

WBRC

2024 - 2027

Strategic Business Plan Priorities



Worcestershire Biological Records Centre

Lower Smite Farm, Hindlip, Worcestershire, WR3 8SZ

Web: wbrc.org.uk

Tel: 01905 759759

WBRC Strategic Business Plan Priorities 2024-27

Your natural partner for wildlife projects in the county.

We work in partnership and for public benefit to:

collect, collate, manage and disseminate quality information about the wildlife, habitats and wildlife sites of Worcestershire.

Our key priorities and performance indicators are to -

- **Maintain and further develop an efficient and effective stakeholder-led organisation.**
 - *All relevant legislation & requirements are met and adequate reserves maintained*
 - *Organisational capacity is maintained and improved.*

- **Ensure effective and secure management of validated biological data for the Worcestershire area.**
 - *Quarterly download of key digital data sources is fully achieved for preceding year*
 - *All single and small data submissions arriving directly to WBRC are processed and available within the Quarter*
 - *Volunteer office data entry capacity is increased by at least 0.4 FTE for 2024-5.*

- **Improve data access and usage through maintenance and further development of a suite of user-led products and services in line with agreed standards for LRCs.**
 - *Agreed SLAs are fully delivered to customers' satisfaction*
 - *95% timely delivery targets are met or exceeded.*

Worcestershire Biological Records Centre Overview 2024

Local Environmental Records Centres (LERCs) provide a focus for the collation, management and provision of data relating to the wildlife of an area and use this to provide high-quality information relating to, for example, species occurrences and distributions for a given area.

History

WBRC has a long history originating in the late 1970s. A team was funded for 1 year by Manpower Services Commission under the auspices of Worcester City Council & Worcester City Museum in the late 1970s. Thereafter WBRC was run by volunteers with support initially from Worcester Museum, collating data from local naturalists and published journals. Files and volunteers moved into various offices until by the late 1990s WBRC was rehoused after an offer of a location from Worcestershire Wildlife Trust (WWT), where we gratefully remain to this day.

In June 2000 the WBRC Study Steering Group was formed to look at development options and a limited company was formed to take over development and running of the Worcestershire Biological Records Centre in March 2002. Charitable status was granted in February 2003 and a Manager appointed to take forward the development and running of WBRC. Similarly, in the early 2000s, Worcestershire Recorders became the formal county group of local natural historians supporting the work of WBRC and actively involved in the running via nominated individuals sitting on the Company's Board of Directors.

Ongoing funding from 3 core county organisations transferred into contractual Service Level Agreements (SLA) or Memoranda of Agreement (MoA). English Nature became Natural England and funding ran to 2016. The Environment Agency (EA) signed a MoA in 2009 which continues to date. The SLAs with both WWT and Worcestershire County Council are renewed on a yearly basis and EA currently engaged in a 5-year contract maintained and reviewed yearly with specific delivery of data and products as required.

Staffing has varied between 1 and 2.4 FTE. Key to the successful working of WBRC always has been the huge amount of volunteer support received in the office to assist the processing data sent in by the many recorders; this continues to this day and developing relationships with local recorders is one of the most important jobs for WBRC. As well as encouraging recorders to allow use of their data, we advise them of the need for data, perhaps to fill gaps in data holdings or to support a particular conservation initiative.

We are active in the West Midlands LERC Forum made up of the 6 LERCs for the area, (created to share and disseminate ideas/information and undertake regional data projects), an Associate Member of the National Biodiversity Network and a founder member of the Association of Local Environmental Records Centres (ALERC), representing the interests of Local Records Centres in the UK, promoting standards and services in biodiversity.



Key achievements 2003 to date

Data Held – Species

- **1.7 million individual** records collated from a variety of paper and digital sources including
 - Local county species recorders and naturalists/local species interest groups such as Worcestershire Recorders, Wyre Forest Study Group, Worcestershire Amphibian and Reptile Group, Worcestershire Bat Group, Worcestershire Mammal Group, Worcestershire Mothers
 - Nationally run schemes/databases such as iRecord, Butterfly Conservation transect monitoring, the BSBI-led Worcestershire Flora Project
 - Historical recording data from all county SSSIs from Natural England and historical recording data from WWT Reserves
 - WWT public participation surveys such as Wild About Hedgehogs and The Wildlife Sightings Project
 - Records collected by WBRC led projects such as Conserving Worcestershire’s Flagship Orchards, Finding Rare Species in the Malverns, The Distribution of Otter on the River Severn, Teme Valley Orchards Project
 - An average of 60,000 new records added to the WBRC data holding each year (2016-2023).

Data Held – Sites

- **Boundary information for all statutory and non-statutory designated sites in Worcestershire** including
 - Maintaining master copy of 537 Local Wildlife Sites for the LWS Partnership
 - SSSI/SAC, Local Nature Reserves, Priority Habitat layers for Orchard/Ancient Woodland/Grassland
 - Maintaining of Worcestershire Ancient Tree Inventory.

Projects and Contracts

WBRC has also been awarded and successfully delivered

- 5 Heritage Lottery-funded projects, each employing a dedicated member of staff managed by WBRC and 2 projects from other conservation funders
- Contracts with District Councils, Malvern Hills AONB, Conservators, delivered locally and as joint regional projects to UK infrastructure providers such as Severn Trent Water and Highways England (and their delivery contractors) and regionally with West Midlands LERCs to Natural England.

Users

- Over 350 commercial and non-commercial data search enquiries on data held by WBRC in 2023
- Government (Environment Agency via MoA, Forestry Commission individual data searches)
- Local Authorities (now totally via Worcestershire County Council with District Councils having no financial input but benefiting from access to key data via WBRC/WCC)
- NGOs (Worcestershire Wildlife Trust, Malvern Hill Conservators, Malvern Hills AONB)
- Ecological/Environmental Consultants via direct contact requests
- Other (national networks such as rail and utilities)
- Local Naturalists, Natural History Groups and Students.

Strategic objectives

These are referenced to [ALERC accreditation criteria](#).

1. **Maintain and further develop an efficient and effective stakeholder-led organisation. (ALERC Organisational Fundamentals)**
 - a) Ensure compliance with all relevant legislation, regulation and reporting including Charity Commission, Companies House and HMRC. (4, 5)
 - b) Gain ALERC accreditation, using the ALERC accreditation framework as a development tool and engaging ALERC support as appropriate and necessary. (10)
 - c) Ensure proactive and effective communications and engagement with stakeholders and clients. (1,2, 8)
 - d) Ensure that WBRC has clearly defined roles and responsibilities, and that the organisation has adequate staff capacity to cope with current and foreseeable future workload, as well as being able to take advantage of and maximise opportunities. (9)
 - e) Maintain effective management of staff and volunteers. (9, 10.2)
 - i. Identify and enable relevant recruitment, development and training for Staff and Volunteers (including Board). (10.4)
 - f) Ensure robust and transparent financial & operational management practices to maintain a sustainable business model, ensuring adequate reserves (4,5,6)
 - g) Ensure appropriate, safe and effective working conditions including accommodation and tools.
 - i. Maximise office presence/coverage while maintaining most efficient ways of working and enabling agreed staff/volunteer flexibility. (9, 10.3)
 - ii. Review & update policy, practice & other key documents in line with agreed schedules and contextual changes (3, 4, 10.1, 10.3)
 - h) Ensure customer satisfaction and organisational responsiveness remain high (8, 10.3)
 - i) Quarterly/annual data acquisition & management reports to Board & externals to include quarterly additions/ running totals. (1, 4, 10.1, 10.2, 10.3) (See 2d)
2. **Ensure effective and secure management of validated biological data for the Worcestershire area. (ALERC Data Custodianship)**
 - a) Fulfil all appropriate data management responsibilities – including custodianship, management, verification, quality assurance, security, and data visibility including by sharing with external organisations (eg NBN/NBN Atlas) where appropriate. (11-15)
 - b) Ensure effective and timely primary data acquisition and maintenance, including engagement with the local recording community, national recording schemes & societies, expert groups, and data recording sites such as iRecord. (11)
 - c) Ensure currency and frequency (*define*) of updates – quarterly Board reports to include quarterly additions and running totals. (10.3, 16) & See 1i above.
 - d) Maintain compliance with the relevant standards for storage & sharing of species and habitat data. (11 – 15)
3. **Improve data access and usage through maintenance and further development of a suite of user-led products and services in line with agreed standards for LRCs. (ALERC Products and Services)**
 - a) Maintain and develop appropriate, cost-effective Service Level Agreements (SLAs) and Memoranda of Association (MoA) and identify potential new opportunities. (20, 8, 10.3)
 - b) Maintain and manage the enquiries flow & resulting income stream. (16, 6)
 - c) Continue to review standard and tailored reporting, further developing and improving as appropriate. (16-20)
 - d) Ensure agreed mechanisms and processes to demonstrate Value for money (VFM) of SLAs and MoA. (6, 10/2, 16) (& WWT priority 2024)
 - e) Identify, develop and manage appropriate externally-funded project opportunities to further the aims of WBRC. (16-20, 2, 10.3)

3-year Business Plan overview

Ref	SO	2024-5	2025-6	2026-7
A	<i>1a</i>	<p>Ensure legal and other externally required actions and reporting are done to standard and on time, and the Essential Actions listing is kept updated.</p> <ul style="list-style-type: none"> • Charity Commission - • Companies House - • HMRC - if VAT Registration threshold reached. 	<p>Ensure externally required actions and reporting are done to standard and on time, and Essential Actions listing is kept updated.</p> <ul style="list-style-type: none"> • Charity Commission • Companies House • HMRC 	<p>Ensure externally required actions and reporting are done to standard and on time, and Essential Actions listing is kept updated.</p> <ul style="list-style-type: none"> • Charity Commission • Companies House • HMRC
B	<i>1gii 1ei</i>	<p>Maintain policy review and update cycle with engagement of Board.</p> <ul style="list-style-type: none"> • Review, revise or produce written and audited policies for responding to queries by phone/email/direct & formal report requests. (See also J) • Review lone worker section of H&S policy to ensure adequacy including on-site at LSF 	<p>Maintain policy review and update cycle with engagement of Board.</p>	<p>Maintain policy review and update cycle with engagement of Board.</p>
C	<i>1b</i>	<p>ALERC accreditation Begin internal ALERC Review Timetable and Board monitoring. From April 2024</p> <ul style="list-style-type: none"> • Review & learn from other LERC operating models and contexts • Continue to work with other LERCs directly and via ALERC to solve common problems. 	<p>ALERC accreditation</p> <ul style="list-style-type: none"> • Complete internal review • Collate evidence/ documentation • Schedule ALERC assessment. 	<p>ALERC accreditation</p> <ul style="list-style-type: none"> • Make ALERC accreditation application • Achieve accreditation
D	<i>1c</i>	<p>Ensure proactive and effective communications and engagement with stakeholders and clients.</p> <ul style="list-style-type: none"> • Review and enhance WBRC engagement with the local recording community • Continue to attend agreed Worcestershire Recorders' meetings, give brief update reports and receive feedback 	<p>Ensure proactive and effective communications and engagement with stakeholders and clients</p> <ul style="list-style-type: none"> • Modernised WBRC website launched. • Identify, develop & test any desirable additional functionality 	<p>Ensure proactive and effective communications and engagement with stakeholders and clients</p> <ul style="list-style-type: none"> • Launch identified additional website functionality • Review and enhance engagement with the local recording community

		<ul style="list-style-type: none"> • Maintain Recorders' links via Board representation, particularly supporting WBRC by seeking nominees with currently identified target areas of expertise/experience in small business and finance • Communications & 'advertising' channels for clients and public - review & decisions on key channels, particularly the website. • Begin review of website functionality and content requirements and drafting specifications as a key communications channel, while ensuring a manageable administrative burden. • Identify and further develop use of our own and others' key channels of communication. 	<p>requirements to streamline systems.</p> <ul style="list-style-type: none"> • Review and enhance engagement with the local recording community • Continue to attend agreed Worcs Recorders' meetings, give brief update reports and receive feedback 	<ul style="list-style-type: none"> • Continue to attend agreed Worcs Recorders' meetings, give brief update reports and receive feedback
E	1f 1d	<p>Develop a sustainable business model, ensuring adequate reserves.</p> <ul style="list-style-type: none"> • Identify immediate funding opportunities for sustainable enhanced capacity (employed staff – see also F). • Develop and maintain a 'pipeline' of funding opportunities to explore, apply for and deliver. • Review and revise as appropriate the pricing of services. • Prepare for the impact of reaching VAT threshold including modelling for Quarterly Board report. 	<p>Review and appropriately adapt business model, ensuring adequate reserves.</p> <ul style="list-style-type: none"> • Monitor funding opportunities & maintain currency of 'pipeline'. • Review and revise as appropriate the pricing of services. • Implement any necessary changes for meeting VAT threshold • Review banking options. 	<p>Review and appropriately adapt business model, ensuring adequate reserves.</p> <ul style="list-style-type: none"> • Monitor funding opportunities & maintain currency of 'pipeline'. • Review and revise as appropriate the pricing of services including VAT threshold implications • Review banking provision options.
F	1d, 1e 1f 1gi	<p>Review capacity needs & increase capacity to enable development and provide flexibility & resilience</p> <ul style="list-style-type: none"> • Identify and specify additional job role(s) to enhance capacity. • Recruit appropriate paid staff (See E – funding-dependent) • Review & implement task delegation, management and monitoring for effective use of enhanced capacity. 	<p>Review capacity needs and roles and act to ensure an efficient, sustainable service.</p>	<p>Review capacity needs and roles and act to ensure an efficient, sustainable service.</p>
G	1d, 1e, 1gi	<p>Urgently recruit additional volunteer capacity for identified roles, e.g. office-based support, miscellaneous data input, admin support...</p>	<p>Maintain/improve volunteer capacity for identified areas</p> <ul style="list-style-type: none"> • Review & implement task delegation, management and 	<p>Maintain/improve volunteer capacity for identified areas</p>

		<ul style="list-style-type: none"> Review & implement task delegation, management and monitoring for effective use of enhanced capacity. With all external engagements Board and staff will promote opportunities for volunteer positions (See also H, K) 	<p>monitoring for effective use of enhanced capacity.</p> <ul style="list-style-type: none"> With all external engagements encourage opportunities for volunteer positions. 	<ul style="list-style-type: none"> Review & implement task delegation, management and monitoring for effective use of enhanced capacity. With all external engagements encourage opportunities for volunteer positions.
H	<i>1ei</i>	<p>Identify and enable relevant development and training for Staff, Board & Volunteers</p> <ul style="list-style-type: none"> Ensure staff and volunteers have access to appropriate training and CPD - including ALERC meetings/conference, skills refresh/development and others as identified to meet individual and organisational needs and priorities. (See also M.) 	<p>Identify and enable relevant development and training for Staff, Board & Volunteers</p> <ul style="list-style-type: none"> Ensure staff access to appropriate CPD - inc ALERC meetings/ conference and identified priority areas for development. 	<p>Identify and enable relevant development and training for Staff, Board & Volunteers</p> <ul style="list-style-type: none"> Ensure staff access to appropriate CPD - inc ALERC meetings/ conference and identified priority areas for development.
I	<i>1h</i>	<p>Ensure customer satisfaction and organisational responsiveness remain high.</p> <ul style="list-style-type: none"> Prepare, publish and promote annual report for stakeholders. 	<p>Ensure customer satisfaction and organisational responsiveness remain high.</p> <ul style="list-style-type: none"> Prepare, publish and promote annual report for stakeholders. 	<p>Ensure customer satisfaction and organisational responsiveness remain high.</p> <ul style="list-style-type: none"> Prepare, publish and promote annual report for stakeholders.
J	<i>1h 1c,</i>	<p>Ensure good customer response in a timely manner.</p> <ul style="list-style-type: none"> Undertake data searches from all clients and deliver reports Monitor response rate / speed of reporting. Publish clear policy statement (including complaints/problems) on website. Review enquiries logging system and make available electronically as appropriate to enable support in monitoring to ensure timely responses. 	<p>Ensure good customer response in a timely manner.</p> <ul style="list-style-type: none"> Monitor response rates. 	<p>Ensure good customer response in a timely manner.</p> <ul style="list-style-type: none"> Monitor response rates.
K	<i>1h, 1c</i>	<p>In partnership, support appropriate, agreed training & events for the local recording community and/or public, e.g.</p> <ul style="list-style-type: none"> Meetings attendance/contributions Support for external events Equipment loans Build in integral review/ feedback 	<p>In partnership, support agreed training & events for recording community/public.</p> <ul style="list-style-type: none"> Meetings attendance/ contributions Support for external events Equipment loans 	<p>In partnership, support agreed training & events for recording community/public.</p> <ul style="list-style-type: none"> Meetings attendance/ contributions Support for external events Equipment loans

L	1i	<p>Ensure effective reporting</p> <ul style="list-style-type: none"> • Management reports to Board on all aspects to increase the focus on areas for improvement and Board to focus on providing support for these. 	<p>Ensure effective reporting</p> <ul style="list-style-type: none"> • Management reports to Board on all aspects to increase the focus on areas for improvement and Board to focus on providing support for these. • Board to continue to request inclusion of additional information and explanation where required. 	<p>Ensure effective reporting</p> <ul style="list-style-type: none"> • Management reports to Board on all aspects to increase the focus on areas for improvement and Board to focus on providing support for these. • Board to continue to request inclusion of additional information and explanation where required.
M	1 a-h	<p>Enhance Board capacity, engagement and effectiveness.</p> <ul style="list-style-type: none"> • Review Board stakeholder representation and member roles e.g. leading working group, liaison, etc. to maximise engagement with and support for WBRC • Skills audit – refresh • Recruit members with appropriate background, skillsets and expertise. • Visit/contact other LERCs for inspiration and ideas. • Consult on and review original Articles and Memorandum. <p>(See also H.)</p>	<p>Enhance Board capacity, engagement and effectiveness.</p> <ul style="list-style-type: none"> • Review Board stakeholder representation and member roles • Skills audit – refresh • Recruit members with appropriate background, skillsets and expertise. • Visit/contact other LERCs for inspiration and ideas. • If required, revise Articles/Memorandum. 	<p>Enhance Board capacity, engagement and effectiveness.</p> <ul style="list-style-type: none"> • Review Board stakeholder representation and member roles • Skills audit – refresh • Recruit members with appropriate background, skillsets and expertise. • Visit/contact other LERCs for inspiration and ideas.
N	2a, 2b	<p>Fulfil appropriate data management responsibilities</p> <ul style="list-style-type: none"> • All data submitted to NBN Atlas when NBN have put access controls in place. (April 24, dependent on NBN) • Follow Data Security procedures as per updated Policy. • Schedule in line with NBN requirements. 	<p>Fulfil appropriate data management responsibilities</p> <ul style="list-style-type: none"> • All data submitted to NBN Atlas • Follow Data Security procedures as per updated Policy. • Schedule in line with NBN requirements 	<p>Fulfil appropriate data management responsibilities</p> <ul style="list-style-type: none"> • All data submitted to NBN Atlas • Follow Data Security procedures as per updated Policy. • Schedule in line with NBN requirements
O	2b	<p>Ensure effective primary data acquisition and maintenance</p> <p>including engagement with the local recording community and national expert groups.</p> <ul style="list-style-type: none"> • Improve speed of entry for miscellaneous individual records and keep recording community informed. 	<p>Ensure effective primary data acquisition and maintenance</p> <p>including engagement with the local recording community and national expert groups.</p>	<p>Ensure effective primary data acquisition and maintenance including engagement with the local recording community and national expert groups.</p>

		<ul style="list-style-type: none"> Review and import available historic records as capacity allows. 	<ul style="list-style-type: none"> Maintain/improve speed of entry for miscellaneous individual records and keep recording community informed. Review and import available historic records as capacity allows. 	<ul style="list-style-type: none"> Maintain/improve speed of entry for miscellaneous individual records and keep recording community informed. Review and import available historic records as capacity allows.
P	2a 2c 2d	Ensure currency and frequency of i-Record updates <ul style="list-style-type: none"> Improve efficiency of iRecord data transfer Maintain regular quarterly data import schedule Maintain Board and stakeholder quarterly reports on progress with additional interim information as appropriate. 	Ensure currency and frequency of updates <ul style="list-style-type: none"> Maintain regular quarterly data import schedule Maintain Board and stakeholder quarterly reports on progress with additional interim information as appropriate. 	Ensure currency and frequency of updates <ul style="list-style-type: none"> Maintain regular quarterly data import schedule Maintain Board and stakeholder quarterly reports on progress with additional interim information as appropriate.
Q	2d	Maintain compliance with the relevant standards for species and habitat data. <ul style="list-style-type: none"> Keep Recorder 6 species dictionary up to date in line with any releases Export from Recorder 6 to Darwin Core format for NBN Atlas with add-in available when needed. 	Maintain compliance with the relevant standards for species and habitat data. <ul style="list-style-type: none"> Keep Recorder 6 species dictionary up to date in line with any releases. 	Maintain compliance with the relevant standards for species and habitat data. <ul style="list-style-type: none"> Keep Recorder 6 species dictionary up to date in line with any releases.
R	3a	Identify/review income from consultancies <ul style="list-style-type: none"> Regular review of charging rates. 	Identify/review Income from consultancies <ul style="list-style-type: none"> Regular review of charging rates 	Identify/review Income from consultancies <ul style="list-style-type: none"> Regular review of charging rates
S	1c 3a 3d	Review existing Service Level Agreements (SLAs) & Memoranda of Agreement (MoAs), ensuring Value for Money (VfM) is clearly demonstrated. <ul style="list-style-type: none"> Meeting partners Reviewing needs Agree year's outcomes Identify & agree VfM Minuted meetings with clients 	SLA & MoA development with stakeholders <ul style="list-style-type: none"> Meeting partners Reviewing needs Agree year's outcomes Identify & agree VfM Minuted meetings with clients 	SLA & MoA development with stakeholders <ul style="list-style-type: none"> Meeting partners Reviewing needs Agree year's outcomes Identify & agree VfM Minuted meetings with clients

T	1c 3a	SLA & MoA development with stakeholders. <ul style="list-style-type: none"> Review Identify potential new clients Minuted meetings with prospective clients Work with ALERC where appropriate with large cross-LERC boundary customers 	SLA & MoA development with stakeholders. <ul style="list-style-type: none"> Address outcomes of review Identify potential new clients Work with ALERC where appropriate with large cross-LERC boundary customers Minuted meetings with prospective clients 	SLA & MoA development with stakeholders. <ul style="list-style-type: none"> Identify potential new clients Work with ALERC where appropriate with large cross-LERC boundary customers Minuted meetings with prospective clients
U	3b 3c	Continue to review standard and tailored data search reports in response to customer feedback. <ul style="list-style-type: none"> Monitor satisfaction / feedback Review and update as appropriate the standard datasearch reports with integral feedback/satisfaction request. Maintain bespoke data search options. 	Continue to review standard and tailored data search reports in response to customer feedback. <ul style="list-style-type: none"> Review ongoing feedback mechanisms including web-based automated solutions. Make minor revisions as appropriate. 	Continue to review standard and tailored data search reports in response to customer feedback. <ul style="list-style-type: none"> Review ongoing feedback mechanisms including web-based automated solutions. Make minor revisions as appropriate.
V	3e	Identify, develop and manage appropriate externally-funded project opportunities to further the aims of WBRC <ul style="list-style-type: none"> Potential AWI extension 	Identify, develop and manage appropriate externally-funded project opportunities to further the aims of WBRC <ul style="list-style-type: none"> Invite discussions with potential partners as opportunities arise. 	Identify, develop and manage appropriate externally-funded project opportunities to further the aims of WBRC <ul style="list-style-type: none"> Invite discussions with potential partners as opportunities arise.
W	2b 3a 3d	Review and continue agreed support for WWT Wildlife Sightings project. (WWT/Recorders maintain public-facing lead)	Continue identified support for WWT Wildlife Sightings project as agreed. (WWT/Recorders maintain public-facing lead)	Continue identified support for WWT Wildlife Sightings project as agreed. (WWT/Recorders maintain public-facing lead)

