

Hampshire Ornithological Society - Data Sharing & Use Policy

1. Introduction

This document sets out the Hampshire Ornithological Society (HOS) policy on the sharing and use of the data it holds. The policy is intended to provide a rational and consistent approach towards the management of data availability and use, and to help data providers and users better understand the Society's aims and intentions. It is important that those who provide data to HOS appreciate how they will be used and made available to others. Further, those that use the data need to understand the rationale behind any constraints placed on the availability of data.

2. Our Aims and Objectives

HOS is the county ornithological society, and collates and disseminates information on birds in the administrative county of Hampshire. The HOS database is a repository for bird records received. HOS works in collaboration with the British Trust for Ornithology (BTO) and other national organisations in organising bird surveys, and with the Hampshire Biodiversity Information Centre (HBIC) to make data available to consultancies, developers and conservation organisations who may be concerned with the management or impact of change on the ornithological environment. HOS publishes the *Hampshire Bird Report* annually; this contains a summary of records and serves to encourage and stimulate ornithological interest and bird recording by giving feedback to members and others.

3. Data Sources

HOS receives, validates, and archives Hampshire bird records that are collected by Society members, other ornithologists and birders, and through partnership with other organisations. Records arise from casual observations and from systematic site, area, or species-targeted surveys. Except where there have been targeted surveys, the record dataset inevitably reflects the interests of casual birders, and is therefore biased to scarce, localised and vagrant species and sites where these are most likely to occur (e.g. coastal reserves).

4. Data Collation & Storage

- 4.1. All data received are subject to a quality control process, and are entered into a secure computer system to enable subsequent retrieval and analysis, and to preserve for future generations.
- 4.2. The primary purpose of quality control is in ensuring the accurate assessment of species, location and number for each record. This process (validation) varies according to the rarity of the species, the location and date, and the record source. Details of the guidelines for the submission of records are given in the *Hampshire Bird Report* and on the society website. Species requiring supportive notes are divided into three categories according to their rarity – those which are accepted at the discretion of the County Recorder, those subject to assessment by the *HOS Records Panel (HOSRP)* and those national rarities which are assessed by the *British Birds Rarities Committee (BBRC)*. The *HOSRP*

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comprises seven members; for a record to be accepted at least six members must vote in favour. Records with fewer than six votes in favour are considered to be “not proven”; the County Recorder will inform the observer of such decisions and will give the reasons.

4.3. Copies of the database are kept on other computers for security and backup purposes, and to mitigate for potential impact of future hardware and software changes. For details see HOS Data Backup Policy.

4.4. Through formal agreements, electronic copies of relevant data are also forwarded to the Hampshire Biodiversity Information Centre (HBIC) and the national Bird Conservation Targeting Partnership (BCTP).

5. Data Sharing

5.1. HOS is committed to promoting the use of data held within its database. When submitting records to HOS, individual data providers agree to any subsequent decisions of HOS regarding data sharing and the use of their records. Thus HOS data are normally freely available, or on an “at cost” basis, for use in not-for-profit decision-making, research, education, and other public-benefit purposes. Data may also be made available for with-profit activities (e.g. in response to consultancy or developer enquiries) where this will contribute to evidence-based planning and decision-making, or other objectives of the Society.

5.2. As a responsible data custodian, HOS will necessarily restrict access, release, or dissemination of parts of the data, depending on the purpose and circumstances. Restricted release of data might involve, e.g. removal of site-names, provision of summary data at a less detailed spatial resolution or removal of observer names.

5.3. Reasons for HOS restricting or limiting the release of data might include:

5.3.1. Risk of putting sensitive species at risk, or other environmental damage.

5.3.2. Risk to relationships or reputation with land-owners or other agencies.

5.3.3. Potential conflict with any formal agreements made with Data Provider organisations. The agreements with some data provider organisations (such as RSPB, WeBS Partnership, BTO, etc) may limit or preclude some data uses (e.g. premature publication).

5.3.4. Potential conflict with the requirements of the Data Protection Act. Information held by HOS must be managed in accordance with the Data Protection Act.

5.4. Terms and conditions of release:

5.4.1. Data released to commercial organisation will be subject to specific terms and conditions, as set out in Appendix One below.

6. Charges

Data will normally be made available to partner organisations, or for specific conservation purposes, at no charge. However, charges will normally be made to commercial organisations, and to organisations and individuals undertaking commissioned work for third-party clients (e.g. environmental impact assessments).

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These comprise a search fee (currently £50) and a fee for each record (currently 10p). Where high numbers of records are involved a lower rate may be negotiated at the County Recorder's discretion. If one observer has been responsible for the collection of a large proportion of the data involved, a proportion of the income from the sale of records may, at the County Recorder's discretion, be passed back to the original observer. Alternatively, the County Recorder may refer a request for data release directly to the principal observer involved.

7. Further Information, Advice and interpretive services

HOS may be able to assist with interpretation of data, for example to place in spatial or historical context, and may also be able to point to likely sources of more detailed additional information held by individuals or other organisations. We can also advise on likely future surveys, and the timescales and possibility of future data that may be relevant for particular purposes.

8. Processes & procedures

- 8.1. Requests for release of data should be directed to the County Recorder.
- 8.2. Decisions on the release of any data, and any restrictions or terms placed upon it, will be made by the County Recorder. In specific instances, he may seek the advice of the Conservation Liaison Officer, Chairman of the Society or Chairman of the Scientific Sub-committee before agreeing to release data. Charges will be decided by the County Recorder, and agreed in advance with the recipient.
- 8.3. Any ongoing agreement for transfer or release of data, or changes to such agreements (for example, to HBIC), will only be entered into after approval by the Management Committee.
- 8.4. A record will be kept by the County Recorder of all releases and provisions of data to other parties. For commercial releases, the County Recorder will prepare invoices including details of the recipient, a description of the data provided, any terms and conditions specific to its release and the charge involved. Invoices will be copied to the Treasurer and, for information, the Chairman of the Scientific Committee.
- 8.5. The Treasurer will inform the County Recorder when payments have been received and of any not received within two months of the invoice date. The County Recorder will follow up any non payments.

Appendix One. Conditions applicable to data supplied by *HOS* for commercial use:

- Data are supplied for the use of the applicant and that of their client only.
- Data should not be passed on to third parties for use in any connection other than the applicant's current commission.
- The source of data should be acknowledged as the *Hampshire Ornithological Society*.

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- Should the applicant wish to use the data in a subsequent application, the terms for this new use should be discussed with *HOS*.
- Whilst every reasonable effort has been made to validate information supplied by *HOS*, owing to the changing and judgemental nature of information relating to wildlife, *HOS* disclaims any responsibility for the accuracy or comprehensiveness of the information supplied and accepts no liability for any direct, consequential or incidental damages or losses arising from its use.

John Clark

On behalf of Scientific Committee

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