

The Statutory Biodiversity Metric - Technical Annex 1: Condition Assessment Sheets and Methodology

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Instructions

The method for assessing habitat condition is split into three main steps, outlined in detail below:

- STEP 1: Considerations before assessing condition
- STEP 2: Choosing the right condition sheet
- STEP 3: Using condition sheets

Step 1: Considerations before assessing condition

The following points must be considered **before** undertaking a condition assessment:

- 1) Condition assessments must be undertaken by a competent person (hereafter referred to as assessors), as defined in the Statutory Biodiversity Metric User Guide.
- 2) Condition assessments should be undertaken at the optimum time of year for the assessed habitat(s).
- 3) Assessors must have digital or hard copy access to condition sheets (see **Tabs 1-25**) and the survey cover sheet during the survey (see **SURVEY COVER SHEET** tab).
- 4) The habitat type of the parcel(s) to be assessed must be determined before consideration can be given to its condition as this enables the assessor to select the correct condition sheet (see **HABITAT DEFINITIONS** tab).
- 5) The location and extent of the habitat parcel(s) to be assessed must be mapped, either on digital or paper maps (mapped habitat parcels can later be split according to their condition).
- 6) Each habitat parcel to be assessed must be assigned a unique reference ID.

Step 2: Choosing the right condition sheet

See **SELECTING CONDITION SHEET** tab which lists the habitat types found in the biodiversity metric and indicates which condition sheet should be used for each habitat type.

- 1) Some condition sheets are unique to a single habitat type; others cover a range of habitat types within the same broad habitat category.
- 2) For each sheet there is version A and B.
 - i. Sheet A can be used to record information for one habitat parcel
 - ii. Sheet B can be used to record information for up to two 10 habitat parcels
- 3) Each condition sheet is set to print at A4 and can be used as a paper form.

Step 3: Using condition sheets (Tabs 1-25)

The following instructions and points of clarification apply to most condition assessment sheets:

- A) Assess the habitat parcel against each condition assessment criterion, recording a 'pass' or 'fail' for each criterion assessed, unless otherwise directed by categories available on the sheet.
- B) If condition varies within a parcel during the assessment then start a new condition assessment. Split the original parcel to ensure that each individual parcel comprises an area of habitat of a consistent type and condition.
- C) Some condition assessment sheets have 'essential' criteria. Essential criteria must be passed to achieve a particular condition state.
- D) Some condition assessment sheets list species that are indicative of suboptimal condition status. These lists are not exhaustive. An assessor may exercise professional judgement and consider additional species within this category, such as those of geographical relevance.
[Report any high-risk non-native invasive species to the GG non-native species secretariat](#)
- E) Any relevant evidence for passing or failing criteria, or for a particular score, should be captured within the habitat survey notes and or by taking photographs. Photographs and notes should be referenced on the condition sheet.
- F) Record any survey limitations on the condition sheet, such as access restrictions or timing restrictions. If survey limitations prevent any criteria from being confidently and accurately assessed, adopt a precautionary approach when passing or failing criteria.
 - i. If a definitive pass or fail cannot be assigned through baseline survey, assume the criterion is passed.
 - ii. When monitoring post-intervention habitat, fail criteria which cannot be assessed due to survey limitations.
- G) Once all applicable condition criteria have been assessed, assign a result of Good, Moderate or Poor condition following instructions provided within the relevant condition sheet.
 - i. The 'Fairly Good' or 'Fairly Poor' condition categories are intermediate categories for site-specific evidence of condition not captured in the standard condition assessment.
 - ii. They should only be applied through application of professional judgement, and sound ecological evidence must be provided to justify the use of these categories.
 - iii. If used, these categories can only be used to adjust the results of a standard metric condition assessment one condition category above or below its result (For example, you cannot go from a standard outcome of 'Poor' to an adjustment to 'Fairly Good' (nor from 'Good' to 'Fairly Poor').
 - iv. Ensure any constraints are made clear in the 'Assessor's comments' box in the metric and associated reporting.
- H) If a habitat parcel is failing all criteria, it may be that the habitat type has been recorded incorrectly and the wrong condition sheet is being used.

The condition assessment survey is a good opportunity to identify any potential opportunities for habitat restoration or enhancement. Note potential opportunities for these within the condition sheet.

The **CA SUMMARY SHEET** can be filled out after the survey to summarise information about the condition assessments, including:

- i. The site or location of the condition assessment survey
- ii. The number of condition sheets used
- iii. The number and type of habitat parcels surveyed and the condition they achieved