

The Environmental Records Centre for Cornwall and the Isles of Scilly

# ERCIS

## Policies and Procedures



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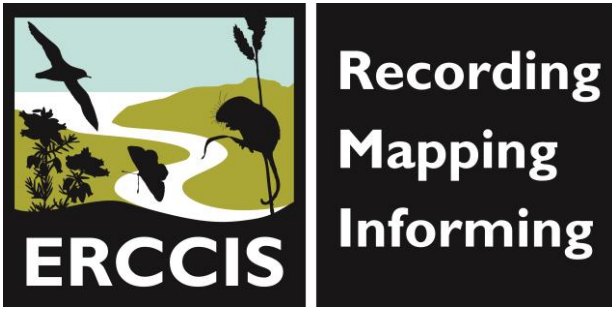


**Cornwall  
Wildlife Trust**

Registered charity number: 214929



Recording | Mapping | Informing



Any organisation needs a suite of standard policy statements and, as a consequence of those stated policies, a series of procedures to implement them. The attached list provides the definitive list of ERCCIS Policies and Procedures along with the staff member responsible for their production, review and re-issue as required.

For the purposes of ERCCIS, the following definitions will apply:

- A policy is a clear public statement of the principles that ERCCIS wishes to abide by. This will provide all ERCCIS stakeholders and partners visibility of ERCCIS' position on particular issues. All ERCCIS policy statements will be published on the ERCCIS website.
- A procedure is a description of how, practically, ERCCIS implements its policies. Procedures are mainly aimed at ERCCIS staff, volunteers and others directly involved with ERCCIS, rather than data providers and users.

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## **A1. SLA Policy – Funding Partners**

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### **1. Policy statement**

1.1 ERCISS will supply data to each of its funding partners in accordance with the provisions within the existing SLA/MoA.

### **2. Background**

2.1 ERCCIS has negotiated agreements with 4 main funding partners who provide finance to support the running of the Records Centre. The partners are:

- Cornwall Council
- Natural England
- Environment Agency
- South West Water

### **3. Data Supply**

3.1 Agreements are negotiated as required and are in place for an agreed number of years; this timescale is different for each partner. The agreements outline the level and type of data supply required annually as part of the funding.

3.2 Copies of relevant agreements are held in ERCCIS and are available for inspection at any time.

### **4. Reporting**

4.1 ERCCIS will report progress against data supply and all other conditions of funding support at the specified intervals laid down in individual agreements.

## **A2. Supply of Data – Commercial Requests**

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### **1. Policy statement**

1.1 ERCCIS will supply biological records in the form of a customised desk study to commercial organisations on request.

1.2 This provision of this data will be subject to a charge; this is for the staff time to put together the data into a useable format. There is no direct charge for the data itself.

### **2. Background**

2.1 ERCCIS, as the major depository of biological and geological data for Cornwall, is regularly required to produce desk studies for consultants working for clients looking to develop or change landscape.

2.2 ERCCIS charges for the staff time to produce these desk studies; there is no charge for the data.

### **3. Desk Study**

3.1 A downloadable proforma requesting a desk study can be obtained from the ERCCIS website. Equally, one can be requested from the Wildlife Information Service.

3.2 On request of a desk study, an estimate based on time expected to be completed will be sent to the consultant. Current prices can be found on the ERCCIS website.

3.3 Desk studies will aim to be processed within 10 working days of the estimate being accepted.

3.4 Final desk studies can be forwarded electronically, on a formatted CD-ROM or in hard copy through the post.

### **4. Data Resolution**

4.1 Resolution of data will be at an agreed level. Notable and endangered species data will be at a low resolution e.g. tetrad or 10km square level.

## **A3. Wildlife Information Service**

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### **1. Background**

1.1 The Wildlife Information Service (WIS) is responsible for accepting and processing data requests from a wide range of people, including but not limited to commercial organisations, statutory organisations, non-governmental organisations, recorders, landowners, students and members of the public.

1.2 WIS endeavours to inform and inspire by engaging with members of the public in a variety of ways.

### **2. Information Requests**

2.1 Members of the public are encouraged to contact WIS with questions relating to wildlife via email, telephone, social media, in writing or in person. There is a dedicated email address and phone number for this purpose.

2.2 WIS will take on any relevant queries which have been directed to the Cornwall Wildlife Trust or ERCCIS.

2.3 WIS will endeavour to respond to queries in a timely manner and prioritise queries which require a swift response.

2.4 WIS will draw on the shared knowledge and expertise of ERCCIS staff as well as the data and literature held at ERCCIS in order to respond to queries in an informed manner. WIS also draws upon the expertise of its network of experts and trusted recorders when required.

2.5 Students and researchers may request ERCCIS data for use in their studies. This may include all records held by ERCCIS for a given species, species group or habitat, or may be site-specific or activity specific.

2.6 Landowners may request data relevant to their land which, combined with general advice from WIS, will enable them to put together an effective management plan for wildlife.

2.7 WIS will offer recorder support in the form of identification help, data supply, advice in targeting recording effort or designing survey and in running events such as workshops.

2.8 Data requests may be made by completing an Information Request Form. Once a signed and completed form has been received by ERCCIS, WIS will endeavour to supply relevant data for qualifying requests free of charge within 20 working days.

2.9 All enquiries to ERCCIS are recorded on a database. Each record includes at least the name of the enquirer, contact details, date of contact and response, enquiry details, action and staff responding.

## **A4a. Charging Policy**

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### **1. Policy statement**

1.1 ERCCIS does not charge for data, but does charge for the supply of data and information. This policy applies to both Service Level Agreement (SLA) holders and to other users, although the approach to charging is different.

1.2 ERCCIS reserves the right to recoup a proportion of the costs of acquiring, collating and managing data from its users, within the scope of maintaining charges at a reasonable level, and in the spirit of the Environmental Information Regulations and the National Biodiversity Network (NBN) Access Principles.

### **2. Background**

2.1 Charges will be levied to recover costs of time spent collating and supplying information, and for any necessary expenses, at point of use to certain organisations and individuals who do not have, or wish to have, an SLA with the Records Centre.

2.2 ERCCIS will not charge the public directly for the provision of data or information. The costs arising from this service is met through the SLA with Cornwall Wildlife Trust.

2.3 ERCCIS will make a charge for educational and charitable organisations and individuals. This will be at a rate lower than that of commercial requests.

2.4 Within the terms of the SLAs with funding partners, ERCCIS will apply charges for the supply of data and information, along with the management of data. No charges will be made specifically for the data. Additional charges will be levied to recover costs of time spent collating and supplying information for funding partners where the type/nature of the enquiry or project work lies outside the scope of any SLA.

2.5 The charging policy of the Records Centre will be ratified by the ERCCIS Advisory Board.

### **3. Related Procedure**

A4 Charging Procedure

## **A4b. Charging Procedure**

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### **1. Background**

1.1 This procedure implements the Charging Policy statement:

1.1.2 ERCCIS does not charge for data, but does charge for the supply of data and information. This policy applies to both Service Level Agreement (SLA) holders and to other users.

1.1.3 ERCCIS reserves the right to recoup a proportion of the costs of acquiring, collating and managing data from its users, within the scope of maintaining charges at a reasonable level, and in the spirit of the Environmental Information Regulations and the National Biodiversity Network (NBN) Access Principles.

### **2. General**

2.1 ERCCIS normally receives its data on the terms that it will be freely accessible to bona fide users, and suppliers of data are informed of this policy upon offer of data to the Records Centre. In relation to some datasets supplied to us, including some species datasets and digital datasets, access is controlled by specific agreements and protocols agreed with each organisation/individual. Data may also be restricted as to its supply to or use by third parties, including funding partners.

2.2 ERCCIS will give free access to the data and information it manages, subject to any conditions imposed on its use by the data copyright owners, to bona fide researchers, members of the public, local recording groups/natural history societies and recorders.

2.3 Digital data will be supplied free of charge to funding partners within the terms of relevant SLAs; this must be for internal business use only.

2.4 Where ERCCIS has entered into a data exchange agreement with a non-funding partner it may, at its discretion, supply data free of charge. However, in normal circumstances, a charge would be made for the supply of information to such organisations. Organisations requiring digital GIS information would be required to enter into a Digital Data Licence, for which there is an annual fee based on the amount and level of information required.

### **3. Calculating the charges**

3.1 In setting its charges, ERCCIS will use the standard annual work days (200) and overall budget as a basis for establishing its costs, including overheads as calculated by Cornwall Wildlife Trust (standard Trust overheads costs, which includes pension, employers National Insurance, office accommodation, basic IT and administration costs).

3.2 Charges will be reviewed on an annual basis, to reflect changes in the cost of providing the Centre's services.

3.3 Cornwall Wildlife Trust will provide the administration and financial processes and procedures for handling the invoicing, money, accounting and auditing on behalf of ERCCIS.



#### ***4. Charges from 1st March 2014***

- 4.1 For non-SLA holders:  
Charges for users of data at point of use: £65 per hour plus VAT  
£400 per day plus VAT
- 4.2 For SLA holders:  
Manager: £300.00 per day plus VAT  
All other staff: £220.00 per day plus VAT
- 4.3 Student/Charitable Organisations £30 per hour plus VAT
- 4.4 The above charges apply to core work delivered through the Service Level Agreements, as well as any additional projects undertaken by ERCCIS.
- 4.5 Where project work is undertaken there may be additional costs relating to specific IT needs of the project, as well as training and/or travel.

## **A5. Website Policy**

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### **1. Policy statement**

1.1 The ERCCIS website has been live since August 2008. The address of the website is [www.ercdis.co.uk](http://www.ercdis.co.uk).

1.2 The ERCCIS website has been created in conjunction with the company Cubik.

1.3 The aim of the website is to inform data providers and data users about ERCCIS, to promote and encourage recording in Cornwall and the Isles of Scilly and to act as the centre for wildlife and geology information in Cornwall and the Isles of Scilly and explain what services can be provided.

1.4 The objective is to create and maintain a website that is simple to use, eye catching and informative.

1.5 ERCCIS will abide by the house style document approved by Cornwall Wildlife Trust which broadly governs the format and layout of the web pages to ensure each page, although written by different authors, has a consistent style and structure.

### **2. Background**

2.1 Maintenance of the structure and content of the ERCCIS website is controlled by ERCCIS staff. Members of staff are assigned different website roles within ERCCIS and can add and/or change content to keep the website up to date.

2.2 All staff members are authors and have the ability to add website content and submit it for approval to the Editor. The Editor can approve postings for publication to the live website. The Administrator manages site structure, content and user accounts, and can gain access to website statistics.

### **3. Website Content**

3.1 There are some key areas to the ERCCIS website. These areas are as follows:

3.1.1 Wildlife Information Service – this section enables data users to be informed what wildlife information services ERCCIS offers. The ERCCIS Charging Policy and Data Access Policy for desk studies are available to download. Information Request Forms are available online. Website users can contact the Wildlife Information Service with general wildlife enquiries.

3.1.2 Wildlife Recording – there are three ways on the website to submit wildlife records. Users can submit individual records using the online form. Multiple records can be submitted using an electronic recording form. Lastly, recording forms can be printed to be completed on paper. In addition, this section contains support and guidelines for recorders, whether experienced or novice.

3.1.3 Data Search – this is a metadata section allowing data users to search for information they need from the ERCCIS library on books and journals. Information about the digital maps ERCCIS uses and can provide is also explained in this section.

3.1.4 ERCCIS Projects – the past and present projects ERCCIS is running are listed and some explained in more detail. Project reports are made available to download or purchase where possible.

3.1.5 Events – ERCCIS events and workshops are listed online. Events cannot be viewed once the date has passed. After some events, a short summary of the event will be written as a news-type article.

3.2 Other general website content will include contact details, staff profiles, job vacancies, newsletters and publications to purchase.

## **A6a. National Biodiversity Network (NBN) Gateway Policy**

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### **1. Policy Statement**

1.1 The provision of access to wildlife data pertaining to Cornwall and the Isles of Scilly is a core function of ERCCIS.

1.2 As a member of the NBN, ERCCIS operates according to the NBN Data Exchange Principles. The wildlife and geological information ERCCIS holds should be made available for use in not for profit decision-making, education, research and other public benefit purposes.

1.3 ERCCIS will provide data to the NBN Gateway in discreet datasets. These datasets will be provided in a standard ERCCIS format which conforms to the NBN Exchange Format.

### **2. Background**

2.1 ERCCIS collates, manages and disseminates biological and geological information about Cornwall and the Isles of Scilly. Data are received from a variety of sources and in different formats.

2.2 Biological information comes in the format of species records which ERCCIS manages on computer databases.

2.3 The aim of the NBN Gateway is to increase access to reliable biological information making it readily available to those who need it.

### **3. Providing Data to the NBN Gateway**

3.1 This policy implements the NBN Gateway Data Provider statement:

*"ERCCIS will upload the data they hold to the NBN Gateway abiding by the formal Gateway Data Provider Agreement from the NBN Trust. The Agreement is required to help the NBN Trust to establish a clear and secure position in regard to the right to hold and work with third party material supplied to them. The Agreement helps build clarity which is important in helping people share and exchange wildlife data through the NBN Gateway website."*

3.2 ERCCIS will provide data to the NBN Gateway as discreet datasets organised by taxonomic group. Datasets to be uploaded will be governed by the Memorandum of Agreement between ERCCIS and Natural England.

3.3 The data will be extracted from the ORKS and Recorder 2006 databases and will contain species records with the minimum information of species name, date and grid reference. Names and personal details relating to the recorder and determiner will not be provided.

3.4 All records can be viewed on the NBN Gateway website by members of the public at a defined resolution of 10km<sup>2</sup>.

3.5 Sensitive records cannot be viewed or downloaded by members of the public.

3.6 ERCCIS will endeavour to provide data of the highest quality possible by means of validating, checking and verifying the records it provides. Where it has not been possible to provide records that are all checked and all verified; these records will be marked as such within the dataset. The NBN Gateway does not expect 'perfect' data to be submitted.

3.7 ERCCIS will provide the NBN Gateway with metadata relating to each dataset.

3.8 ERCCIS will administer the datasets on the NBN Gateway according to the Gateway's guidelines. Full access to datasets through the Gateway will not be granted without prior consent with ERCCIS through a Memorandum of Agreement. Alternatively, dataset requests will be directed to the Wildlife Information Service.

#### **4. *Related Policies***

C1. Data Acquisition and Ownership

C4. Metadata

C5. Data Access

#### **5. *Related Links***

[www.nbn.org.uk/gateway](http://www.nbn.org.uk/gateway)

## **A6b. NBN Gateway Procedure**

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### **1. *The Policy***

This procedure implements A6. NBN Gateway Policy.

1.1 The provision of access to wildlife data pertaining to Cornwall and the Isles of Scilly is a core function of ERCCIS.

1.2 As a member of the NBN, ERCCIS operates according to the NBN Data Exchange Principles. The wildlife and geological information ERCCIS holds should be made available for use in not for profit decision-making, education, research and other public benefit purposes.

1.3 ERCCIS will provide data to the NBN Gateway in discreet datasets. These datasets will be provided in a standard ERCCIS format which conforms to the NBN Exchange Format.

### **2. *Providing Data to the NBN Gateway***

2.1 Identify a role for the NBN Gateway.

2.1.1 ERCCIS is a registered data provider to the NBN Gateway. ERCCIS staff are also registered individually.

2.1.2 The NBN Gateway will act as a method of disseminating wildlife data to members of the public. Additionally, it will help raise awareness and the profile of ERCCIS by encouraging data users to request information through the Wildlife Information Service.

2.2 Prepare a dataset.

2.2.1 A dataset is defined as a collection of records from a data provider that are uploaded and administered as a single unit on the NBN Gateway.

2.2.2 At ERCCIS, a single dataset consists of all records for one taxonomic order. If a dataset is especially large the dataset may be subdivided into smaller datasets as appropriate.

2.2.3 All the records in one dataset are governed by the same access constraints, except those records marked as sensitive.

2.2.4 Datasets are provided to the NBN Gateway in the NBN Exchange Format. As a minimum, the format captures essential information for a species record. Additional fields can be added to a dataset.

2.2.5 When a dataset has been created, the file is validated using the NBN Exchange Format Validator Tool. The dataset cannot be submitted to the NBN Gateway until it has successfully run through this tool.

## 2.3 Provision of supporting metadata.

2.3.1 ERCCIS provides metadata which describes the dataset as best as possible in the Metadata Form for Species Datasets.

2.3.2 The first section of the form need only be completed once; the first time a dataset is provided to the Gateway.

2.3.3 The remaining sections describe the dataset being provided. Good metadata is important as it allows users to learn about the data and whether it is of use to them. It increases the likelihood that the data are used appropriately and reduces the chance of misuse.

2.3.4 ERCCIS staff administer the datasets on the NBN Gateway. The administrators are the Manager, Information Co-ordinator and Data Officer.

## 2.4 Clarify access and use constraints.

2.4.1 ERCCIS operates by the NBN Trust's principle that wildlife data should be made widely available for use in not for profit decision-making, education, research and other public benefit purposes. However, if necessary, the NBN Gateway provides controls to restrict access to particular data.

2.4.2 If records are marked as confidential within the ERCCIS database, they remain marked as confidential on the NBN Gateway. The access constraints to confidential records are controlled by the ERCCIS administrators.

2.4.3 All records provided by ERCCIS on the NBN Gateway are available at a resolution of 1 km<sup>2</sup> or 2 km<sup>2</sup>.

## 2.5 Submit the dataset.

2.5.1 Submit the text file of data and supporting metadata to the NBN by email or CD-ROM.

2.5.2 The dataset will then be checked by the NBN staff and entered into the loading cycle.

## 2.6 Administer the dataset on the NBN Gateway.

2.6.1 The dataset will automatically be available to the public at the level specified in the metadata.

2.6.2 ERCCIS administrators can set and alter levels of access to individuals and groups requesting the data.

2.6.3 Applications for better access to data from members of the public will be rejected and relayed to the Wildlife Information Service instead. This referral of access to data will be dealt with as quickly as possible by ERCCIS administrators.

### **3. *Related Documents:***

B3. Record Validation and Verification

C5. Data Access



## **A7. Privacy Policy**

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### **1. Policy Statement**

1.1 ERCCIS is registered under the Data Protection Act 1998 through its host organisation Cornwall Wildlife Trust. The organisation takes reasonable steps to request permission to use personal data for the following:

1.1.1 To identify the intellectual property right holder in order that they are acknowledged if personal data are used.

1.1.2 For the purposes of administering recording schemes.

1.1.3 To provide contact details when needing to confirm an observation.

1.1.4 For the purposes of validating and verifying data.

1.2 ERCCIS takes appropriate action to ensure data are physically secure, whatever their format.

### **2. Background**

2.1 ERCCIS collates, manages and disseminates information on wildlife and geology in Cornwall and the Isles of Scilly. Information is received from a variety of sources and is stored in its original format and/or on computer databases.

2.2 The name of the data provider and contact details are often provided with data and are copied into the computer databases.

2.3 This policy states what ERCCIS uses personal details for and how the organisation complies with the Data Protection Act 1998.

### **3. Personal Information**

3.1 Personal information is sometimes needed for the interpretation of data. Personal details may be used for validating and verifying wildlife records.

3.2 Records are validated by ERCCIS staff.

3.3 Verification is carried out either by ERCCIS staff or local or national experts. Personal information is not provided where it is not needed and it is not publicised without prior consent from the individual.

3.4 Personal information is used to acknowledge receipt of records.

3.5 Personal information is not used for membership or marketing. Furthermore, personal details are not disseminated to third parties without prior permission being given by the individual.

3.6 Personal details are not made available on the Internet.

3.7 Wildlife records that are uploaded to the National Biodiversity Network (NBN) Gateway will not contain any personal details relating to the individual recorder.

3.8 All wildlife and geology information held at ERCCIS has associated metadata. Metadata, amongst other information, states the access constraints upon the data or dataset. For example, data may be marked as confidential, or cannot be distributed outside of ERCCIS, alternatively, access may be granted upon request.

3.9 ERCCIS ensures data, in both original and computerised formats are physically secure. ERCCIS takes reasonable measures to prevent unauthorised access to, duplication of, or distribution of wildlife or geological information whilst ERCCIS is the data custodian.

3.10 Replacement of data held by ERCCIS is likely to be extremely costly or otherwise impossible. Data is therefore protected against loss and damage. ERCCIS protects against alteration or deletion of original data, physical damage to data (e.g. fire, flooding and vandalism), corruption of computerised data, theft and unauthorised use or copying of paper or electronic data.

#### **4. *Related Policies***

A6. NBN Gateway

B3. Record Validation and Verification

## **B1. MoA Policy – Non-Funding Partners/Recording Groups & Individuals**

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### ***1. Policy statement***

1.1 ERCCIS offers the option of a Memorandum of Agreement (MoA) with any Non-funding Body, relevant Recording Groups and key individual Recorders outlining conditions for the exchange and management of environmental and biological records.

1.2 A skeleton outline of a typical MoA can be obtained from ERCCIS.

### ***2. Background***

2.1 The exchange of records between ERCCIS and key recording groups and individuals remains an essential part of the support mechanism that allows good quality biological records to be available.

2.1 The MoA will look to include access to all datasets – ORKS, Recorder 6 and Marine Recorder but will be restricted to agreed resolutions dependant upon the sensitivity of individual records or datasets.

### ***3. Implementation***

3.1 MoAs will be raised and agreed as required between ERCCIS and recorders. They will, ideally, be extant for a period of 5 years, but shorter duration will be considered.

3.2 A copy of the agreed and signed MoA will be held at ERCCIS and a duplicate will be forwarded to the relevant recorder or recording society.

## **B2. Records – Key Principles**

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### **1 Policy statement**

1.1 In the light of an ever increasing demand for biological and geological data, ERCCIS collates, manages and disseminates this information it holds for Cornwall and the Isles of Scilly.

1.2 The data ERCCIS provides to its data users needs to meet their demands. Minimum recording standards are therefore needed to define the essential elements needed for a biological record to ensure data are useful and fit for purpose.

1.3 ERCCIS encourages recorders to submit data of a higher quality than those stated in the minimum standards. If minimal recording standards are not met, ERCCIS cannot use the data.

1.4 ERCCIS will ensure incoming records contain enough information for their potential use to justify the information entering the data management system.

### **2 Background**

2.1 ERCCIS collates, manages and disseminates biological and geological information about Cornwall and the Isles of Scilly. Data are received from a variety of sources and in different formats.

2.2 Biological information is dynamic. Understanding the effects of changes on ecosystems and the environment can be complex and requires sound and reliable information from which to draw accurate conclusions.

2.3 Comprehensive, high quality and up-to-date data is central to understanding, managing and protecting the natural environment. Biological records are valuable as the information they contain may be used for not for profit decision-making, education, research and other public benefit uses.

### **3. Key principles**

3.1 Minimum recording standards state that four essential pieces of information are needed to make a biological record.

3.1.1 Who – the full name of the recorder making the observation, also known as the observer. The observer may also determine the record by verifying the species observed has been correctly identified. Alternatively, the determiner may be a person who has better knowledge and experience of identifying the species if the observer is unsure.

3.1.2 What – the name of the species observed, preferably both taxonomic and common name and to species level. Recorders should be aware that nomenclature may differ over time as taxonomic changes are made.

3.1.3 When – the date the observation was made. The preferred format is day, month and year. Other formats can be accepted including month and year, the year alone, date ranges of a survey or the season with a year.

3.1.4 Where – the location name and the corresponding grid reference where the observation was made. The most useful grid reference is to 1km<sup>2</sup> resolution or better. The location name should provide an accurate description that corresponds with the grid reference.

3.2 In addition to the minimum recording standards, recorders may wish to include further details. Other useful information includes age, sex, number of individuals observed, evidence of presence (droppings or tracks for example), habitat, weather, associated species, evidence of breeding and comments on behaviour.

3.3 Historical data may not meet the ERCCIS minimum standards for biological data; therefore, it is subject to lower threshold criteria.

3.3.1 Historical data are defined as any record(s) for which it is impossible to contact the recorder or donor for further information to upgrade the data.

3.3.2 It is often possible to upgrade historical records through other means, through additional research and voucher specimens for example.

#### **4. *Related documents***

A Handbook for Biological Recorders – 2nd edition 2006. A Manual for recording plants, animals and their habitats in Cornwall and the Isles of Scilly. CISFBR and ERCCIS.

## **B3a. Record Validation and Verification Policy**

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### **1. Policy statement**

1.1 ERCCIS aims to validate and verify every biological record it receives to ensure the data are as correct as possible and of a consistently high quality.

1.2 Validation is a procedure that ensures the minimum standards needed to make a biological record are adhered to.

1.3 Verification is a procedure to ensure that the record has been attributed to the correct taxon and species identification by the observer has been accurate. This process may be carried out by a determiner who could be a local or national species expert.

1.3.1 Levels of verification needed are determined through assessment of the difficulty of identifying the taxon. The procedure may vary from the reliance of the recorder's identification skills to inspection of voucher specimens.

1.3.2 There are likely to be different verification procedures for different taxonomic groups.

1.4 It is important that the data ERCCIS holds are made available as soon as possible for their use in decision-making, education, research and other public benefit purposes. This may mean making data available before they have been verified. Records that have not yet been verified are clearly marked as such on the computer database. Records that fail verification are clearly marked and are not provided to data users unless requested.

1.5 ERCCIS has a written procedure that explains how to validate and verify biological records.

### **2. Background**

2.1 ERCCIS collates, manages and disseminates biological and geological information about Cornwall and the Isles of Scilly. Data are received from a variety of sources and in different formats.

2.2 Providing high quality, useful data is a core function of ERCCIS. This policy ensures that data are of the highest quality possible and the reliability of the information ERCCIS holds is known.

### **3. Related Policies**

B3. Records Key Principles

## **B3b. Record Validation and Verification Procedure**

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### **1. Policy statement**

1.1 ERCCIS aims to validate and verify every biological record it receives to ensure the data are as correct as possible and of a consistently high quality.

1.2 Validation is a procedure that ensures the minimum standards needed to make a biological record are adhered to.

1.3 Verification is a procedure to ensure that the record has been attributed to the correct taxon and species identification by the observer has been accurate. This process may be carried out by a determiner who could be a local or national species expert.

1.3.1 Levels of verification needed are determined through assessment of the difficulty of identifying the taxon. The procedure may vary from the reliance of the recorder's identification skills to inspection of voucher specimens.

1.3.2 There are likely to be different verification procedures for different taxonomic groups.

1.4 It is important that the data ERCCIS holds are made available as soon as possible for their use in decision-making, education, research and other public benefit purposes. This may mean making data available before they have been verified. Records that have not yet been verified are clearly marked as such on the computer database. Records that fail verification are clearly marked and are not provided to data users unless requested.

### **2. Validation procedure**

2.1 When records are received at ERCCIS they are validated before the recorder is acknowledged.

2.2 Validation ensures the minimum information needed to make a wildlife record is present – who, what, when and where - and that this information is in a useable format.

2.3 Any gaps in the information provided will be filled as best as possible with the aid of the recorder. If missing information cannot be obtained, the record cannot be incorporated into the data management system.

2.4 The computer database ERCCIS uses automatically validates data upon data entry. The database will only accept appropriate use of taxonomic names in its species dictionary, a correct grid reference format and correct date format.

2.5 Every record is checked to ensure data have been accurately transcribed from their original source onto the computer database. Records are marked in the database as checked or unchecked. Checking does not ensure the accuracy of the content of the record, merely that the record has been copied correctly from its original source.

### 3. *Verification procedure*

3.1 ERCCIS will implement a verification procedure for incoming records that have not yet been verified for all major taxonomic groups.

3.2 Some records may have passed verification before they are received at ERCCIS. These records can be marked as having passed verification in the database. Records may have passed verification for the following reasons:

3.2.1 The recorder may have been accompanied by a determiner at the time the observation was made.

3.2.2 The observer may have the taxonomic expertise to determine their own records.

3.2.3 The observer may have passed their record(s) together with any evidence to a local or national taxonomic expert or local or national natural history group or society who may have confirmed the record(s).

3.3 ERCCIS will pass verification for those records it has sufficient in-house expertise or resources to determine, or for species that are easy to identify.

3.4 Records that ERCCIS does not have the in-house expertise to determine will be determined by arranged agreements with external agencies and individuals who can provide this expertise.

3.4.1 Many external agencies, such as recording schemes and societies will have verification procedures already in place for their taxonomic group.

3.4.2 For species groups that do not currently have a verification procedure, the preferred ERCCIS model will be based upon the Odonata verification procedure put in place by Steve Jones, County Recorder for Odonata.

3.5 ERCCIS decides the level of verification needed for each species or taxonomic group. The level of verification needed depends on answers to the following questions:

- How difficult is it to identify this species?
- Could the species be misidentified?
- Has the species been recorded at this location before?
- Is the species observed typically found in the habitat recorded?
- What experience and knowledge does the recorder have of this species? Are they a local or national expert or a natural history novice?
- How robust and appropriate were the methods used to capture the information and subsequently make it available to ERCCIS?

3.6 Some records will require that a voucher specimen or a photograph is submitted to ERCCIS or the external agent carrying out verification.

3.7 A copy of datasets in need of verification by an external agency or individual is transcribed by ERCCIS into a spreadsheet. If the specialist requires further checks, this is followed up with ERCCIS and/or the original recorder.



3.8 The ERCCIS data management system ensures that records are tracked during verification through an audit trail.

3.9 The ERCCIS computer database allows for a species to be re-determined at a future date if necessary.

#### **4 ORKS**

4.1 Data entered via Online Recording Kernow & Scilly (ORKS) will be subject to the same procedures as 3, but will be done online.

#### ***Related Policies***

B3. Record Validation and Verification Policy

C2. Dataset Management

## **B4. Recorder Support**

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### **1 Policy statement**

1.1 ERCCIS plays a key role in the coordination and support of key recording groups and individuals. It will continue to develop and maintain good relations with all sectors of the biological recording community and will foster widespread and accurate recording.

### **2 Background**

2.1 Biological recording in both Cornwall and the Isles of Scilly depends, to a great extent, on the diligence, enthusiasm and cooperation of the main recording groups and key individuals. Their input forms the mainstay of the datasets held in ERCCIS.

2.2 Many of the recording groups are voluntary and rely on input and support from their national, regional and local equivalents; ERCCIS is well placed to take a lead in this support.

### **3. Access to Data**

3.1 Memoranda of Agreement will be offered between ERCCIS and recording groups for exchange and access to data. This policy is laid out at Policy B1.

3.2 ERCCIS welcomes visits from recorders to its offices at Five Acres and will endeavour to provide support as required dependant on available resource.

### **4. Cornwall and Isles of Scilly Federation of Biological Recorders (CISFBR)**

4.1 Cornwall is unique in that it has a federation that supports and fosters biological recording and a bespoke IT windows based recording programme, ERICA. ERCCIS will work closely with CISFBR.

4.2 The ERCCIS Manager (or another nominated staff member) will sit on the CISFBR committee and provide regular updates to its members.

4.3 A member of the CISFBR committee will sit on the ERCCIS Advisory Board.

4.4 ERCCIS will budget annually to provide limited financial support towards the publication of identification literature relevant to both Cornwall and the Isles of Scilly. Additionally, it will provide limited support to the production of Botanical Cornwall when published.

### **5 Workshops/Events**

5.1 ERCCIS, in conjunction with other interested parties, will organise a programme of workshops and other events, including Bioblitzs. These will be for the benefit of local recorders and students studying in Cornwall.

5.2 ERCCIS Staff will endeavour to attend at least 1 meeting of all the recognised recording groups annually and externally organised Bioblitzs.

## **B5. Prioritisation of Record Input Policy**

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### **1. Policy statement**

1.1 ERCCIS seeks to prioritise computerisation of the records it receives according to the current need of the records centre and its data users. This ensures efficient and effective data input and data management.

1.2 All biological and geological records are important to ERCCIS; however, due to limited resources some records need prioritisation to be computerised over others.

### **2. Background**

2.1 Records from different sources, in different formats and for different taxonomic groups require that data are prioritised for data entry. All records will be computerised but there may be a time delay between the date the record(s) is received and the date it is computerised.

2.2 This document is applicable to records received both in paper and electronic format.

2.3 On-line Recording Kernow & Scilly (ORKS). ERCCIS has an online recording database which will accept all records. As such the prioritisation of entry does not apply to this process; however, all other protocols regarding data management will apply.

### **3. Procedure**

#### **3.1 High Priority**

3.1.1 The taxonomic groups listed in the Memorandum of Agreement between ERCCIS and DEFRA Bodies. These are datasets to be uploaded onto the NBN Gateway.

3.1.2 Taxa listed as Species of Conservation Concern (SOCC). This includes Red List species, near threatened species, species protected by legislation in the Wildlife and Countryside Act 1981, the EC Birds Directive, EC Habitats Directive, the Bern Convention Appendices I and II and the Bonn Convention Appendices I and II (native species only) as well as Priority BAP species.

3.1.3 Records from national recorders. These records can be accepted as verified if the expert is recording within their taxonomic expertise.

#### **3.2 Medium Priority**

3.2.1 Records from county recorders. These records can be accepted as verified if the expert is recording within their taxonomic expertise.

3.2.2 Species identified as under-recorded.

#### **3.3 Least Priority**

3.3.1 Records from ad-hoc recorders or inexperienced recorders.

3.3.2 Records within reports. This is a time-consuming activity that requires much staff and volunteer time to identify and extract records from a report. ERCCIS does not have the resources to implement this action as yet.

3.3.3 Least priority records are by no means unimportant and will be computerised after priority species records have been computerised. The disadvantage to labelling a record as least priority is the time delay between receiving the record and being able to provide the data to data users.

3.4 If a paper or electronic recording form contains a mixture of high and low priority records, the entire set of records are to be entered together. High priority records are not to be extracted separately and low priority records to be entered at a later date. Doing this could cause confusion and may lead to duplication in the database if it is not clearly marked which records have been input previously and which ones have not.

#### **4. *Related Policies***

C2. Dataset Management

#### **5. *Related Links***

The Species of Conservation Concern list can be found at

<http://www.jncc.gov.uk/page-3408>

## **C1. Data Ownership and Acquisition**

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### ***1. Policy Statement***

- 1.1 The Environmental Records Centre for Cornwall and the Isles of Scilly (ERCCIS) will seek to enter into data exchange agreements with key data owners. These agreements will outline the responsibilities of ERCCIS and the data owner.
- 1.2 The ownership of the original raw data will remain with the recorder unless this is waived in writing by the data owner.
- 1.3 Data exchange agreements will adhere to the Data Protection Act 1998.

### ***2. Background***

- 2.1 ERCCIS needs to clearly define the ownership of all the data it holds and manages, including raw data and processed information/products. It also needs to agree with the data owners how the data will be managed, made available and used.
- 2.2 In this context, raw data are the information supplied to ERCCIS prior to any processing with ERCCIS.
- 2.3 Data acquired through public participation surveys is covered in the policy on Gathering information from the public.

### ***3. Copyright***

- 3.1 The data owner is the person who has the intellectual property rights over the data. When the data are first recorded in a physical form (e.g. on paper or on computer) the person making the record (either writing or typing) owns the data. However, if the person is paid to make a record the copyright belongs to the employing/contracting organisation or client. This person can transfer this property right to any other person or organisation, if they so wish.
- 3.2 The ownership of the original raw data will remain with the recorder unless this is waived in writing by the data owner and ERCCIS will seek to protect the rights of the data owner.
- 3.3 Data owners have the right to withdraw their data at any time from ERCCIS. ERCCIS will remove the data in accordance with the procedure on the removal of data from the Records Centre, Removal of Data.
- 3.4 Publications and reports making use of analysed data produced by ERCCIS will be owned by ERCCIS. Due credit and acknowledgement will be given within the publication to the data owners.

#### ***4. Data Exchange Agreements***

4.1 ERCCIS will ensure that the data owner's rights are protected through the completion of a data exchange agreement between the Records Centre and the data owner, defining the rights and obligations of both parties.

4.2 The agreements will be simple, clear and user-friendly, and will outline the terms and conditions under which:

- ERCCIS agrees to accept and manage records from the data owner
- the data owner will provide the data

4.3 ERCCIS will discourage any unnecessary restrictions being placed on the data that limit their availability and use beyond ERCCIS's access terms – see the Data Access policy and the Data Supply policy.

4.4 The agreement will license ERCCIS to release data without further consultation with the data owner, providing the data request falls within the guidelines of the policy on Data supply.

4.5 ERCCIS will maintain a register of data exchange agreements.

#### ***5. Satellite copies of data***

5.1 This section of the policy covers the use of satellite copies of ERCCIS data by recorders (a sub-set of data owners) for furtherance of their biological recording.

5.2 ERCCIS and the satellite recorder (data owner) will need to complete a data exchange agreement as outlined in section 4 above, but with the following additional requirements:

- The ownership of the original raw data added to the satellite will remain with the recorder (data owner) unless this is waived in writing by the recorder
- The ownership of the data already in the existing satellite (provided by ERCCIS) remains with the original recorder(s) and can only be used by the satellite users as background research for their own recording
- Data in the existing satellite (provided by ERCCIS) cannot be passed on to any third parties

5.3 These additional requirements will be added to the appropriate data exchange agreements.

## **C2. Dataset Management**

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### **1. Policy Statement**

1.1 ERCCIS will manage the data it holds as discrete datasets, where one dataset is formed by a group of similar information collected in a similar way. For example, datasets of wildlife records are held on the computer database as surveys.

1.2 ERCCIS will provide appropriate metadata for every dataset it holds.

1.3 ERCCIS aims to integrate and computerise all its data holdings into its data management system and make it available for not for profit decision-making, education, research and other public benefit purposes.

1.4 ERCCIS will track all the data it receives by means of an audit trail and ensure information is accurately transcribed from its original source and incorporated into the data management system.

### **2. Background**

2.1 Dataset management is administered on a day-to-day basis by the Data Officer.

2.2 Collating and managing biological and geological data about Cornwall and the Isles of Scilly is a core function of ERCCIS.

2.3 ERCCIS receives and accepts species and habitat records in a variety of formats. Each format of information goes through the same data management system. The formats include the following:

- Electronic datasets as an Excel spreadsheet or Access database
- Recognised paper recording cards
- Handwritten or typed lists
- Personal communication face-to-face or by telephone transcribed onto paper
- Published reports electronically or on paper
- Electronic Recorder Import or Export format files

### **3. Data Management System**

3.1 All records need to be traceable to show what stages of the data management system have been completed. Upon receipt, paper records are stamped with a checklist showing the stages of the data management system.

3.2 Each stage on the checklist is signed and dated when completed. The stages are:

- Acknowledged
- Validation



- Data entered
- Data checked
- Verification

3.3 Paper records are filed by taxonomic group in a filing cabinet according to the data management system stamp stages. Records are moved accordingly when stages are completed into the next stage in the filing cabinet.

3.4 ERCCIS will validate records prior to the data provider being acknowledged.

3.4.1 Any missing information for the record(s) is obtained from the data provider, and then the record(s) is acknowledged. Any changes or additions made to the original data are clearly marked.

3.4.2 All records received should be acknowledged within 10 working days of receipt. For practical reasons, it is not always possible to acknowledge single records. In such instances, an ERCCIS postcard is sent to thank the data provider.

3.5 Most records ERCCIS receives are in paper format and need manually computerising into the database. Datasets received in an electronic format need importing into the database.

3.5.1 The speed at which paper and electronic datasets are integrated into the database depends upon their priority for data entry.

3.5.2 Data entry priorities are likely to be reviewed and amended annually in accordance with the needs of ERCCIS and its data users.

3.6 Records are entered into the computer database.

3.6.1 Electronic datasets do not need manual data entry. The data are imported electronically using an Import Wizard.

3.6.2 Paper records are transcribed by volunteers into a computer mini-database. The mini-database has been designed to be compatible with the Import Wizard.

3.7 Prior to a dataset being imported into the computer database, the records are checked for errors in transmission from paper to computer.

3.7.1 Checking records does not apply to datasets received electronically as there has been no manual data entry process at ERCCIS.

3.7.2 A checked record does not imply that the original information is correct, only that it has been correctly transcribed.

3.7.3 ERCCIS does not have the time or staff resources to check all the historical unchecked records on the computer database against their paper originals. It has therefore been agreed to check 50% of each historical survey dataset.

3.7.4 If frequent errors are found or the data are inconsistent with ERCCIS's current standards and practices, the percentage of records checked can be increased accordingly to rectify errors.

3.8 Verification is the process of checking that a record is 'correct' and it is a process that applies to all records. It ensures the species identified has been correctly determined.

3.9 ERCCIS has a process for removing data from its system should it be required. If requested by the original recorder, computerised records can be removed from the database and all paper originals and copies returned to the data provider. A metadata record of the removed dataset should be retained at ERCCIS as a report.

#### ***4. Related Policies and Procedures***

A7. Privacy

B3. Record validation and verification

B6. Prioritisation of record input

C1. Data Ownership

C4. Metadata Management

C5. Data Access

## **C4. Metadata Management**

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### **1. Policy statement**

- 1.1 ERCCIS will create electronic metadata by documenting its data holdings to help manage datasets and to provide information to staff, volunteers and data users.
- 1.2 ERCCIS will abide by the metadata principles and standards set by the NBN Trust. The policy will be reviewed in the light of developing NBN standards.
- 1.3 Biodiversity data should be easily accessible and therefore needs to be adequately indexed. ERCCIS will make metadata available on the website for the GIS digital maps, library books and journals it holds.

### **2. Background**

- 2.1 The term for the information provided about a dataset is "metadata", which means 'data about data'. ERCCIS creates and maintains metadata for groups of similar data collected in a similar way, which is called a dataset.
- 2.2 Metadata is important to ERCCIS for the following reasons:
  - 2.2.1 To catalogue the range of ERCCIS data holdings for staff, volunteers and for potential data users to view
  - 2.2.2 To make this information available on the Intranet and ERCCIS website where applicable.
  - 2.2.3 To help identify gaps in knowledge.
  - 2.2.4 To manage data effectively to ensure confidentiality, copyright and ownership agreements are adhered to.
  - 2.2.5 To enable potential data users to have a better understanding of the data ERCCIS holds, thereby, making the data more available for use.
  - 2.2.6 To track ownership of its data holdings.
  - 2.2.7 To track the status and location of the dataset within the ERCCIS data management system.
  - 2.2.8 To ensure the nature of the dataset is known, for example, the time period and geographic extent the data covers.
  - 2.2.9 To ensure it can contribute to metadata on the NBN Gateway.

### **3. Metadata**

- 3.1 The datasets ERCCIS holds metadata for include the following:
  - 3.1.1 Surveys of species records
  - 3.1.2 GIS digital maps

3.1.3 The books, journals and reports in the ERCCIS library

3.2 The typical information needed for metadata includes the name of the data owner, the dates between which the data were collected, the geographical area for which the data were collected and the terms under which the data can be made available to data users.

#### **4. *Related Policies***

C1. Data Acquisition and Ownership

C2. Dataset Management

C6. GIS

## **C5. Data Access Policy**

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### **1. Policy Statement**

1.1 The provision of access to data pertaining to the biology and geology of Cornwall and the Isles of Scilly is a core function of ERCCIS.

1.2 As a member of the National Biodiversity Network (NBN), ERCCIS operates according to the NBN data exchange principles. The wildlife and geological information ERCCIS holds should be made available for use in not for profit decision-making, education, research and other public benefit purposes.

1.3 Data is only useful when it is used. Therefore, the overarching principle guiding access to data at ERCCIS is one of open and equal access to all individuals and organisations.

1.4 Access to the data ERCCIS holds needs to be undertaken in a controlled and managed way.

1.5 ERCCIS will comply with the Data Protection Act 1998, which it is registered under through its host organisation Cornwall Wildlife Trust.

### **2. Background**

2.1 ERCCIS collates, manages and disseminates biological and geological information about Cornwall and the Isles of Scilly. Data are received from a variety of sources and in different formats.

2.2 Biological information comes in the format of species records which ERCCIS manages on computer databases. It is this information that is most frequently disseminated.

2.3 Information is supplied to data users after completion and submission of an Information Request Form. The data user must sign to agree with the Terms and Conditions under which the data are supplied to them.

### **3. Data Access**

3.1 ERCCIS provides information through the Wildlife Information Service, which offers an enquiry service to request wildlife information for a particular purpose. This service is available to everyone from conservation organisations, members of the public, students, recorders and commercial and statutory organisations.

3.2 ERCCIS does not charge for the supply of data. ERCCIS does charge, however, for the time invested by staff to collate, manage and disseminate that data.

3.3 ERCCIS will make data belonging to a data provider available to them upon request.

3.4 Data held by ERCCIS remains the intellectual property rights of the data provider. By submitting records and other information to ERCCIS, ERCCIS has the right to hold, copy, process and incorporate the data supplied into its data management system.

3.5 The right for ERCCIS to use this data can be withheld or withdrawn by the data provider at any time.

3.6 Biodiversity data should be used to encourage positive impacts on the natural environment. Where negative impacts are likely to occur as a result of supplying data to a data provider, ERCCIS has the right to withhold access to this data.

3.7 ERCCIS will restrict availability of wildlife information that it deems to be environmentally, commercially or personally sensitive in nature.

3.8 ERCCIS may restrict data access for the following reasons:

3.8.1 If complete access is likely to increase the risk of environmental damage or put sensitive species at risk.

3.8.2 If release of data is likely to jeopardise the supply of future data.

3.8.3 If the data provider has requested that data remains confidential.

3.8.4 Some data may be withheld if it is commercially sensitive, or still under preparation prior to publication and is therefore, incomplete. These restrictions may be temporary depending on the circumstance.

3.8.5 Data that contains personal information will be managed in accordance with the Data Protection Act 1998. Personal information is not supplied to third parties.

3.9 ERCCIS will make sufficient metadata available to allow data users to assess the scope, uses and constraints of the information provided.

3.10 ERCCIS will make relevant Policies and Procedures available on the ERCCIS website to allow data providers and users alike to view the standards and procedures by which ERCCIS operates.

#### ***4. Related Policies***

A4. Charging Policy

A7. Privacy Policy

C1. Data Ownership and Acquisition

C4. Metadata Management

#### ***5. Related Links***

[www.ercis.co.uk](http://www.ercis.co.uk)

## **C6. Geographical Information System (GIS) Management**

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### **1. Policy statement**

1.1 Digital mapping using ArcMap is an integral function to and service provided by ERCCIS. There is a high demand by users of biological information to be able to visualise and query data in a GIS.

1.2 The digital maps ERCCIS uses are either created in-house or acquired from external organisations and partners.

1.3 The digital maps ERCCIS has can be used by ERCCIS staff, provided to Cornwall Wildlife Trust staff and provided upon request to data users. Provision of digital maps depends upon the access constraints of the dataset.

1.4 There are three levels of access constraints that apply to providing digital map datasets. The access constraints are as follows: the digital map cannot be used outside of ERCCIS or Cornwall Wildlife Trust, access can only be granted to Service Level Agreement holders and access is available upon application.

1.5 ERCCIS will ensure metadata are available for each digital map.

1.6 A full list of digital maps ERCCIS holds, together with associated metadata, is available on the Intranet.

### **2. Background**

2.1 A GIS is a tool for capturing data for managing, analysing and displaying all forms of geographically referenced information.

2.2 The information is stored in a coordinate system, a grid reference for example, which relates to a particular part of the Earth's surface.

2.3 GIS allows a user to view, question and interpret data on computerised maps.

### **3. Organisation of GIS maps at ERCCIS**

3.1 Digital maps are stored on the V: drive.

3.2 To add a new digital map to the V: drive the system requires:

3.2.1 A dataset which is defined as the data source. A dataset can consist of any geographically referenced data such as coverage, a shapefile or raster image in a geo-database.

3.2.2 A layer is the visual representation of the data from the dataset. ERCCIS uses digital maps as layers.

3.3 Datasets and layers are organised into the following stratum:

- Administrative – contains vice county outlines, district and parish boundaries.

- Backdrops – grid squares and Cornwall and the Isles of Scilly backgrounds.
- Designations – contains statutory and non-statutory designations for sites of nature conservation importance.
- Habitat – shows different habitats across the county including BAP habitats, National Vegetation Survey cover and Landcover.
- Landscape – maps showing designated Natural Areas and Character Areas.
- Land Use and Management – land under management plans by various organisations including Countryside Stewardship, Organic Farming and Environmental Stewardship.
- Organisations – contains Local Environmental Action Plan areas in Cornwall.
- Reserves and Ownership – land owned or managed by organisations including Cornwall County Council, Cornwall Wildlife Trust and National Trust land holdings.
- Species – distribution maps in Cornwall such as bryophyte and odonata sites.
- Topography – geology data from the British Geological Survey and rivers.

#### **4. *Updating layers***

4.1 GIS datasets and layers will be maintained and kept up-to-date jointly by the IT Manager and the ERCCIS Data Officer.

4.2 On a bi-annual basis, updates will be reviewed and obtained from the MAGIC website.

4.3 Other layers not sourced from MAGIC will be updated on an ad-hoc basis when they are received by ERCCIS.

4.4 Instructions are available for updating or creating new datasets and layers. When a layer is updated, the old layer is archived rather than deleted.

4.5 The properties of the archived layer, i.e. symbology, font style, size and name, are kept the same for the layer that is replacing or updating it.

#### **5. *Metadata***

5.1 Metadata is stored in ArcCatalog for each digital map ERCCIS holds.

5.2 The mandatory metadata fields are title, originator, publication date, abstract and access constraint.

#### **6. *Related Policies***

C4. Metadata



## ***7. Related Links***

[www.magic.gov.uk](http://www.magic.gov.uk)

## **D4. Volunteers at ERCCIS**

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### **1 Policy statement**

1.1 ERCCIS relies quite heavily on the input and support of volunteers to ensure the smooth functioning of the organisation. It will recruit, employ and provide support to all its volunteers.

1.2 The Staff member responsible for volunteer management will be the Data Officer.

### **2 Background**

2.1.1 Local Records Centres are very manpower intensive and require the support of a well trained and motivated team of volunteers. Very often volunteers are people training or studying within the conservation sector.

2.2 Good management and training of volunteers will often be to CWT's benefit; many future paid employees of the Trust have a history of volunteering.

### **3. Induction**

3.1 All volunteers must undertake a full induction using the relevant parts of the CWT Induction proforma. Completed forms should be returned to the HR, Safety & Welfare Manager.

3.2 Volunteers will be viewed as an integral part of the team and should be included in as many activities as possible. All long term volunteers should be given the opportunity to take part in the Staff Day Out and receive an invitation to the Christmas Lunch.

### **4. Volunteer Roles**

4.1 ERCCIS will look to offer volunteer opportunities in the following areas:

- Data input, checking and validation
- Administration
- Library support
- WIS support

4.2 The ERCCIS Data Officer will maintain a list of prospective volunteers and their skills in order that the requirements at 4.1 are maintained as completely as possible.

## **5. Health & Safety**

5.1 Volunteers should follow all H & S procedures, including lone working where appropriate. Risk assessment, if required, should be completed and the paperwork handed to the HR, Safety & Welfare Manager on completion.