

# **Guidance for UK BAP Priority Species and Habitats Review**

## **Stage 1**

### **TERRESTRIAL AND FRESHWATER SPECIES**

APRIL 2005



**Guidance for UK BAP Priority Species and Habitats Review – Stage 1  
TERRESTRIAL AND FRESHWATER SPECIES**

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## 1. INTRODUCTION

### 1.1 Introduction

This information note explains the purpose and process of the Review of UK Biodiversity Action Plan Priority species and habitats. The principal aim of the review is to ensure that the UK BAP remains focussed on the correct priorities for action, and that all specialists and interested parties are invited to contribute. This note explains how you can get involved, what is required and sets out the review timetable. The review is being coordinated by the Biodiversity Reporting and Information Group (BRIG), in association with the Review of Marine Nature Conservation and JNCC's Species Status Assessment programme, on behalf of the UK Biodiversity Partnership's Standing Committee.

This review of UK BAP priority marine, terrestrial and freshwater species and habitats is divided into three stages, of which the first only is set out in detail in this guidance note. Stage 1 uses scientific criteria to produce a candidate list of potential priority species and habitats. Subsequent stages will investigate what can be done to conserve these species and habitats and examine the best ways to achieve results. This note introduces the entire review but only gives full details for Stage 1 for terrestrial and freshwater species. Equivalent guidance notes exist that give complete details of the review processes for terrestrial and freshwater habitats and for marine species and habitats. To obtain these other guidance notes, please refer to section 4 "Links and further information".

### 1.2 Why are the priority species and habitats being reviewed?

The original UK BAP lists of priority species and habitats are 10 years old. Given the importance of the UK BAP in stimulating action and mobilising resources, it is important that these lists are periodically reviewed to ensure that they continue to focus on the right priorities. This is the first full review of the UK BAP list and it is an opportunity to take into account emerging priorities, conservation successes, and the large amount of new information that has been gathered over the past decade.

### 1.3 Scope and guiding principles of the Review

These are summarised below and elaborated for terrestrial and freshwater species in Section 3.

#### 1.3.1 Scope of terrestrial, freshwater and marine species

All species occurring in the UK, including current UK BAP priority species, are eligible for consideration. The criteria developed in the Review of Marine Nature Conservation (RMNC) will be used in the assessments for marine species.

#### 1.3.2 Scope of terrestrial, freshwater and marine habitats

For terrestrial and freshwater habitats, the main focus of the habitat review is in establishing if there are gaps in the existing HAP series. The review also provides an opportunity to consider whether any habitat types need to be merged or re-defined to achieve better clarity and aid delivery. For marine habitats, a more comprehensive review will be carried out, using the Marine Habitat Classification for Britain and Ireland.

#### 1.3.3 Audit trail of decisions

A strict audit of the process and all decisions will be kept to ensure transparency and facilitate any re-assessment or revisions, if required.

- 1.3.4 Any revision of the priority species list must be based on best available information. There will be a presumption against adding data-deficient species to the priority list but it is important to record those species that are considered to have a data deficiency.
- 1.3.5 The Review will be inclusive. The priority lists Review will invite full participation from species and habitat specialists, BAP practitioners at national and local levels, Country Groups<sup>1</sup>, Agencies and Lead Partners.
- 1.3.6 Links to Targets Review and BAP reporting. Consultees who are Lead Partners and individual BAP steering group members will also be involved in the 2005 BAP Reporting round and the BAP Targets Review. The UK Standing Committee and BRIG are acutely aware that these three reviews will contribute significantly to work loads, and have therefore sought to achieve synergy across all three. As set out in the Targets Guidance note, Lead Partners who will be recommending the removal of species from the current list of BAP priorities need not set new targets for these species. The information on species status required for the 2005 BAP reporting round is largely compatible with the information requested for current BAP species in this Review. For further information on the Target Review and BAP reporting go to the UK BAP website (<http://www.ukbap.org.uk/>) and follow the links.
- 1.3.7 First of three stages in priority listing. Stage 1 simply recommends potential species and habitats for priority listing, based on scientific criteria. There will be two further stages in the review process before the priority list is finalised.

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<sup>1</sup> Throughout this Guidance document, the terms “Country Groups” and “Country Biodiversity Groups” refer to the biodiversity decision-making mechanisms or authorities in each country.

## 2. OVERVIEW OF THE REVIEW PROCESS

The Review of species and habitats comprises three stages. Stage 1 looks at the scientific evidence for selecting candidate priority species and habitats while Stage 2 examines our ecological knowledge-base to identify the feasibility and appropriateness of taking conservation action. Stage 3 considers the means of implementing conservation action for both species and habitat priorities. Stages in this process are likely to be iterative. The process is summarised in Figure 1.

Stage 1 of this Review for terrestrial and freshwater species is addressed further in Section 3 of this guidance note and relevant specialists are being asked to contribute towards this important process. Details of Stages 2 and 3 will be sent out in late 2005.

### 2.1 Stage 1: Scientific Assessment of Conservation Status

The priority species and habitats should be those most in need of conservation action and it is important that this assessment is based on good scientific practice. Thus an emphasis is made here on gathering as much quantitative data as possible. In general, this should be the best available information that could pass an accepted level of scientific scrutiny.

#### 2.1.1 Terrestrial and Freshwater species

The first stage of the *Terrestrial and Freshwater species* Review involves taxonomic specialist groups using the best available data to assess each species against objective criteria and specific thresholds. The four scientific criteria are:

- international threat
- international responsibility + moderate decline in the UK
- marked decline in the UK
- other important factor(s)

Applying these criteria will produce a candidate list of potential priority species. All birds and diadromous fish are included in the Terrestrial and Freshwater species review. A scoping list (see Section 3) of terrestrial and freshwater species will be assessed against the criteria set out in Section 3.

#### 2.1.2 Terrestrial and Freshwater habitats

The aim for *Terrestrial and Freshwater habitats* is to review how the existing habitat series (covered by existing HAPs) complies with the principles established by the last review in 1999. This allows a reconsideration of issues surrounding definition and classification. Although there is broad consensus that the habitat types covered by our existing priority HAPs remain priorities for conservation action, some confusion exists over the habitat definitions and how they relate to other habitat classification systems and certain lists such as Annex I of the Habitats Directive. Some problems also arise because the current priority HAP types overlap, or lack a consistent hierarchical level (for example, reedbeds have their own HAP despite being a sub-type of fen which is itself another priority habitat). The UK BAP list review is an opportunity to re-assess our existing HAPs to improve clarity and delivery.

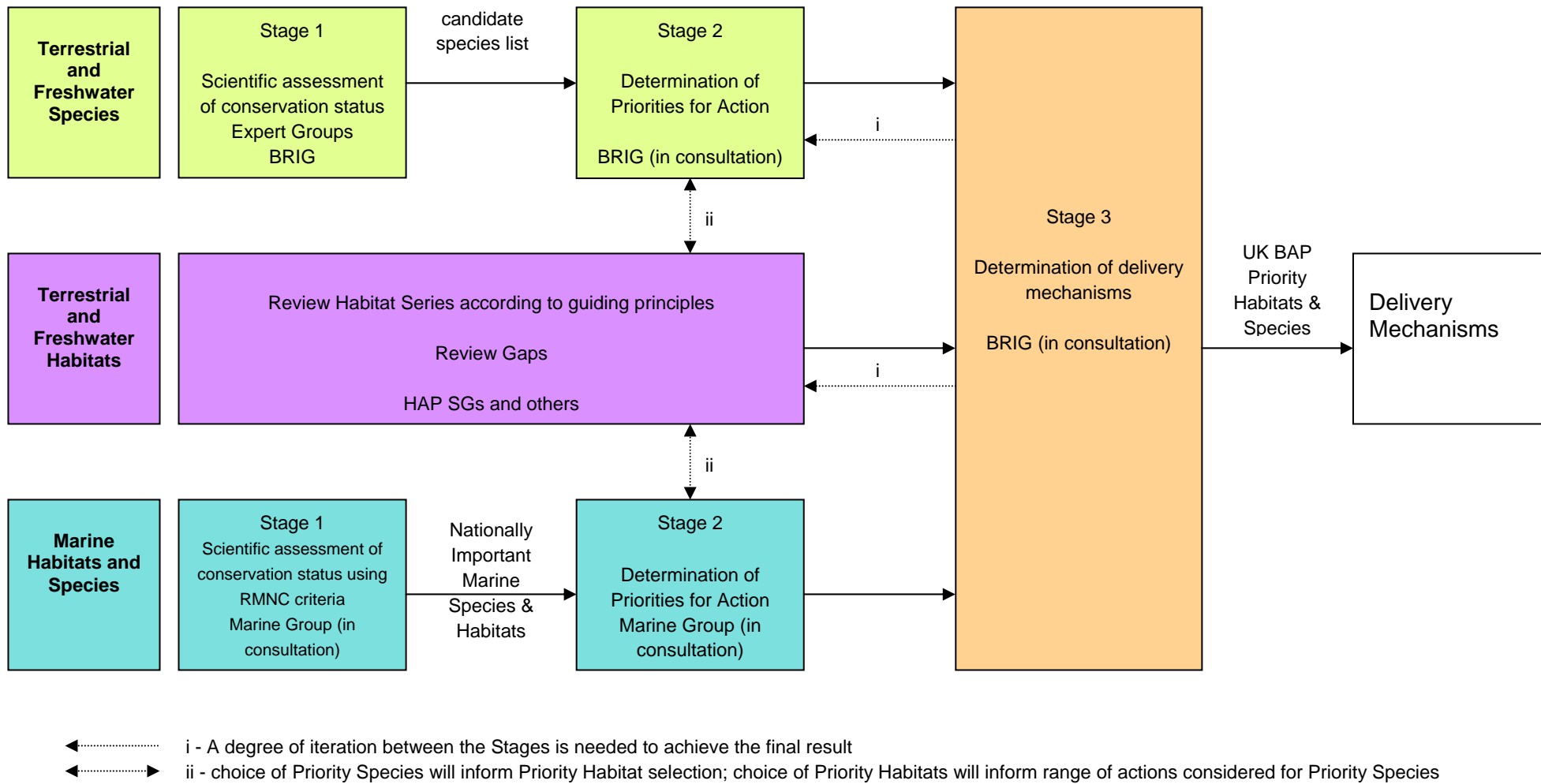


Figure 1. Overview of the elements of the Species and Habitat Priority Review

The Review is also considering whether there are any remaining gaps in terrestrial and freshwater priority habitats, building on the work done for the 1999 review: validating its conclusions and taking account of new data. Since the original HAPs were published, new information has emerged regarding the biodiversity importance and rate of decline of other semi-natural habitats. Proposals for new habitats will be assessed against the following criteria:

- International obligation
- Risk
- Importance for key species

Proposals and supporting data will be sought from HAP steering groups and habitat specialists and analysed by broad habitats working groups in conjunction with BRIG. This is broadly equivalent to Stages 1 and 2 for Terrestrial and Freshwater species.

To obtain full information about the Terrestrial and Freshwater Habitat review see section 4 (“Links and further information”).

### 2.1.3 Marine species and habitats

For *marine species*, the RMNC criteria of rarity, proportional importance, decline and threat of decline will be used. For *marine habitats* a comprehensive review of the conservation priority status of marine habitats is to be undertaken by applying the RMNC criteria, and making use of the recently revised Marine Habitat Classification for Britain and Ireland. Note that all birds, including seabirds, and diadromous fish are included in the Terrestrial and Freshwater species review.

To obtain full information about the Marine Species and Habitats review see section 4 (“Links and further information”).

- 2.1.4 The output from Stage 1 is a critical product for the Review process, and this candidate list of species and habitats will be published on the JNCC website. It may then be used to update the SoCC list.

## 2.2 Stage 2: Determining the need for action

- 2.2.1 Supported by further guidance, Stage 2 will involve a further consultation to identify the practical considerations which apply to the candidate list of terrestrial and freshwater species, and marine species and habitats. These will be assessed to select priorities for conservation action by examining how feasible or appropriate it is to conserve them. Examples of practical issues to be considered include: limitations in knowledge of the species’ ecology and causes of decline, our ability to control the threats, and the feasibility of taking action. This stage will involve consultation with the Country Groups and other BAP stakeholders. At the same time consultees will be asked to complete a pro-forma of questions relating to implementation issues and options to inform Stage 3. For candidate Terrestrial and Freshwater Habitats, Stage 1 and Stage 2 issues will be considered jointly.

## 2.3 Stage 3: Determination of Species and Habitat Delivery Mechanisms

- 2.3.1 This stage is primarily concerned with identifying a suite of implementation mechanisms that will facilitate effective and efficient delivery of conservation objectives for the suite of priority species and habitats considered collectively. A key purpose of this stage is to seek an improved series of implementation mechanisms through a collective approach to all species and habitats. Delivery mechanisms could include species plans, cross-cutting plans, mechanisms that

focus on ecological function or similarity, and direct links to policies, strategies or existing biodiversity action plans.

- 2.3.2 The delivery of the conservation actions has a significant Country dimension, hence the involvement of the Country Groups is essential in developing Stage 3. It is also important to learn from recent experience and deliver the UK BAP through the most effective means of implementation.

## **2.4 What happens next?**

- 2.4.1 This Stage 1 Guidance Note (and associated spreadsheets for data collection) is being sent out to specialists and individual contributors via the co-ordinating network (identified by the contacts). Each of the specialist groups are asked to follow the process set out in Section 3. Completed proformas should be returned to the relevant contacts, via the coordinators for each taxonomic group by 30 September 2005. The contacts should then complete the summary table that they have been sent and return it, together with relevant proformas, to BRIG by 15 November 2005. Any proposals for new priority habitats should also be sent to BRIG by 30 September 2005. It will be up to BRIG and the contacts to quality assure the data. Contact details for each of the groups are given at the end of this note (section 5). It will be up to the contacts to identify and get in touch with the coordinators.
- 2.4.2 Up to 30 September 2005, (the end-date for submissions), there may well be queries and issues that need further discussion between species groups and BRIG. Please get in touch with any of the relevant contacts (details in Section 5) if you need to resolve any difficulties. From November 2005 BRIG will collate and review submissions, and publish a provisional list of priorities by March 2006 for wider consultation. Any contentious proposals will be discussed further with the relevant species or habitat specialist groups.
- 2.4.3 This list, together with the information received through Stages 2 and 3 will be forwarded to BRIG and the Country Biodiversity Groups to consider the proposals and assess the recommended actions. Results from the 2005 BAP reporting round will also be helpful in assessing the degree to which BAPs have been successful compared to other conservation mechanisms (such as sectoral strategies and policies e.g. agri-environment). BRIG will provide further assistance to Country Groups if required. It is possible at this stage that the Countries may additionally consider their own (non UK) priorities.
- 2.4.4 The aim is to complete this process by end 2006.

### **3. ASSESSMENT OF TERRESTRIAL AND FRESHWATER SPECIES: STAGE 1**

#### **3.1 Assessment process**

- 3.1.1 For Stage 1 of the terrestrial and freshwater species review each coordinator is being sent a species checklist based on the NBN species dictionary. The first task is to examine this checklist and select from it a scoping list of species warranting detailed assessment. All species on this scoping list should then be assessed against the four criteria that are listed in Section 3.3. Those species that qualify under any of the four criteria will move on to a candidate list. These steps will eventually be recorded in the attached Excel file “Species Review Stage1.xls”. This file contains four worksheets. Explanatory notes are provided in Appendix A which should be read in association with the Excel file. The coordinator for each taxonomic group should ensure that the information requested in this spreadsheet is completed correctly and that there is only one set of data for each species. Please consult widely to ensure there is a co-ordinated response and broad consensus from across the UK. Contributors should complete the spreadsheet for their taxonomic groups.
- 3.1.2 BRIG is aware that, in association with the Species Status Assessment exercise, many species specialist groups have anticipated the 2005 review and have begun considering priority criteria and reviewing lists. Taxonomic specialists have been asked to coordinate the Review for each taxonomic group, and their details can be obtained from the Contacts listed in Section 5. Anyone wanting to get involved in Stage 1 of the species Review should approach the Contacts given in Section 5.

#### **3.2 Agreement of a reference checklist and refinement to a scoping list**

- 3.2.1 The aim of this step is to produce a scoping list which includes all species for detailed assessment.
- 3.2.2 All species occurring in the UK are eligible for consideration. Existing UK BAP priority species should also be included in this assessment, as it is recognised that some BAP species have begun to recover but may not yet have viable populations. Species checklists, segregated into taxonomic groups based on the NBN species dictionary, are included in the attached Excel file “Species Review Stage1.xls”. The taxonomic group coordinators should help the species specialist groups decide the taxonomic level at which they will work (subspecies, race, variety *etc.*).
- 3.2.3 Although species specialist groups should try to evaluate all species, it is understood that this is a difficult task. However, it will usually be possible to rapidly discount some species from the checklist (e.g. certain species with healthy, stable or viable populations).
- 3.2.4 As far as possible, what BRIG requires is one of the following records assigned to each species in the checklist:
- i) Not assessed – insufficient data. This category is for data-deficient species where information is too poor for a judgement to be made.
  - ii) Not assessed – no expert available.
  - iii) Not Assessed – species not threatened. Data are available, but the species is obviously not a candidate for priority status because it is not under threat.
  - iv) On the scoping list but rejected as priority - the species does not meet any of the criteria

v) On the scoping list and proposed as priority - meets one or more of the criteria

3.2.5 Options (i)-(iii) can be used to rapidly discount some species from the NBN checklist leaving the species that should be assessed against the four criteria i.e. the scoping list. For each species, one of these four options should be recorded on the spreadsheet (see Appendix A).

### 3.3 Scoping list assessment using the criteria (see worksheet “3.3. scoping list assessment”)

There are four categories of criteria used for assessing if a species qualifies for priority status:

- 1) International threat
- 2) International responsibility (of the UK) + moderate decline in the UK
- 3) Marked decline in the UK
- 4) Other important factor(s)

Full details of each of these are given below. Species specialist groups are asked to review the criteria and consider their applicability to their taxa. Criterion 4 provides considerable flexibility, in particular when considering how species rarity (number of occupied sites or population size) should be taken into account. Criteria 1–3 should not be adjusted. These are similar criteria to those used in creating the current UK BAP priority list.

Although there is a generic framework for assessing whether a species should qualify for candidate listing, it is recognised that a single set of thresholds for each criterion will not be appropriate for all taxonomic groups. This is because, for example, the risk of extinction varies according to life history and ecology. It is also recognised that there is substantial variation in the quality of data available, particularly at an international level. It is therefore anticipated that some species assessments will rely on data extrapolation or inference.

Each species that is in the scoping list should be assessed against the following four qualifying criteria. The attached Excel file “Species Review Stage1.xls” together with explanatory notes (Appendix A) allow you to enter the relevant data you have available.

Please note that it is important to indicate your confidence in the result of the each criterion assessment. There is a column next to each criterion to do this.

#### 3.3.1 Criterion 1 - **International threat**

Assess the species’ status in either a global or a European context.

- i) Use the best available knowledge e.g.
  - IUCN global Red Lists
  - Red Lists from individual European countries
  - other (specified) authoritative sources that assess threat or decline.
- ii) Where possible, use the new IUCN categories (CR, EN, VU): if Red Lists use the old IUCN criteria, treat the Rare category with caution.
- iii) Red listing in >50% of countries with adequate data within the biogeographic or European range of the species, would qualify a species as internationally threatened. If this evidence is cited, please indicate the range of the species and list the countries that include it in a Red List.
- iv) The revised IUCN Red List Categories and Criteria (version 3.1, published in 2001) and guidelines on their application at global and national levels are

available electronically at [www.iucn.org/themes/ssc/red-lists.htm](http://www.iucn.org/themes/ssc/red-lists.htm). See [www.redlist.org](http://www.redlist.org) for lists of globally threatened species.

### 3.3.2 Criterion 2 - **International responsibility + moderate decline in the UK**

Under this criterion, a species that has declined by more than 25% in the last 25 years in the UK may qualify if the UK supports 25% or more of the global or European population. Please quantify your answer as far as possible and provide all supporting information

- i) The European or global proportion can be measured in terms of grid square records, sites, numbers of individuals *etc.* Please provide as much data as possible.
- ii) Make a special note if the species is endemic or near-endemic.
- iii) The species needs to have declined by 25% or more over the past 25 years.

### 3.3.3 Criterion 3 - **Marked decline in the UK**

A species which has declined by 50% or more over the past 25 years qualifies under this criterion.

- i) Decline may have been measured or may be deduced from other evidence.
- ii) If no direct evidence exists, deterioration or loss of habitat; threat to a food plant; or other relevant factors may be used as surrogates (i.e. inferred decline).
- iii) Decline can be expressed in a number of possible ways, for instance as population size, range or number of occupied sites.
- iv) In the absence of a 25-year run of data, decline rate will be automatically extrapolated from a shorter (or longer) period in the spreadsheet (Appendix A).
- v) Evidence and sound reasoning must be given in support of the claim.
- vi) Please give the types of record (e.g. 10 km square, 1 km square, site data) and time-span of the supporting data.

In relation to the run of data available, please provide a judgement on how appropriate the extrapolation to 25 years is, and how able the data are to be used in this context. Equally, if you have used an alternative means of measuring rate of decline, please provide the working and outline its usage in this context. If some data were ignored, or discontinuous or more than one data set was used (covering different time periods) this should be highlighted.

### 3.3.4 Criterion 4 - **Other important factor(s)**

Where a species does not qualify under Criteria 1, 2 or 3, there may still be a case for listing it as a candidate. However, evidence of extreme threat is required. Please give a detailed rationale behind any decisions made under Criterion 4. Justifications may include reasons such as:

- i) geographic range is very restricted AND there is evidence of species decline
- ii) substantial threat to a food plant or to a highly specialised habitat, if it is impossible to predict the resulting rate of decline in the species
- iii) pressure from disease, if it is impossible to predict the resulting rate of decline reproductive failure, if it is impossible to predict the resulting rate of decline
- iv) for a species on the existing priority list, factors that caused the original decline are still operating or the species population has not recovered to a point where it is likely to be viable in the long term
- v) the species is declining (but does not qualify under Criterion 3) and is a good 'indicator' species for a declining taxonomic group, a threatened habitat type or a pressing conservation issue.

For all Criteria, please enter as much data as you can. If all requested data are available for a species the spreadsheet will automatically calculate rates of decline *etc.* and determine if the species qualifies or not for the first three criteria. In the case where all data are not available, the spreadsheet will return “Unknown” when trying to determine if a species qualifies under a criterion. If the data are uncertain or missing but you believe that the species should be a candidate, please provide the best argued case possible to support this selection. You can enter “Probably” on the form in the “Criterion Satisfied” column if quantitative data are lacking but there is an indication that a species may qualify for the candidate list.

Remember that you are recommending potential species for priority listing. There will be further stages in the review process before the priority list is finalised.

### **3.4 Information sources and quality**

#### **3.4.1 Data sources**

Evidence, including summary data (e.g. population estimates) either from the literature or from unpublished sources, must be produced to back up the assessments made under each criterion. All sources should be quoted in the “Sources of Information” worksheet.

#### **3.4.2 Confidence**

Please indicate your confidence in the result of each criterion assessment in the column next to each criterion. This could be based on factors such as the significance of any gaps in the data or potential skewing from location of recorder effort. Choose one of the following options for each criterion:

- i) High confidence
- ii) Medium confidence
- iii) Low confidence

### **3.5 Summary of submission format**

The Excel file that is being sent to each of the taxonomic coordinators should be completed and returned to BRIG via the Contacts and Coordinators (see Section 5). This contains two worksheets (for more details on the use of these see Appendix A):

1. Checklist summary. This only needs to be completed once, with one record (as outlined in Section 3.2.4) for each taxonomic group.
2. Checklist (and scoping list) assessment. This comprises the assessment of each species in the checklist, including those that were eliminated from the full scoping exercise by the initial sift (see points (i)-(iii) under Section 3.2.4.) as well as those that were fully assessed against the qualifying Criteria in Section 3.3.

Please only add data to the Excel spreadsheets and resist the urge to modify or reformat them. If you can not easily use this format, owing to the nature of your data, please get in touch with the Technical Contact (see Section 5). Any modifications will invalidate subsequent macros that are needed to merge the spreadsheets which BRIG will receive via the Contacts.

## 4. LINKS AND FURTHER INFORMATION

UKBAP website supporting the implementation of the UK Biodiversity Action Plan (UK BAP) on behalf of the UK Biodiversity Partnership and the UK Government

<http://www.ukbap.org.uk/>

For the full guidance note for the review of Priority Terrestrial and Freshwater Habitats go to WEBLINK

For the full guidance note for the review of Marine Priority Habitats and Species go to WEBLINK

Species Status Assessment programme (internet link) <http://www.jncc.gov.uk/page-1743>  
JNCC.

Buglife – The Invertebrate Conservation Trust (internet link) non-marine invertebrates review 2004/5 <http://www.buglife.org.uk> (scroll to bottom of home page)

## 5. CONTACTS

Contacts have agreed to co-ordinate the review, including providing guidance and collating returns from co-ordinators and contributors across the individual taxonomic groups. However, not all taxonomic sectors (dependent on size) will necessarily require having the co-ordinators role.

### **Terrestrial and freshwater habitats**

Ian Strachan, Joint Nature Conservation Committee  
01397 704716 or 01733 562626  
[ian.strachan@jncc.gov.uk](mailto:ian.strachan@jncc.gov.uk)

### **Marine species and habitats**

Nikki Chapman, Joint Nature Conservation Committee  
01733 866875  
[Nikki.Chapman@jncc.gov.uk](mailto:Nikki.Chapman@jncc.gov.uk)

### **Vascular plants**

Lynne Farrell, Scottish Natural Heritage  
Tel: 01738 444177  
[lynne.farrell@snh.gov.uk](mailto:lynne.farrell@snh.gov.uk)

### **All other plants & fungi**

Chris Cheffings, Joint Nature Conservation Committee  
Tel: 01733 866805  
[chris.cheffings@jncc.gov.uk](mailto:chris.cheffings@jncc.gov.uk)

### **Mammals**

Melanie Hardie, Joint Nature Conservation Committee  
01733 866912  
[melanie.hardie@jncc.gov.uk](mailto:melanie.hardie@jncc.gov.uk)

**Herptiles**

Liz Howe, Countryside Council for Wales  
Tel: 01248 385669  
[l.howe@ccw.gov.uk](mailto:l.howe@ccw.gov.uk)

**Freshwater fish**

Colin Bean, Scottish Natural Heritage  
Tel; 0141 9514488 (x2208)  
[colin.bean@snh.gov.uk](mailto:colin.bean@snh.gov.uk)

**Birds**

David Gibbons, RSPB  
01767 680551  
[David.gibbons@rspb.org.uk](mailto:David.gibbons@rspb.org.uk)

**Terrestrial and freshwater invertebrates**

Nigel Bourn, Butterfly Conservation  
01929 400209  
[nbourn@butterfly-conservation.org](mailto:nbourn@butterfly-conservation.org)  
or  
Deb Procter, Joint Nature Conservation Committee  
01733 866809  
[Deborah.Procter@jncc.gov.uk](mailto:Deborah.Procter@jncc.gov.uk)

**Technical Contact**

Ant Maddock, Joint Nature Conservation Committee  
01733 866827  
[ant.maddock@jncc.gov.uk](mailto:ant.maddock@jncc.gov.uk)

## **APPENDIX A**

# **NOTES ON FILLING IN THE PROFORMA AND SPREADSHEET FOR TERRESTRIAL AND FRESHWATER SPECIES**

### **What are these notes for?**

These notes are to be read in conjunction with the Species and Habitat Review Guidance Note. The Guidance Note explains the details of the Species and Habitat Review while this note explains how to record the data that you have provided to support the nominations for Candidate List in Stage 1 of the review.

It is important that spreadsheets are completed as accurately and fully as possible.

### **Recording the Species and Habitat Review data**

#### **Introduction**

The spreadsheets will list the species for which you are responsible (the Checklist). This Checklist is based on the NBN species dictionary produced by the Natural History Museum and is the best collation of UK species lists available. The taxonomic group coordinators should help groups decide the taxonomic level at which they will work (subspecies, race, variety *etc.*). Anomalies or wrong species can be added in the lines available at the bottom of the spreadsheet (just don't add new lines). If there are a large number of errors or omissions please tell your coordinator or contact. The contact should in turn inform JNCC, who may refer any significant queries on the checklist to the Natural History Museum. However, the main focus of this review is to identify UK BAP priority species and we would not wish a taxonomic review to impede this process, especially if the species in question is not going to be assessed in this exercise.

Please ensure that you indicate your confidence in the result of the each criterion assessment. There is a column next to each criterion to do this.

#### **Discounting obvious non-candidate species**

For each of the species you are requested to provide information that will be used to select Candidate Species. It is understood that this is a difficult task but it should be possible to rapidly discount some species from the checklist. Please refer to section 3.2 in the Guidance Note for details. Essentially species can be omitted from assessment against the criteria if there are no data, there are no experts or if the species is secure. For the remaining species, each needs to be assessed against the four criteria listed in Section 3.3 of the Guidance note.

#### **Entering data**

Data used in this assessment may be recorded in one of two ways; in electronic format using a customised Excel spreadsheet or on a paper proforma both of which are obtainable either from your Contact or your Co-ordinator. The paper proforma is simply a hard copy of the electronic spreadsheet but will not incorporate a checklist of species. We strongly recommend that the electronic spreadsheet be used, especially where there are a significant number of species to be entered.

We want to get as much data as possible for all species. However, in cases where detailed information has already been collated for the whole of a taxonomic group (for example,

vascular plants have a spreadsheet detailing data and calculations) we do not expect contributors to re-key this information into the spreadsheet. In this case the contact should alert Ant Maddock at JNCC as soon as possible to:

- a) agree the best way of getting the information into the same structure as presented in the spreadsheet;
- b) to ensure that the full range of species have been considered; and
- c) most importantly, to ensure that there is a clear explanation of the data and calculations used in this exercise.

The following paragraphs describe each of the two worksheets in the Excel spreadsheet that will be provided to you by the contacts or the coordinators.

### **Worksheet: 3.2. Checklist summary**

The 3.2 refers to the section in the Guidance Note. The main purpose of this sheet is to show where the NBN checklist has been derived from. The co-ordinator should fill in their name and any general comments (ie relating to the whole checklist) on this sheet.

### **Worksheet: 3.3 Checklist**

The 3.3 refers to the section in the Guidance Note. This is the main part of the data records and it is vital that these data are entered accurately.

#### **Taxon name and details**

The first seven columns are prefilled and describe the taxonomy based on the NBN dictionary. You can filter on the species name, common name, order, family and rank by click on the down arrow in the grey column heading.

"On the UK BAP list" - indicates current UK BAP priorities

#### **Overview.**

"Scoping list selection overview" –. Select the options from the pull down menu on the spreadsheet. For use with the proforma these options are: Not Assessed - insufficient data; Not Assessed – no expert available; Not Assessed – species not threatened; On the 'Scoping List' but rejected as priority; On the 'Scoping List' and proposed as priority. Note that unless the species is considered to be "Not Assessed" this column cannot be completed until the rest of the columns are filled in for that species. If you mark a species as being proposed as a priority, please ensure that one or more of the four "criterion satisfied" columns are shown as "yes".

#### **Contributors and consultees**

The next eight columns record the contributors who provide the information and the consultees who agree that the data entered are correct. Names of these people and their affiliations should be listed here. The names of consultees are on a drop down list populated from the contents of the sheet "list of consultees". You should enter the consultees names in the "list of consultees" sheet in order to make those names available in the drop down list.

#### **UK distribution and latest population/extent estimate**

You should consider only the most recent data in this section (generally information collected since 1980). The columns relating to each Country will be useful for Country based biodiversity groups to get an overview for their geographic area. In these columns you should enter either "yes", "no" or "unknown" to indicate whether the species has been recently recorded in each of the Countries. The UK population/extent figures should be entered in free

text format, with the units of measurement given in the following column. You are able to use ranges eg 1-100 to indicate the level of precision in the estimate. If a breakdown of populations or extents is known for each country, this can also be entered in this column.

### **Information relating to declines**

This series of columns records Information relating to declines that will be used in the criteria assessments. You are asked to provide as much biologically meaningful information as possible. The spreadsheet automatically calculates the actual decline between the start and end dates, the time between these dates and the decline extrapolated over 25 years. This facility is obviously not available on the hard copy format of spreadsheet.

If you have used a different method for calculating trends and decline statistics, and do not think it appropriate to use the method built into the spreadsheet you should refer the matter to your contact, who will in seek advice from Ant Maddock at JNCC on how this information needs to be provided to JNCC.

### **The criteria:**

#### **Criterion 1: International threat**

Refer to Section 3.3.1 in the Guidance Note. The first two data columns refer to European or Global IUCN categories (if used, treat the old IUCN Rare category with caution) and the "Fraction of European countries where taxon is Red-listed (where known)". For the latter, it is important to provide the fraction eg 4/6 so that percentages can be determined (species Red-listed in 50% or more of the countries will satisfy this criterion). Satisfying either column will satisfy the overall criterion.

Please ensure that you indicate your confidence in the result of the criterion assessment in the appropriate column.

#### **Criterion 2: International responsibility + moderate decline in the UK**

Refer to Section 3.3.2 in the Guidance Note. This criterion will use information entered in the **Information relating to declines** section requiring a  $\geq 25\%$  decline in the UK. If this criterion is satisfied and the percentage of the global or European population in the UK is  $\geq 25\%$ , the overall criterion will be satisfied. In the spreadsheet, all you need to do is enter data into the global or European population columns and the computer will automatically assess this and the decline in the UK based on information added to the **Information relating to declines** section. If both of these are satisfied, the computer will automatically return **Yes** in the Criterion Satisfied column.

Please ensure that you indicate your confidence in the result of the criterion assessment in the appropriate column.

#### **Criterion 3: UK Decline**

Refer to Section 3.3.3 in the Guidance Note. In the spreadsheet this will automatically be filled in based on the information added in the **information relating to declines** sheet. The criterion will be satisfied if the species has undergone a greater than a 50% decline in the UK over 25 years and the computer will return **Yes** in the Criterion Satisfied column.

Please ensure that you indicate your confidence in the result of the criterion assessment in the appropriate column.

**Criterion 4: Other important factors**

Refer to Section 3.3.4 in the Guidance Note. Where a species does not qualify under any of the above criteria there may still be a case for listing it as priority. However, evidence of extreme threat is required. In this section provide a detailed rationale in support of inclusion of a species under this criterion.

Evidence, including summary data (e.g. population estimates) either from the literature or from unpublished sources, must be produced to back up the assessments made under each criterion. All sources should be listed in the **Sources of Information** worksheet.

**END**