contingency plan in case of reduced funding

Most Partners with Service Level Agreements have to give one year's notice before withdrawing from their SLA. In the event of a drop in funding from one or more partners or from data requests there will be a period of time available to seek out new funding before deciding whether or not to renew one of the two temporary contract posts. If one or both of these contracts are not renewed then this will have adverse implications on service delivery for existing funding partners. It is important to build up a small cash reserve for redundancy payments or unexpected demands and so HBIC has managed to build up a healthy contingency fund of c£70,000 which would tie it over for a year or two depending on the severity of the drop in income.

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<sup>1</sup> Those who could not make the 20% increase saw their number of days and hours reduced pro-rata.

## 7.6 Financial assumptions

**a) Inflation.** Inflation has been included at 2.5% per annum and is shown in the financial statements for staff, office and travel cost projections

**b) Hampshire County Council's contributions** to staff costs are now based on the full costs of the pre-HBIC posts and the previous £24,000/yr 'SLA' has been withdrawn.

**c) Capitalisation.** A small amount of office equipment (books, survey equipment, mobile phones and two laptops) has/will be purchased by the Centre and so capitalised assets will exist.

**d) Partner contributions.** Partners will contribute the same level of funding as previous years plus 3% per annum.

**e) Staffing – Salary costs.** Staff rates are based on rates applicable within Hampshire County Councils pay scales and are predicted to increase by 2.5% each year plus yearly increments where applicable.

**f) On-costs.** National Insurance, Pensions etc. are now calculated at c25.5% of salary.

**g) Office Costs** – these are currently shown as a nominal 21.9% of salary costs and cover all office overheads; including management resources, support services, building costs etc. These costs are being met by Hampshire County Council as an 'in-kind' contribution to the running of the Centre. The County Council is also covering the costs of IT in exchange for HBIC funding travel and training costs of all staff.

**h) Travel.** Expenses are based on existing mileage costs (currently 50.2p/mile for private cars and 8.9p for lease cars)

**i) V.A.T.** Hampshire County Council is able to recover VAT on all related expenditure so this is not included in the financial projections

**j) Projected Income.** Any income derived from the charging of staff time to data enquiries from consultants etc. is returned to the Centre's holding account and set against running costs.

## APPENDIX 1 : Core Income projected for 2007-2011

<b>INCOME COMMITTED FROM PARTNER SLAS – for 2008/9 only. There is no guarantee of these amounts in future years save for expectations within a 3 year SLA.<sup>1</sup> All amounts are provisional, based on current contributions with 3% added per year.</b>	<b>2007/8</b>	<b>2008/9</b>	<b>2009/10</b>	<b>2010/11</b>
Basingstoke & Deane Borough Council SLA	£8,063	£8,303	£8,553	£8,809
East Hants District Council SLA	£8,063	£8,303	£8,553	£8,809
Eastleigh Borough Council SLA	£4,031	£4,152	£4,276	£4,405
Natural England SLA	£15,000	£15,000	£15,000	£15,000
Environment Agency-Southern SLA (£24,000 @ £4,500 +3%/yr over 5 yrs to 2010/2011)	£4,500	£4,635	£4,774	£4,917
Environment Agency – Thames SLA	£1,500	£1,500	£1,500	£1,500
Environment Agency – Wessex SLA	£1,000	£1,000	£1,000	£1,000
Fareham Borough Council SLA	£4,031	£4,152	£4,276	£4,405
Gosport Borough Council	£3,000	£3,000	£3,090	£3,183
HCC Environment SLA	£24,400	Now contributing full salaries of 'pre-HBIC' staff		
HCC Countryside SLA	£3,914	£4,031	£4,152	£4,276
Hampshire Wildlife Trust SLA	£4,031	£4,152	£4,276	£4,405
Hart District Council SLA	£6,969	£7,178	£7,393	£7,615
Havant Borough Council SLA	£4,031	£4,152	£4,276	£4,405
New Forest District Council SLA	£4,031	£4,152	£4,276	£4,405
New Forest National Park Authority	£4,031	£4,152	£4,276	£4,405
Portsmouth City Council	£1,800	£1,800	£1,854	£1,910
Rushmoor Borough Council SLA	£4,031	£3,000	£3,090	£3,183
Southampton City Council SLA	£4,031	£4,152	£4,276	£4,405
Southern Water	£2,850	£2,935	£3,023	£3,114
Test Valley Borough Council SLA	£8,063	£8,303	£8,553	£8,809
Winchester City Council SLA	£8,063	£8,303	£8,553	£8,809
Wessex Water SLA	£1,545	£1,591	£1,639	£1,688
<b>Total Income from Partner SLAs</b>	<b>£130,978</b>	<b>£107,946</b>	<b>£110,659</b>	<b>£113,457</b>
<b>Income from Enquiry Service (consultants)</b>	<b>£20,000</b>	<b>£25,000</b>	<b>£25,000</b>	<b>£25,000</b>
Income from HCC Core contribution :				
Salaries plus on-costs for the three (pre-HBIC) staff posts at their current grades (from 2008/9): recharged to HBIC at end of year	£88,256	119,014	125,649	132,653
Recharge initial costs of 2007 pay awards for partnership funded posts – <i>not confirmed for each year</i>	c£8,000	c£8,000	c£8,000	c£8,000
<b>Total income</b>	<b>£247,234</b>	<b>£259,960</b>	<b>£269,308</b>	<b>£279,110</b>

<sup>1</sup> One year's notice is required in majority of the 3 year SLAs

**Appendix 2 : Projected Allocation of resources for funding Partners (2008/9)**

<b>Service Level Agreement with :</b>	<b>Contributions £</b>	<b>Field Survey Max days allocated (reduced by 15%)</b>	<b>Data Supply, Analysis, mapping, review of SINCs etc. Max hours allocated</b>
Basingstoke/Deane Borough Council	£8,303	30	200
East Hants District Council	£8,303	30	200
Eastleigh Borough Council	£4,152	15	100
Environment Agency Southern	£4,500	10	100
Environment Agency Thames	£1,500	<i>Share above</i>	
Environment Agency SW	£1,000	<i>Share above</i>	
Fareham Borough Council	£4,152	15	100
Gosport Borough Council	£3,000	10	80
Hampshire County Council - Environment	£24,400	40	400
Hampshire County Council - Countryside	£4,031	18	100
Hampshire Wildlife Trust	£4,152	15	150
Hart District Council	£7,178	26	170
Havant Borough Council	£4,152	15	100
Natural England	£15,000	<i>Towards core funding</i>	
New Forest District Council	£4,152	15	100
New Forest National Park Authority	£4,152	15	100
Portsmouth City Council	£1,854	5	60
Rushmoor Borough Council	£3,000	10	80
Southampton City Council	£4,152	15	100
Southern Water	£2,935	<i>Provision of GIS layers only-</i>	
Test Valley Borough Council	£8,303	30	200
Winchester City Council	£8,303	30	200
Wessex Water	£1,591	0	30
<b>Totals</b>	<b>£131,265</b>	<b>344 days</b>	<b>2570 hours</b>

The above allocations are based on the following :

1. Field survey is based on full-time two surveyors working c180 days/year each on habitat survey (50%) and write-up (50%), plus time on SINC evaluation. In addition HBIC 'office' staff conduct some surveys, particularly for Hedgerow retention notices
2. Provision of data is based on approx. 1.50 posts
3. Review of SINCs is based on 0.5 posts
4. The time spent on the organisation of the survey programme (0.60 post) is borne by all partners who require habitat survey but is not shown in the above table.
5. The management of the data (capture, validation etc.) is carried out on behalf of all partners and is not shown above (equates to about 1 post).
6. The above figures exclude time spent on leave, training, sick leave etc.
7. HCC's field survey allocation is low compared to its financial contribution but the organisation benefits from the use of all field survey carried out in the County – as does EN, HWT, EA & Southern Water

**APPENDIX 3 : Policies & Procedures**

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The written policies, agreements and procedures held by the Centre should include (not exhaustive):

**1 Organisation**

- ◇ A Partnership Agreement setting out roles and responsibilities of partner organisations – *revised copy nearly complete*
- ◇ Details of management structure & advisory groups - *completed*
- ◇ Staffing structure + role profiles – *completed*
- ◇ Pay policy\*
- ◇ Equal opportunity policy\*
- ◇ Health & Safety policy including lone working\*
- ◇ Training policy - to cover staff, volunteers and recorders – *to do*

**2 Data Collection**

- ◇ Data Collection policy (including geographic and taxonomic scope of collection)
- ◇ Fieldwork and survey policy (Includes process for identifying data needs)
- ◇ Definition of sites
- ◇ Data Ownership and Confidentiality policy
- ◇ Data transfer procedures & agreements (including Data transfer forms)

**3 Data Supply and Exchange**

- ◇ Metadata
- ◇ Data Supply and Services to be provided - *wrapped up in SLAs*
- ◇ Data Access Policy – *complete*
- ◇ Data Exchange Agreements - *completed*
- ◇ Charging Policy - *completed*

**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 – *Section 4 of the SLAs*
- ◇ Document control and product identification
- ◇ Quality review

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

\* = Policy adopted from the host/Lead Partner, Hampshire County Council

## APPENDIX 4 : NBN Trust Position Statement on Local Records Centres – defining essential and enhanced functions

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### 1. Purpose

This paper sets out the position of the NBN Trust in relation to Local Records Centres. It aims to distil the definition of a Local Records Centre in terms of its functions in order to provide an agreed clear and succinct statement of the concept for the benefit of NBN partners, stakeholders and funding bodies.

*'A Local Records Centre is a not-for-profit service run in partnership for the public benefit, which collects, collates, manages and disseminates information of known quality relating to the wildlife, wildlife sites<sup>7</sup> and habitats for a defined geographical area.'<sup>8</sup>*

This definition relates to biodiversity information. It is recognised that this represents the minimum scope of Local Records Centre coverage and that some may hold information relating to geological, historical and other attributes.

The geographical area covered may be a sub-region or region as well as the traditional county or equivalent scale. For coastal Local Records Centres the extent of coverage in the marine environment needs to be agreed with local partners.

The statement originated as a request from the LRCs Steering Group to NFBR in 2002 and has been developed with contributions from partners.

The paper draws on the work of the Linking LRCs Project, 1998-2001, led by the Wildlife Trusts for the NBN. In particular the functions have built on two products of that project – "Running a Local Records Centre, Volumes 1 and 2" and "Proposals for a Accreditation System for Local Records Centres".

The position of LRCs within the NBN is summarised and the relationship between the NBN data exchange principles and LRC business models clarified. The statement then offers a standard definition of a Local Records Centre and describes their role in terms of essential and enhanced functions.

### 2. Local Records Centres within the NBN

LRCs

- represent the local delivery of the NBN vision
- promote NBN standards
- link professionals with volunteers and data providers with data users
- act as a focus for volunteer recording effort at the local level
- disseminate biodiversity information held by local organisations throughout the NBN
- are custodians of key NBN datasets
- make biodiversity information accessible to users both through direct communication and through the gateway

The NBN Data Exchange Principles state that biological data should be placed in the public domain wherever possible. They also recognise that users should expect to contribute to sustaining the collection, collation and management of the biological data. Local Record Centres (in common with many other data contributors) require the security of a long-term sustainable funding base in order for them to meet their users needs. They currently depend on their users contributing financially to the costs associated with data collation and management (often through Service Level Agreements).

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<sup>7</sup> The use of the term "wildlife sites" here is NOT restricted to sites of recognised nature conservation importance

<sup>8</sup> This definition was first proposed by Charles Copp during the accreditation project, was refined after consultation and has received widespread support.

LRCs provide a vital service to local data contributors and users and in many cases are the local representation of the NBN. The NBN Trust will facilitate partnership initiatives that can build a stronger business case for LRCs as key components of the NBN and hence make a positive contribution to securing a more sustainable funding base for LRCs.

### 3. Functions

Functions<sup>9</sup> of LRCs are here divided into two groups. The **essential functions** are those which every LRC is expected to perform. The **enhanced functions** are optional in the sense that each LRC will include a variable number of these within its operation, depending on local needs, stage of LRC development and funding availability. It is unlikely that any LRC will take on all of the enhanced functions.

LRCs are in essence partnerships. For each of the **essential functions** the LRC will take prime responsibility for its geographical area on behalf of the partnership. For the **enhanced functions** the situation will be highly variable depending on local circumstances. For these enhanced functions the LRC may be the only body involved, it may be working closely with many of its partners in a defined role or it may have no involvement at all.

### 4. Essential functions

ELIGIBILITY		HBIC?
1. Partnership	The LRC should be partnership led, the partnership including at least local authorities, statutory agencies, conservation NGOs and voluntary recorders.	✓
2. Legal body	The LRC should have the legal status to be able to enter contractual agreements and should be accountable and transparent for its business and financial performance	✓
3. Impartiality	The LRC's constitution and documented policies should ensure impartiality and prevent dominance by any one organisation or partner.	✓
4. Non overlapping	The geographical area covered by the LRC should be agreed by its partners and should not overlap with any other LRC	✓
5. User led	The LRC should have mechanisms for determining the needs of its users and primarily exist to meet those needs	✓
SERVICES		
6. Services	The LRC should be capable of offering at least basic biodiversity information services to local authorities, statutory agencies, conservation NGOs and voluntary recorders	✓
7. Data requests	The LRC should at all times be capable of responding to minimum specification data requests within a reasonable time period, at least that set by the Access to Environmental Information Regulations	✓
8. Products	The LRC should develop, maintain and promote a suite of basic information products for its core users	✓
9. Controlled Access	The LRC should implement a confidentiality policy that keeps sensitive data secure within the terms of the NBN Data Access Principles	✓
10. Data capture service	The LRC offers a service to partners of capturing their dataset to agreed standards, making it available to users including export to the original partner's system	✓

<sup>9</sup> The use of the term “function” in this paper is applied loosely to encompass functions, products and services together with some organisational characteristics which enable or modify functions

<b>11. Data Management</b>	The LRC should be capable of maintaining and managing agreed datasets on behalf of partners and other organisations	✓
<b>DATA</b>		
<b>12. Data scope</b>	The scope of an LRC's data holdings should include records of fauna, flora, habitats and sites of wildlife importance	✓
<b>13. Data coverage - species</b>	The LRC should aim to hold or at least have access to all available data, including marine, for at least the protected, RDB and BAP species (national and local) that occur in its geographic area	➔
<b>14. Data coverage - habitats</b>	The LRC should aim to hold or at least have access to all available data, including marine, relating to semi-natural and BAP priority habitats for its geographic area	✓
<b>15. Data coverage - sites</b>	The LRCs should aim to hold site definitions and boundaries, including marine, for all classes of land of recognised nature conservation importance in its geographic area	✓
<b>16. Metadata</b>	The LRC should know what data it holds, supply details to the NBN Gateway and/ or describe its data holdings on its own web site	➔
<b>17. Archive</b>	The LRC should act as a secure archive for the data in its care in perpetuity, protecting it from alteration, damage, loss and unauthorised use	✓
<b>SYSTEMS</b>		
<b>18. Format</b>	The LRC should seek to hold the majority of the data in its care in electronic format.	✓
<b>19. Database</b>	The LRC's database should at least be capable of import to the NBN data model, the data capture interface conforming to minimum NBN standards	✓
<b>20. GIS</b>	The LRC should use GIS to help it capture, manage, manipulate, analyse and display data with geographical or spatial elements..	✓
<b>21. Datasets</b>	The LRC should be capable of integration of datasets and reporting on integrated datasets	✓
<b>NBN COMMITMENT</b>		
<b>22. NBN Data Access Principles</b>	The LRC should conform to the NBN Data Access Principles when agreed	✓
<b>23. Data custodianship</b>	The LRC is capable of taking on the responsibilities of data custodianship within the NBN for agreed datasets, including data exchange with National Schemes and Societies	✓
<b>24. Promotion of standards</b>	The LRC should take a lead in encouraging high-quality recording and promoting NBN standards among volunteer recorders, recording schemes, organisations, professionals and contractors.	✓
<b>25. Validation and verification</b>	The LRC should ensure quality control by having documented procedures in place for validation of its data against agreed standards and managing a verification system, working in partnership with others	➔
<b>PERSONNEL</b>		
<b>26. Voluntary recorders</b>	The LRC should network with the majority of the voluntary recorders in its geographical area	✓

<b>27. Staff resources</b>	The LRC should employ and arrange training of staff as necessary to undertake these minimum functions. The staffing complement will vary across the UK according to the demands placed on the LRC's services. The maintenance of these minimum functions will nowhere be possible with a full-time staff equivalent of less than two and in some areas may require five to ten staff.	✓
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## 5. Enhanced functions

SURVEYS		
<b>28. Strategic Surveys</b>	The LRC manages or undertakes strategic sites, habitats and species surveys	✓
<b>29. Public Surveys</b>	The LRC engages in public involvement surveys	✓
<b>30. Reactive Survey</b>	The LRC offers a reactive survey service	✓
DATA		
<b>31. Species</b>	The LRC holds or at least has access to copies of all available species data for its geographical area and strives to obtain valid and comprehensive data for as many species and taxon groups as possible	→
<b>32. Habitats and habitat change</b>	The LRC works towards comprehensive land cover and habitat information for its geographic area and has a strategy for recording change.	✓
<b>33. Detailed sites data</b>	The LRC holds or has access to copies of all relevant detailed site surveys in support of sites of recognised importance	✓
SYSTEMS		
<b>34. GIS application</b>	The LRC uses GIS to map habitats and to relate species records to habitat parcels and site boundaries.	✓
VOLUNTARY RECORDING		
<b>35. Building recording capacity</b>	The LRC has a programme to improve recording and identification skills through training and to recruit new voluntary recorders – with the HBIC Partnership	→
DATA ACCESS		
<b>36. Enhancing data access</b>	The LRC has a programme to improve access to and interpret its data to enhance understanding by the general public – <b>with HLF grant</b>	→
<b>37. Educational materials</b>	The LRC generates materials for educational purposes based on its data	X
DATA INTEGRATION		
<b>38. Links to other heritage data</b>	The LRC integrates and analyses biodiversity data with other forms of heritage data to enhance understanding by the general public	✓
<b>39. Links to socio-economic data</b>	The LRC integrates and analyses biodiversity data with externally supplied socio-economic data	X

<b>40. Wider environmental information</b>	The LRC holds additional information relating to other environmental attributes such as land cover, land use, landscape, soils, geomorphology and Local Geological Sites.	✓
<b>INTERPRETATION AND EVALUATION</b>		
<b>41. Objective interpretation</b>	The LRC leads on the development of objective criteria for interpretation of significance e.g. County Notable lists, Local Wildlife Site selection and applies these in interpreting data searches for users	✓
<b>42. Site evaluation</b>	The LRC evaluates raw data against criteria in support of selection of sites of defined status e.g. Local Wildlife Sites	✓
<b>43. Gap Analysis</b>	The LRC offers to users a commentary on survey coverage and analysis of information gaps	✓
<b>MONITORING</b>		
<b>44. Site monitoring</b>	The LRC monitors Wildlife Sites or other sites of defined importance	✓
<b>45. BAP Action Reporting</b>	The LRC monitors and reports on the implementation of actions in relation to Biodiversity Action Plan targets	✓
<b>46. BAP Outcome Reporting</b>	The LRC monitors and reports on biodiversity outcomes in relation to Biodiversity Action Plan targets	✓
<b>47. Indicator monitoring</b>	The LRC monitors sustainability, performance or biodiversity indicators on behalf of partner organisations	✓
<b>ENQUIRY SERVICE</b>		
<b>48. Wildlife Enquiry Service</b>	The LRC runs a wildlife enquiry service for the public on behalf of partner organisations	✓
<b>PUBLICATIONS</b>		
<b>49. Publications</b>	The LRC offers support for publication or direct publication of distribution atlases and other relevant materials	✓
<b>THE GATEWAY</b>		
<b>50. Full NBN Gateway integration</b>	The LRC is fully integrated into the NBN Gateway and is able to participate as an internet linked node in the NBN	➔
<b>PROJECTS</b>		
<b>51. Project management and support</b>	The LRC has the capability of managing or supporting biodiversity information related projects at the request of its partners	✓

Progress of HBIC :

- ✓ - achieving this
- ➔ - progressing this
- X - not doing