



# BREEDING BIRD SURVEY & WATERWAYS BREEDING BIRD SURVEY

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## Regional Organiser Handbook





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**REGIONAL ORGANISER HANDBOOK**

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V4.0 27/02/2025

Front cover photograph: Sedge Warbler by Graham Catley.

Drawings by Simon Gillings, Jeff Baker and Graham Giddens.

# Table of Contents

<b>1. INTRODUCTION AND OVERVIEW.....</b>	<b>4</b>
1.1 KEY RESPONSIBILITIES .....	4
<b>2. ORGANISING BBS AND WBBS.....</b>	<b>6</b>
2.1 COVERAGE AND COORDINATION .....	6
2.2 FINDING NEW VOLUNTEERS.....	6
2.2.1 Under 18s.....	8
2.2.2 Retiring volunteers.....	8
2.2.3 Unresponsive volunteers.....	8
2.2.4 GDPR .....	8
2.2.5 Publicising BBS and WBBS.....	9
2.2.6 Training courses.....	9
2.3 BBS ONLINE IN BRIEF .....	9
2.4 RECORDING FORMS.....	10
2.4.1 What makes a BBS or WBBS 'pack' .....	10
2.4.2 Returning forms .....	11
2.4.3 Route maps .....	11
2.5 NEW BBS SQUARES / WBBS STRETCHES.....	13
2.5.1 Uncoverable sites .....	13
2.5.2 Land Access .....	14
2.6 ADDITIONAL RECORDING AND INITIATIVES WITHIN BBS AND WBBS .....	14
2.6.1 Habitat recording.....	15
2.6.2 Mammal recording .....	15
2.6.3 Detection Type recording.....	15
2.6.4 Colony Recording .....	15
2.6.5 Upland Adjacent squares – BBS only.....	15
2.6.6 Upland Rovers – BBS only .....	16
2.6.7 Scottish Woodland BBS (SWBBS) and Upland BBS – BBS only .....	16
2.7 ANNUAL REPORT .....	17
2.8 EXPENSES.....	17
2.8.1 How to claim .....	17
2.9 REGIONAL NETWORK.....	17
<b>3. SURVEY DATA.....</b>	<b>19</b>
3.1 OVERVIEW .....	19
3.1.1 Why would ROs want to download data and types of data available.....	19
3.1.2 Downloading data from BBS Online.....	19
3.2 VERIFYING BBS/WBBS DATA .....	19
3.2.1 Before you start – Data Verification System thresholds .....	20
3.2.2 Some ideas to help you with verifying data .....	21
3.2.3 Other resources.....	24
<b>APPENDIX 1 - BBS EMAIL TEMPLATES.....</b>	<b>26</b>
INTRODUCTION - PLEASE READ FIRST!.....	26
STANDARD TEMPLATES .....	26
BBS participation request .....	27
BBS square allocated .....	28
Retirement/moving away – NOTES FOR ROs.....	29
Mentoring – NOTES FOR ROs.....	30
Wider Countryside Butterfly Survey – NOTE FOR ROs.....	33
BBS on a specified site.....	33

*New Regional Representative (message with focus on BBS)* ..... 34

EMAILS FOR SURVEY MILESTONES ..... 35

*Start of season emails – NOTES TO ROs*..... 35

*Data chasing* ..... 37

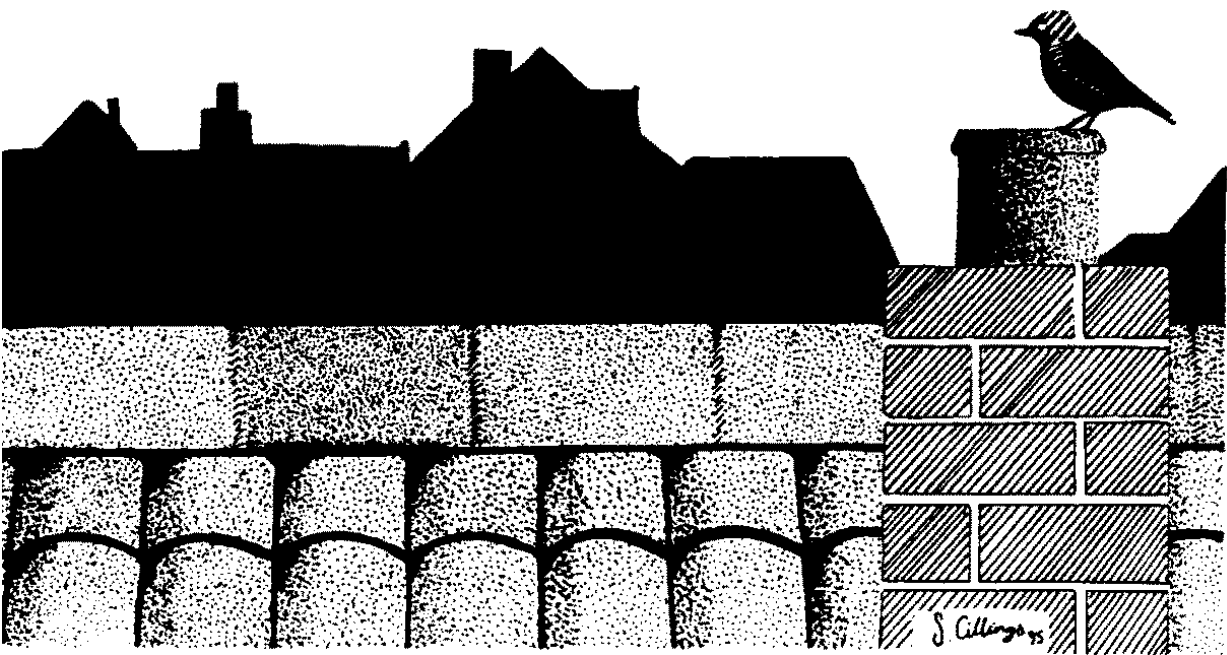
*Data entry reminder* ..... 37

*End of season messages – NOTES FOR ROs* ..... 38

SOME MORE HELPFUL TIPS FOR BBS EMAILS ..... 40

**YOUR NOTES** ..... 41

**CONTACTS**..... 42



*Jackdaw – Simon Gillings*

# 1. Introduction and Overview

The UK is divided into just under 130 BTO regions, each one run by an appointed BTO Regional Representative (RR). The RR may organise the BBS and WBBS (along with other surveys), or these responsibilities may be taken on by separate Regional Organisers (RO). ROs for the BBS and WBBS tend to be the same person in most (but not all) BTO Regions. Some local teams also have a Regional Ambassador who can assist with survey promotion and general engagement with BTO supporters (members and volunteers) and potential supporters.

BTO thanks you for taking the time to read through this document.

BBS National Organiser.

## 1.1 Key responsibilities

The most fundamental part of the role is to coordinate coverage of BBS squares and WBBS stretches in a given BTO Region. This is done by discussing and allocating sites within the BBS or WBBS set, encouraging volunteers to enter their data either on BBS Online or via paper returns by the end of August each year, and verifying the submitted data and route maps.

The key responsibilities are thus as follows:

- **Ensuring coverage** – ROs are responsible for recruitment of volunteers with the necessary skills (sight and sound identification of common and widespread breeding birds – those likely to be seen in the BBS or WBBS site they'd like to cover), allocating these volunteers the sites on the BBS Online system and sending the relevant survey packs and Health and Safety leaflet to the volunteer (via post or email depending on their preferences).
- **Assisting with routes** – Most sites will have routes mapped online; ROs will need to ensure these are **followed for consistency** and discuss any proposed changes with the volunteer and National Organiser. With BBS, routes for sites not previously covered are designed following the BBS Instructions by the NO in the first instance, and then ground-truthed by the volunteer in collaboration with the RO. For new WBBS routes, Primary Maps are stored at BTO HQ and need to be requested per WBBS stretch. These Primary Maps highlight the waterway stretch to be surveyed and using this map, the RO and volunteer decide where to start and end the route within the specified stretch. Route changes made online for BBS or WBBS are then checked and verified by the ROs via BBS Online. Route changes should be agreed between the RO and volunteer *before* alteration – any changes made without the ROs knowledge should be followed up before accepting. Renumbering sectors should be avoided unless at the early stages of route plotting as sector numbering and location are attributes used by researchers.
- **Assisting with methodology queries** – ROs need to be familiar with the survey methods and provide assistance throughout the season from volunteers. The National Organiser is, of course, on hand to help ROs with any queries.
- **Data Submission** – We are happy to accept BBS and WBBS data either via the BBS Online system or on paper. Paper submissions are sent to the ROs for checking before being entered by the RO or forwarded to BTO HQ. If possible, it is a good idea ROs or volunteers scan or photograph paper copies before posting (or emailing digital versions), just in case they are

lost before reaching BTO HQ. ROs should check which data have been submitted and chase late returns. All data should be input by the **end of August** each year. The BBS Online system closes at the end of October (not publicised), after which, all late data will need to be posted (or scanned and emailed) to BTO HQ for entry.

- **Verifying data submissions** – We ask all ROs to check the data input via BBS Online at the end of the season and by the end of October when data are ‘double-checked’ at BTO HQ. Once checked, data are forwarded to our Research Ecologist who calculates the trends. For more information on the thought process and tools available to help you, we have a short guide in Section 3.2.
- **Reporting back to volunteers** – ROs are encouraged to provide feedback to volunteers, thanking them for any submissions and providing a brief overview of how the survey season has gone in the BTO Region. The latter could be done via a newsletter circulated by the RO themselves, but in some regions as part of a wider newsletter from the RR or RA where such roles are in place. BTO HQ is happy to help with the mailing of regional newsletters. It is also encouraged, where possible, that BBS and WBBS feed into County Bird Reports. These summaries are sometimes written by the RO but often by the County Bird Report editor. And requests for BBS data made from County Bird Club report editors to BBS/WBBS ROs should be redirected to the BTO’s data request service:

<https://www.bto.org/our-science/data/data-request-system>

- **Volunteer support and retention** – The role of Regional Organisers in supporting, encouraging and providing feedback to survey participants is invaluable. Retention of volunteers is critical for the BBS and WBBS, relying as it does on observers continuing to visit their squares year-on-year. Regular contact from their RO really does help with this.
- **Promoting BBS and WBBS** – we ask ROs, where possible, to publicise and promote the schemes locally, but also to promote optional recording such as the Wider Countryside Butterfly Survey (WCBS) on BBS squares (this is not an option for WBBS), mammal recording and the recording of Detection Type to volunteers where they are not already doing so.
- **Nearly all of the above involves regular communication with your volunteers.** Much of that is done via email. In the appendix, we provide a number of to help you with this. **You are not obliged to use the wording in any of these templates;** they may instead serve as a useful prompt. They cover all the day-to-day activities (participation requests, retirements) plus the sorts of communications which occur at set times of the year.



*Tree Sparrows - Jeff Baker*

## 2. Organising BBS and WBBS

### 2.1 Coverage and coordination

BBS and WBBS sites are randomly selected and distributed across the UK. They are randomly chosen to ensure that the majority of habitat types in the UK are surveyed. It is essential that we survey the less-popular urban and upland sites, and sites that contain few bird species, so that we obtain a representative sample of the bird numbers in the UK.

ROs will have access to an advanced section of BBS Online. With these enhanced tools ROs can see who is surveying what, what they have submitted, route maps, site notes and who is taking part in the Wider Countryside Butterfly Survey (WCBS). ROs will also be able to see the volunteers' preferences regarding what paper pack they would like to receive at the start of each season. For BBS, new volunteers contact ROs via an interactive map (one each for [BBS](#) and [WBBS](#)) on the website form which triggers an email to the RO. After a discussion between the RO and volunteer about the volunteers' skill level and suitable sites, the RO then allocates the site to the volunteer via the Square Summary page within BBS Online and sends out a full pack along with the H&S form and route map. If it is decided that the volunteer does not have the relevant skills for any squares in the region, ROs should encourage them to take part in another more suitable survey e.g. a single species survey (if there is one at the time), Garden BirdWatch, WeBS, BirdTrack or point them towards the Training course pages. Everyone is different and every square is different, so ROs will need to assess the surveys or training courses which may be suitable. Additionally, there are BBS branded bird call CDs available from BTO HQ which are perfect for sending (free of charge) to potential *future* BBS or WBBS volunteers.

Consistency is another major element of both BBS and WBBS to ensure we are monitoring changes in bird and mammal populations rather than changes in observer habits, routes or survey timing. Squares or stretches which are surveyed year after year by the same observer are particularly valuable and without that local contact from ROs, we may not have such happy and dedicated volunteers – another of the many reasons we rely so heavily on our RO network, we really appreciate it!

**For both schemes, surveys take place between April and the end of June**, ideally by the same volunteer and on a date as similar as previous years as possible. They are conducted in the mornings, **an hour after dawn**. The survey season consists of a recce visit to check routes and record habitat type, followed by the core Early and Late visits, the two main bird recording visits being at least four weeks apart. **Additional information on mammals and colonies can be submitted outside of the two core visits. Full methodologies for BBS and WBBS are available online in the survey Instruction documents. ROs are expected to know the survey methodologies.**

### 2.2 Finding new volunteers

The network of volunteers is a hugely valuable asset. Without this network much of the important work that relies on data from these schemes simply could not be achieved. The RO is the important link between the scheme partners (BTO, JNCC, RSPB) and the network, and of course vice versa.



Volunteers who are completely new to the BTO or online surveys will need to visit [www.bto.org/bbs](http://www.bto.org/bbs) (for BBS) or [www.bto.org/wbbs](http://www.bto.org/wbbs) (for WBBS) to register for BBS Online and select an **Online Username**. Those who have taken part in other BTO online surveys (e.g. BirdTrack, Wetland Bird Survey, Garden BirdWatch, BirdAtlas etc.) will already have a BTO online username. In this case, they simply need to visit 'My BTO' (navigated from the very top of all the BTO webpages), click on the relevant scheme to activate their participation and click 'yes' to the T&Cs. Once this is done and the RO has the volunteers' username or email address, it is possible to allocate the site to them via the Square Summary page of BBS Online. Volunteers who do not have access to the internet or who prefer not to submit data online can also be allocated an Online Username; please contact the National Organiser with their contact details and we will set them up. Existing non-online volunteers will already have an Online Username.

Below is an example of the email sent by the BBS website when a potential BBS volunteer completes the online pre-registration form. They will have selected a 10km in the ROs BTO Region in which they are looking to carry out BBS. This 10km can be filtered in the Square Summary page ROs have access to on BBS Online.

```

From: BBS Online bbs@bto.org
To: <RO email address>
Date: <date>

Dear <RO name>
Interest has been expressed by a member of the public to participate in BBS in your area. The details of this user are:
  • Name:
  • Email:
  • Postcode:
  • BTO User ID: <if they have one and are logged in to 'My BTO' when submitting the form>
  • 10km Grid: <sites can be filtered by 10km in the ROs BBS Online 'Squares Summary' page>
  • Birdwatching experience: <need to know how to ID species by sight and sound for the site/s available to them. Otherwise, may need to carefully suggest other surveys available / training course and encourage them to get back to RO when ready to take part>
  • Distance willing to travel/car access: <are there sites available outside the 10km they could travel to as well? Always worth adding into the reply as well>

Request was made from a logged-in user, they were logged in as: if logged in, a username will appear.
This message was sent from the BBS Online web application on <date> <time>.

```

Following the pre-registration email, the RO then contacts the potential new volunteer and assess their suitability for the survey (their bird identification skills, distance they are willing to travel etc.). It may be useful to email a link to the BBS instructions and tell them which squares are available in their area – repeating the need to know the birds they are likely to encounter on the squares by sight and sound.

If an RO is happy that the potential volunteer is suitable and once a square is agreed, the full BBS/WBBS pack is sent along with the route map (available via the Square Summary page if there is one\*) and the [H&S webpage link](#). Full control of allocation of squares is left to ROs; the National Organiser will not allocate squares from BTO HQ.

\*If there is no site map, send a link showing the 1km using the following URL and changing the grid reference at the end with the relevant one:  
[www.geograph.org.uk/showmap.php?gridref=TL8899](http://www.geograph.org.uk/showmap.php?gridref=TL8899).

Once allocated the square on the system, they will be able to see the blank map on BBS Online. For WBBS, if there is no route, ROs need to contact the National Organiser to get a copy of the Primary Map from which a route can be formed. If the square has been surveyed in the past, but

there is no map online, it is worth contacting the National Organiser to see if there is a paper map at BTO HQ.

### **2.2.1 Under 18s**

We have an increasing number of volunteers who are under 18 years of age. Every volunteer under the age of 18 must ask their parent or guardian to complete and sign a Parental Consent Form. Copies are available from the National Organiser. There is no need for ROs to question every volunteer who requests a site as we assume that they (or their parent) will let ROs know if they are under 18. **However, volunteers who are known to be under 18 should not commence fieldwork until a form has been returned to the National Organiser.**

### **2.2.2 Retiring volunteers**

When volunteers retire from BBS or WBBS, ROs will first need to check the route map and latest data are complete online and if not, ask that it is done before unallocating the site from the volunteer. If the RO knows that the volunteer will be retiring from BBS for good, we ask that ROs send this 'surveys retirement questionnaire'. BTO are eager to understand the reasons why volunteers decide not to continue with surveys. Whilst in the majority of cases it will be old age, it isn't always.

**Retirement questionnaire:** <https://forms.gle/B2cA6jMV8gPiBx8e8>

The NO is not alerted when deallocations take place, so if an RO feels that a particular volunteer is deserving of special thanks from BTO HQ, then we ask that ROs inform the National Organiser. We leave this to the discretion of the RO. If they are a WCBS volunteer, the National Organiser will be sent an automated message to say retirement has occurred. It is our policy to continue to allow retired volunteers to view their data, unallocating the site from their username does not mean they will no longer be able to login and view their historic data.

If ROs receive the sad news that an existing volunteer has passed away, the RO will need to unallocate any survey sites allocated to them and inform the National Organiser immediately. BTO HQ will ensure that the records for the volunteer are archived and will notify other departments within the BTO as appropriate. Similarly, if the membership office or other team received notice, survey organisers are informed and will pass this information on to ROs where necessary.

### **2.2.3 Unresponsive volunteers**

At one point or another every RO will have a volunteer who does not submit data when expected and does not respond to attempts in contacting them. This is always a difficult situation as there could be any number of reasons why the volunteer has not been in touch. A letter or email from the National Organiser could help prompt a response if RO attempts do not work. 'Inactive' volunteers (arbitrarily set at 3 years non-submission) are flagged in red on the Square Summary page on BBS Online, making it easier for ROs to see who needs to be contacted and potentially unallocated.

### **2.2.4 GDPR**

Data Protection is a massively important part of the RO role. It is of paramount importance that all data are handled with GDPR guidance in mind and any GDPR breaches reported to the National Organiser immediately. All ROs must have completed a GDPR online training course and

have studied two documents available in the RN resources page, via the 'My BTO' login. They are as follows:

- Data protection guidance for BTO RRs, RAs, ROs and LOs and Ambassadors\*
- Data protection and electronic communications regulations update April 2018

\*RR = Regional Representative, RA = Regional Ambassador, LO = Local Organiser (an RO for WeBS), Ambassador = Garden BirdWatch representative.

Please contact the BBS team at BTO HQ if you have any queries regarding GDPR: [bbs@bto.org](mailto:bbs@bto.org)

### **2.2.5 Publicising BBS and WBBS**

We ask ROs to promote and publicise BBS and WBBS wherever the opportunity arises. The BBS online map, publicly available, allows potential volunteers to select a 10km they would be happy to travel within to survey, and in turn sends a short form to the relevant RO for the area, expressing an interest to take part and (hopefully) outlining their birding experience.

Many bird clubs and local RSPB groups hold meetings that provide good opportunities for promotion and to recruit new volunteers. Information leaflets about BBS and how to become involved are available from the National Organiser. Raising awareness for BBS and WBBS can be done through local talks, stands at Bird Club meetings or local nature reserve events, through social media, newsletters, training courses etc.

We do understand every RO will feel differently about the kind of things they are comfortable doing in order to promote BBS and WBBS, for example, presenting talks is not everybody's favourite pastime, but don't worry! In areas where there is a Regional Team, the Regional Ambassador or Regional Representative might be able to help. ROs are asked to do only what they are comfortable with and to ask for help from the National Organiser as required. BTO have a staff team dedicated to engagement, and so there are options for BTO staff to come and present to local groups – at a small cost. Equally, if members of the Regional Network are willing and able to present on behalf of BBS/WBBS, the National Organiser can be contacted for resources (slides, graphs, photos and so on).

### **2.2.6 Training courses**

The BTO runs a number of training courses in bird survey techniques. The line-transect methods used in BBS and WBBS form a substantial part of these courses. For BBS and WBBS, any volunteer must know the birds they are likely to encounter on a given square by both sight and sound from the outset. Therefore, Survey Technique courses are a fantastic opportunity for an already skilled birder to find out more about how to carry out the survey itself. BTOs annual training courses are published on the BTO website, but if an RO wishes to carry out a training course in their region, this is encouraged, so please speak to the National Organiser about the idea. Letting the National Organiser know about local training run by the Regional Network Team will allow us to better target BTO-led training elsewhere.

## **2.3 BBS Online in brief**

BBS Online helps BBS and WBBS run smoothly by providing tools for data input, management and output. All visits are computerised for BBS and WBBS and are available via this system. The National Organiser and ROs have additional functions built into their BBS Online system, allowing for data checking, editing maps for volunteers and downloading data at a BTO Region scale. By

engaging in the BBS Online system, ROs will see the full potential for storing most of the information they require to manage BBS and WBBS within this online system. ROs are asked to explore this system using the BBS Online guidance available via the 'Quick start guide to BBS Online' PDF (provided alongside this document) and both the [RO and volunteer Video Tutorials](#). Links to copies of these are shown below:

- BBS Online Quick Start Guide available at:

RO Online Help webpage (link found within BBS Online RO section):

[www.bto.org/our-science/projects/bbs/taking-part/ro-info](http://www.bto.org/our-science/projects/bbs/taking-part/ro-info)

- BBS Online Regional Organiser video tutorial at:

RN resources webpage (link found within 'My BTO'):

<https://www.bto.org/community/regional-network>  
[via the BBS Online web app](#)

- BBS Online volunteer video tutorial at:

BBS taking part webpages

[bbs-taking-part](#)

## 2.4 Recording Forms

Paper recording forms are available for download online at:

[www.bto.org/our-science/projects/bbs/taking-part/download-forms-instructions](http://www.bto.org/our-science/projects/bbs/taking-part/download-forms-instructions)

However, volunteers often wish to receive paper forms via the postal system instead. A list of who would like what sits within BBS Online -> Regional Organiser Tools -> Volunteer Info/Paper Forms. As RO, it is possible to edit volunteer preferences if they are known, alternatively, it is worth asking the volunteers to update their own preferences via BBS Online -> Details and Settings, or by telling the RO who can enter the information online on their behalf.

This page allows ROs to estimate how many of the different types of pack to send out. This is also helpful information to have up to date should an RO retire from the role and handover to somebody else.

Once ordered, all the forms are posted to the RO for dissemination to their volunteers as per their preferences on BBS Online. Any new volunteers must also receive the Health and Safety leaflet alongside recording forms. Ideally, a covering letter from the RO is also sent in the paper packs on headed BTO paper. Stationery and postage costs are covered by BTO HQ. Details on how to claim expenses are provided later on in this handbook.

### 2.4.1 What makes a BBS or WBBS 'pack'

Not all volunteers want to be sent paper packs. In this case, an email with the link to the Paper Downloads page will suffice. Highlighting the Health and Safety leaflet to any new volunteers and providing any available route map too. However, for those that do want paper packs, there are a couple of options:

- **Paper Submission Pack:** 1x Instructions; 2x Field Sheet; 1x Habitat; 1x Mammals; 2x Count Summary
- **Online Submission\* Pack:** 1x Instructions; 2x Field Sheet; 1x Habitat

[\*NB an 'Online' submission pack still involves sending paper – it is not to say that *everything* is done online by the volunteer, merely that they transcribe their Field Recording Sheets straight into the BBS Online web app, rather than use a Count Summary Sheet first]

For volunteers covering more than one square or stretch, additional Field Sheets, Habitat, Mammal and Count Summary forms (or just the former two forms for 'Online submission packs) need to be added to the pack as appropriate. For new volunteers, the route map and Health and Safety leaflet also need to be included, along with the previous years BBS Report.

There will always be the odd 'specific request' as well, and this can be noted via the BBS Online system, under the ROs 'Volunteer Info/Paper Forms' BBS Online webpage.

Each January, ROs are invited by the National Organiser to complete an 'order form' where they can state the number of forms they would like, plus any other stationery needs, and the date that they need them by. ROs typically like to receive their packs no later than the end of February, for onward distribution to volunteers. The timing of pack delivery can be amended to suit personal need, for example to coincide with a local meeting where forms can be handed over in person.

### 2.4.2 Returning forms

At the end of the recording season, volunteers should be reminded by the ROs that all data are due by **31st August**, either online via the BBS Online system, or via paper returns sent initially to the RO for checking. ROs are asked to please have a quick scan through the forms for any obvious mistakes or omissions (e.g. missing dates or other info, wrong species codes, errors in identification, or any indication that the volunteer is not suitable for the survey such as very low numbers of species recorded) and to offer advice to the volunteer where appropriate.

From this point, paper forms can be entered by the RO using the 'Enter data on behalf of a volunteer' facility ROs have access to, or by posting on the forms to the National Organiser (by post, or by scanning and emailing them to [bbs@bto.org](mailto:bbs@bto.org) / [wbbs@bto.org](mailto:wbbs@bto.org)).

Data entered online, either by the volunteer, the RO or BTO HQ will trigger an email to the RO alerting them that data have been input and need checking and verifying via the BBS Online Square Summary page. Within the email alerting ROs to entered data, there is a link which takes the RO straight to the Square Summary page (so long as they are logged in) so the data can be checked.

Sometimes, volunteers send paper returns directly to BTO HQ. Any forms arriving at BTO HQ are logged on BBS Online and this also triggers an email to ROs letting them know the data are here. Furthermore, this will also be reflected in the Square Summary Page Early and Late visit columns.

### 2.4.3 Route maps

It's important that volunteers follow the same route on their square or stretch every year. If a new volunteer takes over a square it's important that they follow the same route as the previous observers. Data are compared sector-by-sector from one year to the next. By changing a route or sector number, the data then being compared changes and this means data from different places

are being compared in the trends. Minor changes where the habitats present within a square are being sampled in a similar way and are not greatly impact landscape-scale trends are usually acceptable.

Dropping sectors entirely is to be discouraged. The models used to calculate population trends do not take square level sampling effort into account. As such, dropping sectors will not result in a similar correction to counts. If sectors need instating elsewhere (for example, where access is denied where previously not), some flexibility is permitted to enable that. In any case, as a general rule, changes should be kept to a minimum. Always ask the National Organiser about a route change.

Any route changes made on BBS Online now trigger an email to the RO, who can accept or reject that change. A description of the changes made is included in the automatic email.

ROs don't need to send route maps to volunteers each year; once volunteers are set up with their square or stretch online they will be able to access the digital map on BBS Online. ROs are requested to print out route maps from BBS Online to send with paper forms to volunteers who aren't online. Before unallocating a retiring BBS volunteer, please check the route map online is a true representation of their route and that they have included as many notes as possible on the route, no matter how simple it might be. Any tips on helping identify the start and end of sectors will greatly aid the handover of a square to a new volunteer.

#### BBS routes

Volunteers new to a square should, in the first instance, follow the existing routes. Where a route does not exist, volunteers, in collaboration with the RO, should plan a new route or ground-truth a route created by HQ. Please email [bbs@bto.org](mailto:bbs@bto.org) to enquire about possible paper routes, which may exist for older squares.

Full guidance on creating a new route is available on the back page of the BBS Instructions: [www.bto.org/our-science/projects/bbs/taking-part/download-forms-instructions](http://www.bto.org/our-science/projects/bbs/taking-part/download-forms-instructions)

Guidance on mapping the route online can be viewed on a Video Tutorial:

[www.bto.org/our-science/projects/breeding-bird-survey/taking-part/bbs-online](http://www.bto.org/our-science/projects/breeding-bird-survey/taking-part/bbs-online)

#### WBBS routes

The setup of a new WBBS route is quite different to BBS. For WBBS, preselected waterways are already chosen and available from the National Organiser. Please email [bbs@bto.org](mailto:bbs@bto.org) for a WBBS 'Primary Map'. Often the route is partly, and sometimes even entirely outside of the 1km Grid Reference given to the site. Again, if a stretch has been covered previously and not mapped online, it is highly likely the National Organiser has the Grid References stored for the start and end points of the WBBS stretch, so ROs will need to ask for these as and when a WBBS stretch is taken on. Otherwise, the route should be available online and should be followed as per the route.

**Consistency is key;** with both BBS and WBBS. By changing a route, it changes the data being compared year-on-year to produce the Population Trends, and this includes changing the number ordering.

## 2.5 New BBS squares / WBBS stretches

It is possible for the National Organiser to allocate new *randomly selected* BBS squares. It is not currently possible to allocate new WBBS stretches, so ROs are asked to maintain and increase WBBS coverage within the scope of the survey and sites available.

In order to allocate new BBS squares, all BTO Regions within the BBS Region (which is often larger than the BTO Region and used to randomly select new squares and produce the weightings for analysis) have to have 75% coverage, on average, over the last three years. Enforcing this rule is to ensure that coverage in a region is sustainable and there is a track record of consistently high coverage over a good period. Some BTO Regions are the same size and shape as the BBS Region, but others are not. Unfortunately, this means that all those BTO Regions within a BBS Region need, on average, the 75% coverage to gain new squares.

Working with neighbouring Regional Network Teams can really help increase coverage – from pointing potential volunteers to ROs over the border or to run joint training days or events. These are just a couple of ways to support one another and increase the *BBS* Regions coverage and achieve the required coverage for more squares.

It can be frustrating, but by allocating squares without any thresholds can result in biased coverage. For example; the upland squares are ignored, new squares are then provided, and squares from the new set which are near more populated areas continue to increase, resulting in the sample being highly biased towards lowland or urban areas. This is something which has already been detected in some of our remote areas of the UK, which we are trying to address using schemes such as Upland Rovers and Upland Adjacent squares; more on these initiatives later in this document.

### 2.5.1 Uncoverable sites

If you consider a BBS square or WBBS stretch to be **permanently** uncoverable, the square can be marked as such. Please discuss such sites with the National Organiser. Reasons might include things such as; the terrain is considered too dangerous (e.g. steep cliffs, tidal areas, etc.), or is physically inaccessible (a working Quarry, MOD land), or there are other dangers to the surveyor (aggressive neighbourhood / dogs / landowner / gamekeepers). Building works for a new housing estate or refusal of access by the landowner are seen as more temporary issues that could change in the future, so tend not to be marked as 'uncoverable'. However, such squares can be noted as temporarily uncoverable (along with the date) in the Square Summary page of BBS Online in the speech bubble next to the Grid Reference.

For squares marked as uncoverable, you are not expected to find volunteers to cover them. The square appears as 'Hide online' in the Square Summary page, with a note to state why. If you think an uncoverable square shouldn't be uncoverable, please contact the National Organiser.



### 2.5.2 Land Access

Good relations with landowners and farmers are paramount to the success of the survey. A general letter giving details of the survey, and requesting access to private land, can be obtained from the National Organiser, or via the 'RO Help' webpage linked from within in the BBS Online system:

[www.bto.org/our-science/projects/bbs/taking-part/ro-info](http://www.bto.org/our-science/projects/bbs/taking-part/ro-info)



*Peregrine – Derek Robertson*

In most cases where access is required, it is down to the volunteer to find out who the landowner is, and to approach them to ask for access in countries within the UK where this is necessary. However, if it is possible to build a landowner to volunteer relationship even when access permission is not required (e.g. in Scotland, along footpaths and roads), that is favourable to help ensure the long-term surveying of the site. For sites in England, there is a Defra website called 'Magic Map' which allows it's users to display Land Based Schemes on the map and then to click the information button which might have the landowners company details on. The site is found at: [magic.defra.gov.uk/MagicMap.aspx](http://magic.defra.gov.uk/MagicMap.aspx). Other sources of information on land ownership can sometimes be found via local planning portals, where recent planning applications may state landownership.

Summary data for BBS squares and WBBS stretches are freely available to the landowner(s) concerned and can be downloaded by the BBS or WBBS volunteer on BBS Online. By updating their Paper Preferences via BBS Online -> Details and Settings, volunteers can request additional BBS Reports free of charge, should they wish to give a copy to landowners.

## 2.6 Additional recording and initiatives within BBS and WBBS

Since the start of the BBS in 1994 and the WBBS in 1998, the two surveys have evolved. Largely in BBS, but the option to record mammals and colony information during site visits can be carried



out for WBBS too. Full details for the recording methods can be found in the survey Instruction documents. A brief overview is included here.

### ***2.6.1 Habitat recording***

Made mandatory in 2014 and an essential part of BBS: data cannot be entered for a square without habitat data. Levels 1 and 2 are compulsory, but all levels should be completed. Habitat data are now pre-populated from the previous year (where the observer remains the same) in the online data entry pages, meaning the habitat types just need to be checked by the volunteer, edited if needed and then submitted. This has made the process quicker and easier for volunteers. A volunteer Habitat guidance document is available online:

[www.bto.org/our-science/projects/bbs/taking-part/survey-methods/habitat-recording](http://www.bto.org/our-science/projects/bbs/taking-part/survey-methods/habitat-recording)

### ***2.6.2 Mammal recording***

It is now possible to produce BBS Population Trends for nine of our larger, terrestrial mammals using data collected by BBS volunteers. Data collected by both BBS and WBBS is used in research. Volunteers are encouraged to record mammals during surveys and on any additional visits they make or records of 'presence' gathered from local knowledge. For BBS, almost 90% of squares covered in recent years have contained mammal data. This is optional, but as with all these things, should be promoted by ROs:

[www.bto.org/our-science/projects/bbs/taking-part/survey-methods/mammal-recording](http://www.bto.org/our-science/projects/bbs/taking-part/survey-methods/mammal-recording)

### ***2.6.3 Detection Type recording***

With a click of a button in BBS Online, volunteers are able to record Detection Type for all their BBS and WBBS bird records. This is whether their attention was drawn to an individual or group of birds by sight or sound. When recording Detection Type, each record is accompanied by either 'Call', 'Song' or 'Visual'. This tells us how the bird was first detected (how the observer's attention was drawn to the bird); it is not an attempt at recording breeding evidence. In turn, we can use this information to find out, amongst other things, how detectable different species are, how detectability varies with season and distance, all of which can potentially help with better estimating bird abundance within an area. Recording Detection Type is optional:

[www.bto.org/our-science/projects/bbs/taking-part/survey-methods/recording-birds](http://www.bto.org/our-science/projects/bbs/taking-part/survey-methods/recording-birds)

### ***2.6.4 Colony Recording***

Volunteers need to count the Apparently Occupied Nests of bird species within their square e.g. Rooks, House Martins, Sand Martins. This can be done during a standard Early or Late visit, or on additional visit. The species, count and date are all that is required. This does not replace the standard counts of these adult birds, which should be counted as normal along the transects and in distance bands and sectors as per the standard BBS and WBBS methods. This is not optional:

[www.bto.org/our-science/projects/bbs/taking-part/survey-methods/recording-birds](http://www.bto.org/our-science/projects/bbs/taking-part/survey-methods/recording-birds)

### ***2.6.5 Upland Adjacent squares – BBS only***

Volunteers who survey squares with certain upland characteristics (defined by certain so-called 'land class codes') can also survey the square to the south if they would like to increase their contribution without increasing travelling time. Squares which have an Adjacent square 'bolted'

on already are flagged by a red 'hill' symbol in the Square Summary page. The Portal will not allow ROs to allocate the core and adjacent square to different observers, nor will it allow just the adjacent to be allocated. The core is the priority square and if an adjacent is added, it must be carried out by the same observer, ideally on the same visit as the core BBS square and cannot be submitted without data from the core square. The Adjacent square essentially works by enlarging the volunteer's core BBS square dataset.

If an RO has a volunteer covering an upland habitat and they might be interested in 'bolting on' an Adjacent square to the south, it is worth asking the National Organiser if the core square is eligible. If so, the RO then approaches the volunteer to see if it is something they would be interested in doing. The National Organiser can then add the Adjacent square to BBS Online.

### **2.6.6 Upland Rovers – BBS only**

We strive to have every BBS square covered twice a year – this means we are more likely to hit the peak time for species easily detected early in the season, and those which maybe arrive later on. For example, vocal Dunnocks in the Early visit and Swifts returned back to the UK in time for the Late visit. Of course location and local weather will influence the peak times for species, but two visits still provide the best overview of the site and should be carried out on a similar date as in previous years.

However, in some remote areas, such as upland habitats, it is evident there is a much-reduced level of coverage. Therefore, for carefully selected core BBS squares we have made the difficult decision to allow one-off visits to the square via a scheme called Upland Rovers. Each year, the BBS squares reaching strict criteria will be labelled an 'Upland Rovers square' and will be promoted for one-off visits. In almost half the cases, the square ends up receiving two visits from different volunteers, which is great – but not as good as the consistent coverage by the same volunteer year-on-year achieved with core BBS squares. It is a compromise we saw necessary to even out potential biases in coverage and one which is going very well indeed, with between 80 and 100 Upland Rovers squares being surveyed annually.

The UK's vast uplands support important populations of breeding waders, raptors and songbirds. An improved understanding of population change among these species would be of great value with respect to conservation management, land use and climate change among other things. ROs are encouraged to promote this scheme, both in regions containing Upland Rovers squares (identified by a green 'hill' symbol), but also as ROs in areas without Upland Rovers squares as volunteers often holiday in these remote locations and take on an Upland Rovers square during their holidays: [www.bto.org/upland-rovers](http://www.bto.org/upland-rovers)

### **2.6.7 Scottish Woodland BBS (SWBBS) and Upland BBS – BBS only**

Since 2009, data from additional randomly selected 1km squares have been surveyed by professional surveyors as part of the Scottish Woodland BBS (SWBBS) and the Upland BBS (UBBS) have been included in the BBS sample for the limited years they were carried out. These squares were surveyed using largely the same methodology as standard BBS squares, and results are incorporated into trends, accounting for additional sampling effort. SWBBS squares now form part in of the core BBS set and are treated in the same way as any other core BBS square. UBBS squares are excluded from the available BBS set because of slight differences and 'pairing' of

squares surveyed which are not entirely compatible with the current analysis for BBS except for bespoke analysis for the years these data are incorporated. ROs do not need to know about these surveys but may see the acronyms used in BBS related outputs, so it is worth mentioning them here.

## 2.7 Annual Report

Everyone who participates in BBS and WBBS is entitled to a free copy of the annual BBS Report, which includes WBBS news and results. We aim to publish the report in the spring following the previous years' surveys. If ROs would like additional copies of the report for events, new BBS or WBBS volunteers or another reason, please let the National Organiser know and they'll be posted out. Volunteers can also request additional copies for landowners or to give to anyone they know might be interested.

The annual BBS Report is automatically sent to any volunteer who entered BBS or WBBS in the previous two years, provided they have not opted out of receiving paper copies. Additionally, a link to the online report is emailed to every allocated BBS and WBBS volunteer who has an email address on the day the report is published from the National Organiser.

## 2.8 Expenses

We are able to reimburse reasonable expenses associated with organising the BBS and WBBS. Stationery – the costs for this will be fully reimbursed on the production of a valid receipt, alternatively BTO headed paper (A4) and compliment slips are available upon request. Postage – will be covered in full, please use 2<sup>nd</sup> class stamps. Receipts for stamps and/or proof of posting should be supplied. If an RO is in doubt as to whether something can be classed as an expenses claim, please contact BTO HQ.

### 2.8.1 How to claim

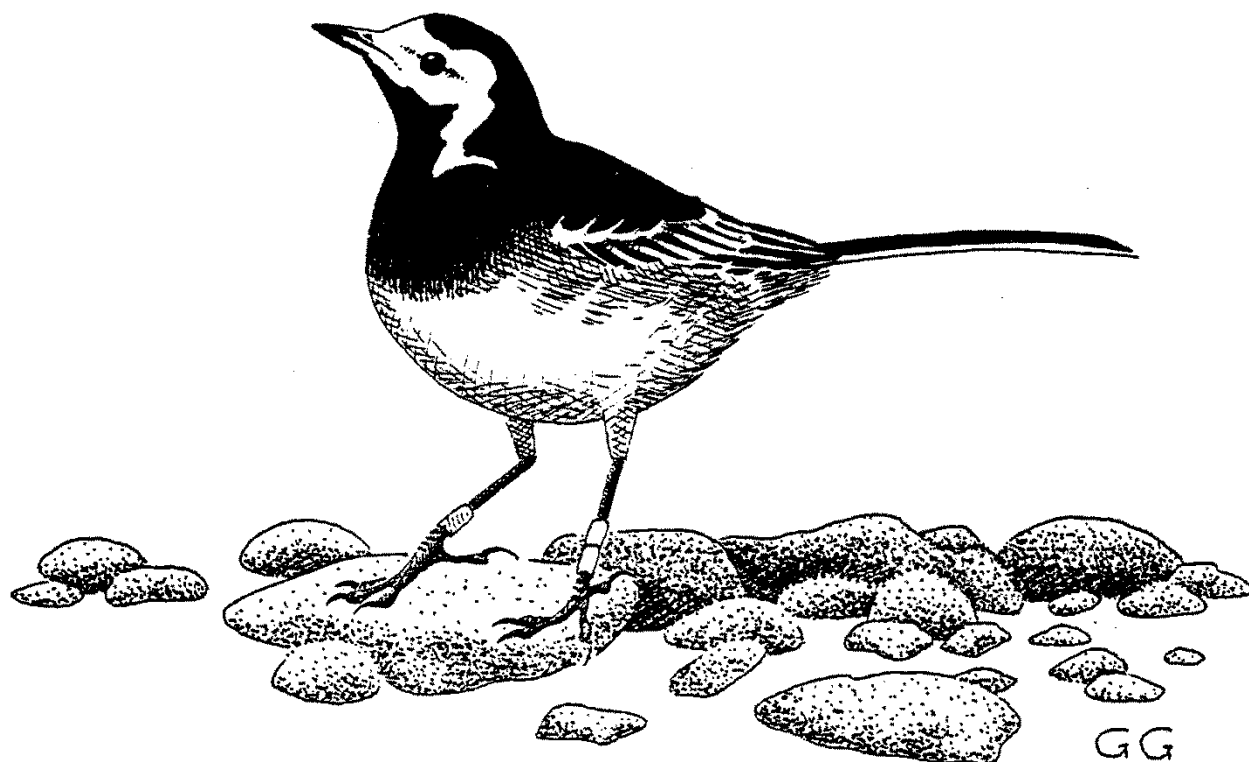
Claims, no matter how small, should be returned monthly; these will be processed as soon as possible after they are received. ROs should return all receipts to the National Organiser, we can accept the original receipt or a scanned copy (email scanned copies to [bbs@bto.org](mailto:bbs@bto.org)). ROs need to ensure an Expenses Claim is submitted alongside the receipts. This form can be emailed from BTO HQ or found within the RN resources page in 'My BTO'.

## 2.9 Regional Network

As part of the wider Regional Network, ROs will receive a monthly newsletter from the BTO's engagement team with information and news across all surveys. BBS/WBBS will usually have a feature, so we encourage you to keep a look out for information in that section. Whilst the BBS National Organiser will contact the RO group specifically (e.g., for new BBS Online updates), this will be the main method of communicating with the network.

BTO also organise Regional Network Meetings. As of 2024, these meetings will be based regionally, with between two and three regions of England covered each year, with Scotland, Wales and Northern Ireland having meetings at one- or two-yearly intervals. These meetings typically cover news on existing surveys, introduction to new surveys and a chance for the

Network to talk through problems with BTO staff. We strongly encourage coming to these meetings, both to hear about the latest BTO developments, but also to meet with other members of the Network in your area and hear about problems that are perhaps unique to your region.



*Pied Wagtail – Graham Giddens*

## 3. Survey Data

### 3.1 Overview

ROs are able to view (via the BBS Online system) data collected on all BBS and WBBS sites within the region they manage. There is also a Data download facility built into the system for Regional Organisers. For County Boundary (rather than BTO Region boundary) data, there is a summary released after the latest BBS Report on the public website, this is particularly useful for County Bird Reports:

[www.bto.org/our-science/projects/bbs/latest-results/species-lists/county-species-lists](http://www.bto.org/our-science/projects/bbs/latest-results/species-lists/county-species-lists)

For bespoke data requests, and requests for county level BBS count data or BBS trends, a Data Request Form must be completed via the BTO website before the request can be processed.

<https://app.bto.org/data-request/new-data-request.jsp>

#### ***3.1.1 Why would ROs want to download data and types of data available***

There are a variety of reasons ROs might want to download data for their BTO Regions, bulk data checking, feedback to volunteers through social media, emails, newsletters, etc. One key thing to remember is to handle any volunteer's personal data – from name to postal address – with great care and never to hand these details on to any third party. Please refer to GDPR guidance documents highlighted in section 2.2.4. Along with raw and summarised downloads, the RO homepage on BBS Online now features a host of infographics summarising data in a given BTO Region. Many of these can be downloaded and provide a great output for social media and newsletters, as well as helping ROs keep an overview of the region. It is possible in some areas to run *County or BTO Region-specific trends*, ideal for County Bird Reports where sample size is large enough. Please contact the National Organiser to discuss this. A download of volunteer details for all currently allocated volunteers in a given BTO Region is also available via the Volunteer Info / Details page of BBS Online.

#### ***3.1.2 Downloading data from BBS Online***

Downloading data is done by logging in to BBS Online, selecting RO Tools and then by selecting 'Data Summaries and Downloads' in the panel on the right-hand side of the screen. This will open a form in which ROs can select the type of data they would like to download. From raw data to summarised, birds to mammals, for all squares in the BTO Region to a select few, all years, to a select period – plenty of options to explore. As mentioned above, for assistance or bespoke data, email the National Organiser.

### 3.2 Verifying BBS/WBBS data

This is intended to be a simple guide to help you to know where to start when you are verifying BBS & WBBS data.

### 3.2.1 Before you start – Data Verification System thresholds

Prior to an RO's review, many records are automatically 'flagged' using a set of thresholds. A good place to start is to consider the various reasons why a record may be flagged up by the Data Verification system. The three main criteria are:

- **Location**: If a species has been reported in either an area that it is not usually seen (such as a Capercaillie in the lowlands of England for example) or sometimes, a species that hasn't been recorded in that square or stretch before. Please note that some species that are flagged up are increasing at such a rate across the UK, that the Data Verification system lags a little behind. Examples of this would be Ring-necked Parakeet in parts of England or Great Spotted Woodpecker in Northern Ireland.
- **Number**: If the count of a particular species in a 200m sector is higher than 'expected'. This is useful for catching obvious 'typos' - e.g., a surveyor meant 1 Treecreeper, but they have accidentally pressed [1] twice, thus leading to 11 Treecreepers. Another important reason for the numbers being flagged up, especially in Late visits is for ROs to double check that surveyors are doing their best not to include juveniles. A good example of this would be if someone reported two Long-tailed Tits in one of their transect sections during their 'Early' visits and then 11 Long-tailed Tits in the same transect section during their 'Late' visit. The system will flag this up and although it is not always the case that the 11 Long-tailed Tits would include some juveniles, this often is.
- **Date**: The date rule is usually triggered when a species is reported out of season. A couple of examples of this would be a Swift being reported on 1 April (which is extremely early for this species in the UK) or a Fieldfare being reported on 22 June (when the vast majority of this species should be on its breeding grounds in Scandinavia or Iceland). Although either species is possible on these dates, it would be quite exceptional).

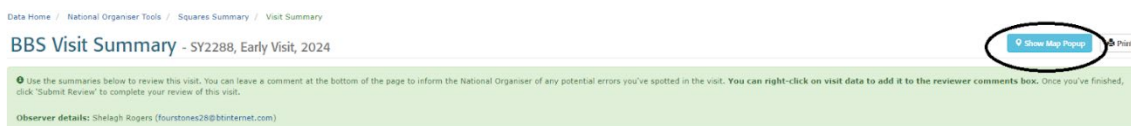
The present rules on which these thresholds have the following characteristics:

- Counts are based on 200m sectors (which is the unit of each individual 'submission' and based on the mean number recorded across a region) and the rules based on past BBS averages.
- These regions are quite big (i.e. verification rules do not operate at the level of the square, but at quite large geographical regions). This would lead, for example, for the persistent flagging of seabirds on some coastal squares. Fulmars may be rare for a given region (the East of England, for example), but not necessarily on a given square on the east coast. Nevertheless, these are still flagged up.
- These rules are only periodically updated and so are always some distance behind the real distributions/arrival dates.
- By necessity, they have to be a little conservative - better to be sure, than let too many spurious counts through the net.

### 3.2.2 Some ideas to help you with verifying data

There are plenty of tools to use to help you in the 'Visit Summary' when you click onto an individual visit.

#### Maps



When in the Visit Review page, you can access a pop up of the map of this square, which includes the transect routes. This can give you immediate access to the likely habitat in the square (as well as letting you check the habitat data). The habitat data alone, as it comes only within 50m of the transect, is often insufficient.

#### Visit details

Visit Date: 09/05/2024	Cloud: 1: 0-33%
Sections 1-5: 09:25 - 11:20	Rain: 1: None
Sections 6-10: 12:07 - 12:55	Wind: 1: Calm
	Visibility: 1: Good

You can glean quite a lot of information from this table. Firstly, if a migrant bird species is flagged up, check the **date** of the visit, as the wrong date may have been entered. If you have a suspicion that a volunteer may have entered the wrong date for their visit. Visit metadata (date, time etc) is just as important as the bird data itself – remember to check this at the same time.

The **time** and **weather conditions** can also be useful reference tools. If you notice that there aren't as many birds reported in a visit that you would perhaps expect, check the time and weather conditions. Although surveyors shouldn't be surveying their squares or stretches in the middle of the day or in bad weather, sometimes they do.

Equally, if you notice that there are more bird of prey records than you would perhaps expect, it may be because a surveyor is out and about in the middle of the day

#### Grid square summary

Bird Species Records			
Species	Max number of individuals per year		
	2022	2023	2024
Red Grouse	1	5	5
Golden Plover	9	5	5
Curlew	4	6	1
Snipe	1	1	
Lesser Black-backed Gull			5
Carrion Crow			2
Raven	1		
Skylark	11	11	9
Willow Warbler	1		
Wren			2
Wheatear	1		
Dipper			1
Meadow Pipit	54	23	15
Number of species (total: 13)	9	6	9



This is a really useful tool that you can use to find out which species have been recorded in a square or stretch previously. A repeated example is the presence of **Red-necked Wallaby** on a BBS square on the Isle of Man. This species is always likely to be flagged up, but on this square, it is a regular.

One of the things that you can do within the Grid square summary is to get historical counts by sector. Whilst the year sum is a handy guide, sometimes it will be necessary to see what is regularly recorded on a square at the sector level, this being the unit of which the rules are applied.

An example of this can be found on a square in Orkney. **Shoveler** is a scarce species on the islands, but each year for the last few years, at least one is recorded in the same transect sector each year. Presumably, there is a loch visible from that transect sector that it lives on. These kinds of clues can be really helpful when verifying data.

On the other side of the coin, if a species has been flagged up as it has not been recorded in a square before, it is worth double checking that the surveyor hasn't **mistakenly entered a species or put the wrong BTO species code in.**

### BTO species code errors

It is well worth having the [list of two letter BTO species codes](#) open when you are verifying data! If you spot a record that doesn't look quite right, check the BTO species code for that species, as a surveyor may have entered the wrong BTO species code.

Here are a few to look out for, that can often be a cause of confusion:

- S. is Skylark, whereas SL is Swallow.
- GF is Golden Pheasant, whereas GO is Goldfinch.
- BK is Black Grouse, whereas B. is Blackbird
- W. is Wheatear, whereas WR is Wren
- G. is Green Woodpecker, whereas GR is Greenfinch

If you find someone who clearly struggles with their BTO species codes, you can pass on the fact that they can, instead, type the species name in directly.

Row	Two letter code	Species Name	Distance Band	Detection Type	Count
1		yel	1, 2, 3 or F	V, S or C	
2	<input type="checkbox"/>	Greater Yellowlegs	1, 2, 3 or F	V, S or C	
3	<input type="checkbox"/>	Lesser Yellowlegs	1, 2, 3 or F	V, S or C	
4	<input type="checkbox"/>	Yellow Wagtail	1, 2, 3 or F	V, S or C	
5	<input type="checkbox"/>	Yellow-bellied Teal	1, 2, 3 or F	V, S or C	
6	<input type="checkbox"/>	Yellow-legged Gull	1, 2, 3 or F	V, S or C	
7	<input type="checkbox"/>	Yellowhammer	1, 2, 3 or F	V, S or C	

### Rare birds

If someone has reported a rare bird on their square or stretch, there are several ways that you can find out if that bird has been seen by someone else/is more widely known about. One of the best places to start is your **local Bird Club website**, as they often list sightings of note. If you have **Bird Guides/Rare Bird Alert**, you could also look on there. Additionally, you could try contacting your [County Bird Recorder](#). Unless a species is being kept quiet for a reason (i.e., it has shown



some signs of breeding behaviour), they will usually tell you if a rare bird has been seen by other people in a given area. You could also try looking in past **County Bird Reports** to see if a species has been reported in an area before.

Additionally, and perhaps most importantly, remember that you have the local knowledge, so please use your judgement if you see that a rare bird species has been reported.

### Mammals

Please don't forget to look at the mammal records that get flagged up! If you are not too knowledgeable about where mammals are distributed in your area, the [Mammal Society](#) website is a great place to start.

Also bear in mind that as well as sightings, surveyors can also report finding signs of mammals and also local knowledge. This has led to an increase in **European Beaver** records on BBS squares and WBBS stretches across the UK, especially in Scotland. Although this species is rarely seen due to its mainly crepuscular habits, they often leave quite obvious signs in areas that they inhabit.

Other non-native mammal species are also increasing their range, especially **Muntjac Deer** and **Chinese Water Deer** across southern England. Other species, such as **Raccoon Dogs**, are only present in small numbers in scattered locations across the UK.

If you are worried about verifying your mammal records, please be reassured that records are also verified on a UK wide level at BTO headquarters. The mammal data that feeds into population trends for the UK are only for nine common and easy to identify species, so hopefully not too challenging a task. For rarer species, additional help is at hand.

### Average arrival/ departure dates of migrant bird species

If you would like a rough reference guide of when different migratory bird species arrive for the summer/ depart for the winter, [this webpage](#) may be of use to you. Although some of the dates mentioned are based on data that is quite old, it at least gives you some guidelines on when to expect certain species.

These dates will of course vary according to several factors, including where you are in the UK, what the weather is like (both in the UK and in non-breeding areas) and to a certain extent, the population status of the particular species in question at that time.

Please remember that due to the nature of the survey, the majority of bird species that get flagged up due to dates are summer migrant species. However, especially for 'Early' visits, some winter visitors may still be lingering. This could potentially include species such as ducks, geese, swans and waders for example, that don't always head back to their breeding grounds until April, May or even June. In terms of smaller birds, it is well worth trying to get to grips as to when species such as **Fieldfare**, **Redwing**, **Brambling** and **Redpoll** tend to leave to return to their breeding grounds from your local area.

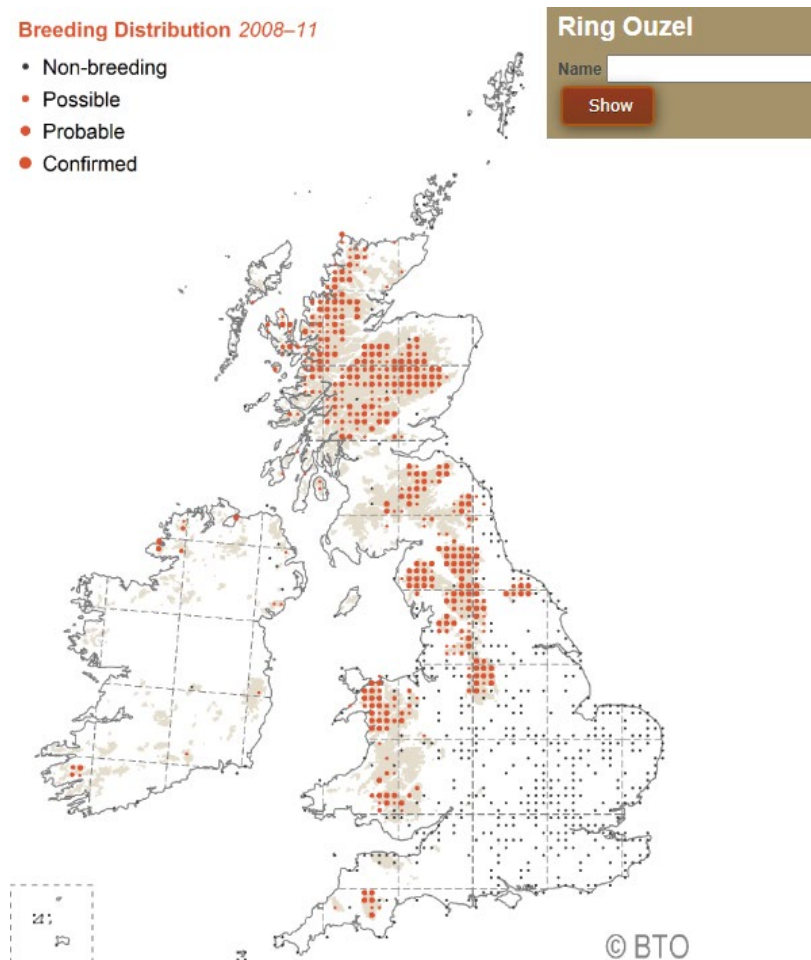
### Use your local knowledge.

Finally, and perhaps most importantly, use your local knowledge. You are likely know the area – and its bird life – just as well as anyone.

### 3.2.3 Other resources

*Bird Atlas Mapstore:* <https://app.bto.org/mapstore/StoreServlet>

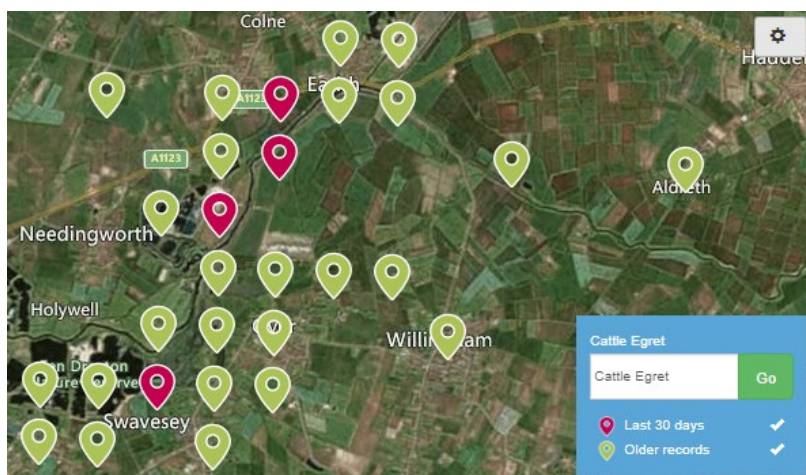
This is a great place to search for distribution maps of breeding birds across the UK. Take a look at the [Map Store Viewer](#) here. Although the data that this is based on is now over 10 years old (the last Atlas Period ran from 2008–11), it will at least give you an impression of whether a species has been previously recorded in a particular area during the breeding season.



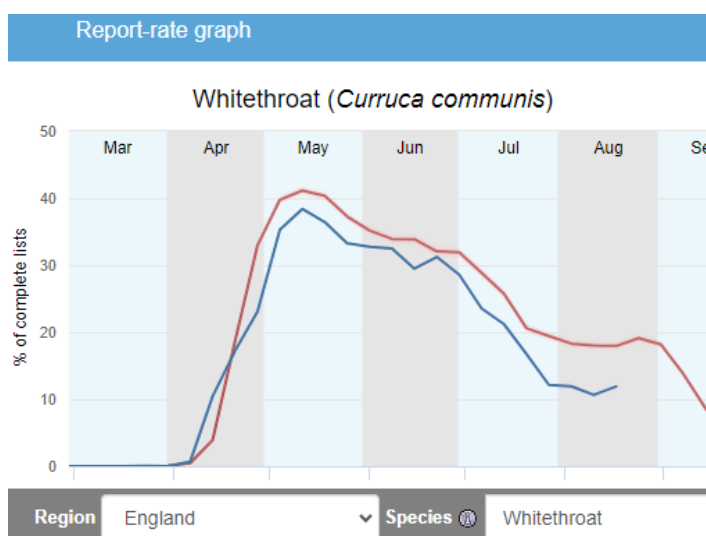
BTO Map store: An online repository of Atlas maps (breeding and non-breeding). The Breeding range of Ring Ouzel in the 2008–11 Atlas period. Whilst a Ring Ouzel could crop up almost anywhere on migration, if records come from outside of the red areas in late May or June, it could be worth checking.

*BirdTrack:* <https://app.bto.org/birdtrack/>

The 'Recent Sightings' map function on BirdTrack can be useful for finding out where particular bird species have been seen. The recording rate graphs can be particularly useful for finding out whether a summer migrant species arrived earlier or later than average in a given year.



BirdTrack maps: Recent and past records of Cattle Egret at the southern edge of the Cambridgeshire Fens.



BirdTrack reporting rate graphs: In 2024 (blue), the initial movement of Whitethroat was a fraction earlier than the 10-year historical average.

**BTO HQ:** [bbs@bto.org](mailto:bbs@bto.org)

If you are not sure about a particular query, or how to go about querying it, please email us at the usual place. We are here to help! If the BBS team can't answer your question, we are never far away from some of the most eminent ornithologists in the country.

# Appendix 1 - BBS Email templates

## Introduction - PLEASE READ FIRST!

The following selection of templates are designed to help you make your role easier. Before you start, here are some key points to consider:

- These are only here to help you. You do not have to use them if you would rather use your own.
- We are definitely won't mind if you don't use them! Some of the templates make reference to things that you may simply not wish to do (e.g., set up a zoom meeting). If so, simply delete that part.
- Some are real (anonymised) emails sent out by ROs past and present.
- You are more than welcome to copy us into your communications with your volunteers.
- If we haven't used your particular email as an example in this document, it was only because we didn't have space.
- We trust you to communicate with your volunteers in the way that works best for you
- Regardless of whether you are using your own wording, or that from one of these templates, don't forget to follow the principles set out in your GDPR training:
  - If sending a single 'mass' email, don't forget to use BCC.
  - Alternatively, use mail merge, which allows you to personalise your message a little.

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## Standard templates

By 'Standard templates', we refer to the 'day to day' emails that Regional Organisers send out. They could apply at any time of year.

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## BBS participation request

Dear #####,

Thank you for getting in touch with regards to the Breeding Bird Survey (BBS). I am delighted that you are interested in taking part in a national monitoring that provides some of the best information we have on how the birds in our wider countryside are faring.

In order to take part in the BBS, you will need to have good bird identification skills. Squares are enormously variable, so you don't necessarily have to be an expert. What we ask is that you are able to identify the bird species you are *likely to encounter on a given square by sight and sound*. We can help you decide if you are in any doubt.

We have the following squares available in your area. If any of these are of interest to you, please let me know and we can look into the species seen or heard during previous surveys and look at any existing routes or plan new ones if needed.

Below are the squares closest to you, along with a little information about each:

#####

[Grab a Grid Duo](#) is a useful tool to view these squares. Copy and paste the Grid References into the purple box on the right.

In the meantime, I'd be grateful if you could do the following:

- Please make sure that your UserID is registered with BBS/WBBS. In your [myBTO](#) account, check to see if BBS/WBBS is in 'My Current Projects'. If it isn't, scroll down to 'Sign up for Projects' and click on 'Sign up' for BBS. Only then will I be able to allocate you a square.
- Have a look at the [Taking Part webpage](#) and download the [full instructions from here](#). If you feel that you might not have the necessary identification skills required for the squares listed above (we can look at any previous species lists for any site if you are unsure), please do consider some of BTO's other surveys, [listed here](#).
- We also recommend that you read the [BTO's statement about audio-ID tools](#) before you commit to surveying a square.

Thanks again for registering your interest in the survey, I look forward to hearing from you.

Best wishes,

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### ***BBS square allocated***

Dear #####,

You should now be able to login to BBS Online now and see your site: <https://app.bto.org/bbs/public/login.jsp>. We also have a [BBS Online](#) help page on the public pages so you can find out more about the system and how to use it.

We have the following additional requests and/or questions.

1. You can access the route map and make edits. We ask that you only make changes in consultation with me and/or BTO HQ. Consistency of route is one of the important elements of the survey, changes should only be made where absolutely necessary. Similarly, please resist the temptation to renumber the sectors. You do not have to survey in the order 1 to 10, if that isn't the most convenient for you.
2. You will be able to see the average date for your square. As above and in the interests of consistency, if you could keep as close to those dates as possible, BTO would be very appreciative. For example, if you can aim to survey your square within a given 7-day period, with the average date somewhere in middle of that. What we really want to avoid is you choosing the 1st April one year and 10th May the next.
3. The link to the various forms and instructions is [here](#). Whilst we can mail these to you, we'd also be very grateful if you were able to make your own arrangements. Many BBS surveyors use their own notebooks (A6 notebooks are the best size). As well as saving on paper and postage, notebooks are also much more convenient in the field. BTO are looking into developing applications for mobile devices. If you would like forms posted to you, please ask. For future years, we'd ask that you fill out your [paper preferences](#). The 'online pack' is the most popular; these are still paper forms, but a reduced set if you are submitting your data online. We'd of course urge you towards specifying 'None', but the choice is yours. You can also specify how many copies of the BBS report you would like, when it is published in May of each year. Please enter "0" if you are happy with just the online version
4. We recommend a recce visit just to make sure you are clear where the sectors start and end. If you don't have detailed notes already from a previous volunteer, we'd urge you to document these sorts of logistical details using the '[edit route](#)' facility. We'd also recommend the recce to get familiarised with the habitats and how to record them, without the distraction of birds. First and second level habitat data (e.g. A.1 = Broadleaved Woodland) are mandatory. If you can add levels 3 and 4, please do.
5. [This page](#) on the survey is a useful walk through the process, which I'd encourage you to read.

We wish you luck with your surveying this year. Volunteers get many different benefits from BBS, but we hope you will feel at least a small amount of pleasure in contributing to this fantastic - now 30+-year old - scheme and the vitally important conservation work it underpins.

Yours sincerely,

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## **Retirement/moving away – NOTES FOR ROs**

Exactly how you write this will depend on whether someone is moving away or retiring completely. Here are some points to make sure are included:

- To say thank you for their contribution, no matter how small.
  - If you think someone has made a really big contribution, then ask HQ for any statistics about them - they may have surveyed others squares that you may not know about.
  - Please ask them to complete the [retirement questionnaire](#) (if this is a retirement).
  - Please ask them to supply any notes on the square (be that parking, landowners, or just trivial things that help them remember where the start and end of sectors are etc).
- 

### *Retiring long term BBS/ WBBS Volunteer [option 1]*

Dear #####,

I hope you are well. We have heard that you are moving away from the area/ you have decided to retire from surveying and are therefore relinquishing your BBS square(s) X (PLUS ANY MORE IF APPLICABLE).

[if relevant]

On behalf of BTO and the rest of the scheme's partners, I would like to thank you for your wonderful contribution to BBS - to have amassed X visits over X years of survey at the *same square(s)* is a contribution rather few people can match.

It wouldn't be right for me to guess what your highlights have been, but there are some that stand out at a quick glance - X species in X year, Y species in Y year for example - I am sure you have others.

OR

if you are retiring from surveying, we would like to wish you all the best for the future. We would also be grateful if you would be able to complete this [this short questionnaire](#), which the BTO Surveys' team would find really helpful; they have so little information on why volunteers stop surveying and this will give them a few insights beyond anecdote

Whatever comes next to you, we wish you very well with your other birding and non-bird pursuits and thank you again for a tremendous contribution.

Yours sincerely,

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### *Retiring from surveying [option 2]*

Dear #####,

I am sorry to hear you have decided to step down from #####. Thank you for getting in touch to let us know, I quite understand and know these decisions aren't always easy.

I have unallocated the site/s from you now on the system. Thank you for your contributions to the survey over the years, they really are appreciated. All the data entered will, of course, continue to be used in future trends and scientific research. Hopefully, we will find a surveyor to continue your hard work and the dataset you have collected over the years.

If you are able to add in as many notes as possible about your square, that would be very helpful. This includes where to park, any contact details of landowners and where each transect section starts and ends. You can do that either by following the instructions on 'editing your route' or, if you would rather not, please note anything useful in an email to BTO HQ ([bbs@bto.org](mailto:bbs@bto.org)) and they can input that information for you. Anything is useful, from useful landmarks to denote the start and end of sectors, to parking and landowners. Future volunteers really benefit from that running start that a previous volunteer can give them, so please do spare five minutes to provide those.

Finally, would you be willing to complete [this short questionnaire](#) so that we are able to learn more about why volunteers retire from surveys? I realise you explained in your email, but by providing a completed questionnaire, it allows BTO to collate that information in one place. Thank you.

Thanks again for all your support.

Best wishes,

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### ***Mentoring – NOTES FOR ROs***

**These emails are designed to encourage volunteers in your region or regions to become 'BBS mentors'. Although this may not be for everyone, some more experienced surveyors are happy to do it and enjoy it.**

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*Email about BBS mentoring (What it is and what it isn't)*

Dear #####,

I hope all is well with you. I am writing to draw your to attention on how to become a BBS mentor. I note that you have been doing BBS for XX years and we wondered if you would be prepared, very occasionally, to pass on your experience to a new volunteer?

The main aim would be to pass on any help on the mechanics of the survey - particularly its field methodology and protocol. This is all about helping newer surveyors to gain confidence with taking part in the survey, and much less so about bird identification.

What might it involve?

- Meeting a newer surveyor on either their or your square to show them how to take part in the survey - going through the forms, explaining the distance bands and habitat codes, etc.
- Walking some or all of the transects on said square and talking through the survey methodology as you go.
- Answering any questions that the new surveyor has about the survey methodology.

What it doesn't involve?

- Importantly, BBS mentors **are not responsible** for assessing whether a new surveyor has the required bird identification skills to survey their square. That said, if you did have concerns about a person's skill level, it would certainly be helpful to pass that information back to me or BTO HQ.
- We are not asking you to complete an assessment, this is designed to be an informal 'run through' of a typical BBS visit.
- The focus is therefore more on providing guidance and instruction where required, not on completing an assessment.

If you are interested in signing up to become a BBS mentor, please do so in the following way:

- Log into BBS online
- Click on 'My Details and settings'
- Under 'Other Preferences', answer the question 'Are you willing to mentor a new volunteer?' with **Yes**.

Once you have done that and someone in your region enquires about being mentored in your area, either I or BTO HQ will get in touch with you when the need arises.

If you have any questions or queries, please contact me for more details.

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*Email for mentors (someone has expressed interest in being mentored in your area)*

Dear #####,

Thank you very much for volunteering to be a mentor for BBS, it is very much appreciated.

I am writing to let you know that **volunteer X** from your area would like some help to get them started. Their BBS square is #####.

If you are happy to get in touch with this new surveyor, their email address is **X**.

Before you meet them, here are some things to consider:

- If you are able to, arrange to either speak to them on the phone or speak to them virtually before you meet them. This will help to break the ice and minimise any possible anxiety that either or both of you may have about meeting up with a stranger out in the field (unless you happen to know them already of course!)
- When you meet them, we recommend that you meet them on their square - you could even offer to undertake the reccy visit with them.
- If the new surveyor is happy to meet on your square, this may make your job easier, as you know that square, including where to park/ where each of the transect sections are etc.
- Remember that the BBS mentoring scheme is all about helping a new surveyor with building their confidence in the BBS methodology, rather than helping them to improve their bird ID skills. The BTO runs both online and face to face training courses that can help new surveyors with this. If you are unsure about this, please let me know and either I or BTO HQ can point you in the right direction.

If you have any further questions or queries, please do not hesitate to get in touch, either with me or BTO HQ.

With best wishes,

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### ***Wider Countryside Butterfly Survey – NOTE FOR ROs***

These messages are geared towards Regional Organisers who are communicating to the volunteers in their region or regions about the Wider Countryside Butterfly Survey. As most of you will know, this is co-ordinated by the BBS Team at BTO HQ.

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Dear XXXXX,

For BBS, you can also revisit the site to survey butterflies, for more information on this, please visit [www.bto.org/butterflies](http://www.bto.org/butterflies).

Once again, many thanks for your help with BBS/WBBS. I hope you are looking forward to the start of the season. If you need any help, please do get in touch with me at X , or contact James & David at HQ ([bbs@bto.org](mailto:bbs@bto.org)).

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### ***BBS on a specified site***

On many occasions, HQ will receive enquiries as to whether or not BBS can be surveyed on somewhere of their choosing. We expect that ROs will be subject to similar requests, sometimes via the RN directory, sometimes via the participation requests themselves. Here is a quick and simple response.

Dear XXXX,

Thank you for your interest in surveying your site/chosen square for BBS. Unfortunately BBS squares cannot be self-selected. To ensure that the survey and its results are unbiased, squares are randomly selected.

If your interest is primarily to undertake bird monitoring for your site, then it is also worth bearing in mind that the BBS protocol is unlikely to be suitable. BBS was designed to provide national scale data on bird numbers and assumes sampling over many sites in a given area. For advice on site-level monitoring, please contact the BTO head office at [bbs@bto.org](mailto:bbs@bto.org).

Yours sincerely,

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### ***New Regional Representative (message with focus on BBS)***

**This is primarily another start of season email. However, we have included it as it is a great example of how to introduce yourself to your volunteers. By sharing a bit of your story, it makes the email less impersonal. People are interested in your story, how you got into birding etc. At the end of the day, we are all like-minded people, and we all share an interest in birds and trying to gain a better understanding of their populations across the UK and beyond.**

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#### *Introducing a new RR/RO*

Dear BBS and WBBS volunteers

Please forgive an impersonal email, but it is easily explained. At the start of XXXX I became the BTO Regional Representative for XXXX. I am learning the ropes and am keen to introduce myself and get going in the role.

I was born and grew up in XXXX, have lived near XXXXX since XXXX and been involved in BBS surveys since XXXX. I've always loved birds but am no expert on them, and will happily lean on your expertise where appropriate, while tackling the admin of the role, attempting to recruit new volunteers (with your assistance) and promoting the BTO and its work as widely as possible.

In ##YEAR## I assume you will be surveying your allocated squares/stretchers as usual. If that's **not** the case, please let me know by email. If you missed covering your square(s) last year, but intend to re-start, please tell me about that. Please check your *Paperwork options* in your BBS Online account. If "not specified" appears against your name, you get sent paperwork by default. If you don't need it, please alter your selection to "none" and save paper, print, postage and time.

As I write, it has been wintry outside, but we look forward to spring and getting out on our surveys. With sincere thanks for your participation in BBS / WBBS and in the hope of getting to meet you all over time.

Best wishes

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## Emails for survey milestones

Below are some templates that are only relevant for certain times of the year. We have ordered them (approximately) chronologically and we have indicated roughly when these would be, but recognise every RO likes to do things in a slightly different way.

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### *Start of season emails – NOTES TO ROs*

Here are a few examples of start of season emails to volunteers. These two that we have chosen cover some important points or information:

- If volunteers are unable to survey their square(s) or stretch(es) any more, to let you know, so you can deallocate the square or stretch.
- Similarly, ask volunteers to let you know if they are unable to complete one or both of their visits this year. You can mark them as having 'time out' from individual visits, or both visits on BBS online. If you are unsure how to do this, please email us on [bbs@bto.org](mailto:bbs@bto.org)
- A plug to sign up to another square or stretch in your region or regions. Share the links to the [BBS vacant squares map](#) and the [WBBS vacant stretches map](#).
- Or, you could send a list or map of vacant squares in your region, via your RO tools.
- A reminder for volunteers to update their paper preferences on BBS online, so they receive the paper packs that they require, if they want them at all.
- Encouragement for volunteers to do a recce visit to their square, just to check that the habitat hasn't changed drastically and the transect routes can still be followed.
- A reminder to volunteers to take a look at the 'Average date of visit' function on BBS online, so that wherever possible, they do their 'Early' and 'Late' visits on approximately the same date every year. If you are not sure where to find that, please just ask us!

*Start of season [option 1]*

Dear BBS/WBBS volunteer,

[Sent to all volunteers currently allocated BBS or WBBS sites in XXXXX]

**Thank you for all your help with these BTO surveys over the years.** We are now just days away from the start of the new year's survey. Last year, between us we surveyed XX squares. Let's see if we can make it YY squares this year!

***Preparations***

Thank you to those of you who complete their survey preferences, which makes my life a lot easier. Forms will be in the post to you. If you choose not to receive forms from me [1] thank you, it saves a job for me and postage costs for BTO and [2] here are the links to download the forms, if you need them.

<https://www.bto.org/volunteer-surveys/bbs/taking-part/download-forms-instructions>

<https://www.bto.org/volunteer-surveys/wbbs/taking-part>

As mentioned in my previous email I am assuming you can survey your normal square(s), and would be grateful to hear from you only if:

- You cannot cover your site(s) this year. If that is the case, you can be marked as 'inactive'. Effectively like having a sabbatical.
- You have to stand down from covering your square, in which case it can be de-allocated and offered to others to survey.

Please look at the attached pdf which gives a map and list of those vacant squares, and consider whether you or someone else might want to take one (or more) on.

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*Start of season [option 2]*

Dear BBS surveyors,

Sorry for this impersonal greeting; please don't let it obscure the sincerity of my thanks for your work for BBS. Your efforts are really very much appreciated. In the sunshine of the last couple of days there was notably more birdsong and we are surely looking forward to the XXXX season.

This email intends to reach you all, even if I have only recently been in touch with some of you. During the last year I have met some of you too, and I hope to meet you all in due course. This will take time because our surveys, and perhaps some of our birding habits too, are often conducted solo.

On the matter of being sociable, I'd like to ask two questions:

- Are you interested in face-to-face meetings with other surveyors ? If so, what form would you like them to take ?
- Are you interested in meeting other surveyors remotely, via Zoom for example ?

Both of these could give a chance to exchange views, learn from others, share difficulties etc. Please let me know what you think of these ideas?

Finally, I very much hope you will wish to continue surveying your square(s) as before. Please let me know if for any reason you won't be able to. There are still nearly XX vacant squares in XXXX. If you know someone who might pick up a square, please point them my way!

Please get in touch with your thoughts, and do enjoy our #YEAR# BBS season.

With best wishes

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### *Data chasing*

This email is designed to remind volunteers to submit their data to us either online or on paper by **31 August** at the latest. Although, as most of you will know, the data entry system actually stays open until 31 October, **we do not publicise this**. The end of August deadline is really important to ensure that yourselves as Regional Organisers and the BBS Team at BTO HQ have enough time to verify data by the end of the calendar year. This is really important, as the data goes into the relevant BBS Report.

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### *Data entry reminder*

Dear XXXX Region BBS surveyors,

Many thanks to all of you for doing your surveys this spring. This is also a brief reminder to those of you who haven't quite got round to entering the data or sending your completed forms! It will be really helpful if you can get the information off fairly soon to give the folk at the BTO plenty of time to do the research and start preparing for the next BBS Annual Report!

Some of you have already said that you couldn't manage it this year, and, especially to those who haven't been well - I hope you will be feeling better soon.

Don't forget that you can look at the local gains and losses of various species in your own area by visiting [data.bto.org/doorstep-birds](https://data.bto.org/doorstep-birds) and putting in your postcode. There may be some surprises - and of course some disappointments.

Please get in touch if you have any queries. I hope you will enjoy the rest of the summer's bird and nature-watching.

Best wishes

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### ***End of season messages – NOTES FOR ROs***

There are a couple of examples of 'End of season' messages below. Here are a couple of suggestions of things to include in these if you can:

- A thank you to all of the volunteers in your region or regions for surveying their squares and stretches, and for submitting their data in a timely manner.
  - Some early data that you can share from your region or regions with your volunteers. You can obtain most of this from the 'Regional Organisers Tools' section of BBS online. Please see the section 'Some more helpful tips for BBS emails' section below for more information about this.
  - A summary of the survey coverage in your region(s).
  - A plug for any BBS training sessions/ mentoring opportunities that may be coming up in your region or regions in the New Year.
  - Anything else that you can think of that your volunteers may find interesting.
- 

### ***End of season [option 1]***

Dear All,

With the <year> BBS data now in, I'd just like to thank you all for your surveying efforts this year, (although I realise that, for various reasons, not everyone was able to take part), and to share a few random statistics!

- This year, XX of you covered XX squares in the region, (the largest number ever), walked nearly XXX km of transect, and in the process counted over XX,XXX individual birds of XX species. Bear in mind though, that a number of these will refer to the same bird counted twice, once on each visit!
  - The top 10 counts were for Woodpigeon, Jackdaw, Carrion Crow, Robin, Blackbird, Wren, Rook, Blue Tit, Starling and Great Tit, and together these account for well over half the total. Woodpigeon has actually held the top spot for the last 28 years!
  - Woodpigeon was recorded in every square, with Carrion Crow, Blue Tit, Wren, Blackbird, Robin in all but one.
  - In total, XXX Chiffchaffs were counted, but only YY Willow Warblers; AAA Blackcaps were counted, but only BB Garden Warblers. And there were no Marsh Tits.
  - At the other end of the scale, there were 9 species with just a single individual noted—Quail, Common Sandpiper, Barn Owl, Little Owl, Tawny Owl, Lesser Spotted Woodpecker, Grasshopper Warbler, Spotted Flycatcher and Siskin.
-



All of these have been recorded in previous years, but there are 16 species which have only ever been recorded once in the 30+ years of the survey, including Stone Curlew, Marsh Harrier, Wood Warbler and Crossbill, so you never know what you may find!

As you can see from the chart [RO to download from BBSOnline], coverage has grown steadily since <year>, except for the "Covid year" of 2020. Most people cover just one square, but there are ZZ people who cover two squares, ETC!

There are 106 squares listed for the region, of which 94 have been covered at some time or another—three of them for all 30 years of the survey—and over half of them for at least 15 years.

It would certainly be good to cover more if possible, and I know I will have some vacancies next year, so would welcome offers to cover another square...or two! Or perhaps recruit a friend?

Once again, thanks for your support!

Best wishes

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### *End of season [option 2]*

Dear BBS/ WBBS volunteers,

I hope you are well.

As the year nears its end and we look forward to the days lengthening and another breeding season, I just wanted to drop you a line to say a big thank you to you all for contributing to the BBS and WBBS this year.

[insert with some message regarding coverage in your region, or species seen, any plans to run a mentoring/training session in the New Year etc etc]

E.g.: Thanks to your efforts, we had the highest coverage in the county since XXXX, with N squares surveyed. Hopefully we can increase this further in the years ahead.

Next year I'll be running a BBS **training event at XXXX on YYYY**. If you could spread this and BBS/WBBS generally amongst your birding friends that would be fantastic, and if **any of you would like to take on an additional square or two in <year>, I would be delighted to hear from you.**

Thanks again for your support, and I wish you all a restful festive season with friends and family and good birding in <year>.

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## Some more helpful tips for BBS emails

This section is intended to help you to find data from your region or regions that you can share in communications such as end of season messages.

We hope that you find the above templates helpful. If you are thinking of sending a message to your BBS/ WBBS volunteers, just remember that there are several things that you can include in it, here are a few examples. Much of the content mentioned below can be downloaded from the '[Regional Organiser Tools](#)' section of BBS online. If you struggle to access any of this, please let us know.

- **BBS trends from your BBS region/ county:** Please email [bbs@bto.org](mailto:bbs@bto.org) for these.
  - **Map of where there are vacant BBS squares/ WBBS stretches in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **Most numerous species recorded on BBS squares/ WBBS stretches in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **Most widespread species recorded on BBS squares/ WBBS stretches in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **Rarest species recorded on BBS squares/ WBBS stretches in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **An infographic showing the total distance that BBS/ WBBS volunteers in your region or regions have walked in order to survey their squares or stretches:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **Charts/ tables of numbers of squares or stretches surveyed in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online
  - **Charts/ tables of the number of active volunteers in your region or regions:** These are available to download from the 'Regional Organiser Tools' section of BBS online.
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## Your Notes

## Contacts

Thank you for your interest in the Regional Organisers role in managing the BBS and WBBS. We could not run such large-scale schemes without the dedication and enthusiasm of our hugely valued Regional Organisers. Should you have a query regarding any BBS or WBBS matter, please contact the **National Organiser** or the **Support Officer** for these surveys at BTO HQ:

### BBS/WBBS Team

#### British Trust for Ornithology

#### The Nunnery

#### Thetford

Norfolk IP24 2PU

Tel. 01842 750050

Website:

BBS: <https://www.bto.org/bbs>

WBBS: <https://www.bto.org/wbbs>

Email:

BBS: [bbs@bto.org](mailto:bbs@bto.org)

WBBS: [wbbs@bto.org](mailto:wbbs@bto.org)

BBS and WBBS social media account:

Twitter account: [www.twitter.com/BBS\\_birds](https://www.twitter.com/BBS_birds) or @BBS\_birds

Bluesky account: [bsky.app/profile/bbs-birds.bsky.social](https://bsky.app/profile/bbs-birds.bsky.social) or @bbs-birds.bsky.social

Regional Organiser Pages:

BBS/WBBS RO resources page: [www.bto.org/volunteer-surveys/bbs/taking-part/ro-info](http://www.bto.org/volunteer-surveys/bbs/taking-part/ro-info)



The Breeding Bird Survey (BBS) and Waterways Breeding Bird Survey (WBBS) are the monitoring schemes for common breeding birds in the UK, the aims being to provide the principal data for the conservation of bird populations generally (BBS) and in a specific habitat (WBBS). The BTO/JNCC/RSPB Breeding Bird Survey is a partnership jointly funded by the BTO, JNCC and RSPB, with fieldwork conducted by volunteers. The BBS partnership incorporates the WBBS.