



# **BSBI Strategic Plan**

**2024 to 2027**

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# Executive Summary

As the publication of our *Plant Atlas 2020* demonstrates, in this time of biodiversity loss and a changing climate, our wild plants have never been more in need of the understanding, appreciation and support that BSBI is uniquely placed to provide. BSBI's 2024-2027 strategic plan guides our direction for the next three years, building on our past work and taking forward opportunities generated.

BSBI has much to be proud of in terms of all we have achieved in the period of our 2021-2024 strategic plan, including the publication of *Plant Atlas 2020*, making our 50+ million records widely available. This is a huge achievement, made possible thanks to the amazing contribution of our members and partners. In addition, our membership has grown by 30%, our events and activities are more popular than ever and our external profile is increasing, resulting in exciting and impactful collaborations. There are huge opportunities for BSBI but also significant challenges to address in terms of the threats that our wild plants face. We need to have a clear direction of travel to enable us to engage with these opportunities and challenges.

Our [Strategy Map](#) outlines our Vision, Mission, Goals and Foundations. These, along with the priorities for the next three years, provide our direction of travel and ambition. The Values and Principles drive our behaviour and are central to everything we do as we deliver our strategy.

BSBI's Vision is "**A world where wild plants thrive and are valued and understood.**" Our Purpose is "**To advance the understanding and appreciation of wild plants and support their conservation in Britain and Ireland.**" Our three Goals reflect BSBI's unique contribution, strengths and ambitions toward achieving our Vision and Purpose.

Goal 1 is to "**Inspire, build and support a diverse community of botanists to sustain and develop the skills base.**" We have set two priorities for this work in the next three years, so that botany and botanical skills are sustained in the long-term. Priority 1.1 is to "Deliver opportunities for learning, local engagement and participation for people of all botanical skill levels, including everyone from beginners to BSBI's network of expert recorders and referees." This includes improving the breadth and accessibility of BSBI training, events and engagement provision and developing clear botanical pathways along our botanical skills ladder. Priority 1.2 is to "Make botany more accessible by engaging a broader community and reducing barriers to participation." As well as working to identify and overcome barriers to participation, we will also develop an Equality, Diversity and Inclusion (EDI) plan and monitor progress.

Goal 2 is to "**Provide high quality, impartial data and interpretation needed for research and to help address key environmental issues, such as biodiversity loss and climate change.**"

This is the high level goal of our Science Strategy, with three subgoals on evidence, state and impact: to provide high quality evidence on our flora (including its taxonomy, geography and ecology); to provide high quality evidence on the state of our flora and how it is responding to environmental and human drivers; and to provide impartial scientific advice, to ensure BSBI data have impact in supporting nature recovery. The priorities under each of these are summarised below and there is more detail within our [Science Strategy](#).

Goal 3 is to "**Raise the profile of wild plants and botany to help ensure plants are better understood and more highly valued.**" Here our priorities are to develop a Communications Strategy identifying the tailored information we will deliver to key target audiences, to support their

botanical activity and a growing profile and to review our communications resource needs to achieve this strategy. Our other priority here is to improve the impact of our public engagement resources and projects including our website, publications, events and communications.

We have also defined five Foundations which will underpin our strategy and ensure we focus on building both our effectiveness and long-term resilience. These foundations are:

- **Motivated, skilled people** - to ensure our members, supporters and staff are well motivated, trained and supported.
- **Strong relationships** - to ensure we have strong, clear, long-term relationships with key partners.
- **Strong governance** - to ensure the decisions we take fit our strategy and our committees are well-informed and resilient, proactively embracing succession planning.
- **Effective data management** – to implement our Data Plan which aims to maintain effective online recording and data management systems and includes priorities to improve our Distribution Database documentation, support and training and to improve data flows, including through further development of our BSBI recording app.
- **Sustainable business model** - to ensure our work is financially sustainable and we have the time and know-how in place to meet the ambitions set out in our strategy and stay resilient when dealing with growth and change.

Members will always remain central to all we do. BSBI is entirely reliant on, and extremely grateful for, the effort, time and skills contributed by our members and supporters. Our plan allows our members to be more fully aware of BSBI's goals and planned activities and exactly how they can contribute towards delivering them and fulfilling BSBI's potential.

We welcome new ideas and bring these to our annual Forum meeting, to consider for future plans. Our Strategy decision-making criteria help guide our thinking when considering new ideas for activities, projects or ways of working, to ensure everything we do fits with the strategy and ensures our long-term resilience.

Since 1836 BSBI has repeatedly re-focused so that we could meet the demands of the times. We have broken new ground and pioneered new approaches while building on a solid base. Now we look forward to working with our members, partners and supporters to make the most of current opportunities and rise up to meet future challenges.

## 1. Who we are and the difference we seek to make

### 1.1 Our origins, history and impact to date

The Botanical Society of Britain and Ireland originated as the Botanical Society of London in 1836 when the emphasis was on discussing, identifying and exchanging both views and specimens of plants. Today we still enjoy discussion and identification, especially in the field, but the emphasis on collecting specimens has changed to collecting records, and providing and interpreting botanical data, to underpin evidence-based conservation of the British and Irish flora. We work throughout the UK, the Republic of Ireland, the Channel Islands and the Isle of Man.

Our work is undertaken by our members, whose common characteristic is a love of plants. The collection of over 1.5 million records by over 1,500 members between 1954 and 1960, which led to the publication of the first *Atlas of the British Flora* in 1962, is one of the first examples of what we now know as 'citizen science'. The technological advances pioneered by the Atlas were revolutionary, using distribution maps combined with an authoritative text, showing the status of every plant species growing in the wild. Many other researchers and societies throughout the world now use this technique, which is proving crucial in illustrating change, in relation to our climatic and population trends.

The BSBI also publishes scientific papers online through *British and Irish Botany*, free to both authors and readers. BSBI Handbooks, which provide definitive guides to identification of particular plant groups, are valued and used by both beginners and more experienced botanists. BSBI runs field meetings and indoor events, botanical surveys, training courses and skills assessments. Many government agencies, societies, consultants, universities and students value and use the robust data and information that we gather and the training, events and publications we provide.

The BSBI is a society for all those interested in plants, whether they be amateurs or professionals, and each person can play a part, contributing to past, present and future studies of botany.

## 1.2 Our vision, purpose, values and principles

BSBI's **Vision** is **A world where wild plants thrive and are valued and understood**. This is our 'big picture' of the world that we would like to see, one in which there is understanding and appreciation of wild plants and the need for their habitats to thrive at a time of rapid biodiversity loss and climate change. We share this vision with others.

BSBI's contribution to our **Vision** is set out in our **Purpose: To advance the understanding and appreciation of wild plants and support their conservation in Britain and Ireland**.

Our Purpose reflects BSBI's unique contribution and strengths in:

- providing high quality, impartial data and scientific analysis to underpin and enable nature recovery
- education, training and skills to sustain and develop a diverse community of botanists
- public engagement and dissemination of information, to raise the profile of plants and help ensure they are valued and understood

Our [Policy on nature conservation](#) sets out the way in which BSBI supports and encourages collaborative working at policy, strategic and tactical levels to support nature conservation.

BSBI's **Values** are: **A love of plants**, **Inclusive**, **Inquisitive**, and **Intrepid**. Our values reflect who we are as a community now and how we aspire to be in the future:

- **A love of plants** - Our love and appreciation for wild plants underpins all that we do
- **Inclusive** - We seek out and engage with others with respect and sensitivity
- **Inquisitive** - We are committed to botanical & organisational learning & sharing knowledge
- **Intrepid** - We go out in all weathers and terrains to pursue our passion for plants

These **Principles** guide us in doing what we do:

- We are knowledgeable about botany
- We are collaborative, preferring to work with others
- We are objective and evidence based
- We are dependable and the integrity of our data can be trusted to be of high quality
- We will be forward thinking in our work
- We will be influential and work with others to create change

### 1.3 Our decision-making criteria

We use these decision-making criteria to screen all existing work and any new case for a centrally resourced project or activity, to ensure everything we do both fits with the strategy and ensures our long-term resilience. We also use the criteria as the basis for a business case template, to guide our thinking when we are preparing a case for change. In practice, it may be that a proposal does not meet a particular criterion, but we will have considered it and made a conscious, strategic decision if we proceed none the less.

<b>Criteria</b>	<b>Detail</b>
<b>Fit with Purpose</b>	The activity is within our scope, delivers to one of our goals and contributes to our vision. It fits within our strategy map
<b>Financially viable</b>	The activity is financially viable and planned sufficiently far in advance to be budgeted. If there is no budget, the task is important enough that we should seek funds/ partners or use reserves to achieve it and make it viable
<b>We have the time and capacity to manage and govern</b>	We are able to give the activity the time and attention it needs or are able to find funding to buy-in capacity or expertise. Members are given the steer and support they need, as required
<b>We have the capability and know-how</b>	We have the capability and expertise in house or can buy it in or work with others to bring it in. This could include using training opportunities
<b>Opportunity</b>	The activity offers an opportunity to: <ul style="list-style-type: none"> <li>• work in partnership with others</li> <li>• fill identified gaps in our activities (e.g. training for different skills levels, plant groups or regions) or extend successful current work across our geography</li> <li>• provide useful leads or future strategic opportunities</li> </ul>
<b>Risks are understood</b>	The risks of the activity are understood, especially the risk to our reputation and integrity (see BSBI Values and Principles)
<b>We can evaluate our contribution</b>	We can evaluate our activity and demonstrate added value; that we have made a difference. We will get due credit for our contribution and be able to flag up our achievements

## 2. Strategy development and progress review

### 2.1 Development of our 2021-2024 strategic plan

The 2021-2024 Strategic Plan was developed through widespread consultation as part of BSBI's Resilience project with support from the Centre for Charity Effectiveness at Bayes Business School and Heritage Lottery funding.



**Figure 1 Consultations to develop the 2021-2024 Strategic Plan**

The plan introduced our Strategy Map which provides a clear direction of travel for our work long-term, and priorities for our focus in the three-year period. A Governance Report was also produced which led to some key changes in the way we work, including moving our governance and reporting from Council- to Trustee-led. We also developed an Income Diversification Strategy.

### 2.2 Review of progress

As part of developing this 2024-2027 Strategic Plan, a review of progress against the 2021-2024 plan was undertaken by a strategy working group and presented to the 2024 BSBI Forum meeting.



**Figure 2 Forum consultations to develop the 2024-2027 Strategic Plan**

The review concluded we have made good progress on the priority work under most of our goals. Below are some examples:

- We have developed our training and skills offering, with a growing programme of in-person and online training events, as well as taking in-house the Identiplant training programme and the coordination and quality assurance of FISC botanical skills assessments, thanks to the generosity of the BSBI members who developed these programmes.
- We have improved our support for our County Recorders by developing our Countries Support team and introducing new Country Officer roles (including the Countries Manager, to coordinate support across Britain and Ireland) and projects (including the Botanical Skills and Evidence project in Northern Ireland).
- We have published and launched *Plant Atlas 2020*, in partnership with UKCEH, as a book and free to access website, making our 50+ million records widely available. This is a huge achievement, possible thanks to the amazing contribution of our members and partners.
- We are now using the high-quality plant distribution data collected and checked for the Atlas to directly influence key land management and conservation decisions, including through the development of botanical heatmaps (developed in England in partnership with Natural England, funded by the Natural Capital Ecosystem Assessment). In the next strategy period we will be working to develop heatmaps in Scotland in partnership with NatureScot and on a feasibility study for heatmaps in the Republic of Ireland in partnership with the National Parks and Wildlife Service); publishing a GB Red List of threatened species (with funding from Natural England and in partnership with UKCEH); leading on a Priority Plants in SSSIs in Wales project with funding from Welsh Government and the National Heritage Lottery Fund.
- We have developed a new Science Strategy, which is integrated into our new strategic plan for 2024-2027 (see Goal 2 below).
- The Atlas launch gained widespread media coverage and a high profile across Britain and Ireland.
- Our membership has grown substantially, from 3,131 to 4,056, a 30% growth over the three-year period, far surpassing our targets (see figure 5 below). We have maximised opportunities to join, making the most of growing interest in environmental issues and training (see opportunities below), as well as the high profile of *Plant Atlas 2020*.
- We have continued to provide a vibrant and varied programme of field meetings, indoor events and outreach activities across Britain and Ireland, with the number of events growing each year, so we can expand and share our knowledge and love of plants.
- We have published handbooks on Broomrapes, Dandelions and Lady's-mantles, continued to publish our open access scientific journal *British & Irish Botany* and have found new ways to disseminate our information including through launching our publications as eBooks and sharing webinar and talk recordings on our YouTube channel.
- Our New Year Plant Hunt in 2024 engaged over 3,000 people, the highest number of participants to date.
- We responded proactively to the Covid pandemic, shifting to online meetings and training, which has increased participation as well as reducing our carbon footprint. As a result, we are now able to provide both online and in person activities, improving our overall offering and reach.

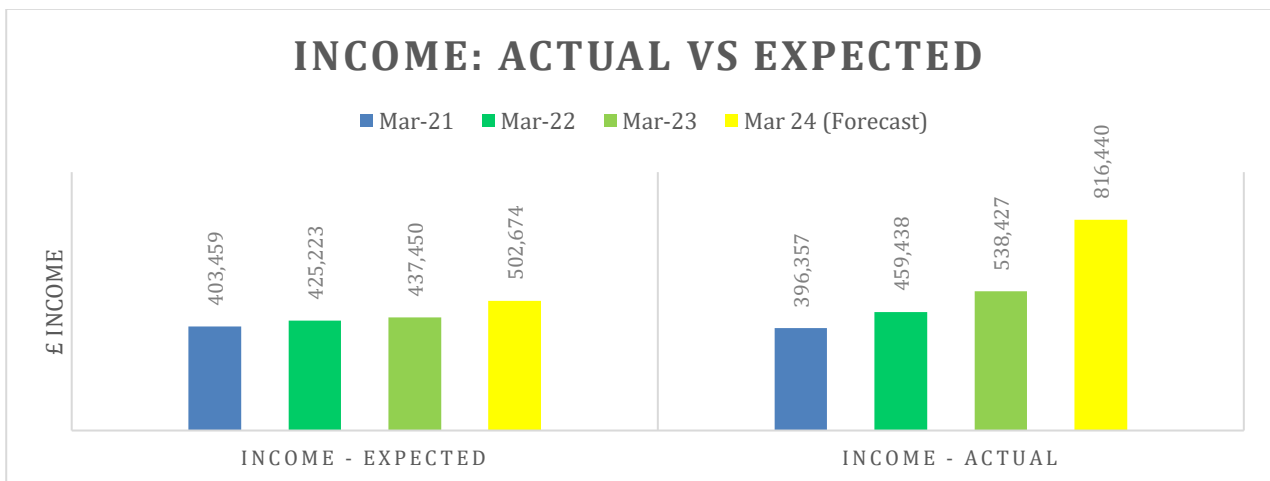
We have also made good progress in strengthening our five **Foundations**, which underpin our strategy and are critical to our effectiveness and long-term resilience:

- **Passionate, Skilled People:** to support the people who underpin all we do, we have strengthened support for Country Recorders (as mentioned above); audited the skill mix

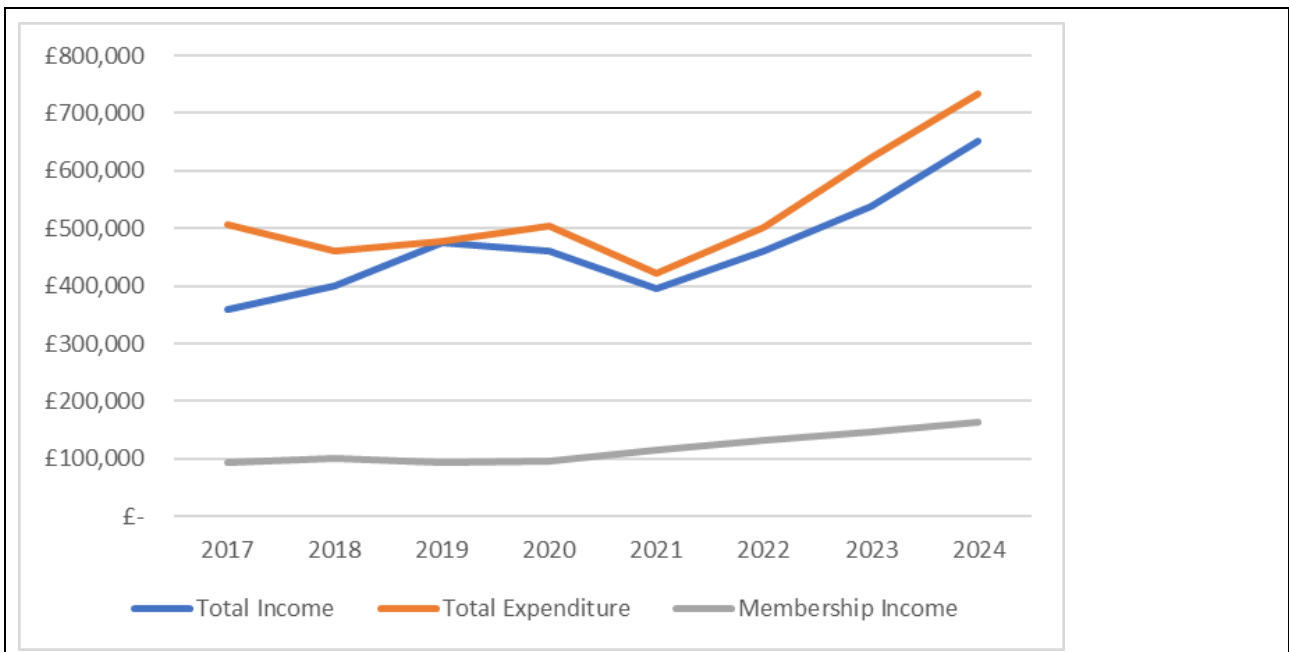


needed on our committees and opened up advertising of Committee roles to the membership. We have undertaken a staff review to ensure we have the right roles and team structure in place to support our strategic ambitions. In 2022/23 we also made the first attempt at quantifying the hugely generous time and effort our members contribute to our work in a voluntary capacity. We found there are more than 20 types of volunteering, contributing over 11,000 days, valued at £1.7 million (more than three times our financial turnover that year of £0.5 million), demonstrating the vast contribution our members make to the scale and reach of our work.

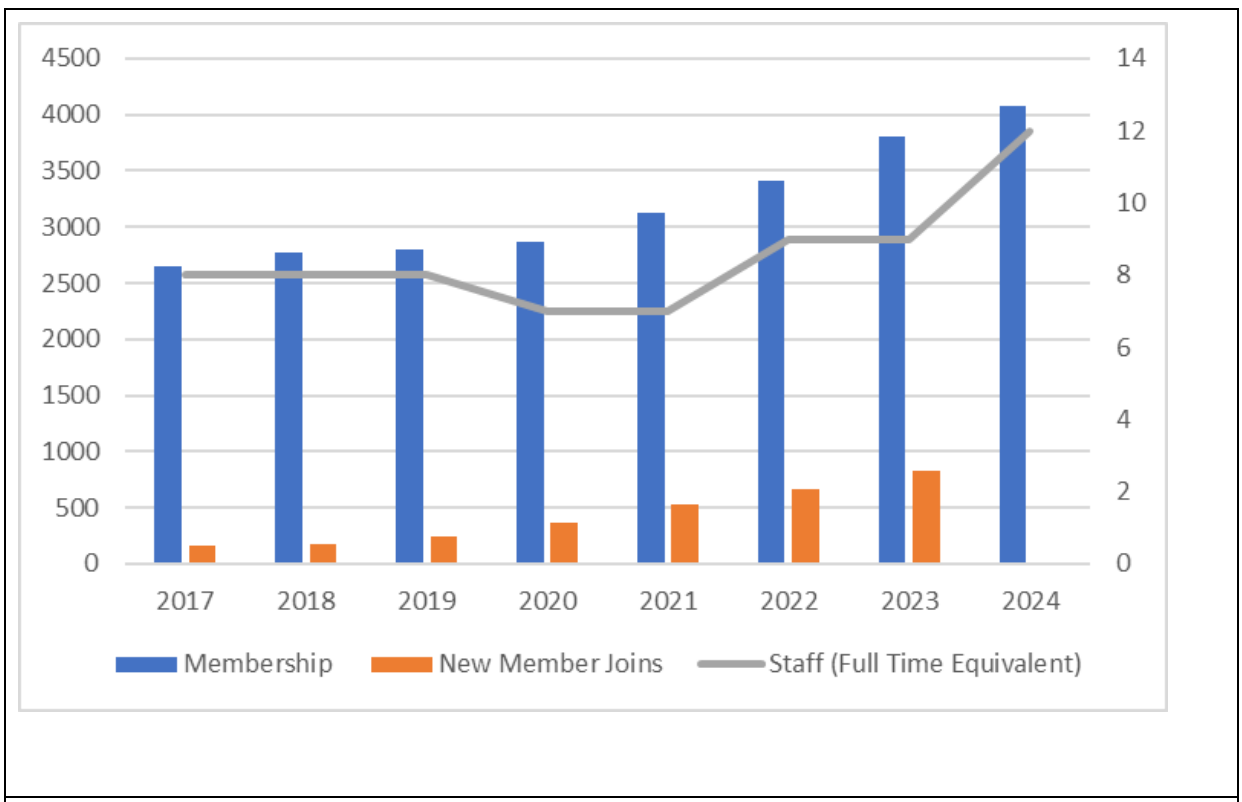
- Strong Relationships: we have strengthened and built on our relationships with current and new partners and put in place longer-term agreements with statutory funding agencies. In the past three years our collaborations with partners have increased our impact and reach, as was demonstrated in the development and launch of *Plant Atlas 2020*.
- Strong Governance: we have held annual Forum meetings to give an opportunity to review and celebrate progress against our plans, bring in new ideas from our members and ensure we are agreed on our overall direction. In response to the 2020 Governance report we have strengthened committee liaison with trustees and developed a Governance Handbook. We have used our strategy decision making criteria in key decisions, such as taking Identiplant and Field Identification Skills Certificates (FISC) in house.
- Effective Data Management Systems: we have invested in new data management and support capacity which is allowing us to document and provide user guidance for our Plant Distribution Database (DDb) and strengthen our data input systems. Much of this work continues in the new strategy period, including launching members' access to the DDb.
- Sustainable business model: we have continued to work towards a business plan that is sustainable in the long-term. Work on our Income Diversification Strategy has led to our income growing much more than we expected (see figure 3) and growth in the number of different types of sources of our income (see Annual Report and Accounts). It has enabled us to launch new projects in areas where we have gaps such as in Northern Ireland (see below).



**Figure 3 Income has grown by much more than we expected**



**Figure 4: Total Income and Expenditure (and Membership Income)**



**Figure 5: Members and Staff Growth (predicted for 2024)**

Our growth in income is allowing us to put in place new roles to meet our strategy ambitions (see figure 5, which shows how growth in staff roles is tracking growth in membership). In the past three years these new staff roles include the Chief Executive, Countries Manager, Fundraising Manager, Data Support Officer, Training Coordinator (FISC & Identiplant) and Northern Ireland Botanical Skills Officer. In the next strategy period planned new roles include the England Officer (pilot

project to identify support needs for County Recorders and improve data flow) and an officer to support the Priority Plants in SSSIs project in Wales.

There are big opportunities to achieve more and be more cohesive in the delivery of our work across the jurisdictions we work in (Ireland, Northern Ireland, Scotland, Wales, England and the Channel Islands and Isle of Man).

However, there are some priority areas where we still need to do more work:

- We have made some progress on better understanding the botanical community and barriers to participation but have more work to do here, including developing an Equality, Diversity and Inclusion Strategy.
- Our Science Strategy has identified the need to record more structured data to answer specific questions, for example on how our flora is changing.
- We have developed and invested in new capacity for our Data Management Plan but have more work to do to deliver the priorities within this.
- We still need to work on making our website fit for purpose and develop a communications strategy.
- We still need to do more proactive succession planning for key roles (including County Recorders, referees, trainers, authors, editors, event organisers and committee members) and we need to continue to regularly refer back to our decision-making criteria in future decisions, to avoid situations where we take on too many areas of work at once to deliver on time (such as members' data access – see below).
- We need to manage change and the high level of growth we have been through recently, in order to grow our work in a sustainable, resilient way, rather than overstretching our brilliant members, staff and governance structures.

In summary we have huge achievements to celebrate from the past three years, including *Plant Atlas 2020* and our training, events, publications and outreach. We have invested in country support and data management capacity to address concerns from members. We still have work to do in other areas including proactive succession planning, addressing barriers to accessing botany, developing structured surveys, making our website fit for purpose, developing a communications strategy, implementing the top priorities in our Data Management Plan and staying resilient in this time of change and growth.

## 2.3 Development of our 2024-2027 Strategy

The 2024-2027 strategic plan guides our direction for the next three years, building on our past work, taking forward opportunities generated and continuing work still in progress. The plan was drafted by the Strategy working group and presented to the 2024 Forum meeting for wider input, then taken to trustees for final decision. The review did not cover BSBI's values and principles, as this would require wider consultation, but these could be reviewed in future years if a clear need is identified. These consultations on the strategy have concluded that our strategy map (vision, mission, three goals, five foundations, strategy decision making criteria), with refreshed priorities for the next three years (against the goals and foundations) and some small changes to wording of our strategy statements (see Strategy Map), continues to be a good fit for our ambitions and direction of travel.

## 3. The environment we operate in

### 3.1 The opportunities and threats in our environment

In our 2021-2024 Strategic review, in discussion with current and potential partners, we analysed the trends and drivers in our external environment. Since then, we have developed our new Science Strategy (including further analysis of the environment we operate in, see figure 6 below); held three Forum meetings to discuss progress and new ideas; reviewed and updated our Income Diversification Strategy; undertaken a membership survey; and developed our Data Management Plan.

Key science topics	n	%
Climate change (including adaptation & resilience)	41	14
Non-native species (distribution, spread & impacts)	19	7
Improving data quality through new technologies	18	6
Genetics (including genomics, eDNA, phylogenetics, etc.)	16	5
Monitoring ecological change & drivers of change	15	5
Education & training of future botanists	14	5
Impacts of land management & conservation activities	12	4
Plant taxonomy & variation	12	4
Plant interactions with other groups (e.g. animals, fungi, insects, etc.)	11	4
Community engagement & public understanding of our science	9	3
Developing conservation guidance & strategies for land managers	8	3
Species distribution analyses	8	3
Focused studies on rare, scarce & threatened species	8	3
Monitoring rare/threatened species' populations at key sites	7	2
Ecological restoration & rewilding	6	2
Habitat studies & species associations including novel habitats & assemblages	6	2
Causes and consequences of habitat loss, change and fragmentation	5	2
Plant diseases & resistance	5	2
Plant translocations & reintroductions	5	2

**Figure 6: Science Strategy consultation: key science topics identified, in order of popularity**

All of these reveal a wide range of both generic and specific opportunities and threats, which are central to the development of our strategy. We believe the following have the greatest significance to us, presenting both opportunities and challenges or threats:

- Climate change, biodiversity loss, land use change and globalisation of trade bring many implications:** threats include species loss; new pests and diseases; pressure on land and resources; habitat destruction; rising sea levels; invasive species; and population movement. Opportunities include: more people interested in botany and conservation; more interest in the need for new policy and evidence; and the creation of new funding opportunities.
- Changing demographics affecting our members:** we have unique expertise, knowledge, skills and contributions from our members; collectively our members contribute a huge and expert voluntary effort (estimated value £1.7 million in 2022/23). However, we also face: an increase in members over 70; fewer younger members with sufficient time for volunteering (both in botany and governance); a strong need for proactive succession planning.

- **Economic uncertainty:** high cost of living; inflation – and resultant pressures on our members, funders (including government funding uncertainty) and partners putting our work and reach at risk.
- **Increasing awareness of environmental issues, combined with the health and well-being agenda and an associated increase in demand for botanical training, mean greater opportunity to attract new members** and develop an interest in botany and the key role that plants play in the functioning of ecosystems; we have seen very strong and sustainable growth in our membership in 2021-24; we need to balance recruitment and provision for new members alongside supporting the needs of long-term and highly skilled members.
- **The drive to open (widen) access to all data has both opportunities and threats:** by making our data more readily available we increase their usefulness and therefore our visibility and relevance in underpinning and enabling nature recovery, but this must be balanced with respecting the views of the members who collect the data and covering the costs we incur in generating and managing the data.
- **The lack of botanical content in education** is leading to poor skills in educators and influencers, the risk that young people may be disconnected from nature, and fewer people with botanical skills entering the ecology and plant science professions; there is strong need and demand for botanical training and we have good resources and activities available to support botanical study, although there are some gaps in provision both for different skill levels and for different regions.
- **Technological advances**, especially around data capture and analysis, and DNA and RNA sequencing and plant identification. Also, advances in digital and AI systems bring opportunities (e.g. communications, online engagement) and threats (e.g. data loss, difficulty for members to keep up with changing technology, costs).
- **Travel and infrastructure uncertainty:** severe weather, continued health issues post-pandemic, train/bus strikes, and broadband outages all impact the ability of members to attend events both in-person and online.

## 3.2 The partnership environment

BSBI is committed to working with others who share our Vision; indeed, we are convinced that we will only be able to create the change we seek by working alongside other individuals and organisations to pool resources, share ideas and skills.

We are already in partnership, and/or work closely, with key agencies including the statutory nature conservation bodies in the UK (DAERA, Defra, JNCC, Natural England, Natural Resources Wales, NatureScot) and Ireland (National Parks and Wildlife Service). We are also developing relationships with other government agencies involved in land management such as the Environment Agency, Forestry Commission and Forest and Land Scotland.

We work with many Botanic Gardens including those in Cambridge, Dublin, Edinburgh, Kew and Wales. We also work with museums with natural history collections such as the Natural History Museum (London) and the National Museums Northern Ireland and with other local and national organisations with herbaria.

We work with national and local record centres (including with the Association of Local Records Centres in the UK) and with National Biodiversity Network (UK) and the National Biodiversity Data Centre (Ireland).

We work with a range of environmental organisations and collaborations including Plantlife, the Field Studies Council, the Chartered Institute of Ecology and Environmental Management (CIEEM), Butterfly Conservation, the State of Nature partnership, the British Ecological Society, the British Trust for Ornithology, the RSPB, the Royal Entomological Society, national and county Wildlife Trusts, the Wild Flower Society, Wildflower Hour, The Conservation Volunteers (TCV), local natural history societies, botany groups and networks. Also, with landowners such as National Trust, National Trust for Scotland, Woodland Trust and national parks such as in Killarney, the Cairngorms and the Yorkshire Dales. Internationally, we are involved in discussions around the formation of the Federation of European Botanical Societies.

We work across sectors to encourage botanical education, for example we support Botanical University Challenge, we work with environmental consultancies, Natural England, Wildlife Trusts and other partners to deliver FISC botanical assessments and we support the OCR examination board in their work to develop the Natural History GCSE.

We work closely with the UK Centre for Ecology & Hydrology (UKCEH) as well as with a wide range of other universities and research organisations in Britain and Ireland and elsewhere in Europe such as the Met Office, and the Swedish University of Agricultural Sciences.

Current and potential future partnership opportunities include:

- Training and education of professionals and the general public; botanical and habitat identification and survey skills; botanical skills assessments
- Joint conferences or events such as those held for the launches of *Plant Atlas 2020*, or a BSBI presence at partners' events
- Joint field events with partners – for botany or with a focus across taxa and habitats
- Research and data collaborations
- Digitising herbarium specimens
- Monitoring spatial and temporal change in the distribution of our flora, and investigating the causal factors
- Using our data and expertise to strengthen our partners' advocacy work to improve local, national and international policy and decision-making on plant conservation and land management
- Collaborating to strengthen botanical networks, locally, nationally and internationally.

## 4 Our strategy map and pathway to resilience

### 4.1 Strategy map

Our [Strategy Map](#) starts with our Vision, which we know is shared by many other organisations. Our Purpose defines our contribution to achieving this Vision, and how we will work with others to deliver it. The three Goals then set out our ambitions and our key areas of focus.

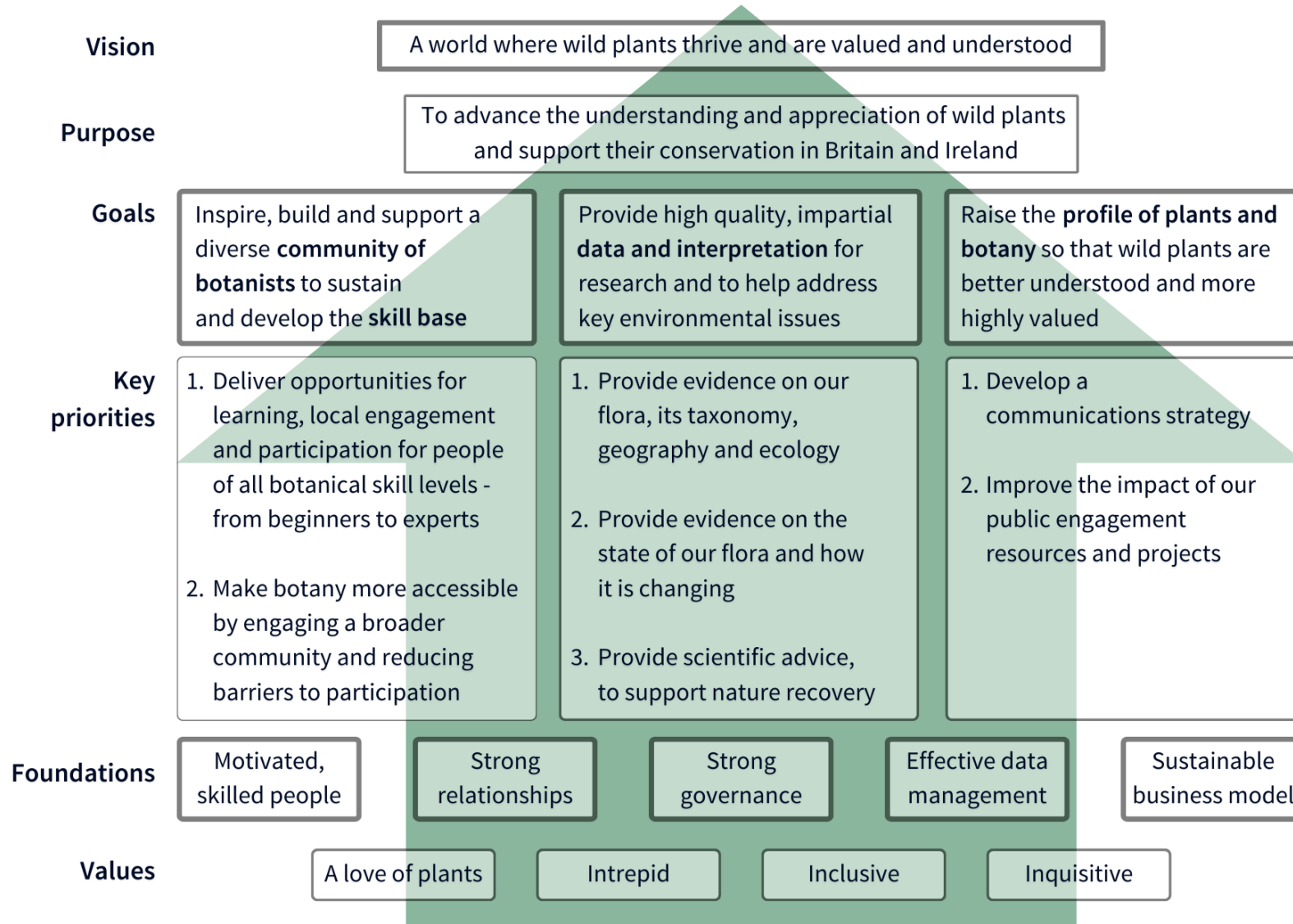
We expect that this Vision, the statement of Purpose, and the three Goals will be the focus of our strategy for many years. The Key Priorities will be our focus for the next three years.

We have defined a set of Foundations which will underpin our strategy and ensure both our effectiveness and our long-term resilience. Each of the Key Priorities and Foundations has a set of success measures and a range of associated activities which are set out below. The Board of Trustees will use these measures to evaluate our performance, and our workforce (members and staff) will use the activities to plan and review their work.

The Values and Principles will drive our behaviour and are central to everything we do as we deliver our strategy.

**Figure 7: BSBI Strategy Map 2024-2027** – see next page.

# BSBI Strategy Map 2024-2027





## 4.2 Our pathway to long-term resilience

Following on from the 2021-2024 strategy, the focus continues to be on building resilience by strengthening our Foundations, ensuring we grow our work in a sustainable way – for our people, capacity and finances - so we can support wild plants, botanists and botany long-term for present and future generations.

The Board will use the following indicators to help define the stages of resilience:

- Reserves within policy levels
- Strong partnership arrangements in place with appropriate partners
- Sufficient diverse new projects in the approval pipeline
- Diverse range of income sources
- Length of contracts with key agency funders

## 5 The deliverables and our three-year plan

### 5.1 Our three strategic goals, their priorities and key activities

Our three strategic goals and their priorities define our core strategy for the next three years. The key activities associated with each priority define the agenda for all our centrally resourced work done by members, staff and committees.

We want to encourage a wide range of different ways in which people can get involved, to meet our shared vision; our members may also wish to pursue local and regional projects, supported by our four country committees.

We have included some discretionary projects that we would like to develop, but where these require central resourcing, trustees must be satisfied that they meet the decision-making criteria before they can commence.

**Goal 1:** Inspire, build & support a diverse **community of botanists** to sustain & develop the **skill base**

**Key Priorities:**

**1.1: Deliver opportunities for learning, local engagement and participation for people of all botanical skill levels, including everyone from beginners to BSBI's network of expert recorders and referees.**

- Improve breadth (across all skills levels, plant groups and regions) and accessibility of BSBI training, events and engagement provision
- Develop a clear journey along our botanical skills ladder – “botanical pathway” to upskill members at all botanical skill levels.

**1.2: Make botany more accessible by engaging a broader community and reducing barriers to participation**

- Identify barriers to participation and implement methods to reduce them.

- Develop an Equality, Diversity and Inclusion (EDI) Plan to improve our inclusion of people from different age groups, genders, regions and other demographics and monitor progress.

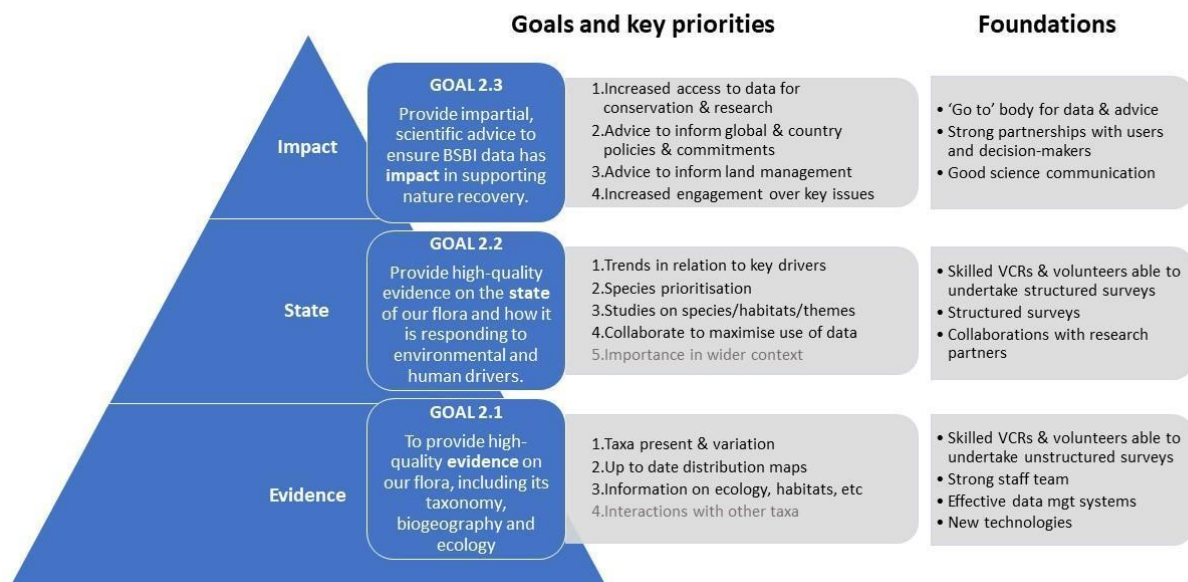
**Goal 2: Science Strategy:** Provide high quality, impartial **data and interpretation** for research and to help address key environmental issues such as biodiversity loss and climate change.

This goal and the underlying priorities come from BSBI’s [Science Strategy for 2024-2029](#).

Our science goals can be seen as a pyramid comprising **evidence**, **state**, and **impact** (see figure 8 below):

- **Evidence** is the foundation of the pyramid as it informs everything BSBI does. These are the data that our expert County Recorders and volunteers collect on the taxonomy, distribution, and ecology of native and non-native plants, largely through unstructured surveys undertaken for county Floras and national distribution atlases.
- **State** is the range of measures (metrics) that we derive from these data to tell us how our flora is changing (trends) and the challenges it is facing (drivers, pressures). As for other taxa, accurate information on state often relies on the findings of more structured surveys designed to address specific questions.
- **Impact** is placed at the apex of the pyramid as it is where information on evidence and state are used to influence and inform decision-making about our natural environment, in particular policies around land use (e.g. forestry, agriculture) and external factors such as climate change and pollution. To have impact, the BSBI needs to be well-known and trusted to provide the evidence needed for environmental decision- and policy-making.

**BSBI Strategy GOAL 2:** To provide high quality, impartial data and interpretation needed for research and to help tackle key environmental issues such as biodiversity loss and climate change



**Figure 8. Science Strategy map.** Note that discretionary priorities are shown in light grey text.

Each science goal has key priorities in terms of the work needed, although it is important to stress that not all will take place within the 5-year Science Strategy period. Discretionary priorities are

also included under each goal. These are projects that BSBI and its supporters consider desirable but of lesser priority. Below is a summary of the three science strategy goals and priorities. For more detail please refer to the Science Strategy document.

## **Science Strategy Goals and Key Priorities**

### **2.1 Provide High Quality evidence on our flora, including its taxonomy, geography and ecology**

#### **Key priorities**

1. Keep track of the changing composition of the British and Irish flora considering taxonomic changes, variation, genetics, evolution, and the arrival of new species.
2. Keep track of the distributions of vascular plants growing in the wild in Britain and Ireland including their origins to allow accurate mapping of native and introduced ranges.
3. Improve our understanding of the ecology of British and Irish vascular plants, including their phenology and habitat requirements.

#### **Discretionary**

4. Improve our understanding of the role plants play within ecosystems, including their interactions and dependencies with other biota (e.g. fungi, animals, insects, etc.) and ecosystem functions and services.

### **2.2 Provide high quality evidence on the state of our flora and how it is responding to environmental and human drivers**

#### **Key priorities**

1. Use data from structured and unstructured surveys to quantify temporal trends for vascular plants in relation to key drivers, such as climate change, invasive non-native species (INNS), pollution, land management, conservation activities, and pests and pathogens.
2. Utilise our data to carry out periodic threat assessments, to underpin species prioritisation for conservation.
3. Undertake focused studies on individual species, assemblages or habitats for monitoring purposes (e.g. populations of priority species on key sites) or to address specific issues (e.g. impacts of water quality on aquatic species).
4. Work with partners to maximise the use of our data through modelling and statistical analyses.

#### **Discretionary**

5. Assess the importance of British and Irish plant populations in a wider international context.

### **2.3 Provide impartial scientific advice, to ensure BSBI data has impact in supporting nature recovery**

#### **Key priorities**

1. Being more proactive in showcasing BSBI science and data and making our data as widely available as possible for the benefit of plants in research, conservation, land management, and development control, ideally via online platforms such as National Biodiversity Network (NBN) Atlas and Global Biodiversity Information Facility (GBIF).
2. Provision of data and advice needed to inform the global environmental agreements (Global Biodiversity Framework, Global Strategy for Plant Conservation, COP) as well as UK, Ireland and country-level strategies, policies, and commitments.
3. Provision of data, advice and tools needed to inform conservation and land management decision-making, such as tree-planting, Biodiversity Net Gain, national nature recovery strategies and networks, agri-environment scheme targeting, ecological restoration, rewilding, species introductions, and seed sowing.
4. Provide a strong voice on key issues through increased engagement with other organisations & decision-makers.

**Goal 3: Raise the profile of plants and botany** so that wild plants are better understood and more highly valued

**Key Priorities:**

3.1 Develop a communications strategy

- Deliver tailored information to defined key target audiences
- Create content and resources, and set objectives, that support current audiences' botanical activity and develop our reach
- Review communications' resource needs and business case to support a growing profile e.g. online content and meetings

3.2 Improve the impact of our public engagement resources and projects (website, publications, events and communications)

- Set and evaluate objectives against resources
- Consider strategic need and business case for website redesign
- Trailblaze impactful ways of sharing stories and information to inspire a passion for plants

## 5.2 Our foundation enablers: critical to success and resilience

The five Foundations underpin our strategy and are critical to our effectiveness and long-term resilience. Each Foundation has a brief description of the overall aim, along with priority activities and success indicators for the next three years.

### Foundation 1: Motivated, Skilled People

Our community of members, supporters and staff are well motivated, trained and supported

- Support our network of expert members who contribute so much time and expertise to our work (e.g. County Recorders, referees, trainers, educators, communicators, authors etc.) so they are motivated to continue our activities and so that BSBI members and others have local and skilled botanists to call on as needed
- Ongoing review of staff and officer roles, structure and training to ensure we have the capacity and capability in place to deliver our strategy

Success Indicators:

- A well-motivated network of expert County Recorders, referees, trainers, communicators, authors and other volunteers in place, who are able to undertake a wide range of tasks (such as surveys and recording; data management; engaging people in local botany; supporting skills development and succession planning, writing handbooks)
- A strong staff team with the skills mix needed to deliver our goals, including skills in activity design (botanical surveys, resources, events etc); project management; volunteer coordination; communication; collaboration; data analysis; digital and financial management
- The right staff and voluntary roles are in place to deliver our strategy (within the context of a sustainable business model)

## Foundation 2: Strong Relationships

We have strong, clear, long-term relationships with key partners

- Maintain strong partnerships and relationships with key partners, with clarity and agreement on how we will work together
- Develop collaborations with research partners to fit with our strategy goals

Success Indicators:

- Partnership agreements in place with key partners and regularly reviewed
- Length of funding agreements with government agency funders
- BSBI recognised as the 'first port of call' for information on vascular plants (data and research collaboration requests)
- Up-to-date partner organisational contacts available for stakeholder communications

## Foundation 3: Strong Governance

Ensure decisions fit our strategy and committees are well informed and resilient

- Ensure our trustees and committee members actively work within our strategic plan
- Ensure decisions on new or changed activities consider our strategy decision-making criteria
- Hold induction meetings and/or provide induction information for new trustees, president, committee chairs and secretaries
- Committees and trustees proactively embrace timely succession planning (with clarity on who is responsible for leading on which roles; regular review of timescales and when people plan to step down; proactive work to seek successors (including advertising to and/or approaching members) and to fill upcoming vacancies in time for good handover periods)

Success Indicators:

- Trustee papers to consider and decide on the case for new or changed work are informed by the strategy decision-making criteria
- Committees develop plans which fit within the overall strategy map (e.g. annual operational plans using relevant parts of the map as a template, or plans in their preferred format that link back to the strategy)
- Trustee, committee and officer vacancies promoted to appropriate timetable and format to ensure: fewer last minute gaps; advertising of vacancies to members; time for handover
- Induction meetings held and/or information packs provided; feedback 6-12 months following induction meetings; review of summary of induction feedback

## Foundation 4: Effective Data Management

Maintain effective online recording and data management systems

- Improve our data management infrastructure including its documentation
- Improve our capacity to support and train recorders and other data suppliers/users in aspects of our data management and systems
- Improve our dataflows including the ability of recorders to submit their data to the BSBI's Distribution Database using a range of platforms including a new online BSBI recording app

The above are the three objectives from the BSBI Data Plan 2024-2026. This plan includes a list of 38 data management tasks, which have been prioritised (high, moderate and low priorities) and are reviewed through quarterly steering group meetings. The low priorities are discretionary projects which we would like to develop but which will take more time and further

investment or funding (with suitable consideration against our strategy decision making criteria). These include revitalising the Herbaria at Home project and developing use of new technologies to improve data quality including remote sensing, eDNA, genetic analysis, image recognition, etc.

## Foundation 5: Sustainable Business Model

Our work is financially sustainable and we have the time and know-how in place to meet our strategy ambitions and stay resilient when dealing with growth and change

- Robustly scrutinise opportunities for growth and change (using our strategy decision-making criteria)
- Monitor performance against strategic, robust financial & operating plans to identify & build on successes and learn from experience
- Recognise the value of our work, internally and externally, and charge appropriately for its continuance and to achieve our aims
- Maintain an appropriate balance between setting core guidance on ways of working for good working practice and efficiency, whilst remaining receptive to the need to be flexible to meet local needs
- Invest ethically, in line with BSBI's environmental charitable aims

Success indicators:

- A diverse range of income sources
- Membership growth % and retention %
- In general, achieve a small surplus each year, subject to our Reserves Policy
- BSBI's reputation upheld by always following responsible and fair working practices

### 5.3 Our operational plans and how will review these

The next step in taking forward our 2024-2027 Strategy is to develop Operational Plans to deliver the priority targets and outcomes identified under each goal and foundation. These will have clear activities, responsibilities, timelines and success criteria to measure and review progress.

Some operational plans will be developed by staff, in consultation with appropriate committees. For example for Goal 2, the Science Operational Plan is led by the Head of Science, with input from appropriate committees (Science & Data Committee and country committees); for Foundation 4, the Data Management Plan was developed and is steered by a working group of staff and trustees, reporting to the Board of Trustees.

BSBI committees will also be encouraged to develop brief annual plans showing the key priorities from the strategy that fit with their area of work and the actions that committee members will take to progress these.

Staff and committees will report to trustees on progress against these Operational Plans. In some cases, we will also need to work on plans to capture the data needed to monitor success such as more data on skill levels, participation and diversity.

The annual BSBI Forum meeting will continue to provide an opportunity to review and celebrate progress against our Strategic Plans, across trustees, committees and staff, and to bring in new ideas from our members or consider whether changes are needed and to ensure we are agreed on our overall direction.

## 6 The risks we foresee & how we will overcome them

Like all charities, BSBI operates in an environment in which there are uncertainties and risks (see section 3.1). The Board of Trustees works to identify risks to which BSBI is or could be exposed and to then either mitigate or manage the impact. The trustees maintain a Risk Register which documents the major risks identified, under the themes of Governance, Operations, Finance, Environmental & Legal. The Board reviews the Risk Register at its quarterly Board meetings and agrees actions. Trustees are satisfied that this system addresses, mitigates and manages BSBI's exposure to the major risks.

Currently risks on which trustees' attention is particularly focused are shown in the table below:

Risks	Mitigators
<p><b>Key governance posts unfilled when current post holders step down</b> – Vacancies in trustee, committee chair or secretary and other senior officer roles give rise to risks that key areas of our strategy delivery, administration, governance, regulatory compliance or financial responsibilities are not carried out, leading to loss of morale or even potentially financial penalties and reputational risks.</p>	<p>This strategy prioritises and emphasises the need for regular proactive succession planning. Support is provided to succession plan for key governance roles, including clearly describing roles, advertised these widely to members and encouraging role sharing and handover periods.</p>
<p><b>Unsustainable growth:</b> Rapid growth in membership, government grants and contracts leads to a level of activities that cannot be sustained and/or overstretched staff or active members, with a knock on impact on delivery and trust from members and partners.</p>	<p>Trustees use the Strategy decision making criteria and regular review of staff and active member's roles and workload to monitor for signs of stress and propose mitigation measures for consideration.</p>
<p><b>Loss of data, electronic functions or other important information.</b> A digital &amp; data review was carried out which identified risks to core activities and functions if not addressed. These included IT issues such as server failure, a lack of specialist knowledge and resource to manage and maintain the BSBI Plant Distribution Database (DDb), a critical BSBI resource, and / or cyber-attack.</p>	<p>Trustees are addressing the situation by strengthening BSBI's resources; a Data Support Officer started in Summer 2023 working alongside the existing Database Officer, each with a clear programme of work, including increasing knowledge and user guidance for the DDb and developing an emergency recovery plan against which progress can be measured.</p>
<p><b>Non-compliance with Irish Charity legislation</b> arising from BSBI not being registered with the Charities Regulator in Ireland, which exposes risks or legal liabilities around the legitimacy of BSBI's activities in Ireland under its UK governing documents.</p>	<p>Trustees have applied to the Charities Regulator in Ireland for BSBI to become a charity in Ireland and are working on some changes to the BSBI's Articles of Association to comply with Irish Charity law, which will need to be approved by members.</p>

## 7 Change leadership and management

BSBI has much to be proud of in terms of all we have achieved in the period of our 2021-2024 strategic plan (as outlined in section 2.2), including the publication of *Plant Atlas 2020*, making our 50+ million records widely available. This is a huge achievement, made possible thanks to the amazing contribution of our members and partners. In addition, our membership has grown by 30%, our events and activities are more popular than ever and our external profile is increasing, resulting in exciting and impactful collaborations. At a time of rapidly growing interest in environmental issues, there are huge opportunities for BSBI, should we be in a position to take them. However, we also face significant challenges. We need to continue to have a clear direction of travel, to enable us to engage with the challenges of loss of biodiversity and a changing climate as well as economic and political uncertainty.

Our Strategy strengthens BSBI by ensuring we have the Foundations we need to move forward in a sustainable and resilient way. Our Strategy gives us the proper avenues for innovation to flourish and ensures that our resources will be used in the best possible way, so we can make the biggest difference to the understanding and appreciation of our wild plants. The goals and actions contained within the plan address and harness the challenges outlined above and allow us to feel confident that we can deal with whatever comes our way.

Having explained the need for ongoing change, it's important to point out what will remain the same. Members will remain central to all we do. BSBI is entirely reliant on, and extremely grateful for, the effort, time and skills received from our members. Our plan allows our members to be more fully aware of BSBI's goals and planned activities and exactly how they can contribute towards delivering them and fulfilling BSBI's potential. The Foundations BSBI relies on for our work – motivated, skilled people, strong relationships, strong governance, effective data management and a sustainable business model - will be improved and strengthened in order for BSBI to deliver even more, and to do so more effectively in the future. Our members are at the heart of these endeavours and we aim to provide them with all the necessary tools and functions to support them in their activities.

The way we have designed our strategic plan and governance means that the great ideas that come from members now have the means to get on the agenda. This ensures that we can make the most of and harness the hard work that takes place locally and across Britain and Ireland.

In a changing world, our wild plants have never been more in need of the support, understanding and appreciation that BSBI is uniquely placed to provide. Since 1836 BSBI has repeatedly re-focused and re-structured so that we could meet the demands of the times. We've broken new ground and pioneered new approaches while building on a solid base: our reputation and influence, our heritage and our many achievements over the decades. Now we continue to change, so we are ready to make the most of current opportunities and meet future challenges.



## 8. References

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## 9. High Level Budget 2024-2027

The table below provides a summary of the high-level budget for the Strategic Plan period. A spreadsheet version (attached for Trustees' meeting) gives details of assumptions and comparisons with other years.

		<b>YE Mar-25  BUDGET</b>	<b>YE Mar-26 HIGH LEVEL BUDGET</b>	<b>YE Mar-27 HIGH LEVEL BUDGET</b>
<b>INCOME</b>				
	Grants	286,276	200,000	200,000
	Projects and Contracts	248,610	170,337	175,000
	Botanical Education - Conferences & Courses	146,696	150,000	154,500
	Botanical Publications	29,400	25,000	25,000
	Membership Subscriptions	155,000	162,750	179,432
	Donations	108,750	100,000	100,000
	Legacies	3,000	10,000	10,000
	Royalties	4,000	4,000	4,000
	Investment Income	21,936	20,000	18,000
	Gift Aid Income	22,669	27,125	29,905
	<b>TOTAL INCOME</b>	<b>1,026,337</b>	<b>869,212</b>	<b>895,837</b>

<b>EXPENDITURE</b>				
	<b>Direct Costs</b>			
	Grants	66,410	50,000	50,000
	Projects & Contracts	20,371	1,250	1,250
	Botanical Education - Conferences & Courses	87,965	90,000	92,700
	Botanical Publications	14,830	11,000	10,000
	Membership costs	51,590	50,000	50,000
	Website and Databases	7,078	10,000	5,000
	<b>Sub total</b>	<b>248,243</b>	<b>212,250</b>	<b>208,950</b>
	<b>Staff Costs</b>	<b>649,634</b>	<b>626,899</b>	<b>645,705</b>
	<b>Overheads</b>	<b>126,968</b>	<b>119,727</b>	<b>122,990</b>
	<b>TOTAL EXPENDITURE</b>	<b>1,024,845</b>	<b>958,876</b>	<b>977,646</b>
	<b>OPERATING SURPLUS / (DEFICIT)</b>	<b>1,491</b>	<b>(89,664)</b>	<b>(81,809)</b>
	<b>GAIN / (LOSS) ON INVESTMENTS</b> (too unpredictable to estimate)	-	-	-
	<b>NET SURPLUS / (DEFICIT)</b>	<b>1,491</b>	<b>(89,664)</b>	<b>(81,809)</b>
	<b>General Fund</b>	<b>49,791</b>	<b>(38,864)</b>	<b>(34,009)</b>
<b>Operating Surplus / (Deficit) met by Fund</b>	Strategic Development Fund	(33,000)	(43,000)	(40,000)
	Presidents' Award Fund	(300)	(300)	(300)
	Welsh Flora Fund	-	-	-
	Scottish Officer Fund	-	-	-
	Heritage Fund	-	-	-
	Support for Recorders Fund	(10,000)	(5,000)	(5,000)
	Botanical Training Fund	(5,000)	(2,500)	(2,500)
	<b>TOTAL</b>	<b>1,491</b>	<b>(89,664)</b>	<b>(81,809)</b>

BSBI's [Reserves Policy](#) summarises the reserves held by BSBI and gives context for this high level budget. This policy is reviewed annually and the latest version is available on the [Governance page](#) of our website.