



The Environmental Record Centre for Cornwall and the Isles of Scilly Records Policy

Cornwall Wildlife Trust, or CWT: registered charity in England and Wales 214929.

ERCCIS collates, manages and disseminates biological and geological information for use in research, conservation and sustainable development, working with local and national biological recorders and conservation organisations for the better environmental conservation of the county.

As a Local Environmental Record Centre, ERCCIS works to support and facilitate recording across Cornwall, through our Wildlife Information Service and online recording website ORKS - Online Recording Kernow and Scilly

Information is received from a variety of sources and is stored in its original format and/or on computer databases.

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AI. Records – Key Principles

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.

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- 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 1km² 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.

A2. Record Validation and Verification Policy

I. *Policy statement*

- I.1 ERCCIS aims to validate and verify every biological record it receives to ensure the data is as correct as possible and of a consistently high quality.
- I.2 Validation is a procedure that ensures the minimum standards needed to make a biological record are adhered to.
- I.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.
 - I.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.
 - I.3.2 There are likely to be different verification procedures for different taxonomic groups.
- I.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.
- I.5 ERCCIS has a written procedure that explains how to validate and verify biological records.

A3. Record Validation and Verification Procedure

1. 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 is of the highest quality possible and the reliability of the information ERCCIS holds is known.

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.

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- 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; the previous 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.



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- 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.

A4. Prioritisation of Record Input Policy

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 Low 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 Links*

The Species of Conservation Concern list can be found at

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

A5. Recorder Support

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 Data Agreements will be offered between ERCCIS and recording groups for exchange and access to data. This policy is laid out in the Data Policy.
- 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 Workshops/Events

- 4.1 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.
- 4.2 ERCCIS Staff will endeavour to attend at least 1 meeting of all the recognised recording groups annually and externally organised Bioblitzs.
- 4.3 ERCCIS Staff will offer training to any recording group to help with recording and uploading biological records to the Online Recording Kernow & Scilly (ORKS).