

SEWBRc BUSINESS PLAN OBJECTIVES 2023-28

This plan organises SEWBRc's business objectives into four main themes. Within each theme, individual objectives are identified and organised into sub-themes. For each objective, measures and metrics are identified, classified and colour-coded as either **quantitative** or **qualitative**. Reporting on measures and metrics will take place at least annually and will be collated over the plan period, so that longer-term trends can be identified. These will trigger actions and will inform objectives in future business plans.

Theme 1 - IMPROVING RECORDING AND DATA

Supporting the recording community:

1.1	<p>Events: provision of an annual Recorders' Forum event and a minimum of two recorders' field days per year</p> <ul style="list-style-type: none"> ▪ Number of events ▪ Number of attendees
1.2	<p>Communications: provision of two newsletters per year, monthly emails and at least weekly social media posts across relevant platforms</p> <ul style="list-style-type: none"> ▪ Numbers of newsletters ▪ Number of posts ▪ Levels of engagement with social media posts ▪ Subscribers to email communications
1.3	<p>Initiatives: promote squares of the month (for Glamorgan and Gwent), species of the month and other recording initiatives at appropriate intervals</p> <ul style="list-style-type: none"> ▪ Number of participants in recording initiatives ▪ Number of incoming records generated
1.4	<p>Make access to equipment and resources via Recorders' Grant Scheme, equipment loan scheme and SEWBRc reference library</p> <ul style="list-style-type: none"> ▪ Number of applications ▪ Grant expenditure ▪ Number of incoming records generated ▪ Feedback from grant recipients
1.5	<p>Support local and national expert groups to encourage more recording in our area</p> <ul style="list-style-type: none"> ▪ Grant expenditure ▪ Technical support given
1.6	<p>Improve the recorder experience by providing feedback and recognition to recorders where possible</p> <ul style="list-style-type: none"> ▪ Records of the week ▪ Publicity and recognition of recorder efforts ▪ Improved access to personal records
1.7	<p>Provide and promote websites, apps and software for record submission</p> <ul style="list-style-type: none"> ▪ Number of records flowing into SEWBRc via approved/promoted routes
Training and promoting standards	
1.8	<p>Provision of introductory courses to encourage recording both proactively and where requested</p> <ul style="list-style-type: none"> ▪ Number of events ▪ Number of attendees ▪ Number of new recorders ▪ Feedback received

1.9	<p>Provision of an annual programme of species identification courses</p> <ul style="list-style-type: none"> ▪ Number of attendees ▪ Number of records of groups covered submitted by attendees ▪ Feedback received
<p>Overall Theme Measure</p> <ul style="list-style-type: none"> ▪ Total number of records on SEWBRc database 	

<p>Theme 2 - MANAGING DATA</p>	
<p>Data flow</p>	
2.1	<p>Maximise potential data sources such as local recorders and groups, national schemes and societies, partner organisations, academia and consultants</p> <ul style="list-style-type: none"> ▪ Number of data flows from new sources established ▪ Regular and effective data flows taking place
2.2	<p>Ensure data exchange is formalised and implemented with data providers through data exchange agreements, as appropriate</p> <ul style="list-style-type: none"> ▪ Number of established and new Data Exchange Agreements ▪ Regular data flows taking place
2.3	<p>Optimise speed and efficiency of movement of data from capture to output</p> <ul style="list-style-type: none"> ▪ Time taken between data capture (or date of receipt at SEWBRc) and incorporation into SEWBRc database across different methods of data submission ▪ Size of data backlog
<p>Data quality and verification</p>	
2.4	<p>Support a network of local and national verifiers to actively verify data in the SEWBRc area</p> <ul style="list-style-type: none"> ▪ Support a network of local and national verifiers to actively verify data in the SEWBRc area ▪ Number of records verified per year by local and national verifiers
2.5	<p>Establish and maintain a system for SEWBRc to verify common and widespread species</p> <ul style="list-style-type: none"> ▪ Number of records verified per year by SEWBRc staff
<p>Data quantity and comprehensiveness</p>	
2.6	<p>Monitor geographical and taxonomic spread of incoming data; identify and rectify gaps</p> <ul style="list-style-type: none"> ▪ Analysis of geographic/taxonomic spread of annual incoming data

<p>Theme 3. IMPROVING DATA USAGE</p>	
<p>Data flow</p>	
3.1	<p>Deliver appropriate public access data (currently via Aderyn)</p> <ul style="list-style-type: none"> ▪ Number of uses of Aderyn public data access tools
3.2	<p>Deliver core data searches (currently via Aderyn) such as commercial data searches and direct partner access; implement system improvements as appropriate</p> <ul style="list-style-type: none"> ▪ Number of uses of Aderyn for commercial data searches ▪ Number of uses of Aderyn for partner data searches ▪ Evaluation of quantity and impact of Aderyn system improvements
3.3	<p>Develop and deliver enhanced data products and services such as ecosystem resilience mapping and modelling</p> <ul style="list-style-type: none"> ▪ Evaluation of extent of use of data for enhanced products and services
<p>Data sharing</p>	
3.4	<p>Adopt and implement FAIR data principles (Findable, Accessible, Interoperable, Reusable)</p>

	<ul style="list-style-type: none"> Evaluation of progress
3.5	<p>Ensure data held by SEWBReC is made available as appropriate (including via the NBN Atlas and direct data supply) to support the work of national schemes and societies and others</p> <ul style="list-style-type: none"> Number of records accessible via the NBN Atlas Evaluation of interactions and data sharing instances with national schemes and societies
Promoting data use	
3.6	<p>Ensure SEWBReC is the principal and preferred source of biodiversity data relating to our region and, via LERC Wales, to the whole of Wales</p> <ul style="list-style-type: none"> Evaluation of instances of misuse of data from other sources which by-pass SEWBReC Seek testimonials from service users
3.7	<p>Promote the use of data to inform all aspects of biodiversity protection and conservation by public sector bodies (such as local authorities and statutory bodies) and NGOs</p> <ul style="list-style-type: none"> Number or percentage of planning applications checked against SEWBReC data Number of data searches undertaken by public sector Aderyn users
3.8	<p>Promote the use of data to inform all aspects of biodiversity protection and conservation by the private sector (including developers and environmental consultants)</p> <ul style="list-style-type: none"> Number of commercial data enquiries
Customer satisfaction	
3.9	<p>Seek customer feedback on products and services and adapt to ensure customer satisfaction</p> <ul style="list-style-type: none"> Undertake customer satisfaction survey at least every 4 years; evaluate and share findings

Theme 4. GOVERNANCE	
Business management	
4.1	<p>Ensure robust and transparent financial and operational management practices to maintain a sustainable not-for-profit business model</p> <ul style="list-style-type: none"> Ensure Finance Committee with terms of reference meets 4 times per year and reports to Board of Directors Maintain and evaluate financial procedures manual Ensure regular reporting of operational practices to Board and AGM Size of financial reserve in relation to inflation and operating costs
4.2	<p>Ensure SEWBReC has adequate staff capacity to maximise opportunities and cope with workload and that staff have clearly defined roles and responsibilities</p> <ul style="list-style-type: none"> Undertake annual staff appraisals and implement any actions arising Review and evaluate roles and responsibilities document at least annually Evaluate effectiveness of staff meetings and daily live chat in highlighting issues of work capacity
External relationships	
4.3	<p>Maintain relationships with relevant professional bodies (including LERC Wales Limited, the Association of Local Environmental Records Centres, National Forum for Biological Recording and the National Biodiversity Network)</p> <ul style="list-style-type: none"> Number of LERC Wales Ltd board of directors and working groups attended Number of meetings /percentage of attendance at ALERC board meetings, conference/AGM Engagement with ALERC directors and the LERC community via the ALERC Knowledge Hub Number of meetings/percentage of attendance at NBN Atlas Steering Group, NBN conference, NFBFR committee and Wales Biological Data Group meetings
4.4	<p>Maintain engagement with local and regional biodiversity initiatives and partnerships, attend national working group meetings and conferences.</p>

	<ul style="list-style-type: none"> Number of meetings/percentage of attendance at Local Nature Partnership, Welsh working groups and Wales Biodiversity Conference
Standards and compliance	
4.5	<p>Maintain ALERC accreditation/standards. Ensure that formal reaccreditation is achieved every 5 years (due 2027)</p> <ul style="list-style-type: none"> Provide annual review to SEWBRc board on maintenance of ALERC accreditation standards
4.6	<p>Ensure compliance (financial reporting/HMRC/H&S)</p> <ul style="list-style-type: none"> Meet all monthly or annual reporting requirements of HMRC and Companies House Report H&S issues to quarterly board meetings (detailed H&S monitoring is the responsibility of the Risk Management working group)
Reporting	
4.7	<p>Provide an annual report to members and stakeholders recognising the contribution of volunteers, directors and staff and providing feedback on performance against all objectives of this business plan, including appropriate metrics. Regular reporting by staff to board</p> <ul style="list-style-type: none"> Provide quarterly reports on performance against these business objectives to SEWBRc board Deliver an Annual Report at AGM and publish on website as a document Develop a sub-set of these business plan metrics as infographics to go on SEWBRc website