

**Association of Local Environmental Record Centres**  
**Strategic Plan**

**2015-2020**



## 1. Introduction

The Association of Local Environmental Records Centres Strategic Plan has been drawn up to answer the fundamental question, what direction will ALERC take over the next five years? It starts by looking at the key external drivers that are likely to shape the environment within which our members and ALERC operate. It considers the purpose and values that underlie the association's work, the audiences we seek to influence and how we can positively support and promote our members' work. And it concludes by setting out our key priorities, and the resources needed to deliver them.

The Strategic Plan relates to four key areas as shown below.



It sits above the Directors and National Co-ordinator to guide their work, and importantly it informs the Annual Business Planning & Working Groups. Importantly, it is driven by the needs of our members, and recognises the wider partnerships within which we operate.

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## 2. Background

Formed in 2009, ALERC is an association between Local Environmental Records Centres (LERCs) in Great Britain. The Association aims to provide a central voice for the views and concerns of the Records Centre community, whilst building a support-based network of knowledge and advice to meet the needs of its members.

Since its formation ALERC has successfully grown to represent the majority of LERCs within the UK, and operates with the following resource:

Directors: 14 voluntary positions

National Co-ordinating Officer: 1 Paid FTE

Company Secretary: Part time paid

### Milestones and achievements:

- Incorporated as a Community Interest Company in July 2009
- ALERC website provides a shop window for all LERCs, demonstrating the coverage and depth of knowledge and skills available from its members
- A formalised accreditation system is in place for members, with supporting information and a mentoring framework
- Directors working groups – provide targeted development in crucial areas
- Strategic representation – Directors sit on national partnerships, committees, and respond to national consultations
- An annual ALERC conference attracts circa 80 attendees and keynote speakers
- National Co-ordinating officer role created and initial funding part externally sourced
- A positive financial balance maintained to date

## 3. External drivers

We live in challenging times, both financially and for the environment. Biodiversity is not high on the UK & Devolved government's agendas, and the English environmental delivery agent DEFRA is heavily under resourced. With its individual agencies having undergone rapid reform in an effort to save costs in recent years, the aftermath is being felt both in national and local offices, directly affecting their relationship with LERCs. Whilst historically Scotland and Wales have independently wrestled with devolved government policy, Defra's draft Biodiversity Monitoring & Surveillance Strategy includes working with the devolved administrations collectively to launch a more cohesive approach. Ultimately this means Defra's direction of travel will impact all UK LERCs equally for the first time.

Funding from governments to support LERCs is in shorter supply than in previous years, and there is immense pressure on local partnerships to fill the gap in budgets for many of our members. The legal framework we support is also under supported, with wildlife crime rarely followed by prosecutions, and habitat destruction going principally unchecked. Yet there are plenty of opportunities – a more informed public, new means of getting our messages across and the rise in our understanding of the economic value of LERC services. Some of the most significant threats and opportunities are set out in the table below.

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	<b>Threat</b>	<b>Opportunity</b>
Financial	Recession and statutory funding cuts threaten core funding of all LERCs	New funding opportunities emerging: Water Industry targets, Biodiversity Offsetting, Green Infrastructure Planning, the localism act, private sector
Political	Biodiversity low on the political agenda, anti-regulation culture in government, Free & Open Data agenda	Major policy changes: Common Fisheries Policy, CAP, health and welfare reform, EU INS legislation LERCs mobilise data cost effectively – ALERC can work with members to prove the business case
Technological	Resource hungry processes for data in & limited outputs – traditional LERC service seen as outdated?	Increased access to high quality IT, bespoke programs and shared development of solutions – sophisticated & speedy outputs opening new markets
Environmental	Impacts of climate change, rapid change in the distribution & condition of key species and habitats, and in the marine environment, little protection outside statutory sites	European legislation/targets The rise of ecosystem services and ecological networks: Catchment planning - water quality Proof of concept studies – flood prevention
Legal	Weak NERC Act NPPF watered down responsibility to the environment EU membership only driver behind main Biodiversity legislation	ALERC members with a determination to work more closely with LPA, LNPs and national bodies, and better placed to do so, potential to support shrinking LPA biodiversity resources further

**4. Key challenges**

The external drivers set out above point to the following key challenges for the association:

- Providing strong leadership within the current financial storm: the tough financial environment is likely to be with us for some years to come. We will need to guide & support members in adapting to reduced reliance on traditional income sources and advocate building up wider portfolio's to maintain future sustainability.
- Maximising our impact: we will need to focus hard on those activities that really make a difference for our members, grasping new opportunities quickly and refining our approach so that we think in terms of what we achieve, rather than what we do.

- Presence: we need to make the association, its members and their work much more visible to people throughout the country.
- Sharing best practice: ALERC will need to lead on the drive for innovation within LERC services, and coordinate a framework through which all LERCs can benefit
- Setting the standard: ALERC will build confidence and improve standards by requiring all our members to become accredited through the formalised ALERC accreditation system within the lifetime of this plan.
- Securing our future: in an increasingly competitive world, where 'open data' may be the new expectation, we need to build our reputation on what makes Local Environmental Record Centres special as the place to go for all local data needs, and why our model works.

## **5. A framework for our development priorities**

The most obvious concerns of any association looking at its future during difficult times relate to pressure on resources: its people, its finances and importantly, the ability to meet its members expectations. Essential though these undoubtedly are individually, it is important that ALERC puts these matters in the context of what we are looking to achieve, why we wish to do so, who we are trying to benefit and what drives us. Our development priorities are led by the following broad headings:

- Our members: this is what drives us;
- Purpose: this is about why we are here and how we seek to support our members;
- Working groups: the broad areas of work in which we get involved;
- Audiences: the people we seek to get involved with and influence, and whom we target through our work.

### **5.1 Our Members**

Membership of ALERC is open to all LERCs in the UK including those at a developmental stage. Currently there are 42 LERC Members ranging from a LERC with 1 FTE to a LERC with 7.4 FTE. There are three principle business models within which these operate;

Wildlife Trust hosted - 13

Local Authority hosted (including those hosted by museums) - 16

Independent not for profit (CIC/Charity) - 11

Charity host such as museum or biodiversity partnership - 2

Data holdings (species observations) c.300 000 – c. 5.5m

Data holdings (habitat records – as a proportion of LERC's entire coverage area) 0% - 100%, average 43.22%.

Number of data enquiries per year c. 80 – c.1200

Number of hours per week contributed to LERC by volunteers 0 – c.151

Whilst our members vary considerably in size and constitution, they share the same aims, objectives and core function.

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## 5.2 Our Purpose

ALERC is the only body that is dedicated to representing and supporting the UK's LERCs and their staff. The Association is working to provide information and advice to staff and volunteers, helping them do their work and provides a means of sharing good practice.

The following statements capture the association's objectives;

- To promote and encourage the completion of a UK-wide network of Local Environmental Records Centres.
- To promote and develop good standards of practice in the collection, collation, management, dissemination and analysis of environmental data
- To promote Local Environmental Records Centres regionally, nationally and at a UK level to potential users and suppliers of data.
- To provide full representation of the UK with country specific solutions and equal emphasis on the individual countries' requirements.
- To develop and promote accreditation schemes for Local Environmental Records centres and their staff.

It is vitally important that we encourage and facilitate networking between Centres to enable exchange of ideas, collaborative working, developing joint tools and sharing good practice.

## 5.3 Working Groups

ALERC has a number of working groups that are comprised of directors and other members. Whilst a number of ALERC outputs remain reactive such as responding to consultations, the role of these groups is to progress the work of ALERC in a number of different areas, in a planned strategic way. They may or may not meet physically, but will carry out much of their work electronically via email. They will also report on their work and interact with the general membership through the ALERC forum. The directors, ANC officer and our members are ALERC's resource.



1. Accreditation Working Group

The ALERC Accreditation Working Group is a group tasked with reviewing all aspects of ALERC LERC Accreditation and suggesting and implementing changes in order to keep it as rigorous, efficient and appropriate as possible. This means looking at both the wording of the criteria and the process as a whole. The group will also approve, or otherwise, the accreditation of LERCs after their assessment. Group membership will come from people currently working at accredited LERCs.

2. Business Development Group

The group will seek to develop the reach of the Association of Local Environmental Records Centres and its members. It will work with relevant external organisations on furthering the understanding and awareness of ALERC and individual records centres within our target audiences. This will be achieved through the development of a suite of position statements and guidance on key operational areas and meetings with key partners and client groups.

3. Website Working Group

The ALERC Website Working Group is a technical group tasked with reviewing all aspects of the ALERC website and suggesting and implementing changes in order to keep it relevant, up to date and useful. The group will also look at other internet issues affecting LERCs. Group membership will come from people currently working at LERCs who have a specific interest in web development and / or technical skill.

4. Conference Working Group

The ALERC Conference Working Group aims to assist the organisation of the ALERC conference by reviewing the feedback of previous conferences and developing ways of keeping the format and content of future conferences topical and appropriate. Membership of the group will come from the ALERC directors and can also include representation from the wider membership.

ALERC will develop working groups only where appropriate and where outcomes have been identified. For example a Data Flow Working Group is currently in development, and it will work with a wide range of members, and external stakeholders such as NSS for maximum mutual gain.

#### **5.4 Our audiences**

Our audiences are those groups of people that we feel it is most important to target our work towards. Whilst defining those audiences we recognise their diversity, not only in their size, aims, objectives and motivation, but also in their use of, or need for, biodiversity information.

Over the next five years we will: -

- Analyse all our audiences and identify our priorities;
- Revisit our branding and how we position the association and its members;
- Establish and build links with partners who can also promote ALERC
- Deliver our communications with a view to making them more directed and with a clear idea of what we seek to get out of them;

#### **6. Our values**

Our membership is what drives us, however it is our values as an association that binds that membership and provides strength in unity. It is possibly the single most important thing that connects the organisations together, motivates the Directors and appeals to our wider partners and supporters.

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It is important to ensure:

- a) Our values are reflected in all our messages;
- b) We practice what we preach, with the credentials and professionalism to support this;
- c) We are consistent in our approach

## **7. ALERC within a wider partnership**

In shaping our future we need to bear in mind the potential benefits a well-functioning partnership can deliver. But also at the same time balance the needs of remaining sufficiently independent so we can act in our members best interests.

ALERC will engage constructively with the National Biodiversity Network as an equal amongst others, reflecting the strength and unity of its members and sharing our mutual aims to protect and enhance biodiversity. We will seek to get actively involved in national initiatives where we have specific skills to contribute, and we will seek to push the NBN partnership forward in ways that will improve its effectiveness nationally, and also importantly, locally. In particular we will engage with, and become actively involved in the NBN Strategic Action Plan 2015-2020 in areas such as verification, data flow and data standards, on-line recording, attracting new recorders, developing sustainable business models, and open data.

In doing this we will strengthen our members' positions as local nodes of the NBN partnership, promote their value and secure their future. We will be open to working with mechanisms within the NBN such as the Gateway whilst mutual benefit is possible, and open to working with organisations who are not members of the NBN, for instance to mobilise biodiversity data to wider audiences from new sources.

ALERC and its member LERCs also have a strong role to play in the Defra Biodiversity Monitoring and Surveillance Strategy 2015-18 in contributing to the national evidence base on status and trends; reporting to Europe, informing agri-environment schemes, and local decision making etc. As Defra are committed to working with the devolved administrations to achieve a unified approach across the UK, then all LERCs should have a role to play.

There are specific areas within which ALERC's voice will be central to supporting our membership, these include:

Supporting the ongoing development of LERC business models which successfully incorporate a mix of project, commercial, local authority and government income to deliver maximum value & services.

The benefits of an integrated network of local nodes of the NBN, accredited to a recognised set of standards will be promoted to all LERC clients and partners

Open data, clearly defining the definition and context within the biodiversity data sector, ensuring that LERCs are respected for the part they play in mobilising data. And

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specifically that the mechanisms they use to fund this work are accepted as long term solutions, which complement rather than undermine the NBN’s shared objectives of making data more accessible.

Building partnerships and dialogue with national bodies such as the Association of Local Government Ecologists (ALGE), the Chartered Institute of Ecology and Environmental Management (CIEEM), the NBN Secretariat, National Species Recording Schemes and Societies, and Government Departments such as Highways England and the Department for Communities and Local Government

## 8. Financing the plan

ALERC’s Strategic Plan is underpinned by a five year financial forecast.

The association has low unrestricted cash reserves and insufficient income to support the full time National Co-ordinating Officer post (ANC), addressing this is a critical priority for the five year financial plan. The plan will be based on the following principles: -

- Matching income and costs in discrete functions; such as the annual conference
- Building up our cash reserves over time to allow for match funding of project bids
- Securing long term funding of the ANC, through external project bids, long term partnerships and increased membership income over time.

Membership rates have been held for the last few years, but during the next five years income generated will need to increase substantially to sustain the ANC post long term as other funding options narrow. Successful expansion of the membership base will increase membership income in the early stages of this plan, however, more significant levels of funding are needed to ensure ALERC maintains the resource required to deliver its targets. Recent events have shown members the real value of both ALERC as an organisation, and of its need for an employed post.

Therefore ALERC will review and revise its membership rates in year one and seek to gain support from members for rises of circa 250% during years two – four. This level of income has been set to meet the costs of the ANC post at 0.8FTE (the minimum resource level required).

Based on current fee levels:

	2013-14	2014-15	2015-16 estimated
<b>Total Income</b>	£13 550	£14 800	£19 200
<b>Membership income</b>	£11 015	£11 940	£16 740
<b>Number of members</b>	44	45	47
<b>Number of new members</b>		1	2

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Number of members lost	0	0
Number of non-members	8*	6*

**Proposed income levels:**

	2016 - 2018	2018 - 2019	2019 - 2020
<b>Total Income</b>	£28,500	£37,500	£38,800
<b>Membership income</b>	£26,440	£35,040	£36,040
<b>Number of members</b>	49	51	53
<b>Number of new members</b>	2	2	2
<b>Number of members lost</b>		0	0
<b>Number of non-members</b>	4*	2*	0

\*This only includes established LERCs who are likely to gain from membership. It does not include LERCs from the Highlands and Islands, some of which are closed for half the year. It also includes individual members that are not LERCs.

Category	Definition	Benefits	Annual	16/17	17/18
<b>Developing LERC</b>	No services being provided	Max 1 place on each event at preferential rate Max 2 users on forum/ private area of website	£175	£200	£225
<b>Small LERC</b>	1-2.9 FTE <sup>1</sup>	Max 2 places on each event at preferential rate Max 4 users on forum/ private area of website	£300	£400	£500
<b>Medium LERC</b>	3-4.9 FTE <sup>1</sup>	Max 4 places on each event at preferential rate	£450	£650	£850
<b>Large LERC</b>	5+ FTE <sup>1</sup>	Max 6 places on each event at preferential rate	£600	£900	£1200
<b>Individual members</b> <sup>2</sup>	Individuals <sup>2</sup> approved by ALERC Board	1 place on each event at preferential rate and individual use on forum/ private area of website	£20	£30	£40
<b>Associate members</b> <sup>3</sup>	Satellite records centres inc. geological	Max 1 place on each event at preferential rate Max 2 users on forum/ private area of website	£175	£200	£225

## 9. Our priorities

It is very unlikely that ALERC will be able to deliver all of our aspirations within a five year period. It is crucial that we focus first and foremost on those things that we believe are most important. With this in mind, priorities are divided into those that are about *survival* and those that are *developmental*.

### 9.1 Survival

Our most critical priorities are things on which the future wellbeing of the association and its members depend. They may be financial, reputational or integral to the core functioning of the association. Our key priorities over the next five years are: -

- Growing our membership
- Securing long term funding of the ANC post
- Substantially growing the number of Accredited LERCs, with our target being 100% of ALERC members achieving accreditation within five years
- Including, setting out a clear and manageable timetable for the accreditation of the entire membership, including existing and new members to enable this
- Publishing a clear LERC definition & relevant Position Statements
- Negotiating 'long term' agreements with government agencies
- Increasing the profile of biodiversity data within decision making

### 9.2 Developmental

The next set of priorities are those that are not necessarily essential for our survival but which are central to fulfilling our vision. They are: -

- Securing 100% membership of LERCs
- Delivering a profitable conference, annually
- Making LERC accreditation a requirement of membership of ALERC

## 10. What will ALERC look like in five years time?

If ALERC succeeds in delivering these priorities, we will be an association that: -

- a) has a high profile, operating in equal partnership with others within the NBN
- b) provides benefits for all LERCs within the UK
- c) provides a co-ordinated voice for biodiversity data within the planning system and within government departments and agencies
- d) assures a consistent high standard to LERC clients through its Accreditation system, with all members being accredited LERCs

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- e) has sufficient resource to grow strategically and be reactive to our members needs
- f) is integral to developing national partnerships and initiatives for long term biodiversity data projects, which deliver nationally and locally