

Lancashire Environment Record Network

Validation and Verification of Records Policy

Background

Validation is the process of carrying out standardised checks on the completeness and accuracy of the content of a record (*who, what, when, where*). Verification is ensuring the accuracy of the identification of the thing being recorded - either a species, habitat or other factor. LERN endorses the National Biodiversity Network (NBN) Trust's 5 basic principles to assure wildlife data quality:

- Organisations involved in operating field recording programmes should promote standard methods of capturing and processes for submitting records wherever possible, while recognising that casual records received in other forms may still be valid, as long as they contain the basic minimum to be regarded as an effective record.
- Field records collected by individuals should be collated, preferably using standard formats, by either a recognised local or national species recording scheme, or by a formally established local records centre, if there is one in a particular area.
- Records collated by local voluntary organisations should undergo validation and verification where necessary either by their own recognised experts, or through submission to external experts or a national recording scheme, according to published protocols.
- Records collated by a local records centre should be subjected to verification and validation by recognised local or national experts where relevant, according to agreed, published protocols.
- Records collected by professional or other official organisations should be subject to as rigorous quality checks as those recommended for voluntary sector or local recording organisations, and they should consider making their data available for "peer review" by relevant experts where necessary before they are made available to others

Policy

All biological records entering the LERN *Recorder 6* system will be subjected to validation and verification checks. However, the extent of these checks and the role of LERN in validation and verification are variable depending on the data contributor.

LERN uses Recorder 6 as its main species recording package. Recorder 6 does not allow the entry of incomplete records or those that fail certain accuracy checks (e.g. is the tetrad within the VC). The process of data entry therefore automatically confirms a record's completeness and some of its validity. Records that fail this check should firstly be checked to ensure accuracy of data entry and, if required, be discussed with the originator in order to resolve the matter (incomplete records for common/widespread species may not merit significant validation effort). The system will also try and identify duplicate records.

The verification process assesses the likelihood of the record being an erroneous taxonomic identification by checking new records against known trends and by flagging “difficult” or "significant" species that should be confirmed by an expert prior to being released to outside bodies (including the NBN Atlas).

LERN will maintain Schedule 1 to this Policy listing the name, specialisms and geographical coverage of those local experts it uses for verification. What constitutes a “difficult” or "significant" species will be by agreement between LERN Technical Advisory Group and the Verification Experts and will form Schedule 2 to this Policy (e.g. this should include records for species shown on the provisional Lancashire Long List of BAP Species). This will also include guidance as to when and how voucher specimens or other supporting evidence should be submitted where required to support identification.

Each record undergoing verification will be assigned to one of six verification categories which will be entered in Recorder 6. Any disputes in respect of verification should be referred up to the relevant national referee.

It is important that all those undertaking verification share the same understanding of the terms. The actual definitions may vary between species groups (e.g. are we recording presence or breeding) and will be by agreement between LERN Technical Advisory Group and the Verification Experts and will form Schedule 2 to this Policy.

A record will be kept of the verifier’s name, the verification date and any comments made as part of the process. Duplicate records and those which are incomplete and cannot or do not merit further verification will not be entered into the database. Records considered erroneous may be entered into Recorder 6 and be marked as "Incorrect" where this could help save time re-evaluating the record should it be re-submitted in future.

Verification Categories

Term	Status	Consequence
Correct	Passed Verification	<i>Can be released to NBN/others</i>
Considered likely to be correct	Passed Verification	<i>Can be released to NBN/others</i>
Possibly correct [= unconfirmed]	Failed/Pending Verification	<i>Will not be released to NBN/others</i>
Considered likely to be incorrect	Failed/Pending Verification	<i>Will not be released to NBN/others.</i>
Incorrect	Failed Verification	<i>Will not be released to NBN/others.</i>
Not yet checked	Not Verified	<i>Will not be released to NBN/others.</i>

Some records coming into LERN will already have been subject to validation and verification procedures. Where these data require re-keying they will require re-validation. Where records can be imported electronically the validation required will focus upon ensuring a correct match between species, recorder and location names.

Verified records received from individuals or organizations listed on Schedule 1 will be considered to have satisfied the LERN verification procedure.

Anonymity of Recorders

LERN recognises and respects the needs and wishes of some recorders to remain anonymous. LERN will not normally disclose recorder names where an applicable exception under the Environmental Information Regulations 2004 applies and where the public interest supports withholding the information. At the same time LERN wishes to maintain data quality so records must have been subject to adequate validation and verification procedures.

In order to address this situation and maintain the goodwill of recorders, when receiving records from a specialist, VC recorder or other recording group that the Lancashire Natural Environment Record Network recognises through its Records Validation and Verification Procedure, Lancs LERN will accept anonymised records where the original recorder's name is replaced with a reference to the originating data set e.g. "BSBI VC59 Data Set."

Any recorder who wishes their anonymity to be protected should therefore submit their records to LERN via a recognised expert outside a public body.

When seeking verification for a record LERN will provide the verifier with the record at its full resolution and include the recorder's name. It is the verifier's responsibility to ensure that they have the appropriate permissions from the data owner for any further use or distribution of the record outside LERN.

Schedule 1 Local Verification Experts

Taxon Group	Name	Geographical Extent	Contact Details
Bees, Wasps and Ants	Ben Hargreaves	Lancashire	bhargreaves@lancswt.org.uk
Birds	Steve White	Lancashire	https://www.bto.org/volunteer-surveys/birdtrack/bird-recording/county-bird-recorders
Butterflies	Laura Sivell	Lancashire	http://www.lancashire-butterflies.org.uk/Local_Recorders.html
Hoverflies (Syrphidae and Dolichopodidae)	Glenn Roston	VC59 & 60	bioglenn@gmail.com
Macro Moths	Richard Walker Steve Benner	VC59 VC60	http://www.lancashiremoths.co.uk/contacts
Micro Moths	Dave Bickerton/Ben Smart Ben Smart/Steve Palmer	VC59 VC60	http://www.lancashiremoths.co.uk/contacts
Mammals	Tony Parker	West Lancashire Borough	
Mosses and Liverworts	John Lowell	VC59	http://rbg-web2.rbge.org.uk/bbs/recording/vc59.htm
Odonata	Steve White	Lancashire	
Orthoptera	Michael Foley	VC60	orthoptera@ceh.ac.uk
Vascular plants	David Earl/David Blowers Dave Earl/David Shaw	VC59 VC60	https://bsbi.org/in-your-area/local-botany/lancashire

Schedule 2 Difficult and Significant Species

All species included in the provisional Long List of Lancashire Key Species¹.

¹ Details of Lancashire Key Species and Lancashire BAP Species can be found at: <https://lancashire.gov.uk/> **Username:** LERNPublic and **Password:** '341tBthH'

