

Sharing Sussex Beetle Records

Lessons Learned



The SxBRC team perusing Peter Hodge's beetle notebooks – now accessible via the NBN Atlas

Version	Date	Notes
Draft version 1	15 March 2017	Prepared by Clare Blencowe
Draft version 2	20 April 2017	Updated by Clare Blencowe, with input from Peter Hodge
Draft version 3	7 June 2017	Updated to include feedback from Martin Harvey
Final	3 July 2017	Finalised after giving beetle recording scheme organisers an opportunity to comment.

1. Background

Sussex Biodiversity Record Centre (SxBRC) was awarded a grant under Natural England's Open Licensing of Species Data grant scheme to facilitate the sharing of Sussex beetle records under an Open Data Licence.

The objectives of the project were as follows:

- Make an 'as-complete-as-possible', good quality Sussex beetle dataset available for use under an Open Licence (CC-BY), while minimising duplication of records and respecting the wishes of recorders with respect to sharing their data.
- Identify effective ways of working with the relevant national schemes, with the aim of ensuring the Sussex beetle dataset is appropriately verified and the 'latest and best' version of a record is the one in use. (While recognising that these are volunteer-led schemes and their capacity to input to this project may be limited.)
- Understand the extent to which Sussex beetle records submitted via iRecord are being shared via the NBN Gateway.
- Work with the Biological Records Centre (BRC) to explore options for mobilising additional Sussex beetle records that are available on the iRecord website but have not yet been verified and shared via NBN.
- Share learning with the National Biodiversity Network and biological recording community so that it can feed into work in the NBN Strategy working groups and other initiatives.

The purpose of this lessons learned report is to report factually on the issues encountered and solutions found in the course of pursuing the project objectives.

This report does not make recommendations regarding how other organisations or national schemes should manage beetle data as this is a matter for the beetle recording community.

2. Sussex beetle recorders

Analysis undertaken at the beginning of this project¹ showed that over 1,000 people have shared their beetle records with SxBRC. Of these, over 650 people have shared between 1 and 4 records, as illustrated in the graph below.

The biggest contributions to the Sussex beetle dataset actually come from a very small number of people.

In fact – as this graph shows – there is one person who has recorded an order of magnitude more Sussex beetle records than anyone else. That person is Peter Hodge.

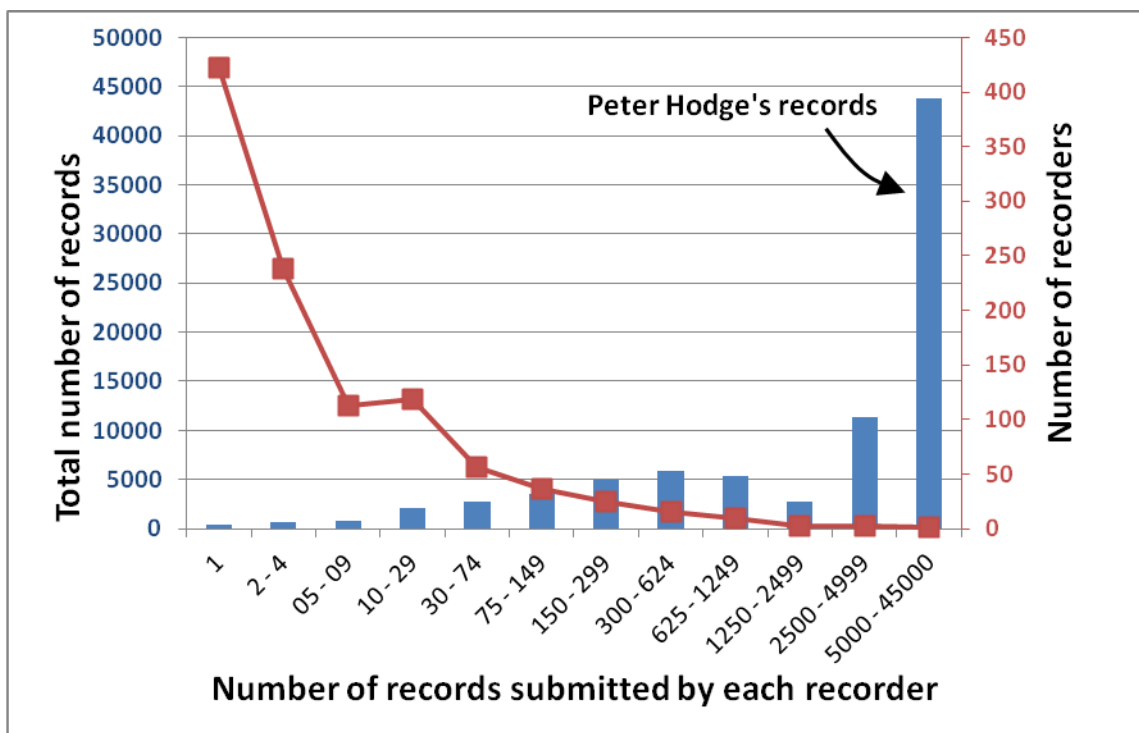


Figure 1. Analysis of Sussex beetle data, as of August 2016.

90 % of the beetle records held by Sussex Biodiversity Record Centre were recorded by just 60 recorders, or around 6 % of recorders who have ever shared their beetle records (or a beetle record) with Sussex Biodiversity Record Centre. For the purposes of this project, we've identified these people as 'major contributors'.

¹ Note that this analysis is based on data extracted in August 2016, so does not include records which have digitised or imported during the course of the Sharing Sussex Beetle Records project.

3. Peter Hodge's records

Peter Hodge is the volunteer Sussex County Recorder for Beetles. Since 1971, he has been keeping records of the beetles he finds in a series of field notebooks.

Over the past ten years, SxBRC has been working on digitising Peter's records, using a combination of volunteer time and grant funding to pay for staff time.

The Open Licensing of Species Data grant from Natural England has enabled us to finally complete the digitisation of Peter's notebooks.

Through this project we digitised 15,000 records from Peter's notebooks, bringing the total dataset to 43,000 records.

Many significant changes have occurred in beetle taxonomy and nomenclature since Peter began recording beetles in his notebooks. In consultation with Peter, his records have been converted to modern accepted nomenclature, as used in the UK species inventory.



Figure 2. Peter Hodge with his field notebooks.

3.1 Peter's professional invertebrate surveys

In numbers...

Number of professional invertebrate surveys undertaken	95
Number of different clients	45

As well as recording for personal interest, since 1990 Peter has undertaken professional invertebrate surveys for a range of different clients. Records from these surveys were also entered into Peter's field notebooks.

As we were designing this project, Peter alerted us to the fact that his clients *may* consider that the records gathered through his professional surveys, and recorded in his notebooks, belong to them. It is therefore conceivable that they could challenge Peter and SxBRC on our legal right to apply a CC-BY licence to Peter's notebook data. In order to minimise legal and reputational risks to Peter, it was decided we would write to all of Peter's clients to notify them of our intention to share his records under a CC-BY licence and give them an option to request that data collected while working under contract to them be excluded (see appendix 1). This was only possible thanks to cooperation from Peter who supplied us with a list of every professional invertebrate survey he has ever undertaken, with information on the date and site surveyed so the relevant records could be excluded from the open dataset, if requested by the client.

Contacting Peter’s clients turned out to be significantly more complex and time-consuming than originally anticipated due to various sub-contracting arrangements.

In the most extreme example, we were referred by Peter’s ‘client’ (i.e. the person who paid Peter’s invoice) to a large environmental consultancy who had sub-contracted the work to Peter’s ‘client’, who had then sub-contracted the work to Peter. This large environmental consultancy initially said they were unable to identify the specific job that Peter had been working on, therefore must refuse permission for Peter’s beetle records to be shared. At this point we went back to Peter’s ‘client’, who very helpfully retrieved information on the original Invitation to Tender (ITT) from his files; the ITT identified the end-client as a well-known global resource management company. We wrote again to the large environmental consultancy, with the ITT information for the job Peter had been involved in. This large environmental consultancy then invited us to contact the end-client ourselves, regarding permission to share Peter’s beetle records. Which we did.

We had naively assumed that securing permission to share the records gathered through Peter’s professional survey work would involve, at most, sending one letter per survey. In this example we found ourselves having to send five separate communications to three different organisations.

Results from contacting Peter’s clients

<i>In numbers...</i>	
Number of clients who responded, confirming they are content for data to be shared	29 / 45
Number of clients requesting that data is excluded from the open dataset	0 / 45

We received explicit confirmation from 29 of Peter’s end-clients, confirming they are content for data from 80 of Peter’s professional invertebrate surveys to be shared. None of Peter’s end-clients asked us to exclude survey data from the open dataset.

We were therefore able to proceed with sharing all the data from Peter’s professional surveys under a CC-BY licence.

Several of Peter’s end-clients raised issues in relation to sharing the data:

- An ecologist acting on behalf of a private estate noted that there is a rare species of beetle which Peter has recorded on the estate, close to a public right of way. She raised concerns as to whether this species would be at risk from collectors, if information on its whereabouts were made publicly available.
- A private landowner explained that he has experienced problems previously with naturalists coming onto his land uninvited. He raised concerns as to whether sharing this beetle data publicly would increase the incidence of people trespassing – looking for rare species.
- An environmental consultancy added a condition that the records must not include any specific reference to the scheme for which the survey was originally undertaken.

As beetles are a fairly obscure taxonomic group, the ecologist and landowner were content that – in this instance – the risks from collectors and trespassers are low; after some discussion, they decided they would allow the records to be shared under a CC-BY licence.

The range of responses received also highlighted that different consultancies have different policies in relation to sharing biological data:

- One consultancy responded, “Quite happy for the data to be used. We have a clause in our T&Cs that inform our clients that we will submit data to LRCs unless explicitly requested not to.”
- Another consultancy made reference to whether the surveys had been conducted in pursuit of a submitted planning application and therefore become “a matter of public record”. Where the survey had not become a matter of public record, their view was that the data remains the property of the end-client and therefore referred us on to them for permission to share the data.
- Other consultancies simply referred us straight their end-client. One noted, “...we would have no issue with the results being in the public domain but it is not a decision for us.”

If consultancies could be encouraged to adopt a more consistent approach towards sharing and licensing the biological data they collect or commission, it could make projects such as this significantly easier to implement.

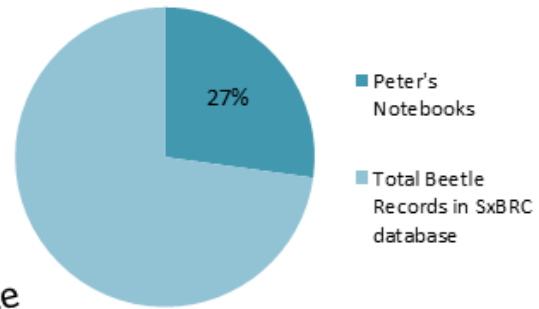
The CIEEM guidelines on Accessing and Using Biodiversity Data² set an expectation that biodiversity data should be submitted to the relevant Local Environmental Record Centre, either directly or through the Consultants Portal³. The guidelines don’t say anything explicitly about data licensing. However, terms and conditions of the Consultants Portal state that that all data stored on the platform must be covered by one of the following licences: OGL, CC0, CC-BY, or CC-BY-NC. If no licence is applied, the system defaults to a CC-BY licence.

² Accessing and Using Biodiversity Data, CIEEM (2016, URL: http://www.cieem.net/data/files/Publications/Guidelines_for_Accessing_and_Using_Biodiversity_Data.pdf)

³ Consultants Portal, CIEEM & NBN (URL: <http://www.consultantsportal.uk/terms-and-conditions>)

Top 5 recorded beetles:

Noterus clavicornis	534
Coccinella septempunctata	474
Hyphyrus ovatus	458
Anacaena limbata	452
Hydroporus palustris	442



355 species only recorded once

Peter Hodge's Notebooks: The Stats

14 Notebooks **43 years of data**
10 years of digitising
43,000 records
2,270 species



Unusual recording locations:

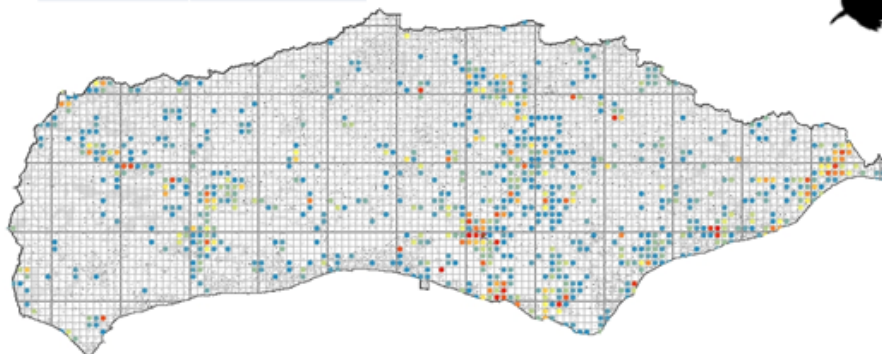
- Dead Blackbird
- Dead Cat
- Rabbit carcass
- In Dog dung
- On floor of telephone exchange toilet
- Dead Magpie
- Under dead Mole
- In Magpie droppings
- Fallen from belfry
- Inside Dead Swan
- Under a discarded Playboy



Most recorded 1km squares

Grid Square	No. of Records
TQ4209	997
TQ4009	938
TQ7610	915

Most records in one year:
2004 – 2268 records



Distribution of notebook records across Sussex
 (Records for 835 1km squares)

Figure 3. Some headline findings from the digitisation of Peter's field notebooks.

4. Consultation with recorders

When we came to deliver this project, we were unable to find any ‘best practice guidance’ on consulting with recorders in relation to sharing their records under an Open Data Licence. We therefore had to devise our own approach.

In keeping with SxBRC’s role as a local, trusted custodian of biological records, we decided we should use “reasonable endeavours” with regards to contacting Sussex beetle recorders and requesting their permission to share their beetle records under a CC-BY licence. Advice was sought from Martin Harvey of the Biological Records Centre, and Rachel Stroud of the NBN Secretariat, on how best to frame our communication with recorders.

We agreed we should keep our communication clear and project-focussed, with enough factual context to help people understand what we were asking, and why.

A copy of the email we composed is included at Appendix 2.

Of the roughly 1,000 people who have ever shared their beetle records with SxBRC, we were able to source email address for around 300 people. With so many people to be contacted, we were conscious of the need to handle communications efficiently. With this in mind, we sent out our consultation email via MailChimp, so that all recorders would receive an email greeting them personally, and we linked to a form in SurveyMonkey, so that responses would be collected in a structured way.

The first email, sent in December 2016, elicited 117 responses via SurveyMonkey. A reminder email was sent in early March to those who hadn’t responded to the first email which yielded a further 47 responses.

‘Major contributors’ known to SxBRC, if they hadn’t responded to the consultation emails, were contacted directly with a more personalised message – asking if they would be content to share their beetle records under a CC-BY licence. This approach was successful in adding a further four ‘major contributors’ (and over 9,700 records) to the list of recorders willing to share their Sussex beetle records under a CC-BY licence.

We also mentioned the project at the annual Sussex Biological Recorders’ Seminar, which prompted a few more recorders to contact us, confirming that they’re happy for their records to be shared.

Our approach to the consultation met with a generally positive and cooperative response. However, the questionnaire wasn’t universally appreciated, as one respondent commented:

“Just supposing even just of all the local records centres wrote to me individually asking me to complete their questionnaire! I record beetles. I do not do questionnaires.”

It should be noted, therefore, that our approach may not be scaleable to the local environmental record centre network as a whole.

Results from our consultation with recorders

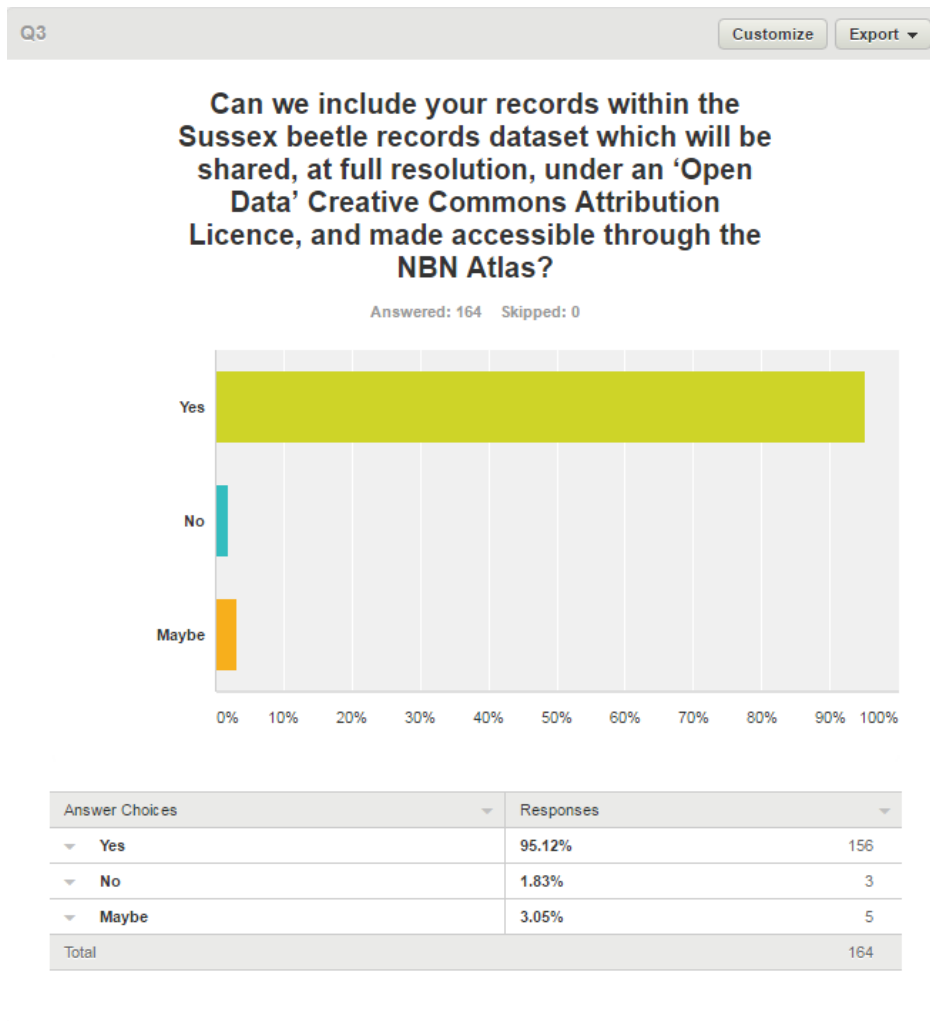


Figure 4. Responses to our consultation.

The majority of the beetle recorders we contacted were in favour of their records being shared under a CC-BY licence. However, it should be noted that several of the major contributors (people who've shared 150 records or more) responded "No" or "Maybe".

Reasons for withholding permission to share data under a CC-BY licence included:

- Concerns regarding threats to sensitive species
- Concerns regarding collecting / recording on private land and SSSIs
- Concerns regarding the impact that open data would have on the viability of Local Environmental Record Centres
- Concerns regarding individuals or organisations benefitting financially from the data being made open

- Concerns regarding ownership rights over commercially gathered data
- Concerns regarding site locations divulging recorder's home address
- Concerns regarding errors in data which the recorder would wish to be corrected before a CC-BY licence is applied
- Queries regarding how the various creative commons licences will be enforced, i.e. how will recorders know if data users are giving appropriate credit?

Some recorders who responded "yes" also added comments indicating that they would have reservations about making all biological data fully open. E.g.

"Though personally I have recorded very few beetles and am happy to share the records, in general I believe that national and local wildlife databases SHOULD have the ability to hide records at the request of the recorder, or to make them available only on request. To store only records that are freely publicly available to anyone, will restrict the records submitted - perhaps not enormously, but it will restrict them. This would be true if recorders statistically represented a cross section of personality types in Britain, but is especially true given the greater number of particularly shy, private people amongst the community of recorders - people with a tendency not to want to publicise their private land, or any creature that they believe may attract unwanted attention from collectors, recorders, curious members of the public etc."

"I only have very few records in this datasets so the answer is yes. However, if it was a more extensive dataset I would reconsider my position."

There were also a range of positive responses to the consultation. E.g.

"Delighted that these records are made 'open to all'."

"More opportunities like this please - the more open the data the more successful conservation will be."

"I welcome this approach to all biological records, except under exceptional circumstances where very rare species or sites could be put at risk."

"I think that this is a very good idea."

"Nice to see this Clare, good clear approach and well presented. I'll hang on to this as a model for future things we might ask of [our] vols."

"I am replying on behalf of my husband ... who passed away in June 2014. I'm sure he would have had no problem in his records being included, perhaps a nice memorial for him."

"Great project – good luck!"

"I look forward to seeing the growing data set. Well done for putting it together!"

Deceased recorders

Peter Hodge, the Sussex County Recorder for Beetles, advised us fairly early on in the project of around 20 Sussex beetle recorders who he knows to be deceased.

New guidance for adding historic data to the NBN Atlas⁴ was published in March 2017, just as we were preparing the final dataset for sharing with via the NBN Atlas.

Based on this new guidance, we made the decision that we would include data from deceased recorders within the Sussex beetle records dataset, shared under a CC-BY licence, where one of the following conditions applies:

1. The data was provided over 15 years ago and, as far as we are aware, has not undergone any substantial changes to its content within the period since it was provided.
2. The data derives from a specimen collection or set of notebooks which was passed on to another party, upon the recorders' death, and the inheritor has given their permission for the records to be shared. This applies, for example, where the recorders' collection is now housed in the Natural History Museum's Coleoptera collection⁵.

Following this approach, we were able to include data from 20 deceased recorders (over 2,500 records) in the Sussex beetle records dataset, which will be shared under a CC-BY licence and made accessible through the NBN Gateway.

⁴ Guidance for adding historic data to the NBN Atlas, NBN Secretariat (2017, URL: <https://nbn.org.uk/news/guidance-adding-historic-data-nbn-atlas/>)

⁵ Coleoptera collections, Natural History Museum (URL: <http://www.nhm.ac.uk/our-science/collections/entomology-collections/coleoptera-collections.html>)

5. Verification

SxBRC produced a web-based mapping system to enable Peter Hodge, the Sussex County Recorder for Beetles, to review the entire Sussex beetle dataset remotely and flag records which are erroneous or require further checking.

Peter's approach was to briefly view the distribution map of every beetle species recorded from Sussex, searching for records that were obviously out of place or were located in the sea. Rare species or species with a history of taxonomic confusion were critically examined. Common species were treated more leniently since it was considered that a small percentage of errors are acceptable, even if not desirable. It soon became evident that some recorders were making mistakes with their identifications, so these were addressed.

As a verifier, you have to make decisions on whether a recorder that you know only by name can be trusted to provide records with a high degree of accuracy. Peter highlighted this as an important, and sometimes challenging, aspect of the role. He sought to achieve the right balance between enforcing accuracy and encouraging recorders who were clearly making an effort to find and identify beetles.

Obviously, no dataset is ever perfect. Peter has suggested that a 'commenting' facility would be a useful addition to the NBN Atlas, allowing other coleopterists to flag potentially erroneous or suspect records. Errors could then be corrected in the next update to the dataset.

With Peter's input, we are confident that the data has been 'quality assured' to a sufficiently high standard to be shared via the NBN Atlas. The accompanying metadata statement includes commentary on data quality and verification.

6. Working with the national beetle recording schemes

We contacted participating national beetle recording scheme organisers at the beginning of the project, explaining that we were keen to understand the existing situation with regards to sharing beetle records so we could deliver the objectives of this project in a way which works for them, as well as recorders and SxBRC. We asked if they would complete a questionnaire which included questions on:

- How they currently manage records for their recording scheme.
- How they'd like to be involved in the *Sharing Sussex Beetle Records* project.
- Existing and planned data sharing via the NBN Gateway.

If we learned one thing through the course of this project it's that, in the main, beetle recording scheme organisers don't like questionnaires. (Which is fair enough – they're volunteers who got into this because they're interested in recording beetles.)

We did receive informative responses from five of the 15 beetle recording scheme organisers. Their responses revealed a complex array of different arrangements for managing and sharing data. This information was augmented with the Biological Record Centre's knowledge of how the beetle recording schemes operate.

Only some of the national beetle recording schemes have uploaded datasets directly to the NBN Gateway. Several of the scheme organisers remarked on **data quality issues** with the NBN data. Darren Mann of the Dung Beetles & Chafers recording scheme noted that, "Much of the NBN data is inaccurate and requires validation, there are issues with nomenclature and identifications." Howard Mendel of the Click Beetles & Allies recording scheme was more succinct, explaining, "Don't do NBN – full of dud records."

Adrian Fowles, in his questionnaire response for the Weevil & Bark Beetle Recording Scheme, made an interesting point about **duplication**: "I mentioned in a previous email that I see value in having one version of verified weevil data for the whole of Britain available on the NBN. No doubt SxBRC sees the value of having one version of verified Sussex data available on the NBN. That would entail duplication of data on the Gateway, but a user would have one-stop reliable sources to answer their queries. I feel that enabling the user to have reliable and convenient access to GB biodiversity data outweighs any concerns over potential duplication, but there may be technical reasons why the NBN want to restrict duplication. I do think this is an area which needs discussion (presumably with the NBN involved as well) before your project gets too far advanced."

Darren Mann, in his questionnaire response for the Scarabaeoidea (Dung Beetles & Chafers) Recording Scheme, made an interesting point about the **attributes which it is important to retain with a record**: "If vouchers are retained in a collection this should be referenced (i.e. whose collection, or Museum). Citations for records from the literature should be included in full."

Steve Lane, in his questionnaire for the Histeridae & Sphaeritidae (Clown Beetles) Recording Scheme, highlighted some **dataflow issues** that he has encountered in collating data for an IUCN

review that he was contracted to write. There is a grey area here between non-commercial use (e.g. in running a Recording Scheme for public benefit) and commercial use (e.g. in delivering on a contract for private gain) – this type of crossover is inevitable in the more obscure areas where the necessary expertise is contained in one and the same person.

These responses raise a number of important issues which it is beyond the scope of this project to address. It is hoped they can be picked up in future work related to beetle recording and implementation of the NBN Strategy.

Sharing data with the national beetle recording schemes

SxBRC staff visited the Biological Record Centre to meet with Martin Harvey and Stephanie Rorke, to discuss data management options for sharing data with the national beetle recording schemes. One output of this meeting was a comprehensive assessment of the current data management situation within SxBRC and the national beetle recording schemes. See figure 5.

We agreed a data management protocol *in principle* with BRC, which would facilitate sharing of Sussex beetle records with the national beetle recording schemes via an Indicia ‘website’, for verification purposes, before the data is uploaded to the NBN Atlas. However, we hit upon some technical and practical issues which meant it wasn’t feasible to implement this within the timetable of this project.

It has therefore not been possible to carry out verification by national schemes within the current project. We don’t consider this to be a major issue, as the dataset has been locally verified by Peter Hodge, the Sussex County Beetle Recorder and a well-respected Coleopterist.

As we now have a blueprint for sharing data with national schemes for verification purposes, it is SxBRC’s intention to implement this on a longer timetable which will allow volunteer beetle recording scheme organisers plenty of time to scrutinise the data. Their input can then be used to update the Sussex beetle dataset on the NBN Atlas.

Mobilising beetle data within iRecord

As figure 5 shows, we understand that around half of the national beetle recording schemes are accessing iRecord data; so for those groups of beetles there is a pathway for data flow to the NBN Atlas. For groups of beetles covered by the other the national beetle recording schemes, there isn’t currently a functioning pathway for records submitted through iRecord to reach the NBN Gateway.

Peter Hodge, the volunteer Sussex County Recorder for Beetles, is set up as a local iRecord verifier; so we had intended to look at options for mobilising locally-verified iRecord beetle data to the NBN Atlas. However, due to the significant demands that this project placed on Peter’s time, we concluded it wasn’t feasible to tackle this, at the same time as asking Peter to verify the Sussex beetle dataset held by SxBRC.

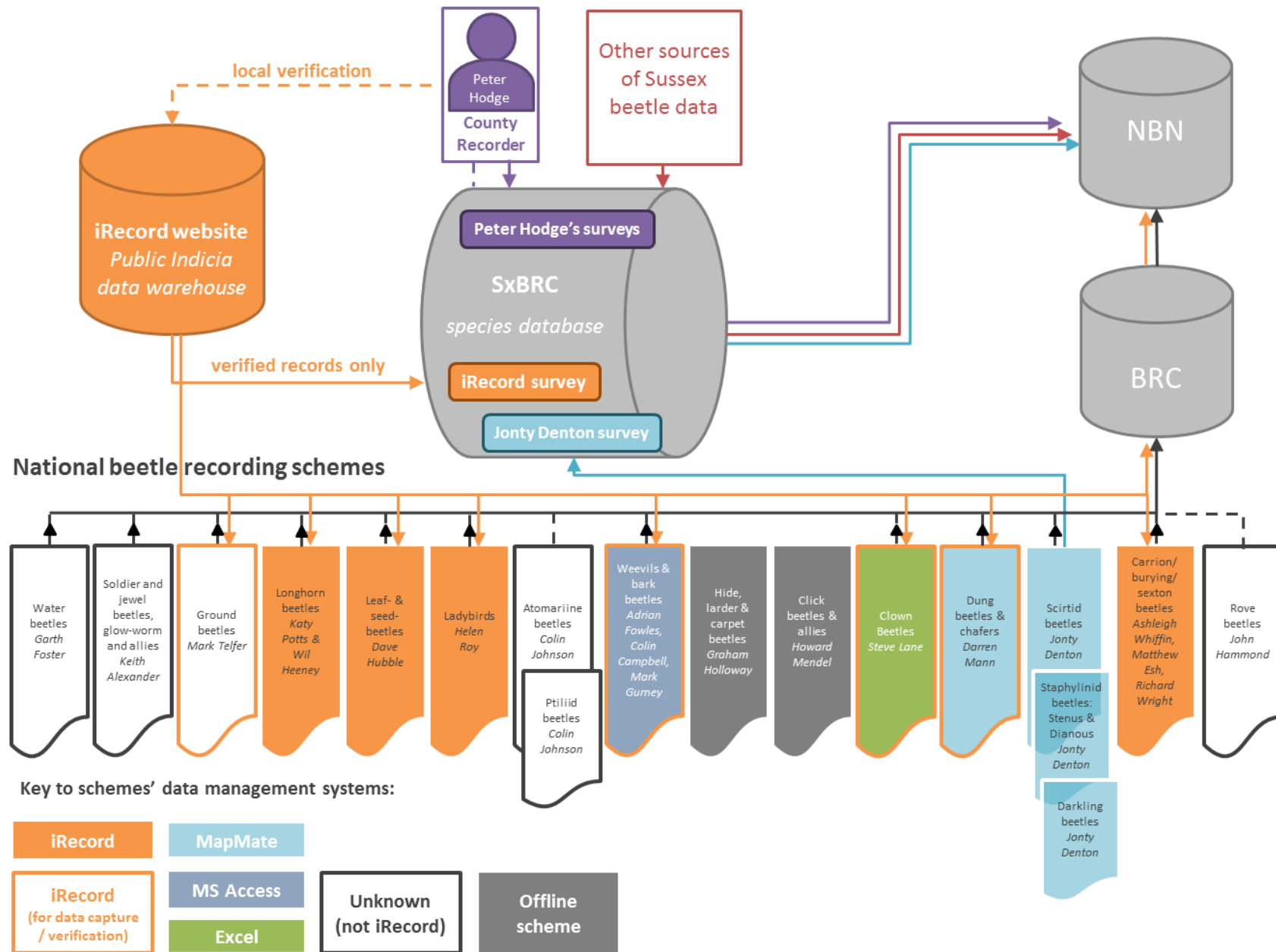


Figure 5. Beetle data flow.

7. Sharing data via the NBN Atlas

The following table summarises the major Sussex beetle datasets which will be shared at original capture resolution under a CC-BY licence, via the NBN Atlas. Individual datasets over 2,000 records are listed separately.

Dataset	No. records
Peter Hodge's Field Notebooks	43,000
Peter Hodge's other beetle records	21,000
Graeme Lyons' beetle records	5,532
Chris Bentley's beetle records	2,237
Various Sussex Recorders' beetle records	20,696
Various Sussex Recorders' beetle records (iRecord)	<i>Not included</i>
Sussex beetle records shared on the NBN Atlas	92,465

What we included

The Sussex beetle dataset which will be shared via the NBN Atlas only includes records where the recorder (or inheritor) has given their explicit permission for the data to be shared.

Where there were **multiple recorder names** against a single record, we took the decision that the record would be shared if at least one of the recorders had given their permission. Where conflicts arose, with records where one recorder had given permission for the record to be shared and another recorder had refused permission for the record to be shared, we decided the preference of the first named recorder would take precedence.

What we left out

SxBRC holds a further 18,000 Sussex beetle records which haven't been included in the Sussex beetle records dataset, as we were not able to secure permission to share these records under a CC-BY licence.

Of these, around 1,600 records were submitted by recorders who have explicitly refused permission. The rest (16,400 records) have come from recorders who we were either unable to contact, or who didn't respond to our consultation.

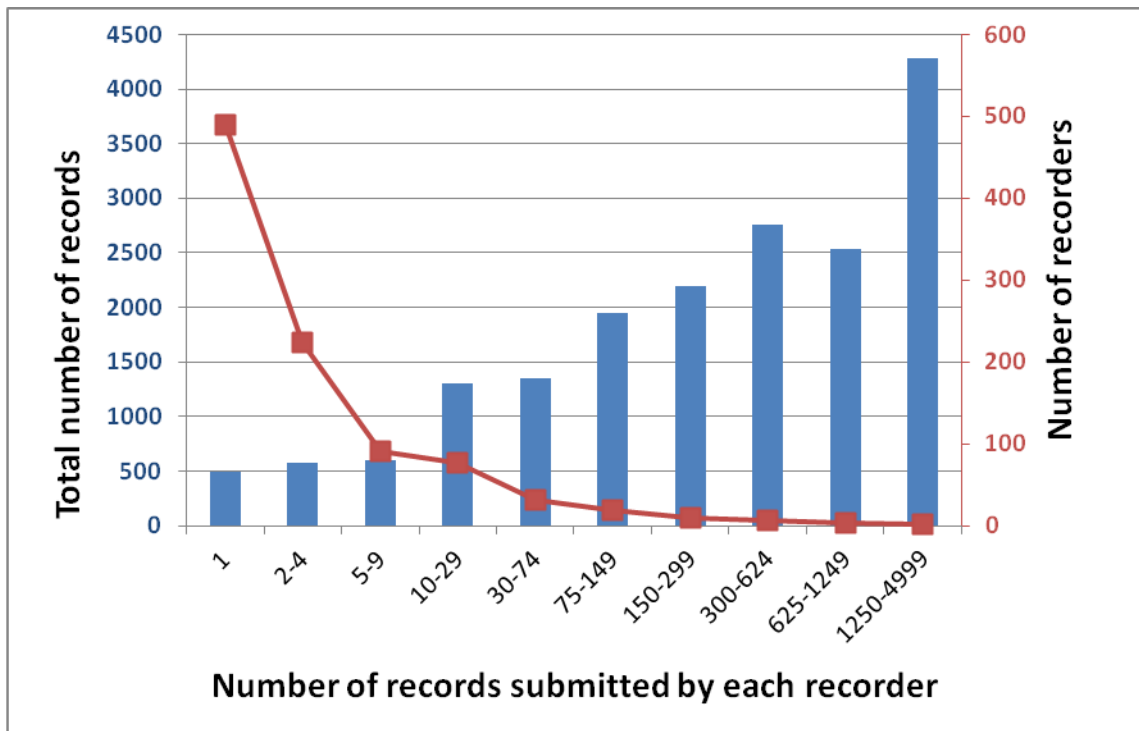


Figure 6. Summary of records not included in the Sussex beetle records dataset on the NBN Atlas.

As of March 2017 there are also over 2,000 Sussex beetle records sitting in iRecord. As explained in section 6, above, we did not include any of the iRecord records in the Sussex beetle records dataset which we are sharing via the NBN Atlas.

<i>In numbers...</i>	
Percentage of SxBRC's beetle data holdings which have been mobilised to the NBN Atlas as a result of this project	83 %
Percentage of SxBRC's beetle data holdings for which recorders have explicitly refused permission to share the data under a CC-BY licence , at original capture resolution	2 %
Percentage of SxBRC's beetle data holdings which we've been unable to mobilise to the NBN Atlas , as recorders were uncontactable or didn't respond to our consultation	15 %

Thanks in large part to the efforts and cooperation of Peter Hodge, this project has been successful in mobilising a very large Sussex beetles dataset to the NBN Atlas, under a CC-BY licence. However, the dataset shouldn't be regarded as 'complete'.

For access to SxBRC's complete data holdings, we would refer enquirers to our data request service:

<http://sxbrc.org.uk/data-requests/>

8. Resourcing

To put the achievements of this project into context, we have provided a full breakdown of the resources invested in this project in appendix 3.

The majority of the staff costs were met by an *Open Licencing of Local Species Data* grant from Natural England, with a total value of **£5,906**.

However, this project could not have been delivered without the enormous volunteer contribution from Peter Hodge. We are also grateful to SxBRC's volunteers for their support in digitising Peter's notebooks; and to the national beetle recording scheme organisers who took the time to engage with our project, and provide advice and information.

We also extend our thanks to Martin Harvey at the Biological Records Centre and Rachel Stroud at the NBN Secretariat, for their in-kind contributions to the project.

Appendix 1: Letter to Peter Hodge's clients



Woods Mill, Henfield
West Sussex, BN5 9SD
Tel 01273 497521
info@sxbrc.org.uk
www.sxbrc.org.uk

<<Client name>>
<<Client address>>
<<Date>>

Dear Sir or Madam

Licensing of beetle data collected by Peter Hodge

Sussex Biodiversity Record Centre (SxBRC) is working on an innovative project on sharing Sussex beetle records. With grant funding from Natural England, we have been able to complete the digitisation of tens of thousands of records from the notebooks of Peter Hodge – the Sussex County Recorder for Beetles – with a view to collating an 'as complete as possible' Sussex beetle records dataset.

We are aiming to make as much as possible of the Sussex beetle records dataset available as 'Open Data', so that others can see and make use of the data with as few restrictions as possible.

Peter has made us aware that some of his beetle records derive from the following professional invertebrate surveys undertaken for <<Client name>>:

Survey name	Date of survey
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We are not aware that any specific agreement was entered into regarding ownership of the biological records arising from Peter's professional survey work. However, as one of his clients, Peter naturally wishes to respect your wishes regarding the licensing of any beetle records collected while he was working under contract for you.

As part of our agreement with Natural England, an 'as complete as possible' Sussex beetle records dataset will be shared under a Creative Commons Attribution (CC-BY) licence at the end of March 2017 and made accessible through the upcoming NBN Atlas website, due to be launched in the Spring.

If you would like records collected on any / all of the surveys listed above to be excluded from this open dataset, please notify SxBRC of this fact by **Friday 3 March 2017**.

We thank you in advance for your cooperation. Please don't hesitate to contact me personally if you have any questions:

Email: clareblencowe@sussexwt.org.uk

Tel. 01273 497521

Yours sincerely,

Clare Blencowe, SxBRC Manager
cc. Peter Hodge

Appendix 2: Consultation email to Sussex beetle recorders



Dear Clare

Can you help us make Sussex beetle records more accessible?

Sussex Biodiversity Record Centre (SxBRC) is working on an innovative project on sharing Sussex beetle records.

With grant funding from Natural England, we have been able to complete the digitisation of tens of thousands of records from the notebooks of Peter Hodge – the Sussex County Recorder for Beetles. We've also been busy collating Sussex beetle records from hundreds of other coleopterists and local biological recorders, such as yourself, with a view to collating an 'as complete as possible' Sussex beetle records dataset.

We're working with the national Biological Records Centre and volunteers from the British Beetle Recording Schemes on designing efficient data-sharing arrangements to support the verification of Sussex beetle records - recognising we all have a role to play in the creation and curation of high quality datasets.

We are aiming to make as much as possible of the Sussex beetle records dataset available as 'Open Data', so that others can see and make use of the data with as few restrictions as possible.

As part of our agreement with Natural England, an 'as complete as possible' Sussex beetle records dataset will be shared under a Creative Commons Attribution (CC-BY) licence at the end of March 2017 and made accessible through the upcoming NBN Atlas website, due to be launched in the Spring.

You are someone who has recorded beetles (or a beetle) in Sussex.

We'd like to know if it's okay to include your records within this high quality open dataset.

Please complete our very short survey, to tell us your views.

[Sharing Sussex beetle records survey](#)

Many thanks,
Clare

The survey we asked beetle recorders to complete:

Sharing Sussex Beetle Records

Thanks for taking the time to respond to this short survey

This is your chance to tell us if it's okay to share your beetle records, at full resolution, under an 'Open Data' Creative Commons Attribution (CC-BY) licence, and make them accessible through the NBN Atlas website.


A CC-BY licence allows people to share and adapt data for any purpose, as long as the source of the data is made clear by providing appropriate acknowledgement. Once a dataset has been licenced as Open Data, those freedoms to share and adapt the data can never be withdrawn, provided the user has followed the terms of the licence. For details see: <https://creativecommons.org/licenses/by/4.0/>


The NBN Atlas will be a replacement for the NBN Gateway, which you might be familiar with. Unlike the NBN Gateway which has access controls restricting public access to certain datasets, every record that is held on the NBN Atlas will be shared publicly and licenced with one of three Creative Commons Licences or an Open Government Licence. Only access to sensitive species will be restricted. For details see: <https://nbn.org.uk/news/future-nbn-gateway-nbn-atlas-opening-access-data/>


Data protection

The information you provide in response to this survey will be used to inform delivery of the Sharing Sussex Beetle Records project led by Sussex Biodiversity Record Centre. Your contact details will be held in a database at Sussex Biodiversity Record Centre (a department of the Sussex Wildlife Trust) and will only be used to contact you if there is a query about your beetle records, or if you express an interest in hearing more about this project. Your contact details will not be passed on to any third parties without your permission. Your name and your response may be shared with the Biological Records Centre and the British Beetle Recording Schemes.

Anonymised responses may be published as part of a 'lessons learned' document which will be produced at the end of this project

* 1. Your name: 

2. Your email address 

* 3. Can we include your records within the Sussex beetle records dataset which will be shared, at full resolution, under an 'Open Data' Creative Commons Attribution Licence, and made accessible through the NBN Atlas? 

- Yes
- No
- Maybe

The survey also offered recorders a chance to add comments to their response, and tell us if they'd like to receive occasional updates on the progress of this project.

Appendix 3: Resources invested in delivering the Sharing Sussex Beetle Data project

Staff costs & travel

	Project Manager £180 a day	Lead Data Officer £170 a day	Data Support Officer £150 a day
Staff costs			
Prepare project proposal for grant application ^a	1.5	0.5	
Consultation with recorders	2		
Consultation with commercial companies	2		
Consultation with national beetle recording scheme organisers	1		
Digitisation of notebooks			12
Process notebook data for import (update nomenclature, etc)		2	
Enter other Sussex beetle data into Recorder 6		1	2
Produce maps for county-level verification		2	
Agree data management protocol to support verification by national schemes	1.5	1	1
Implement data management protocol ^b	-	-	-
Finalise Sussex beetle dataset held by SxBRC (incorporating amendments from local verification exercise)		2	
Prepare Sussex beetle dataset for sharing under a CC-BY licence		1	
Produce metadata statement and send to NBN	0.5		
Produce lessons learned document	2.5		
Reporting to Natural England	1		
Project management	1		
End of project communications with national schemes & beetle recorders	1		
Staff costs	£2,520	£1,615	£2,250
Total staff costs			£6,385
Travel (trip to BRC in Wallingford)			£81
Total costs			£6,466

The majority of the financial costs of this project were met by an *Open Licencing of Local Species Data* grant from Natural England, with a total value of **£5,906**. The remaining costs were met by SxBRC.

^a Cost not covered by the grant from Natural England

^b Sharing data with the national beetle recording schemes to support national verification was found not to be feasible within the timeframe of this project, as discussed in section 6.

In kind contributions

	Days
Biological Records Centre Advice and support around engaging with the national beetle recording schemes, and consulting with recorders	2.5
NBN Secretariat Advice on consulting with recorders	0.5

Volunteer contributions

	Days
SxBRC biodiversity data support volunteers Digitisation of Peter's notebooks	10
Peter Hodge, Sussex County Recorder for Beetles Verifying the Sussex beetle dataset. Providing advice and information through every stage of the project.	8
National beetle recording scheme organisers Providing advice and information	Not assessed, but appreciated!