

**A Statement on
Common Standards
Monitoring
1998**

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A STATEMENT ON COMMON STANDARDS FOR MONITORING DESIGNATED SITES

1. Introduction

- 1.1** One of the special functions of the three country agencies (Countryside Council for Wales, English Nature and Scottish Natural Heritage) is the establishment of common standards throughout Great Britain for the monitoring of nature conservation. This information note describes the basic standards which relate to the monitoring required on statutory sites. The standards have been developed by these agencies, together with the Environment and Heritage Service in Northern Ireland and have been agreed by the Joint Nature Conservation Committee.
- 1.2** The standards apply to statutory sites designated as Sites of Special Scientific Interest (SSSIs) and Areas of Special Scientific Interest (ASSIs). They will also apply to areas designated as part of the Natura 2000 series, (Special Protection Areas (SPAs) under the EC Birds Directive and Special Areas of Conservation (SACs) under the EC Habitats Directive), together with Ramsar sites designated under the Convention on Wetlands of International Importance.
- 1.3** The standards set out below provide the basic framework required to ensure consistent monitoring throughout the UK. A glossary of the terms associated with common standards monitoring is provided in Annex I. Further guidelines are being produced by the country agencies to assist with the practical interpretation and application of these standards. Once agreed they will be published by the Joint Nature Conservation Committee. The detailed implementation of the standards is the responsibility of the individual country agencies.

2. The need for common standards for site monitoring

- 2.1** There are several benefits to be derived from having an agreed set of common standards for site monitoring:
 - At a local level, staff have a framework within which they can develop their programme of site monitoring with the confidence that this is supported and being implemented throughout the country. The standards enable staff to make consistent judgements about site condition and help to ensure that judgements are comparable from one person to another and from one site to another.
 - If data are collected, managed and exchanged following accepted standards the costs of data exchange are substantially reduced. Less time is spent interpreting and reconciling data from different sources and consistent data facilitates the comparison of results in time and space.
 - Common standards allow individual agencies to establish procedures to ensure data is provided at the right time, in the right format. The data can then be aggregated and information produced at a range of geographical scales. This will enable obligations to report on the condition of designated sites at a country level and at a United Kingdom level to be met.

3. The basic approach

- 3.1** In developing common standards for site monitoring it is important to define what is meant by monitoring. In these standards, we distinguish between surveillance and monitoring.
- 3.2** Surveillance relates to a continued programme of surveys systematically undertaken to provide a series of observations over time. Such programmes of repeated observations are very valuable for establishing the trends in the components of nature conservation at different geographic scales. Surveillance programmes and survey information both contribute to the national audit of wildlife which serves a range of different purposes including informing decision making, policy development and empowering individuals and groups to make wise choices about the natural environment. Surveillance programmes can benefit from agreed standards but this is not dealt with further in this paper.
- 3.3** Monitoring is, in contrast to surveillance, the making of an observation to establish whether a standard is being met. This can be established in a single visit or observation and does not require information collected over time.
- 3.4** The purpose of site monitoring is essentially to:
- Determine whether the desired condition of the feature(s) of interest for which the site was designated is being achieved. This can enable judgements to be made about whether the management of the site is appropriate, or whether changes are necessary.
 - To enable managers and policy makers to determine whether the site series as a whole is achieving the required condition, and the degree to which current legal, administrative and incentive measures are proving effective.
- 3.5** Standards for site monitoring need to be sufficiently robust so that they can be implemented consistently across the UK by the different agencies, yet also be able to cater for the different operational practices and systems that have evolved in each country. The framework of standards ensures that the minimum requirements are defined and are able to be delivered within the resources available. The detailed operational development of these standards is the responsibility of each of the country agencies. The standards must enable us to monitor all of the habitats, species and earth science features protected within the SSSIs and ASSIs, including those of importance in the Natura 2000 network and Ramsar sites.
- 3.6** The bulk of the monitoring effort is likely to be undertaken by local conservation officers in the course of their day to day duties although in some situations, for example in the marine environment, other specialists may be required. The framework is designed to enable staff to undertake the assessments required bearing in mind the wide variation in types of site, interest features, knowledge of natural changes which occur and even the variation in the expertise and experience of staff. The standards facilitate quick and simple judgements but are also sufficiently robust to provide the required level of quality control and assurance that the assessments of site condition are accurate and consistent across the country.

4. The common standards

4.1 The basic framework of common standards for monitoring covers:

- Features to be monitored
- Conservation objectives
- Judging the condition of site features
- Recording activities and management measures
- Monitoring cycle
- Reporting arrangements

4.2 *Features to be monitored*

The features to be monitored are known as the *interest feature(s)* for which the site has been notified or, in the case of Natura 2000 and Ramsar sites, the features for which the site is designated.

In monitoring, the special interest of the site may not always be dealt with as a single entity since many sites have a complex mix of species, habitats or earth science features which provide the justification for the designation of the site. However, the individual interest features can be identified, monitored and reported separately. These interest features are described in the notification documents and are the reasons why the site was designated. In the case of SPAs and Ramsar sites the interest features which justify the designation are recorded in the site documentation. Until SACs are formally designated the interest features are those for which the site has been selected.

4.3 *Conservation Objectives*

Conservation objectives will be prepared for interest features on all sites. These objectives will define what constitutes favourable condition of each feature by describing broad targets which should be met if the feature is to be judged favourable.

Each interest feature of a site will have one or more attributes that can be used to help define favourable condition. For species, these may include population size, structure, habitat requirements and distribution. Attributes of habitats may include area covered, key species, composition and structure and supporting processes. Attributes for earth science features include the Geological Conservation Review selection criteria and accessibility for education and research purposes.

Broad targets will be identified for those attributes that most economically define favourable condition of the interest feature. Because all features are subject to some degree of change the targets may express how much change we would accept while still considering the feature to be in a favourable condition. If a feature changes to the extent that it falls outside the thresholds expressed, then this acts as a trigger for remedial action or further investigation.

In some cases relatively little may be known about the interest feature so it may be difficult to define favourable condition. In such circumstances we will consider using the current condition as our definition of favourable condition, in the absence of any evidence that the current condition was unfavourable.

4.4 *Judging the Condition of Sites*

The condition of site features will be assessed against the following categories:

- **Favourable - maintained.** An interest feature should be recorded as *maintained* when its conservation objectives were being met at the previous assessment, and are still being met.
- **Favourable - recovered.** An interest feature can be recorded as having *recovered* if it has regained favourable condition, having been recorded as unfavourable on the previous assessment.
- **Unfavourable - recovering.** An interest feature can be recorded as *recovering* after damage if it has begun to show, or is continuing to show, a trend towards favourable condition.
- **Unfavourable - no change.** An interest feature may be retained in a more-or-less steady state by repeated or continuing damage; it is unfavourable but neither declining or recovering. In rare cases, an interest feature might not be able to regain its original condition following a damaging activity, but a new stable state might be achieved.
- **Unfavourable - declining.** Decline is another possible consequence of a damaging activity. In this case, recovery is possible and may occur either spontaneously or if suitable management input is made.
- **Partially destroyed.** It is possible to destroy sections or areas of certain features or to destroy parts of sites with no hope of reinstatement because part of the feature itself, or the habitat or processes essential to support it, has been removed or irretrievably altered.
- **Destroyed.** The recording of a feature as destroyed will indicate the entire interest feature has been affected to such an extent that there is no hope of recovery, perhaps because its supporting habitat or processes have been removed or irretrievably altered.

These categories will be used to assess and report on the condition of features of interest and will replace the old loss and damage categories previously used.

Judgements on the overall condition of a feature will be influenced by a variety of factors and in some cases a feature may be assessed as being in favourable condition when only some of the targets set for it have been met.

4.5 *Recording Activities and Management Measures*

Activities on, or near, the site and practical management measures affecting the condition of interest features will be included in the monitoring process. This information will be reported using a set of agreed categories.

An important part of monitoring is the potential of relating observed changes in the condition of the interest features to the reasons for such changes. Activities being carried out on, or near, the site may be causing the feature to decline in condition, or may be constraining desired improvements. Conversely, management measures may result in improvements to the condition of features and the identification of such measures will

demonstrate their value and influence future management actions. The result of such compliance monitoring will help inform views on whether existing legal, administrative, practical management and incentive measures are proving effective. Data from other sources may also provide contextual information and help inform our views on the success or otherwise of measures.

4.6 *Monitoring Cycle*

The overall cycle will ensure that the interest features for all statutory sites will be monitored at least once within six years. However, for any particular site all the interest features should be monitored within a three year period.

There is a need to monitor statutory sites and their interest features within an agreed cycle. This cycle needs to take account of the scale of monitoring required, the likely rate of change and the national and international reporting needs. As key reports on European Directives and international agreements and Conventions operate on a six year cycle this has been chosen as the overall cycle for monitoring in the UK. Within the overall monitoring cycle, it will be useful to form a view of the overall condition of the features within a proportion of the statutory sites on a more frequent basis. Each interest feature within a site should therefore be monitored, preferably within the same year, but certainly within a three year period. This will enable an interim UK wide report on a proportion of the statutory site network to be produced every three years.

4.7 *Reporting Arrangements*

Information on the SSSI and ASSI series will be presented, at the UK level, on the basis of the biodiversity broad habitat types originally described in the UK Biodiversity Action Plan (1994) and on categories appropriate to the Geological Conservation Review. Reporting on species is for an agreed set of species categories. A full report will be produced once every six years with an interim report produced between full reports. The monitoring framework will generate information on the condition of features across the statutory site network as a whole, or on the status of features within individual sites, and will be used to fulfil reporting requirements under European Directives and International Conventions.

Reports on the condition of features are required for a variety of purposes and on a variety of scales. The common standard is to allow the separate country accounts to be compared and aggregated to produce a UK account on the overall condition of features and the activities and practical management measures affecting them. The standard must also enable more specific accounts to be produced on the important habitats and species covered by the Biodiversity Action Plan, the Annex I habitats and Annex II species listed in the Habitats Directive, Annex I birds in the Birds Directive and species and habitats covered by the Ramsar Convention. It may also be necessary to aggregate information on features to produce site based reports. Individual country agencies may report in more detail than these categories and may wish to report on a more frequent basis.

5. Further information

The JNCC is a committee of the Countryside Council for Wales, English Nature and Scottish Natural Heritage, together with independent members and with representatives from the Countryside Commission and Northern Ireland. The Committee is supported by staff from the three agencies.

For further information on the programme of work associated with common standards monitoring and reporting contact:

Dr James Williams, Reporting and Standards Manager, Biodiversity Information Service, JNCC, Monkstone House, City Road, Peterborough, PE1 1JY. Tel: 01733 866868, Fax: 01733 555948, E-mail: james.williams@jncc.gov.uk

For further details on operational implementation in each of the four countries contacts are as follows:

England: Dr Rob Cooke, English Nature, Northminster House, Peterborough PE1 1UA. Tel: 01733 455149, Fax: 01733 568834, E-mail: rob.cooke@english-nature.org.uk

Scotland: Sarah Hutcheon, Scottish Natural Heritage, 2 Anderson Place, Edinburgh, EH6 5NP. Tel: 0131 446 2400, Fax: 0131 446 2277. E-mail: sarah.hutcheon@snh.gov.uk

Wales: Dr Alan Brown, Countryside Council for Wales, Plas Penrhos, Bangor, Gwynedd, LL57 2LQ. Tel: 01248 385500, Fax: 01248 355782, E-mail: a.brown@ccw.gov.uk

Northern Ireland: Dr Paul Corbett, Environment and Heritage Service, Commonwealth House, 35 Castle Street, Belfast, BT1 1GU. Tel: 01232 251477, Fax: 01232 254700. E-mail: paul.corbett@doeni.gov.uk

Annex I - Glossary of terms used in Common Standards Monitoring and Reporting

This glossary defines the main terms used in common standards monitoring and reporting. It explains the specialist technical terms used by the conservation agencies. The glossary is not, however, exhaustive. Only terms that are directly relevant to the *Statement On Common Standards Monitoring* have been listed. Consistent terminology should be used in relation to all SSSIs, ASSIs, Natura 2000 and Ramsar sites.

Terms

Attribute: A characteristic of a habitat, biotope, community or population of a species which most economically provides an indication of the condition of the interest feature to which it applies.

Biodiversity Broad habitats: A framework classification of habitats contained in *Biodiversity: The UK Steering Group Report* (as amended by the Targets Group) which can be used to describe the whole land surface of the UK, and the surrounding sea to the edge of the continental shelf in the Atlantic ocean.

Compliance monitoring: Monitoring to determine whether the management measures agreed for particular designated sites are in place and operating.

Condition categories: The generic term describing the categories used for judging and reporting on the condition of an interest feature.

Condition monitoring: Monitoring to determine the conservation status of *interest features* on statutory sites and to determine whether the *conservation objectives* for particular sites are being met.

Conservation objective: A statement of the nature conservation aspirations for the features of interest on a site, expressed in terms of the *favourable condition* that we wish to attain for each interest feature.

Contextual information: Data and information which aid the interpretation of Common Standards Monitoring results by enabling them to be viewed in a broader geographical or temporal perspective (e.g. by comparison of results for a feature on one site with those on other designated sites, with trends in the wider countryside in the UK or beyond, or with other data to elucidate a trend). It is expected that contextual information will not be used in the assessment of the interest feature condition. See also *Supporting information*.

Destroyed: Recording of the condition of an interest feature as *destroyed* indicates that an entire *interest feature* has been affected to such an extent that there is no hope of recovery, perhaps because its supporting habitat or processes have been removed or irretrievably altered.

Favourable - maintained: An *interest feature* is recorded under the condition category *favourable - maintained* when its conservation objectives were being met at the previous assessment, and are still being met.

Favourable - recovered: An *interest feature* can be recorded in the condition category *favourable - recovered* if it has regained 'favourable condition', having been recorded as 'unfavourable' on the previous assessment.

Favourable condition: The target condition for an interest feature in terms of the abundance, distribution and/or quality of that feature within a site, that we aim the feature to attain.

Favourable conservation status: A range of conditions for a natural habitat or species at which the sum of the influences acting upon that habitat or species are not adversely affecting its distribution, abundance, structure or function throughout the EU in the long term. The condition in which the habitat or species is capable of sustaining itself on a long-term basis.

Feature Monitoring Cycle: The period within which each individual interest feature on a site should be monitored. [Set in the Common Standards Statement as 3 years]

Interest feature: A habitat, habitat matrix, geomorphological or geological exposure, a species or species community or assemblage which is the reason for notification of the site under the appropriate selection guidelines or, in the case of Natura 2000 and Ramsar areas, the features for which the site will be designated.

Monitoring: Surveillance undertaken to ensure that formulated standards are being maintained. The term is also applied to compliance monitoring against accepted standards to ensure that agreed or required measures are being followed.

Overall Monitoring Cycle: The period within which all designated sites and their interest features will be monitored. [Set as 6 years in the Common Standards Statement]

Partially destroyed: Where sections or areas of certain interest features are destroyed or parts of sites are destroyed with no hope of reinstatement because the *interest feature* itself, or habitat or processes essential to support it, have been removed or irretrievably altered. Such cases would be recorded under the condition category *partially destroyed*.

Potentially damaging activities: Any activity occurring in an SSSI that has the potential to damage the interest features for which the site has been designated.

Reporting categories: The generic term which refers to the categories that will be used to report the results of SSSI/ASSI monitoring at the GB/UK level.

Reporting cycle: The period within which a definitive report on the condition of features protected within the SSSI/ASSI series will be produced. [Set as once in every 6 years in the Common Standards Statement]

Supporting information: Data and information which are directly of use in the development or assessment of conservation objectives (e.g. by helping to set the level of targets, or by providing the level of one or more of the attributes measured). See also *Contextual information*.

Surveillance: A continued programme of (biological) surveys systematically undertaken to provide a series of observations in time.

Survey: A set of standard observations, usually obtained with a standard method and within a restricted time period (see *Surveillance* and *Monitoring*)

Target: Broad targets which describe the fluctuation of the *attributes* of an *interest feature* under prevailing conditions. Because all features are subject to some change the targets may express how much change we would accept whilst still considering the feature to be in favourable condition. These will serve as a trigger mechanism so that when changes that fall outside the thresholds expressed are observed or measured some further investigation or remedial action is taken.

Unfavourable - declining: Decline is another possible consequence of a damaging activity. In this case, recovery is possible and may occur either spontaneously or if suitable management input is made. This condition category can be recorded more than once for a particular *interest feature* in relation to a single damaging activity.

Unfavourable - no change: An interest feature may be retained in a more-or-less steady state by repeated or continuing damage; it is unfavourable but neither declining or recovering. In rare cases, an interest feature might not be able to regain its original condition following a damaging activity, but a new, stable state might be achieved.

Unfavourable - recovering: An interest feature can be recorded under the condition category *recovering* after damage if it has begun to show, or is continuing to show, a trend towards favourable condition. This category can be recorded more than once for a particular feature in relation to a single damaging activity.