



**81st  
Annual Report  
& Accounts  
2014/15**

The British Trust for Ornithology  
The Nunnery  
Thetford  
Norfolk IP24 2PU

Registered Charity No. 216652 (England & Wales) No. SC039193 (Scotland)  
Company Limited by Guarantee  
Registered in England and Wales Company No. 357284

**The British Trust for Ornithology  
Council and Management  
2015**

**Patron** HRH The Duke of Edinburgh

**Council**

<i>President</i>	C G Packham	2014-2017
<i>Chairman of Council</i>	Professor A D Fox	2014-2017
<i>Honorary Treasurer</i>	Dr T J Osmond	2012-2015
<i>Honorary Secretary</i>	Ms F M Hurst	2015-2018

<i>Chairman of Regional Network Committee</i>	Lt Col R C Dickey	2014-2017
<i>Chairman of Ringing Committee</i>	Dr K W Smith	2011-2014
<i>Other Council Members</i>	Dr F Barclay	2014-2017
	Professor S Bearhop	2015-2018
	B D Briggs	2012-2015
	A C B Henderson	2014-2017
	Dr H Insley	2012-2015
	C P R Mills	2014-2017
	Professor I P F Owens	2012-2015
	Dr D M Parker	2014-2017
	Mrs J Spencer	2015-2018

<b>Vice Presidents</b>	K F Betton	2014-2021
	Professor T R Birkhead	2013-2020
	Professor J O'Halloran	2011-2018
	Professor A R Watkinson	2012-2019

**Regional Network Committee**

*Chairman* Lt Col R C Dickey; N Bielby; R E Chapman; C W Dee; R J Haycock; Dr H Insley; G R Kirk; Dr D M Parker; Mrs P A Williams.

**Ringing Committee**

*Chairman* Dr K W Smith; Professor S Bearhop; B D Briggs; J D Fletcher; Dr M V Hounsome; Professor D Norman; Dr J Smart; C P Wearn; E Weston.

**Management**

*Director* Dr A Clements; *Director of Science* Dr J W Pearce-Higgins (from Jul 2014); *Director of Science (Ecological Change)* Professor R J Fuller (to Dec 2014); *Director of Science (Modelling & Demography)* Dr S R Baillie (to Dec 2014); *Director of Services & Company Secretary* A T Scott; *Associate Director Communications (Engagement)* Dr D I P Evans; *Associate Director Communications (Science)* M P Toms; *Associate Director Country Offices* Dr C V Wernham; *Associate Director Information Systems* Mrs K M W Wright (from Nov 2014); *Associate Director Science (Monitoring)* Dr A J Musgrove (from Nov 2014); *Associate Director Science (Research)* Dr R A Robinson (from Nov 2014).

**Past Chairmen and Presidents**

<i>Chairman</i>	<i>Presidents</i>		
1935-39	The Right Hon. Earl of Mansfield	1958-60, 65-68	R C Homes
1940-41	The Right Hon. Malcolm MacDonald MP	1961-64	C A Norris
1942-47	Dr A Landsborough Thomson CB OBE DSc	1969-72	I J Ferguson-Lees
1948	Dr E M Nicholson CB CVO	1973-76	R A O Hickling
1949	A W Boyd MC	1977-80	J M McMeeking MBE
1950	Sir Norman Kinnear	1981-84	S M Taylor
1951-56	Major-General H P W Houston	1985-89	J A Hancock OBE
1957	R C Homes	1990-93	R P Howard
1988-91	G H Green	1994-96	Sir William Wilkinson
1992-96	I C Castle	1997-2001	Sir Frederick Holliday
1996-2000	Dr H P Sitters	2002-2005	Lord Blakenham
2001-2004	A J Martin	2006-2013	Baroness Young of Old Scone
2005-2008	Dr S Hunter		
2009-2013	Professor I Newton FRS OBE		

**BRITISH TRUST FOR ORNITHOLOGY**

**STAFF LIST**

(as at 31 March 2015)

**DIRECTOR: Dr Andy Clements**

PA to the Director: Nicki Read

<b>SCIENCE</b>		<b>COMMUNICATIONS</b>		<b>SERVICES</b>		
<p align="center"><b>Director: Dr James Pearce-Higgins</b> PA / Senior Secretary: Nicki Read Senior Secretary P/T: Jane Chase</p>		<p align="center"><b>Associate Director Communications – Engagement: Dr Ieuan Evans</b> <b>Associate Director Communications – Science: Mike Toms</b> Senior Secretary P/T: Sam Rider Secretary: Sandra Sparkes</p>		<p align="center"><b>Director: Andrew Scott</b> PA / Personnel Officer P/T: Sophie Foulger</p>		
<p><b>Associate Director – Monitoring: Dr Andy Musgrove</b> (Secretary: Nicki Read) <b>Associate Director – Research: Dr Rob Robinson</b> (Secretary: Jane Chase)</p>		<p><b>COMMUNICATIONS ENGAGEMENT</b></p>		<p><b>Accounts &amp; Facilities</b></p>		
<p><b>Senior Research Fellow: Dr Stephen Baillie</b> (Secretary: Jane Chase) <b>Senior Research Fellow P/T: Prof Rob Fuller</b> (Secretary: Nicki Read)</p>		<p><b>Membership &amp; Volunteer Engagement</b></p>		<p>Facilities / H&amp;S Officer Sam Massimino† Facilities / H&amp;S Officer (mat cover) Steven Messenger Financial Accounts Officer / Administration Supervisor Mary Gray General Sales Officer / Admin. &amp; Finance Assistant P/T Sonya Calder Management Accountant P/T Irene Bowles Receptionist P/T Christine Bloomfield Receptionist P/T Charmain Innes † <i>maternity leave</i></p>		
<p><b>Terrestrial Ecology</b></p>		<p>Membership Manager Debbie Todd Membership Administrator Chris Morley Asst. Membership Administrator Sam Graham Training Manager Su Gough</p>		<p><b>Information Services</b></p>		
<p>Head &amp; Principal Ecologist Dr Gavin Siriwardena Senior Research Ecologist Dr Ian Henderson Research Ecologist Dr Greg Conway Research Ecologist Dr Daria Dadam Research Ecologist Dr Kate Plummer Research Officer David Norfolk Secretary Maria Knight/Nicki Read</p>	<p><b>International Research</b></p>		<p>Head Emma Douglas Fundraiser (Corporate &amp; Trust) Bonita Johnston Fundraising Secretary P/T Sam Rider Supporter Development Officer Rachel Gostling</p>		<p>Information Services Manager Dr Peter Lack Librarian P/T Carole Showell</p>	
<p><b>MONITORING</b></p>		<p><b>Fundraising</b></p>		<p><b>Research Support</b></p>		
<p><b>Demography</b></p>		<p>Head Kate Risely† GBW Administrator Heather Pymar GBW Assistant P/T Donna Hobbs GBW Assistant P/T Nicky Ward GBW Development Officer Clare Simm</p>		<p>Senior Research Support Officer Emily Coleman Research Support Administrator Sandra Sparkes Research Support Officer Penny Mitchell</p>		
<p>Head &amp; Principal Research Manager Jacquie Clark Research Ecologist Gary Clewley Research Officer P/T Mark Grantham Secretary Jane Waters</p>		<p><b>COMMUNICATIONS SCIENCE</b></p>		<p>Business Science Leader P/T Dr Nigel Clark Nunnery Lakes Site Manager P/T Chris Gregory</p>		
<p><i>Ringling Licensing and Sales</i></p>		<p><b>Garden Ecology</b></p>		<p>.....</p>		
<p>Head of Lic. &amp; Regulation Allison Kew Licensing &amp; Sales Manager P/T Jez Blackburn Ringling Sales Officer P/T Anne Trewwhitt</p>		<p>GBW Organiser GBW Administrator GBW Assistant P/T GBW Assistant P/T GBW Development Officer</p>		<p><b>Marketing</b></p>		
<p><i>Ringling Data Management</i></p>		<p>† <i>maternity leave</i></p>		<p>Head Jeff Baker Media Manager Paul Stancliffe</p>		
<p>Ringling Data Manager P/T Bridget Griffin Recoveries Officer Lee Barber Ringling Database Officer P/T Dr Dorian Moss Recoveries Officer Diana de Palacic Ringling Officer Sabine Schäfer</p>		<p><b>RESEARCH</b></p>		<p><b>INFORMATION SYSTEMS</b></p>		
<p><i>Demographic Monitoring Projects</i></p>		<p><b>Population Ecology &amp; Modelling</b></p>		<p><b>Associate Director: Karen Wright</b> Senior Secretary P/T: Jane Chase</p>		
<p>Senior Research Ecologist Dr Dave Leech Nest Records Organiser Carl Barimore Ringling Surveys Organiser Ruth Walker Secretary Hazel Evans</p>		<p>Head &amp; Principal Ecologist Dr Simon Gillings Senior Research Ecologist Dr Stuart Newson Ecological Statistician Dr Alison Johnston Ecological Statistician Dr Mark Miller Research Ecologist Dr Sam Franks Research Ecologist Dr Dario Massimino Research Ecologist Dr Blaise Martay Research Ecologist Dr Cat Horswill Secretary Jane Chase/Hazel Evans</p>		<p>Senior Database Officer Dr Andrew Joys Senior Software Developer Mark Hammond Senior Software Developer Dave Turvey Senior Systems Manager Ian Yates† Website Manager William Skellorn Computer Support Officer Lee Cadwell Database Officer Bob Blogg Database Developer Steve Pritchard Database Developer Justin Walker Software Developer Sam Marston Software Developer Matthew Baxter Temporary Computer Systems Officer Luke Delve † <i>additional paternity leave</i></p>		
<p><b>Surveys</b></p>		<p><b>Wetland &amp; Marine Research</b></p>		<p><b>BTO SCOTLAND</b></p>		
<p>Head of National Survey Coordinator Dawn Balmer Secretary Maria Knight/Nicki Read Projects Co-ordinator John Marchant BirdTrack Organiser Nick Moran BBS National Organiser Sarah Harris</p>		<p>Head &amp; Principal Ecologist Dr Niall Burton Senior Research Ecologist Dr Graham Austin Research Ecologist Dr Aonghais Cook Research Ecologist Dr Viola Ross-Smith Research Ecologist Dr Chris Thaxter Research Manager Dr Lucy Wright Research Officer Ian Woodward Secretary Maria Knight/Nicki Read</p>		<p><b>Associate Director Country Offices P/T: Dr Chris Wernham</b> Senior Secretary P/T: Rebecca Cranston</p>		
<p><i>Wetland Bird Survey</i></p>		<p><b>COMBINED ECOLOGY</b></p>		<p>Senior Research Ecologist P/T John Calladine Data and Admin. Officer Anne Carrington-Cotton Development Coordinator Dr Ben Darvill Research Ecologist P/T Dr Liz Humphreys Research Ecologist Dr Mark Wilson Scottish Raptor Monitoring Coordinator Dr Amy Challis</p>		
<p>WeBS National Organiser Dr Chas Holt WeBS Low Tide Count Organiser Neil Calbrade WeBS Counter Network Org P/T Heidi Mellan</p>		<p><b>Commercial Director</b> Allan Archer Science Director Phil Atkinson Secretary Nicki Read/Maria Knight</p>		<p><b>BTO CYMRU</b></p>		
				<p>Senior Ecologist P/T Dr Rachel Taylor Development Coordinator Kelvin Jones</p>		
				<p><b>BTO NORTHERN IRELAND</b></p>		
				<p>Northern Ireland Officer Shane Wolsey</p>		

**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report)**  
**For the Year Ended 31 March 2015**

For the purposes of Section 162 of the Charities Act 2011 and Directors' Report for the purposes of Section 415 of the Companies Act 2006.

Company number:	357284
Charity number:	216652 (England and Wales) SC039193 (Scotland)
Principal Office and Registered Office:	The Nunnery, Thetford, Norfolk IP24 2PU
Principal Advisers:	
Auditor	Lovewell Blake LLP, Bankside 300, Peachman Way, Broadland Business Park, Norwich NR7 0LB
Principal Bankers	National Westminster Bank plc, 7 Cornhill, Bury St Edmunds, Suffolk IP33 1BQ Royal Bank of Scotland, 2 Blenheim Place, Edinburgh EH7 5JH
Solicitors	Birketts LLP, Kingfisher, 1 Gilders Way, Norwich, Norfolk, NR3 1UB
Pensions Advisers	Russell Ulyatt Financial Services Ltd, 1 The Triangle, ng2 Business Park, Nottingham NG2 1AE
Investment Advisers	Russell Ulyatt Financial Services Ltd, 1 The Triangle, ng2 Business Park, Nottingham NG2 1AE
Insurance Brokers	Uttings, 16 The Fairland, Hingham, Norwich, Norfolk NR9 4HN

The members of Council are the directors of the charitable company and the trustees for the purpose of charity law. Those serving during the period were as follows:

Dr F Barclay	Ms F M Hurst
Professor S Bearhop (appointed 1 January 2015)	Dr H Insley
B D Briggs	C P R Mills
N J Bucknell (retired 31 December 2014)	Dr T J Osmond
Lt Col R C Dickey	Professor I P F Owens
Professor A D Fox	C G Packham
Professor R W Furness (retired 31 December 2014)	Dr D M Parker
A C B Henderson	Dr K W Smith
Mrs M P Henton (retired 31 December 2014)	Mrs J Spencer (appointed 1 January 2015)

## **Structure, Governance and Management**

### **Governing Document**

The British Trust for Ornithology (also known as the BTO) is a company limited by guarantee governed by its Memorandum and Articles of Association. It is registered as a charity with the Charity Commission and the Office of the Scottish Charity Regulator. Membership is open to any person whose application is approved by Council upon payment of the requisite subscription. Members undertake to contribute up to £1 each in the event of an insolvent winding up.

### **Trustees**

Trustees are nominated by Council or members and elected by the members at the Annual General Meeting in December each year, to serve from the following 1 January. The normal term of office is four years. New trustees receive a comprehensive information pack and undergo an induction day at The Nunnery to brief them on the BTO and their role as company directors and trustees.

### **Organisation**

The trustees make up the Council, which is the governing body of the BTO. Council meets four times a year. Council is supported by the Regional Network and Ringing Committees. The day-to-day management of the BTO is delegated to the Management Group, led by the Director.

**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report) - Continued**  
**For the Year Ended 31 March 2015**

### **Related Parties**

The BTO's wholly owned subsidiary, BTO Services Ltd, was established to undertake commercial operations in support of the BTO, and gifts its profits to the Trust.

The BTO co-operates with many other charities, with government agencies and other bodies in pursuit of its objectives, as illustrated in this report.

### **Volunteers**

The Trust depends on the contributions of many thousands of volunteers who participate in BTO surveys and other activities. We are greatly indebted to them, and especially to the Regional Representatives and other regional volunteers who organise so much BTO activity at a local level. It was estimated that BTO volunteers contributed the equivalent of 203,000 days of work in 2014.

### **Risk Management**

A risk register is maintained which identifies the significant risks faced by the BTO and the measures in place to manage those risks. These are monitored by Management and reviewed biannually by Council.

### **Investments**

The Memorandum of Association permits the Trust to invest monies not immediately required for its purposes as the trustees see fit. During the year the trustees reviewed their investment strategy, and appointed Dimensional Fund Advisors Ltd as fund managers. A substantial part of the portfolio was re-invested in a sustainable fund (see note 9).

### **Objectives and Activities**

#### **Charitable Objects**

The objects of the Trust, as set out in its Memorandum of Association are, for the benefit of the nation:

- (i) To promote, organise, carry on and encourage study and research and particularly field work for the advancement of knowledge in all branches of the Science of Ornithology.
- (ii) Permanently to preserve and protect lands and objects which by their natural features are suitable for the preservation and study of bird life and of fauna and flora generally.

#### **Public Benefit**

The trustees have complied with the duty in Section 17 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission. The following paragraphs set out in detail the aims, activities and performance of the Trust, and the way in which they provide public benefit.

#### **Objectives and Activities**

The BTO's purpose and public benefit is to deliver objective information and advice, through undertaking impartial research and analysis about birds, other species and habitats, to advance the understanding of nature. We inform policies and evidence-based decisions that impact on the environment such that future generations can benefit from a healthy and wildlife-rich environment. The BTO does this by:

- Sustaining long-term extensive programmes and smaller scale intensive research to study the population trends, movements, breeding, survival, ecology and behaviour of wild birds;
- Encouraging, enthusing, training and supporting volunteers to take part in scientific studies;
- Bringing together professional scientists and volunteer birdwatchers in surveys of wildlife (particularly, but not exclusively, birds);
- Analysing the data gathered through these studies, making information available to Government and other bodies, and publishing the results in the primary scientific literature and via the internet, the birdwatching and conservation press and the media more generally.

**The British Trust for Ornithology  
Council (Trustees') Report (incorporating the Strategic Report) - Continued  
For the Year Ended 31 March 2015**

The BTO Strategy 2009-14 has been formulated to achieve our mission, and has the broad aims of:

- Encouraging more proactive, innovative and responsive science;
- Improving the accessibility of data and information;
- Achieving a stronger image and improved public profile;
- Gaining more supporters and enhancing our engagement with them;
- Looking after our staff;
- Growing and broadening the Trust's funding base;
- Demonstrating best practice governance.

These broad aims are achieved through a well-defined and cost-effective programme of work of which the key elements are:

1. Conducting fieldwork through our nationwide network of 50,000 volunteers, with planning of projects, collation of data and the analysis and publication of results by staff, under guidance from Council and its committees;
2. Maintaining a programme of long-term monitoring of the distribution and abundance of birds (including Integrated Population Monitoring and modelling), to alert the conservation community to population changes, to suggest likely causes and remedies, and direct further research;
3. Growing our research programme on the relationships between wildlife and their habitats, at multiple scales from ecosystems to territories, in order to better understand the impacts of land-use and environmental change;
4. Developing a collaborative climate change research programme;
5. Undertaking research at home and abroad on migration and the ecology of migrant birds;
6. Extending our wetland and coastal research and survey into an established marine environment programme.

## **Strategic Report**

### **Achievements and performance**

The objectives set for 2014/15 and the progress achieved against those objectives were as follows:

1. *Determine our strategic science priorities to ensure we remain impartial, independent and relevant. We will aim to provide evidence-based knowledge to support decision-making for the environment, and to inform and engage society in participating to understand and contribute to the value of that knowledge. While we expect our science increasingly to set the agenda for ornithological research, we will continue to build and rely on strong partnerships that yield highly collaborative research.*

During the period April 2014 to March 2015, BTO Science has undergone considerable reorganisation, moving from two Science Directors (Rob Fuller and Stephen Baillie), who have become Senior Research Fellows and will continue to make an important contribution to BTO research, to a single Director of Science (James Pearce-Higgins), supported by two associate directors, Andy Musgrove (monitoring) and Rob Robinson (research). To reflect this, the structure of the science department has changed, improving linkages between the Demography and Surveys teams, whilst ensuring strong working across both monitoring and research. These changes should maximise our twin strengths, of delivering long-term citizen science monitoring and of research excellence, particularly around the analysis and interpretation of those long-term data.

At the same time, the Science Strategy was developed, to feed into the BTO Strategy 2015-20, and also to form an operational guide for science staff. Three questions describe the motivation that underpins BTO science, and are an outworking of our vision of outstanding science inspiring action for a wildlife-rich world:

- What is the status of populations and what are the causes of changes?
- What processes explain observed ecological patterns amongst birds and other biodiversity?
- What is required to manage species and habitats sustainably?

This research will be undertaken within a broad framework consisting of nine topic areas which define the space within which BTO science operates and build on and extend the six themes of the 2009-14 strategy:

- The science of monitoring
- Flyways ecology
- Habitat relationships
- Species ecology
- Population & range dynamics
- Testing interventions
- Species interactions
- Climate change
- Birds & human values

**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report) - Continued**  
**For the Year Ended 31 March 2015**

**Achievements and performance (cont'd)**

Eight strategic research programmes (SRPs) have been identified as priorities for the initial years of the new strategy period, but will be kept under review by the Science Strategy Group.

- Developing mechanistic and predictive models of population and range changes
- The ecology, population dynamics and migration strategies of Afro-Palaeartic migrants
- The development of appropriate adaptation strategies in response to the impacts of climate change upon biodiversity
- The ecology, population dynamics, migration strategies and impacts of development on seabirds
- The ecology, population dynamics and migration strategies of non-breeding waterbirds
- The impacts of land management on birds and other biodiversity in the uplands
- The consequences of urbanisation and infrastructure development for biodiversity
- The ecology of predators and non-native species, and their impacts on other species and the environment

*Terrestrial Ecology*

Most research in this area in 2014-15 was driven by the availability of external contract funding, but promising new avenues for work in 2015-16 and beyond were opened up late in the financial year by the establishment of a new appeal for funding for research on farmland bird issues and the winning of a number of Sound Approach small grants. Although no new large projects were started, reflecting the reduction in public spending throughout the UK, new work was conducted under a Natural England (NE) framework agreement that had been won previously, whilst much of the remainder involved consolidation and continuation (or completion) of previously existing projects. The rationale behind all our contract research has been to support evidence-based policy-making by government and its agencies by providing sound, new knowledge. Some of this work has been collaborative, with important relationships with the Centre for Ecology and Hydrology (CEH) and Universities of Cranfield, Exeter and Sheffield in particular, as well as with various universities around PhD projects.

In farmland, the international 'FarmLand' BiodivERsA project (funded by Defra), which investigated the potential of crop heterogeneity to deliver the biodiversity and ecosystem services found in more complex landscapes without reducing agricultural productivity, reported and the data are currently being integrated into international analyses by colleagues in France, Germany and Spain. Collaborative papers will follow and it is hoped that BTO-specific outputs will be produced under JNCC funding in 2015. In Wales, the BTO component of the Glastir Monitoring and Evaluation Project (GMEP, led by CEH), continued and the second year of field survey results, together with summaries of bird population trend information and new analyses of the effects on birds of historical ('legacy') agri-environment schemes, have been reported to the Welsh Government. This is a major, multi-objective, integrated monitoring scheme that considers a range of biodiversity, water quality, soil quality, greenhouse gas emissions and landscape aesthetics, focusing on a 'health check' for Wales as a whole as well as measuring the effects of Glastir on environmental targets. Although planned to continue indefinitely, GMEP funding has been cut for year three in 2015 and future support is uncertain. The projects conducted in 2014-15 under the NE framework agreement for agri-environment monitoring (in collaboration with RSPB) were monitoring of the new supplementary feeding option in Environmental Stewardship (ES) and a repeat of the Baker *et al.* (2012, *Journal of Applied Ecology*) analysis of ES effects on bird populations with three further years of data and management. Both have reported, producing some interesting results, and papers integrating these results with review work and the Welsh legacy scheme analyses are planned for submission in 2015. Finally in farmland, a PhD project with the University of Cardiff using molecular techniques (Polymerase Chain Reaction analyses) is making good progress in identifying thrush diets in contrasting pastoral (South Wales) and arable (Cambridgeshire) landscapes.

Following the Defra-funded woodland research project that reported in 2013-14, little further woodland work has been funded, although Rob Fuller has continued to work on the biodiversity implications of management responses to ash die-back under BTO/Joint Nature Conservation Committee (JNCC) Partnership funding. Volunteer survey work on Woodcock has resulted in a submitted manuscript to *Bird Study* led by Game and Wildlife Conservancy Trust (GWCT) that gives new population estimates for the species. In grassland and heathland, the PhD project with Lancaster University investigating survival and productivity as drivers of Whinchat population change on Salisbury Plain has been completed, with papers expected to be submitted in 2015. Research on Nightjar ecology and habitat use using GPS tagging has continued, with growing collaborations with NE and groups in Sweden and Belgium helping this work to develop. Repeat survey work in Wales on the transitional scrub habitat known as ffridd was conducted in 2014 under Natural Resources Wales (NRW) funding and analyses are in progress with a view to producing a paper in 2015.

BTO, in partnership with the John Hutton Institute and MacArthur Green, is continuing to provide specialist scientific advice on machair waders to Scottish Natural Heritage's (SNH) Uist Wader Research programme, which aims to assess the effects of predation to inform ongoing management of machair. A BTO study (currently a pilot as an MRes study) is investigating birds using beach wrack: seasonal, tidal, structural (of the wrack) and invertebrate abundance (within the wrack) correlates with bird abundance.

**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report) - Continued**  
**For the Year Ended 31 March 2015**

**Achievements and performance (cont'd)**

In the field of urban ecology, effectively forming groundwork for a new Strategic Research Programme in 2015-16, work was conducted in four principal areas. First, three papers are in preparation from the Defra Street-lighting and Moths project from 2013-14. Secondly, (professional) fieldwork on the Natural Environment Research Council (NERC) Biodiversity and Ecosystem Service Sustainability (BESS) project (in collaboration with Cranfield, Essex and Sheffield Universities) has been completed and the data collected are under analysis, in collaboration with Exeter University. Work on the effects of urban form on the bird communities in Luton, Bedford and Milton Keynes is being led by Exeter, while papers measuring the aesthetic "service" provided by different bird species will be led by the BTO. Third, analyses of the effects of urbanisation around our towns and cities on bird communities are being investigated using Bird Atlas 2007-11 data (under BTO/JNCC Partnership funding). Finally, the programme of research using the BTO Garden BirdWatch (GBW) dataset (building on specific appeal-generated BTO funding), is continuing. The first major topic, an analysis of the influences of garden bird feeding and habitat on the increase in the reporting of Blackcaps in gardens, has been submitted to *Global Change Biology*.

Broader habitat-focused modelling work remains in progress in two main areas. First, whilst there has been little progress in the integrated socio-economic modelling of land-use and biodiversity with the University of East Anglia (UEA) leading on from the UK National Ecosystem Assessment (NEA), more significant work is expected in 2015-16. Second, the modelling project considering land-use correlates of bird abundance at different scales being conducted using bird data collected during Countryside Survey (CS) 2000 and the contemporaneous Land Cover Map and CS field data is nearing completion. This is being done as a PhD studentship with CEH and the University of Newcastle and a first paper has been accepted for publication in *Methods in Ecology and Evolution*.

Finally, significant research has been undertaken under the BTO/JNCC Partnership. In addition to the analyses of urbanisation effects using atlas data mentioned above, a report reviewing and trialling a range of approaches for enhancing the monitoring value of BTO data by adding the capability to summarise assemblages of species efficiently and to incorporate monitoring based on functional groups (c.f. 'guilds') has been completed. This will be converted into a manuscript for peer review and submitted to a journal in 2015.

*Population Ecology & Modelling*

Although much of the work of the Population Ecology and Modelling (PEM) team has been focussed on analysing BBS data, it will increasingly also cover atlas research, with Simon Gillings now taking over management of the team from James Pearce-Higgins. The first paper from the *Beyond the Maps* appeal, concerning range shifts between the 1988-91 and 2007-11 bird atlases, was accepted and published in *Global Change Biology* (Gillings *et al.* 2015). Species-specific papers using atlas data were published for Tree Pipit, Lesser Redpoll, Whinchat and Stonechat (Henderson *et al.* 2014 *Bird Study*, Burgess *et al.* 2015 *Bird Study*). Bird atlas data featured prominently in a review of the status of fish-eating birds in Scotland and analyses of the relationships between avian predators and their avian prey, as part of the *Understanding Predation* project. Bird range shifts, derived from species-specific survey data, also contributed to a Bournemouth and York University led collaborative paper published in the *Biological Journal of the Linnean Society* (Gillingham *et al.* 2015). Analyses of bird communities changes in the uplands and of the factors determining distribution and abundance patterns were undertaken, and will be completed for publication in 2015.

The development programme of the Breeding Bird Survey (BBS) has successfully delivered a number of products. Firstly, the production of habitat-specific trends was finalised, leading to an additional component of the reporting on the BirdTrends webpages. Analyses of these data were published in *Biology Letters*, demonstrating that national scale variation in these population trends is consistent with predictions from the buffer effect (Sullivan *et al.* 2015). An additional manuscript from this work is currently in review. Additional analysis of the drivers of change in bird communities on BBS squares was completed, and has produced two draft manuscripts which should be submitted to journals early in 2015/16. Further analyses compared the patterns in the composition of bird and butterfly communities on BBS squares (the latter from the Wider Countryside Butterfly Survey) and found some significant covariance between the two. This was published in *Landscape Ecology* (Eglington *et al.* 2015). Important work examining variation in the detectability of birds on BBS squares was also published (Johnston *et al.* 2014 *Bird Study*). Ongoing analyses of correlates of Curlew status, range shifts, projected climate change impacts, spatial indicators and changes in habitat on BBS squares are at an advanced stage, and should be progressed towards publication in 2015. As usual, analysis within the team (largely by Dario Massimino) led to the production of BBS trends, the update of the BirdTrends website, and the production of bird indicators for Defra.

Climate change issues continued to be a significant component of the work conducted within the team. Whilst a final draft of the BICCO-Net report has been produced, a number of papers from this project, which assessed the impacts of climate change upon species' population trends across a range of taxa, have been progressed towards submission to journals. An important paper, summarising the impacts of climate change on UK breeding birds from the first BICCO-Net project was published in *Journal of Animal Ecology* (Pearce-Higgins *et al.* 2015). Work for another collaborative project



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For the Year Ended 31 March 2015**

**Achievements and performance (cont'd)**

(SPACE 2), this time led by CEH and funded by NERC, has involved analyses of bird and insect phenologies to examine the potential impacts of phenological mismatch upon the breeding success of swallows in detail, and upon insectivorous birds in general. Related to this topic, the book *Birds and Climate Change: Impacts and Conservation Responses*, written by James Pearce-Higgins and Rhys Green (RSPB), was published by Cambridge University Press in July 2014.

The Norfolk Bat Survey completed a successful second field season and a manuscript describing the field and analytical protocols and showing spatio-temporal patterns of distribution and activity has received favourable reviews from the journal *Biological Conservation*. The project will continue with BTO funding in 2015.

*Demographic Research*

A key aim of the BTO's monitoring programme is to understand the demographic mechanisms responsible for large-scale changes in population size, which then provide information to underpin wider conservation strategies. Increasingly, we are seeking to integrate our datasets to assess the contributions of different demographic rates to population change. A major advance facilitating this has been the creating of Integrated Population Models using a Bayesian state-space framework (Robinson *et al.* 2014 *Methods in Ecology & Evolution*). These combine ringing, nest recording and count data in a single analysis to gain a full picture of the annual life-cycle, even though we may not measure directly all the demographic rates. Importantly, these models allow us then to easily compare variation in drivers, and their contribution to population change, across species facilitating identification of generic patterns within particular groups. This analysis suggested that change in population size of increasing species is driven to a greater extent by variation in adult survival, while change in declining populations is more associated with variation in recruitment. In future, we aim to expand the range of species for which we can create such models.

One group of species for which there is much concern at the moment are the Afro-Palaeartic migrants, with populations of some species showing large declines, though populations of others are increasing (BirdTrends 2014). A variety of work, at a range of scales, has been undertaken to investigate the drivers of these population changes. At a European scale, we secured funding from NERC (with colleagues at the UEA) for a three-year project exploring spatial variation in population trends across Europe and relating this to migratory status and demographic changes. A key question at such scales is the (demographic) mechanisms underlying range change. We published a paper relating changes in spring temperature to latitudinal variation in productivity, to assess whether increased productivity could explain range expansions seen in some migratory species (Eglinton *et al.* 2015 *Global Ecology & Biogeography*). This suggested that latitudinal gradients have not changed much through time, but highlighted significant local adaptation in productivity. Timing of events in the annual cycle can be especially important for migratory species and we published work on the timing of breeding in Willow Warblers (Morrison *et al.* 2015 *Bird Study*) and the timing of moult in a range of migrant and resident species (Morrison *et al.* 2015 *Ibis*), the latter work funded almost entirely by ringers who collected the data.

Another key group on which we undertook demographic work has been seabirds, where we have worked closely with colleagues at JNCC and the Seabird Monitoring Programme (SMP) to better understand variation in both survival and productivity. Good knowledge of both is critical in the construction of population viability models, which are frequently used as part of the assessment process for offshore energy developments, especially windfarms. We also continued our collaborative work on disease by looking at the potential importance of wild birds in the spread of diseases: garden birds and salmonellosis (Lawson *et al.* 2014 *PLoS One*) and West Nile Virus (Bessell *et al.* 2015 *Transboundary & Emerging Diseases*).

*Wetland & Marine Research*

During the past year, there has been further development of the BTO's marine research work programme, and a more renewed focus on our wetland research, this being paralleled by developments in monitoring.

BTO scientists have been actively engaged with JNCC and other partners of the national SMP in the development of plans for the next national Seabird Census. Initial surveys are being undertaken in 2015, with the full census expected to run from 2016-2018, subject to funding. A second annual Northern Ireland Seabird Report, for 2014, was produced through the work of the Northern Ireland Seabird Network, coordinated by the BTO, working in close collaboration with the JNCC's SMP team, and funded by the Northern Ireland Environment Agency (NIEA). (Funding for the Northern Ireland Seabird Coordinator ceases in June 2016.)

Funding is also being sought and Information Systems development implemented for the proposed Non-Estuarine Waterbird Survey (NEWS-III), planned for the winter of 2015/2016, which will complement WeBS by updating population estimates for waterbirds, contributing to monitoring of protected sites, and providing data for researching the effects of climate and other environmental change on these populations.

Our marine research programme has had a continuing focus on marine renewables. On behalf of the Department of Energy and Climate Change (DECC), and in collaboration with the University of Amsterdam, we have extended our work assessing the interactions of Lesser Black-backed and Herring Gulls from Special Protected Areas (SPAs) with offshore

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wind farms through GPS tracking to two further sites, Skokholm (Skokholm and Skomer SPA) and South Walney (Morecambe Bay SPA). The project has produced exceptionally high quality information about how birds use the offshore environment, throughout the year. Work from this project was presented at the Conference on Wind Energy and Wildlife Impacts in Berlin and BOU Avian Tracking and Remote Sensing conference in March. The first three of a series of papers planned from the projects have also been published (Thaxter *et al.* 2014 *Ringling & Migration*, Thaxter *et al.* 2015 *Biological Conservation*, Wade *et al.* 2014 *Marine Environmental Research*). A related project has trialled new GPS tags in Northern Ireland.

Forewind Ltd's Dogger Bank Creyke Beck A and B Offshore Wind Farm projects received consent from the Planning Inspectorate in February 2015, while the Planning Inspectorate examination process for the following Dogger Bank Teesside A and B Offshore Wind Farm projects was also completed in the same month, with a decision expected later this year. The BTO's work to inform these applications has been significant, and has included survey and other research-based advice, and production of the ornithological baseline reports and Environmental Impact Assessments (EIA) for these projects. The BTO's contribution resulted in some major modifications to the original specification of the wind farm design. A paper on the modelling of population estimates for this work has recently been published (Johnston *et al.* 2014 *Journal of Applied Ecology*).

Our advisory work in relation to offshore wind farms has included, on behalf of Marine Scotland Science, a key review of collision avoidance rates and, on behalf of JNCC, an assessment of the sensitivity of metrics used to assess population impacts of offshore wind farms on seabirds and a review of seabird demographic rates and density dependence.

Following work for JNCC to develop a series of indicators to inform the Marine Strategy Framework Directive, further work has been undertaken on behalf of the OSPAR Convention to expand these indicators to include data for other countries for the Celtic Seas and Greater North Sea. Further marine work has included a synthesis of information on the conservation status of the Lesser Black-backed Gull (Ross-Smith *et al.* 2014 *Seabird*) and associated reviews of ringing data to inform NE's conservation advice.

Our wetland research has been varied, from the applied, through advisory to novel considerations of the ecosystem services provided by waterbirds. On behalf of Tidal Lagoon Power, through Combined Ecology, we have provided advice on potential impacts and survey requirements to inform proposals for a tidal power lagoon in the Severn Estuary. On behalf of Medway Council, we reviewed knowledge regarding the effect of major estuarine developments on bird populations with reference to proposals for an airport in the Thames. Through collaboration with Footprint Ecology and Bournemouth University, and a workshop consultation, we have undertaken work to quantify the potential for impacts from housing development to waterbirds on SPAs to help inform NE's strategic approach to this issue.

We continue to provide detailed advice to country agencies on waterbird trends on SPAs through fine-scale analyses of WeBS data and building on this work have investigated potential factors for bird declines on the Humber Estuary SPA and The Wash SPA as part of NE's 'Improvement Programme for England's Natura 2000 Sites' (IPENS) programme. Also on behalf of NE, we have reviewed the use of WeBS data for rapid condition assessment of non-breeding waterbird SPAs. As part of a flyway-level collaboration, BTO contributed to a further paper assessing climate change impacts on wintering wildfowl distributions (and protected area networks) (Pavon-Jordan *et al.* 2015 *Diversity & Distributions*). BTO work on the cultural services provided by waterbirds (informed by WeBS data) in association with socio-economists from the University of St. Andrews and Queen's University, Belfast, is ongoing.

*Monitoring Research*

David Noble continues to be very active at a European level, providing good profile for BTO, particularly as Vice-Chair of the European Bird Census Council (EBCC), where he is heavily involved in the European Breeding Bird Atlas project. Stephen Baillie has been actively inputting to another EBCC project, EuroBirdPortal, which is a mechanism for collating bird records from European schemes, such as BirdTrack, in order to track seasonal changes in species' distributions and abundances. This should result in a BTO-led perspectives journal publication, and a website, to be launched in June 2015.

Work was completed on the European Red List for Birds project as part of a consortium led by BirdLife. A new European Red List will be launched on June 3<sup>rd</sup>. The State of Nature in EU report, which is based upon submissions by member states for Article 12 and 17 reporting (Birds and Habitats Directives), is being launched on May 20<sup>th</sup> (<http://www.eea.europa.eu/publications/state-of-nature-in-the-eu/>). Importantly, the UK submission (by JNCC) included a large volume of distribution and trend info from BTO surveys. Also at a European level, work is underway by Simon Gillings and David Noble under the Alterra-led project to evaluate the umbrella effect of Natura2000 sites across Europe in protecting non-target species. BTO and SOVON are leading on the bird elements, which will involve significant analysis early in 2015/16.

In the UK, the WildSurveys element of the Royal Society of Wildlife Trusts' (RSWT) Living Landscapes project has been completed with the development of multi-taxa survey protocols to inform the structured monitoring of conservation interventions across RSWT's sites and Living Landscapes. In addition, BTO submitted a report commissioned by National

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Trust (NT) to use BTO monitoring schemes to quantify breeding and wintering bird populations on their land, and where possible to compare trends on and outside NT land. The NERC-funded DURESS research project led by Cardiff University on the ecosystem services provided by upland rivers in Wales has been extended until December 2015. BTO will undertake analyses of its extensive bird datasets for Wales over the next few months.

*International Research*

Research on migration continues to be a significant work area for the International Team. Research on Cuckoos has moved beyond tracking *per se* to using the data to answer broader questions about linking migration strategy to population dynamics and focusing in on stopovers and the role of protected areas in Europe. Two advanced-draft manuscripts have so far been produced. We continued to pursue international collaborations and tagged 10 additional birds in Belarus in 2014. For Nightingale and Swifts we continue to use geolocators to describe individual's migration strategies and look to integrate the data from these two species with that of the Cuckoos and Nightjars to look at the dynamics of the spring stop-over in West Africa. We continue to promote our tracking work very successfully through the BTO website (e.g. daily updates on the Cuckoo tracking work [www.bto.org/cuckoos/](http://www.bto.org/cuckoos/) and local and national media, including a talk at the Cambridge Science Festival).

BTO has been involved in the setup of the Migrant Landbird Study Group. In November 2012, the CMS Conference of the Parties (COP) being held in Bergen, Norway, delivered a mandate to establish a Working Group to develop a new Action Plan for Africa-Eurasia Migrant Landbirds (AEMLAP). This Action Plan was accepted in 2014 and one of the actions was to encourage the development of a Migratory Landbird Study Group (MLSG), an international network of specialists and organisations involved in research, monitoring and conservation of migratory landbird species, and encourage participation by national experts in the MLSG.

The other main focus of the team's work has been that of International capacity building. BTO has entered into a four-year partnership with the AP Leventis Ornithological Institute (APLORI, University of Jos, Nigeria) and the University of Cape Coast (UCC) in Ghana to develop a two year MPhil course in Ornithology and Conservation Biology. This initiative is funded by the AG Leventis Foundation and APLORI and will provide scholarships for two Ghanaian students each year. BTO will also teach a third-year undergraduate ornithology module on the undergraduate course.

- 2. Continue to improve accessibility to BTO data, enhancing its value to society. We will extend our data, information and on-line services, through a larger constituency, and to broader taxa, and build our recognised capability with new technologies for data capture. We now have an active collaboration with the Cornell Lab of Ornithology, Ithaca NY USA, and with Birdlife International, and will use our success with BirdTrack global data entry portal to make further progress in building a facilitative platform to accept bird observational data at the global scale.*

During the period April 2014 to March 2015, the Information Systems team in conjunction with, especially, the Surveys and Demography teams, continued to develop and release several key projects.

The WildSurveys component of the LivingMap initiative (in partnership with RSWT) was completed and released in March 2015. The LivingMap project is strategically relevant to the BTO's work, broadening our abilities into the multi-taxa arena. The WildWalks component, released last year, has multiple benefits to society: public engagement, the capacity to record spatially referenced wildlife observations, flexibility to involve people with different levels of expertise from entry level to expert, the ability to direct people to specific places, the ability to make qualitative judgements on long-term change, and the capturing of data of conservation value. However the highly innovative concepts and tools within WildSurveys are complementary to all existing biodiversity monitoring in the UK, providing information on habitat creation and intervention activity, providing a tool for assessing quantitative long-term change in biodiversity and creating the framework for addressing questions about management at landscape scales. Plans are in place to seek funding for further developments and increased promotion of these tools.

BirdTrack continues its steady rise with 6m observations from Britain and Ireland last year, bringing the total to 32.8m records. There has been a continued focus on the development of our global data entry system, with another 86,000 global records entered directly by observer. Additionally, an important milestone was the incorporation of millions of records from the WorldBirds database previously managed by RSPB and BirdLife International. We are now responsible for extensive data holdings in many countries, particularly in the Middle East and parts of Africa, Thailand and Sri Lanka. Notably, the dataset includes about a million observations made by around 750 people in Spain and Greece alone. BirdTrack is now being used by BirdLife Cyprus as their core bird recording system and we are already providing them with over 3,000 records per month. Although BirdTrack's global data entry systems are still relatively young, we were able to provide sample datasets for 24 countries to the European Breeding Bird Atlas 2 project, and anticipate being able to provide large numbers of records in future years. As well as transferring these records into the BTO's database, we have undertaken important work to enable BirdTrack to be used in multiple languages, and we have also been setting up a

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number of country-specific web-portals (Spain and Nigeria have been the first to go live). We look forward to working ever more closely with the BirdLife community over the coming years.

BTO has played a leading part, alongside colleagues from Catalonia, Switzerland, the Netherlands, Belgium and many other countries, in the development of a new collaboration known as EuroBirdPortal. This initiative, due to be launched in Brussels in June 2015, combines summarised data from BirdTrack alongside other similar online schemes to produce a continent-wide picture of bird movements, including some innovative new map outputs. Similar collaborative work with Cornell has not progressed as rapidly as we might have liked. However, towards the end of the year, a new funding opportunity was identified which has allowed discussions between Cornell and the BTO to resume at a higher level. This will hopefully facilitate the building of a global data repository and provide the impetus for the *Tringa* project to become established.

The restructured Ringing database and the associated application for staff use were transferred to the live server in June 2014. The servers hosting this, and the other online surveys, were upgraded with extra memory and storage at this time, necessitating a complete rebuild of the infrastructure. Feedback from ringers has been good, with many reporting very noticeable improvements in turn-round times for details of reported birds. Work continued throughout the rest of the year on the next phase of this project, building online functionality for ringers, nest recorders and members of the public and is expected to continue with a high level of Information Systems resources for several more months. This will include work in parallel to incorporate the Scottish Raptor Monitoring Scheme. The ringing permit renewal process was automated, reducing time and costs associated with this task.

The incorporation of the Waterways Breeding Bird Survey into the BBS online system was very popular, with 75% of participants moving to the new system in its first year. Similarly, the developments to allow optional recording of detectability during BBS, introduced at the end of 2013/14, were also adopted immediately and smoothly by the majority of participants.

Towards the latter part of the year, the Information Systems team began development of the software for NEWS-III. This is planned for the winter of 2015/2016 although the software has been developed to enable this to be conducted as a regular monthly survey similar to WeBS should this be required in the future.

Development work for the Heronries survey, the BTO's longest running survey, started in the summer of 2014 and completed in early spring 2015. The software has been designed to allow for better re-use of the code as surveys of other colonial nesting species are scheduled. The Information Systems team is working towards better integration in general of the BTO online surveys and BTO web pages which will speed development and produce a more coherent set of online survey pages.

The functionality to request a grid square for the House Martin Survey was deployed in March 2015 (the full data capture pages were released in early April) with high levels of interest and around 2,000 squares had been taken up by the end of the month.

A small piece of work was produced for the Norfolk Bat Survey, building on the grid allocation functionality released last year, which now allows members of the public to reserve bat detectors from local centres.

BTO data and data products continue to be made widely available, both through our bespoke data request service and through our heavily-used online systems such as the WeBS Online Report (updated in August 2014 and again, in record time, in March 2015), the Online Ringing Report, BirdTrack, BirdTrends and so on. Of particular significance, we also launched the Bird Atlas Mapstore allowing free, live access to all of the Atlas maps from 1968-72 to 2007-11.

We have continued to build functionality to share data more effectively, working with CEH to build a mechanism to transfer multi-taxa data between the BTO and CEH's iRecord database and allowing observations to be verified by experts outside of the BTO system. This will be particularly important for Living Map and BirdTrack, but also relevant for GBW, BBS and other schemes.

We were pleased to be able to make a substantive submission to a consultation on Defra's Biodiversity Monitoring and Surveillance Strategy. We continued to be engaged in discussions with the planning and consultancy sector, and with the Association of Local Environmental Records Centres (ALERC), about the best ways to enable biodiversity data can be used for wise decision making.

We had positive discussions with the NBN Trust in the light of their new strategy and plans for a new UK Wildlife Portal and we expect to have more involvement with this over the coming year. Over two million BBS records (birds and mammals) were uploaded to the NBN Gateway in July 2014.

We are planning a new CRM (Customer Relations Management) system to replace the current membership database and had several discussions with suppliers. Unfortunately none of these has led to a firm outcome although they have enabled us to have greater clarity on the integration of the online survey applications with the BTO's website in order to provide a more coherent view for our supporters and to extend our information sharing services. We have identified a new supplier and will continue to work on this.

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3. *Continue to grow and broaden our membership and supporter base.*

An important strand for the Communications Department in 2014-15 has been to initiate a process for improving communication within the organisation, so that the content emerging from the BTO's research is directed to appropriate audiences through relevant communications channels. Better and more joined up communications will support fundraising efforts, help BTO researchers to communicate the relevance of their work to partners and funders, and provide volunteers with feedback that underlines the value of their efforts. A project-based approach, with project communications time-lined for forward planning, will facilitate this and, additionally, increase the sense of ownership that BTO researchers and survey organisers have over the content they are producing. Key to the success of this approach will be the Science Communications Manager, a new post that will also see the development of communications skills more widely across the organisation through training, support and mentoring. All of the BTO's publications will be reviewed as part of this process and already we have seen a major change in emphasis around the printed publications delivered by the Demographic Monitoring Team. The four scheme-based newsletters produced by this team have been amalgamated into a single, larger magazine, *Life Cycle*. At the same time the regulatory content from these newsletters has been moved to electronic channels, enabling us to 'open up' our demographic work to a wider audience and simplifying the structure of our messaging to the volunteers contributing to our demographic surveys.

The renewal date for the vast majority of our members is 1 January each year; therefore, our most accurate measure of member numbers is on a calendar year basis. During 2014 our membership rose above 17,000 for the first time and we ended the year with 17,265 members, a growth of 2.4%. Recruitment was strong with an increase of 5.1% over last year. Our 'Member-get-a-Member' campaign was popular again, accounting for nearly a quarter of those new members. Retention, however, was not as high as usual, chiefly because the largest single source of leavers in any one year are those that joined two years ago and that year was our best ever for recruitment.

The membership experience of new joiners and peer advocacy are obviously hugely important to membership growth. This is also illustrated by a further 5% of new members joining through 'word of mouth'. As such, stewardship will remain integral to achieving our targets under the new strategy.

The number of BTO GBW participants at 31<sup>st</sup> December 2014 was 12,608, down by just under 5% on the previous year; recruitment of new participants was also down on the previous year. Staffing changes, which involved a significant period without the GBW Organiser post fully staffed, no doubt contributed to this but increased competition for 'citizen science' volunteers is likely to have played a part too. Work is underway to review the project and the market within which it operates, with a view to delivering a significant upturn in participation over the next five year period.

In Northern Ireland, Shane Wolsey continued in post as BTO Northern Ireland (NI) Officer and Kerry Leonard as Seabird Coordinator. An application to the Natural Heritage Grants Programme was successful in obtaining funding to continue the NI Officer post for a further three years from November 2014 and to part-fund a Scientific Officer post in NI for the final year of the grant. Shane's work to continue to develop the supporter base in NI continued, including eight formal training events for volunteers (five for BBS and one each for BirdTrack, WeBS and nest recording; attended by around 60 people). The BBS courses were a particular success with an uptake of the survey of almost 70% and resulting in 24 new squares covered. GBW promotion benefitted from the hard work of two volunteer Ambassadors, resulting in attendance at more than 20 events and talks and around 20 new GBW members. In addition, a series of four training days held in collaboration with two local councils was particularly successful, with more than 50% join up from participants. A BTO residential bird survey techniques course was run at Derrygonnelly Field Studies Council centre and attracted 11 participants. A BTO NI e-newsletter was also developed for circulation to supporters during 2014 and the first NI Seabird report was published and was well received by the seabird volunteer network. The BTO NI Members Conference was reinstated in November 2014 after a break in 2013 and attracted 140 delegates (including 25% from the Republic of Ireland). The BTO NI drone was completed and flown for the first time in 2014, including a demonstration to the NI Environment Minister, and attracted considerable interest from supporters and potential users. Successful applications to the NIEL Challenge Fund in 2014 supported development of a new CES site at Portmore Lough (in partnership with RSPB) and part-funded a second Measuring and Monitoring Biodiversity Offshore (MAMBO) conference in March 2015.

In Scotland, a high proportion of activity to grow and broaden the BTO supporter base was focused around the ongoing 'What's Up?' initiative, with the aim of getting more people involved in upland surveying. During the 2014 breeding season, volunteer training courses of two types were run. Those with a general upland focus promoted participation in BBS, BirdTrack and the Mountain Bird Survey; six of these courses across Scotland trained around 120 participants. Further courses were aimed specifically at hillwalkers and included high altitude walks as part of the programme; eight such courses were attended by around 90 participants. During the spring, two BTO staff members provided BBS mentoring to eight new volunteers and supported indirectly many more in taking up new BBS surveys. In total, 488 squares were surveyed in Scotland in 2014, the highest number ever and more than 100 more than prior to 'What's Up?' in 2012. Birdtrack users providing records in upland 10km squares also increased from 393 in 2012 to 593 in

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2014 and the number of records of focal upland species increased from 4,400 in 2012 to 8,600 in 2014. Volunteer engagement in upland surveying and the full range of upland recording was also promoted in articles in a whole range of walking and mountaineering publications and on-line media, and through a number of face-to-face talks to relevant clubs. BTO surveys and upland bird recording were promoted at a series of events through the year, including: the Scottish Bird Fair; Gardening Scotland (GBW focus); the Banff Mountain Film Festival; the Tayside Recorders Day; Stirling Mountain Aid event; RSPB Scotland Annual Volunteers' Day and staff conference; the Scottish Canoe Association Conference; the Dundee Mountain Film Festival and the SOC Annual Conference. Three general bird survey techniques/WeBS courses were also run in 2014 (training 40 volunteers) and weekend bird survey techniques and identification residential courses on Speyside. The annual one-day Scottish Birdwatchers' Conference organised jointly with SOC and held at Glasgow University in March 2015 attracted 180 delegates and was followed by two walks to promote bird recording on the following morning. BTO Scotland staff took part in discussions with the Scottish Land & Estates Wildlife Estates project officer and staff from the British Association for Shooting and Conservation to develop ideas for involving estate staff in bird recording in future. They also shared BTO's experiences of running long-term volunteer-based monitoring schemes at an SNH Sharing Good Practice event on environmental monitoring using citizen science approaches. The new Scottish Raptor Monitoring Coordinator, Amy Challis, took up post in June 2014, hosted by BTO Scotland and working on behalf of the Scottish Raptor Monitoring Scheme partnership. She is developing a range of activities to enhance the Scheme, including training for existing and new raptor monitoring volunteers and a new common raptor monitoring initiative to attract new volunteers.

In Wales, the main focus during the beginning of the year was the continued expansion of BBS across the country. The mentoring scheme continued for another spring and resulted in 411 BBS squares being allocated though unfortunately not all were surveyed due to changing circumstances of the volunteers. Four courses were held across Wales which were again open to all BBS volunteers, and proved popular with excellent attendance. With the grant from NRW for capacity-building ending, the end of the year was spent running BBS and other BTO survey days. The format was an expanded version of the BBS days with the emphasis being on retention and motivation of existing volunteers. The events included the forthcoming House Martin survey, Heronries online, WeBS, BirdTrack and a question and answer. All four events were again very well supported, and the mix of experience present at the days led to lots of interesting interaction. In partnership with the Montgomery Wildlife Trust a WeBS course was held at the Trust reserve on the Dyfi estuary which was well attended and filled in numerous gaps in the west of the county and on the Dyfi biosphere area. Courses will be held in other parts of Wales following on from discussions with the local organisers. The summer period was spent engaging with the members and volunteers through events and demonstrations. The end result was that Wales now has the highest membership per head of population. Further talks and engagement were undertaken during the early winter months. The joint conference with the Welsh Ornithological Society/RSPB was held in November in Ruthin, and the BTO speakers and contribution featured prominently in the positive feedback.

There were 76 radio and media appearances in 2014 (113 in 2013) – 11 TV, 64 radio and one Podcast. The Podcast was for Naked Scientist and featured Viola Ross-Smith. We made 13 appearances on Welsh Radio and two on Welsh TV (SC4), reflecting our continued presence in Wales. Other TV appearances were on BBC Springwatch/Springwatch Extra (3), Rudong TV (China) (1), BBC Look East (1), The One Show (2) and Belarus TV (2). A minimum of 17 members of staff were interviewed on radio/TV (27 last year). We know of 160 talks given by 41 members of staff in 2014 (compared to 163 in 2013).

Our Twitter following continues to grow with over 36,000 followers at the end of 2014. Viola Ross-Smith continues to provide substantial input to our Social Media work, particularly through scientific content. Our tweets during 2014 were retweeted 34,000 times and reached over 200 million potential impressions. We engaged regularly with a number of high profile users including BBC Radio 4, BBC SpringWatch, Nature, London Natural History Museum, BBC Earth, and Chris Packham. We are continuing to grow our presence on Facebook and now have over 13,000 fans. Our YouTube channel continues to work well as an engagement tool. Last year we reported that the BTO YouTube channel had been viewed 425,000 times with over 1,800 subscribers. At this time in 2015 this has increased to over 900,000 views and 3,700 subscribers. The Bird ID videos continue to prove most popular with the Song vs Mistle Thrush video receiving over 125,000 views and the Night Singers video over 95,000 views. We are now also using the channel regularly to provide guidance to surveyors on participating in new surveys. Two blogs – the Demog Blog and the Migration Blog are regularly updated and are successful both in terms of followers and in providing great content for our social media and web presence.

The BTO e-newsletter continues to be a key tool for engaging supporters. During 2014 the e-news mailing list grew from 49,000 to 53,000 addresses and the number of e-news opens increased from 20,000 to 21,500. Individual click through rates vary each month but in 2014 we achieved 6-10,000 clicks per email (depending on the time of year).

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In 2014, volunteers contributed 1.5 million hours of time to BTO work at an estimated monetary value of £29.9 million. BirdTrack and Garden BirdWatch volunteers contributed over 300,000 hours to each scheme while volunteers undertaking ringing and nest recording contributed almost 700,000 hours.

4. *Continue to realise additional capacity in donor fundraising and further develop corporate, trust and legacy giving.*

Our supporters underpin everything we do. Voluntary income is crucial in the face of government funding cuts to fund the research that will inform the conservation priorities of the future for birds and the habitats on which they depend. Donations from members, garden birdwatchers, volunteers and supporters to our *Beyond the Maps* appeal totalled a staggering £142,000 (including Gift Aid). Coupled with large grants secured from successful charitable trust applications provided a total of £210,000 (including Gift Aid) to fund the research to go beyond the maps and find answers to the questions posed by *Bird Atlas 2007-11*. Analysis has already been carried out on 'Directionality of recent bird distribution shifts and climate change in Great Britain' published in *Global Change Biology* (Gillings *et al.* 2015). Our supporters have also provided us with the vital funding to help keep our House Martins from slipping onto the red list of Birds of Conservation Concern. £107,000 was raised through donations to our House Martin Appeal securing a two-year survey to collect new information on population size, breeding ecology and habitat preferences of this charismatic species. The Christmas Raffle generated £26,708 of unrestricted funds for core BTO research.

Significant donations this year include a transformational gift from Mark Constantine, founder of The Sound Approach and Lush Cosmetics, which funded six research projects proposed and developed by our scientists, including Marsh Tits, Nightjars and Long and Short-eared Owls, and the last instalment of a living legacy from Denis Summers-Smith to fund PhD studentships through our Young Scientists' Fund.

Final instalments were received from NRW and the Esmée Fairbairn Foundation for the Senior Ecologist and Development Officer posts in Wales; providing support for volunteer engagement, capacity building and mentoring.

Working in partnership with corporate organisations is an essential component in the realisation of the BTO's strategic vision. We have been forging relationships over this financial year with two large organisations to deliver long-term strategic partnerships, enabling us to grow our financial independence and help maximise the impact and influence of the BTO's research on society through a formal mutually beneficial relationship based on shared values and goals. We have also begun to foster engagement with local business. With The Nunnery Lakes Reserve as our focus we launched the Egg Business Network generating cash through fundraising pledges, volunteer effort through work parties and gifts in kind, such as tools and equipment to improve the reserve. The new five-year contract with Gardman attracts an annual sum of £120,000.

Gifts in wills make a real difference to the work we are able to do. Over half a million pounds was received through legacies this year and we are immensely grateful to be remembered in this special way. An incredibly generous gift from Penny Hollow has launched our *Flight Lines* project, combining art with science to convey the journey of migration, and Maxwell Hoggett has facilitated the instigation of a fellowship programme for BTO scientists.

During the year we launched a commercial consultancy, Combined Ecology, part of BTO Services Ltd, to drive growth in the commercial application of our data, knowledge and scientific expertise at home and internationally, and provide unrestricted funds to support the BTO.

5. *Achieve best-practice governance and maintain good staff morale.*

BTO Council met four times during the year with an excellent attendance record, and good engagement from Vice-Presidents. Our President, Chris Packham, gave an inspiring presentation at our AGM. We continued to work on improving staff morale, engaging early-career scientists and senior managers in particular. As part of strategic development for our people our Director led the development of BTO's *Common Approach to Management*, guiding the culture and behaviour of our organisation for the future.

**Financial Review**

The principal sources of funds continued to be contract research, membership subscriptions, individual donations and legacies. A total of £5,446k was spent during the year on carrying out, supporting and communicating ornithological research. A reduction in commercial and other contract work, together with a lower (although still very good) level of legacy receipts resulted in an operating deficit of £27k for the year, following last year's exceptional surplus of £643k which was boosted by legacies and Atlas book sales. The Trust plans to compensate for the decline in public sector contract funding by investing in new fundraising capacity and by promoting consultancy services through Combined Ecology, part of BTO Services Ltd.

**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report) - Continued**  
**For the Year Ended 31 March 2015**

### **Financial Review (cont'd)**

A further reduction in bond yields led to an increase of £1,483k in the final salary pension scheme liability at the year end and a negative balance sheet total. The trustees are satisfied that this is a temporary anomaly that will be reversed when market conditions normalise, and that the planned level of deficit reduction payments will remain affordable.

### **Reserves**

The trustees have an unrestricted free reserves target range of 9 to 12 weeks' operating expenditure. These reserves are held against any unexpected falls in income or other unforeseen circumstances. Unrestricted funds excluding tangible fixed assets and the pension fund liability at 31 March 2015 totalled £1,090k, equivalent to 9.2 weeks' expenditure. The trustees anticipate that the reserves may fall below the target range in the short term.

### **Principal Risks and Uncertainties**

The trustees consider that the principal risks and uncertainties which could affect the Trust's ability to deliver its objectives in the next year and beyond are public expenditure reductions leading to reduced contract, grant and partnership funding, and the final salary pension scheme deficit draining reserves and presenting at least a theoretical risk of insolvency in the medium to long term.

### **Plans for future periods**

We finalised the BTO Strategy 2015-2020, building in a rich vein of partner, member and supporter responses to a strategic 'Green Paper' consultation issued during the year. Our strategy for the future refreshes our vision and mission:

Our vision: Outstanding science inspires action for a wildlife-rich world

Our mission: BTO is a leading independent, impartial research charity, increasing knowledge of birds and other wildlife, and their relationships with the environment and people. We do this by:

- **Studying wild birds**, their populations, movements, ecology and behaviour;
- **Monitoring the state of nature** by **gathering long-term data sets** and **sharing the outputs**;
- **Inspiring, training and supporting volunteers** to take part in scientific studies, **stimulating a deeper public understanding** and appreciation of birds and other wildlife;
- **Publishing high quality science** and communicating our findings to decision-makers, conservation practitioners and others;
- **Recognising that birds are global travellers** and that our work should reflect this;
- **Sharing our skills**, expertise and experiences by **working in partnerships**;
- **Providing a stimulating and supportive environment** for staff and volunteers.

Our four strategic objectives for the coming period are to:

- Enable and deliver high quality and relevant science
- Share data, information and knowledge through excellent communications
- Enthuse and encourage our people
- Grow our financial independence



**The British Trust for Ornithology**  
**Council (Trustees') Report (incorporating the Strategic Report) - Continued**  
**For the Year Ended 31 March 2015**

**Statement of Council Members' Responsibilities**

The Council members are responsible, as Directors of the Company, for preparing the Annual Report (including the Strategic Report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Council members to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and the group at the year end and of the incoming resources and application of resources, including the income and expenditure, of the charitable company and the group for the year. In preparing these financial statements, the Council members are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company and the group will continue in operation.

The Council members are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Council members are responsible for the maintenance and integrity of the corporate and financial information included on the Trust's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

In so far as the Council members are aware:

- there is no relevant audit information of which the Trust's auditor is unaware; and
- the Council members have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

**Auditor**

A resolution to re-appoint Lovewell Blake as auditor for the ensuing year will be proposed at the annual general meeting under section 485 of the Companies Act 2006.

The Council (Trustees') Report (incorporating the Strategic Report) was approved by the Council as Directors and Trustees and authorised for issue on 8 July 2015.

Professor A D Fox  
Chairman

Dr T J Osmond  
Honorary Treasurer

## **Independent Auditor's Report to the Members of The British Trust for Ornithology**

We have audited the financial statements of The British Trust for Ornithology for the year ended 31 March 2015 which comprise the Consolidated Statement of Financial Activities, the Consolidated Income and Expenditure Account, the Consolidated Balance Sheet, the Company Balance Sheet, the Consolidated Cash Flow Statement and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006 and to the charitable company's trustees, as a body, in accordance with section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and regulation 10 of the Charities Accounts (Scotland) Regulations 2006 (as amended). Our audit work has been undertaken so that we might state to the charitable company's members and the charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company, the charitable company's members as a body and its trustees as a body, for our audit work, for this report, or for the opinions we have formed.

### **Respective responsibilities of Council Members and Auditor**

As explained more fully in the Statement of Council Members' Responsibilities set out on page 14, the Council Members (who are also the directors of the British Trust for Ornithology for the purposes of company law) are responsible for the preparation of the Annual Report and the financial statements and for being satisfied that the financial statements give a true and fair view.

We have been appointed as auditor under section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and under the Companies Act 2006 and report in accordance with regulations made under those Acts. Our responsibility is to audit and express an opinion on the financial statements in accordance with applicable law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's (APB's) Ethical Standards for Auditors.

### **Scope of the audit of the financial statements**

A description of the scope of an audit of financial statements is provided on the FRC's website at [www.frc.org.uk/apb/scope/private.cfm](http://www.frc.org.uk/apb/scope/private.cfm).

### **Opinion on financial statements**

In our opinion the financial statements:

- give a true and fair view of the state of affairs of the charitable company and the group as at 31 March 2015 and of the group's incoming resources and application of resources, including its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006, the Charities and Trustee Investment (Scotland) Act 2005 and regulations 6 and 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended).

### **Emphasis of matter – going concern**

In forming our opinion on the financial statements, which is not modified, we have considered the adequacy of the disclosure made in accounting policy note 'k' to the financial statements concerning the British Trust for Ornithology's ability to continue as a going concern. The parent charitable company incurred a net loss of £1,786,439 during the year ended 31 March 2015 and, at that date, the parent charitable company's net liabilities were £878,834, including the defined benefit pension scheme liability of £3,794,000. This condition, along with the explanation contained in note 'k' to the financial statements, indicate the existence of a material uncertainty which may cast significant doubt about the parent charitable company's ability to continue as a going concern. The financial statements do not include the adjustments that would result if the parent charitable company was unable to continue as a going concern.

**Independent Auditor's Report to the Members of  
The British Trust for Ornithology - Continued**

**Opinion on other matter prescribed by the Companies Act 2006**

In our opinion the information given in the Strategic Report and the Council Report for the financial year for which the financial statements are prepared is consistent with the financial statements.

**Matters on which we are required to report by exception**

We have nothing to report in respect of the following matters where the Companies Act 2006 and the Charities Accounts (Scotland) Regulations 2006 (as amended) require us to report to you if, in our opinion:

- the parent charitable company has not kept proper and adequate accounting records or returns adequate for our audit have not been received from branches not visited by us; or
- the parent charitable company's financial statements are not in agreement with the accounting records or returns; or
- certain disclosure of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

Bankside 300, Peachman Way,  
Broadland Business Park, Norwich NR7 0LB  
Date:

Mark Proctor ACA DChA (Senior Statutory Auditor)  
For and on behalf of Lovewell Blake LLP, Statutory Auditor

**The British Trust for Ornithology**  
**Consolidated Statement of Financial Activities**  
**for the Year Ended 31 March 2015**

	Note	Unrestricted Funds £	Restricted Funds £	Total 2015 £	Total 2014 £ <i>Restated</i>
<b>Incoming resources</b>					
<b>Incoming resources from generated funds:</b>					
<i>Voluntary income:</i>					
Membership subscriptions and donations		841,352	-	841,352	807,010
Individual donations		102,979	346,787	449,766	401,420
Trust and corporate grants and donations		16,258	132,254	148,512	96,072
Legacies		588,308	2,547	590,855	848,863
		<u>1,548,897</u>	<u>481,588</u>	<u>2,030,485</u>	<u>2,153,365</u>
<i>Activities for generating funds:</i>					
Trading and consultancy		648,412	-	648,412	978,851
Royalties and copyright		121,488	-	121,488	98,934
Corporate membership and sponsorship		11,492	-	11,492	8,346
Other income		15,396	-	15,396	110,592
		<u>796,788</u>	<u>-</u>	<u>796,788</u>	<u>1,196,723</u>
<i>Investment income</i>	3	21,106	51	21,157	22,551
		<u>2,366,791</u>	<u>481,639</u>	<u>2,848,430</u>	<u>3,372,639</u>
<b>Incoming resources from charitable activities:</b>					
Monitoring, research and communications		2,567,232	3,397	2,570,629	2,951,129
<b>Total incoming resources</b>		<u><b>4,934,023</b></u>	<u><b>485,036</b></u>	<u><b>5,419,059</b></u>	<u><b>6,323,768</b></u>
<b>Resources expended</b>					
<b>Costs of generating funds:</b>					
Costs of generating voluntary income		460,986	34,007	494,993	428,912
Costs of activities for generating funds		543,493	-	543,493	754,199
		<u>1,004,479</u>	<u>34,007</u>	<u>1,038,486</u>	<u>1,183,111</u>
<b>Charitable activities:</b>					
Monitoring, research and communications		4,014,195	356,512	4,370,707	4,459,889
<b>Governance costs</b>		37,253	-	37,253	38,004
<b>Total resources expended</b>	6	<u><b>5,055,927</b></u>	<u><b>390,519</b></u>	<u><b>5,446,446</b></u>	<u><b>5,681,004</b></u>
Net (outgoing)/incoming resources before transfers		(121,904)	94,517	(27,387)	642,764
Gross transfers between funds	15,16	(93,578)	93,578	-	-
<b>Net (outgoing)/incoming resources before other recognised gains and losses</b>	4	<u><b>(215,482)</b></u>	<u><b>188,095</b></u>	<u><b>(27,387)</b></u>	<u><b>642,764</b></u>
(Losses)/gains on investment assets for charity's own use	9	(6,652)	-	(6,652)	29,683
Actuarial loss on pension scheme	18	(1,752,400)	-	(1,752,400)	(821,000)
<b>Net movement in funds</b>		<u><b>(1,974,534)</b></u>	<u><b>188,095</b></u>	<u><b>(1,786,439)</b></u>	<u><b>(148,553)</b></u>
<b>Reconciliation of funds</b>					
Total funds brought forward		546,679	360,926	907,605	1,056,158
<b>Total funds carried forward</b>		<u><b>(1,427,855)</b></u>	<u><b>549,021</b></u>	<u><b>(878,834)</b></u>	<u><b>907,605</b></u>

The notes on pages 24 to 35 form part of these accounts.

The Statement of Financial Activities includes all gains and losses recognised during the year.

All incoming resources and resources expended derive from continuing activities.

Membership subscriptions are now shown under Voluntary income, with the costs relating to this income shown under Costs of activities for generating funds. The corresponding previous year figures have been restated accordingly.

**The British Trust for Ornithology  
Consolidated Income and Expenditure Account  
For the Year Ended 31 March 2015**

	Note	2015 £	2014 £
<b>Income</b>		5,397,902	6,301,217
Operating expenses		(5,446,446)	(5,681,004)
<b>Excess of (operating expenditure over income)/income over operating expenditure</b>		<u>(48,544)</u>	<u>620,213</u>
Income from investments	3	<u>21,157</u>	<u>22,551</u>
<b>Excess of (expenditure over income)/income over expenditure</b>		<u><u>(27,387)</u></u>	<u><u>642,764</u></u>

None of the company's activities were acquired or discontinued during the above two financial years.

The company has no recognised gains or losses other than those dealt with in the income and expenditure account.

The notes on pages 24 to 35 form part of these financial statements.

**The British Trust for Ornithology**  
**Consolidated and Charity Balance Sheets**  
**as at 31 March 2015**

		Group		Charity	
	Note	2015 £	2014 £	2015 £	2014 £
<b>Fixed assets</b>					
Tangible assets	8	1,192,234	1,190,509	1,192,234	1,190,509
Investments	9	539,888	546,540	539,988	546,640
		<u>1,732,122</u>	<u>1,737,049</u>	<u>1,732,222</u>	<u>1,737,149</u>
<b>Current assets</b>					
Stocks	10	130,100	159,902	-	-
Debtors	11	1,032,903	1,182,753	1,216,211	1,379,456
Short-term deposits		1,350,646	1,623,648	1,350,646	1,623,648
Cash at bank and in hand		87,181	50,240	(14,762)	(9,720)
		<u>2,600,830</u>	<u>3,016,543</u>	<u>2,552,095</u>	<u>2,993,384</u>
<b>Creditors:</b>					
Amounts falling due within one year	12	(1,385,764)	(1,510,106)	(1,337,129)	(1,487,047)
		<u>1,215,066</u>	<u>1,506,437</u>	<u>1,214,966</u>	<u>1,506,337</u>
<b>Net current assets</b>					
		<u>2,947,188</u>	<u>3,243,486</u>	<u>2,947,188</u>	<u>3,243,486</u>
<b>Total assets less current liabilities</b>					
<b>Creditors:</b>					
Amounts falling due after one year	13	(32,022)	(24,881)	(32,022)	(24,881)
<b>Net assets excluding pension scheme liability</b>					
		<u>2,915,166</u>	<u>3,218,605</u>	<u>2,915,166</u>	<u>3,218,605</u>
Defined benefit pension scheme Liability	18	(3,794,000)	(2,311,000)	(3,794,000)	(2,311,000)
<b>Net (liabilities)/assets including pension scheme liability</b>					
	17	<u>(878,834)</u>	<u>907,605</u>	<u>(878,834)</u>	<u>907,605</u>
<b>Represented by:</b>					
Restricted funds	16	549,021	360,926	549,021	360,926
Unrestricted funds	15	(1,427,855)	546,679	(1,427,855)	546,679
<b>Total Funds</b>					
	17	<u><u>(878,834)</u></u>	<u><u>907,605</u></u>	<u><u>(878,834)</u></u>	<u><u>907,605</u></u>

Approved by the Council and authorised for issue on 8 July 2015 and signed on its behalf by:

Chairman Professor A D Fox

Honorary Treasurer Dr T J Osmond

Company registration number 00357284.

The notes on pages 24 to 35 form part of these financial statements.

**The British Trust for Ornithology  
Consolidated Cash Flow Statement  
For the Year Ended 31 March 2015**

	Note	2015 £	2014 £
<b>Reconciliation of changes in resources to net cash inflow from operating activities</b>			
Net (outgoing)/incoming resources for the year		(27,387)	642,764
Depreciation	8	37,073	33,890
Profit on disposal of fixed assets		(1,073)	-
Decrease in debtors	11	149,850	157,555
(Decrease) in creditors	12,13	(117,201)	(500,218)
Decrease in stocks	10	29,802	19,524
Difference between payments to defined benefit pension scheme and amount charged to expenditure		<u>(48,000)</u>	<u>(60,000)</u>
Net cash inflow from operating activities		23,064	293,515
<b>Cash flow statement</b>			
Payments to acquire tangible fixed assets	8	(38,951)	(57,386)
Receipts on disposal of fixed assets		1,226	-
Pension deficit repair payment		(221,400)	(219,000)
Net decrease/(increase) in short-term deposits		<u>273,002</u>	<u>(23,111)</u>
Net cash inflow/(outflow)		<u>36,941</u>	<u>(5,982)</u>

<b>Analysis of short term deposits and cash</b>	<b>1 April 2014 £</b>	<b>Cash flow £</b>	<b>Other non-cash changes £</b>	<b>31 March 2015 £</b>
Cash at bank and in hand	50,240	36,941	-	87,181
Short term deposits	<u>1,623,648</u>	<u>(273,002)</u>	-	<u>1,350,646</u>
Net funds	<u>1,673,888</u>	<u>(236,061)</u>	-	<u>1,437,827</u>

<b>Reconciliation of net cash inflow to movement in net funds</b>	<b>2015 £</b>	<b>2014 £</b>
Increase/(decrease) in cash in the year	36,941	(5,982)
Cash (disinvested)/invested in short-term deposits	<u>(273,002)</u>	<u>23,111</u>
Change in net funds resulting from cash flows	<u>(236,061)</u>	<u>17,129</u>
Movement in net funds in the year	(236,061)	17,129
Opening net funds	<u>1,673,888</u>	<u>1,656,759</u>
Closing net funds	<u>1,437,827</u>	<u>1,673,888</u>

The notes on pages 24 to 35 form part of these financial statements.

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts**  
**For the Year Ended 31 March 2015**

**1. ACCOUNTING POLICIES**

**a) Basis of Preparation**

The financial statements have been prepared under the historic cost convention, with the exception of investments and freehold property which are included at market value. The financial statements have been prepared in accordance with the Statement of Recommended Practice – Accounting and Reporting by Charities (SORP 2005) issued in March 2005, applicable UK Accounting Standards, the Companies Act 2006 and the Charities Accounts (Scotland) Regulations 2006. The principal accounting policies adopted in the preparation of the financial statements are set out below.

**b) Group Financial Statements**

These financial statements consolidate the results of the charity and its wholly owned trading subsidiary BTO Services Ltd on a line by line basis. A summarised profit and loss account of the subsidiary is given in note 9. A separate Statement of Financial Activities and Income and Expenditure Account is not presented for the charity itself following the exemptions afforded by section 408 of the Companies Act 2006 and paragraph 397 of the SORP. The gross income and deficit for the year of the parent company were £4,873,239 and (£27,387) (2014: £5,651,569 and surplus £642,764).

**c) Incoming Resources**

Voluntary income including donations, gifts and legacies is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Income from charitable activities includes income received under contract which is recognised as earned (as the related work is performed). Income from grant funding included in this category provides funding to support charitable activities and is recognised where there is entitlement, certainty of receipt and the amount can be measured with sufficient reliability.

Income is deferred when it is received in advance of the services it relates to. Life membership income is released to the Statement of Financial Activities in equal instalments over a ten-year period.

Income from the trading subsidiary and other commercial trading activities is recognised as earned (as the related goods and services are provided).

Investment income, sponsorship and royalty income and membership subscription income are recognised on a receivable basis.

**d) Resources Expended**

Expenditure is recognised when a liability is incurred.

Costs are allocated directly to activity cost categories.

Costs of generating funds are those costs incurred in attracting voluntary income, including membership subscriptions, in carrying out trading activities and those costs associated with royalties and sponsorship income.

Charitable activities include scientific research contracts, allocated fund research work and restricted fund research work. They also include volunteer surveyor support and science communication costs.

Governance costs include those incurred in the governance of the charity and its assets and are primarily associated with constitutional and statutory requirements.

Support costs include central functions and have been allocated to activity cost categories on a staff time basis.

VAT has been reclaimed on allowable expenses under the partial exemption rules. Where not reclaimable it has been included within expenses.



**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**e) Tangible Fixed Assets**

Individual assets costing £500 or more are initially capitalised at cost.

Tangible fixed assets are depreciated on a straight line basis over their estimated useful lives as follows:

Asset Category	Annual Rate
Computer Equipment	25%
Motor Vehicles	25%
Furniture and Equipment	25%

Freehold property is not depreciated as, in the opinion of the Council, any such depreciation charged will be immaterial. Annual impairment reviews are carried out on the property. Revaluations are performed every five years, or as the trustees consider necessary, by a qualified valuer. The increase or decrease on revaluation is credited or charged to the fund holding the asset.

**f) Investments**

Investments are shown at market value and any unrealised gain or loss on the revaluation is taken to the Statement of Financial Activities. Surpluses / deficits on the sale of investments are credited / charged in the year they arise.

**g) Stock**

Stock is valued at the lower of cost or net realisable value. Net realisable value is based on estimated selling price less further costs to completion and disposal.

**h) Foreign Currency Translation**

Monetary assets and liabilities denominated in foreign currencies are translated into sterling at the rates of exchange ruling at the accounting dates. Transactions in foreign currencies are recorded at the rate ruling at the date of the transaction. All differences are taken to the Statement of Financial Activities.

**i) Funds Structure**

The Trust has a number of restricted income funds to account for situations where funds have been raised for a specific purpose. All other funds are unrestricted income funds. The trustees intend to use part of the unrestricted funds to provide longer-term funding for BTO projects and core activities. Designated funds have been set up to reflect this. A Pensions reserve fund has been created so that movements and balances relating to pension fund valuations can be separately identified. The funds in each of these categories are disclosed in notes 15 and 16.

**j) Retirement Benefits**

The defined benefit scheme provides benefits for staff based on final pensionable salary. The scheme was closed to future accrual with effect from 1 April 2013. The assets of the scheme are held separately from those of the Trust, being invested with Dimensional and other fund managers. Defined benefit pension liabilities are measured using the projected unit cost method and discounted at the current rate of return on a high quality corporate bond of equivalent term and currency to the liability. Under FRS17-Retirement Benefits, any net liability arising based on these valuations is the best estimate of the present value of the actual amounts to be paid out of the scheme, less the market value of the scheme assets. The net interest on the scheme liabilities is charged to the Statement of Financial Activities. Actuarial gains and losses are recognised in the Statement of Financial Activities.

The Trust also makes payments in respect of employees' own defined contribution schemes, through a group self-invested personal pension arrangement. For these schemes, the amount charged to the Statement of Financial Activities in respect of pension costs is the contributions payable in the year. Differences between contributions payable in the year and contributions actually paid are shown as either accruals or prepayments in the balance sheet.

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**k) Going Concern**

The FRS17 valuation has increased the pension scheme liability as at 31 March 2015 to £3,794k, resulting in a negative balance sheet total for the Trust and the Group. This is due to exceptional conditions in the bond market affecting the valuation of future long-term liabilities. The trustees are satisfied that the normalisation of bond yields will in due course reverse this position, and that although the triennial actuarial valuation of the scheme as at 1 April 2015 may also result in an increased deficit, the necessary deficit reduction contributions can be kept at an affordable level and will not affect the status of the Trust as a going concern.

**2. MEMBERS' LIABILITY**

Under the Memorandum of Association of the Trust, members are required to undertake to contribute to the assets of the Trust in the event of its being wound up while they are members, or within one year after they cease to be members, for payment of the debts and liabilities of the Trust contracted whilst they were still members and of the costs, charges and expenses of winding up such an amount as may be required, but not exceeding £1 each.

<b>3. INVESTMENT INCOME</b>	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
Bank interest receivable	5,370	6,130
Dividends	15,787	16,421
	<u>21,157</u>	<u>22,551</u>

<b>4. NET (OUTGOING)/INCOMING/ RESOURCES</b>	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
The (deficit)/surplus for the year is stated after charging:		
Auditor's remuneration:		
Audit services	18,150	17,600
Depreciation	37,073	33,890
Receipts on disposal of fixed assets	(1,226)	

<b>5. STAFF COSTS</b>	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
Wages and salaries	3,065,684	2,882,448
Social security costs	271,375	252,137
Pension contributions and other pension costs	320,424	310,880
FRS17 charges	(48,000)	(60,000)
Total	<u>3,609,483</u>	<u>3,385,465</u>

The number of employees whose emoluments exceeded £60,000 fell within the following bands:	<b>2015</b>	<b>2014</b>
£60,001 - £70,000	-	-
£70,001 - £80,000	1	1

Pension contributions of £8,219 (2014: £8,652) were made in relation to one employee (2014: one) earning in excess of £60,000 who participated in the group self-invested personal pension arrangement. For details of pension contributions and other pension costs, see note 18.

Council members receive no remuneration. Expenses were reimbursed to 17 (2014: 14) Council members as follows:

	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
Travel & subsistence	<u>4,263</u>	<u>4,948</u>

There are no other related party transactions to disclose.

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**5. STAFF COSTS (continued)**

Average numbers of staff and full time equivalent (FTE)

	2015		2014	
	No	FTE	No	FTE
Permanent posts	112	104.5	106	98.7
Seasonal fieldworkers	9	6.4	11	8.4
<b>Total</b>	<b>121</b>	<b>110.9</b>	<b>117</b>	<b>107.1</b>

**6. TOTAL RESOURCES EXPENDED**

	Direct costs £	Support costs £	2015 Total £	2014 Total £ <i>Restated</i>
<b>Costs of generating funds</b>				
Costs of generating voluntary income	384,427	110,566	494,993	428,912
Costs of activities for generating funds	487,521	55,972	543,493	754,199
<b>Charitable activities</b>				
Monitoring, research & Communications	3,430,884	939,823	4,370,707	4,459,889
<b>Governance</b>	32,832	4,421	37,253	38,004
<b>Support costs</b>	1,110,782	(1,110,782)	-	-
<b>Total resources expended</b>	<b>5,446,446</b>	<b>-</b>	<b>5,446,446</b>	<b>5,681,004</b>

**7. SUPPORT COSTS**

	Premises £	IT & Office Services £	Human Resources £	Manage- ment & Finance £	2015 Total £	2014 Total £ <i>Restated</i>
<b>Costs of generating funds</b>						
Costs of generating voluntary Income	17,776	42,992	13,148	36,650	110,566	80,344
Costs of activities for generating Funds	8,999	21,764	6,656	18,553	55,972	65,868
<b>Charitable activities</b>						
Monitoring, research & Communications	151,098	365,436	111,762	311,527	939,823	798,350
<b>Governance</b>	711	1,719	526	1,465	4,421	3,911
<b>Total support costs</b>	<b>178,584</b>	<b>431,911</b>	<b>132,092</b>	<b>368,195</b>	<b>1,110,782</b>	<b>948,473</b>

Governance costs include audit fees, Council meeting expenses, and the staff time cost of servicing Council meetings.

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**8. TANGIBLE FIXED ASSETS - GROUP AND CHARITY**

	Freehold Property	Furniture and Equipment	Computer Equipment	Motor Vehicles	Total
	£	£	£	£	£
Cost or valuation at 1 April 2014	1,107,445	234,442	441,339	133,422	1,916,648
Additions	-	7,051	19,297	12,603	38,951
Disposals	-	(16,500)	(74,811)	(26,033)	(117,344)
At 31 March 2015	<u>1,107,445</u>	<u>224,993</u>	<u>385,825</u>	<u>119,992</u>	<u>1,838,255</u>
Depreciation at 1 April 2014	-	219,445	383,807	122,887	726,139
Depreciation charge	-	6,970	25,193	4,910	37,073
Disposals	-	(16,500)	(74,658)	(26,033)	(117,191)
At 31 March 2015	<u>-</u>	<u>209,915</u>	<u>334,342</u>	<u>101,764</u>	<u>646,021</u>
Net book value at 31 March 2015	<u>1,107,445</u>	<u>15,078</u>	<u>51,483</u>	<u>18,228</u>	<u>1,192,234</u>
Net book value at 1 April 2014	<u>1,107,445</u>	<u>14,997</u>	<u>57,532</u>	<u>10,535</u>	<u>1,190,509</u>

The freehold property at The Nunnery, occupied by the British Trust for Ornithology, was valued by external valuers, Fenn Wright Chartered Surveyors, on 31 March 2012 on the basis of existing use value, at £1,100,000. Additions since that date of £7,445 have been capitalised at cost.

The trustees discussed the condition and value of the freehold property at their meeting on 8 July 2015 and agreed that there had been no material change in either since the last external valuation in March 2012.

On an historical cost basis, the freehold property would have been included at a cost and net book value of £2,284,365 (2014: £2,284,365).

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**9. INVESTMENTS**

**The Group**

**Investment Funds**

	Market value 2014 £	Disposals proceeds £	Additions at cost £	Gains /(losses) £	Market value 2015 £
<b>Birds in Trust Fund</b>					
M&G Charibond	98,303	(101,939)	-	3,636	-
M&G Charifund	138,297	(126,861)	-	(11,436)	-
Dimensional Global Short Dated Bond	-	-	93,878	(6,981)	86,897
Dimensional Global Sustainability Core Equity	-	-	132,745	16,076	148,821
Wrap Cash	-	-	4,530	176	4,706
	<u>236,600</u>	<u>(228,800)</u>	<u>231,153</u>	<u>1,471</u>	<u>240,424</u>
<b>General Funds</b>					
Black Rock Charishare	158,437	(144,749)	-	(13,688)	-
JP Morgan UK Equity	151,503	(140,231)	-	(11,272)	-
Dimensional Global Short Dated Bond	-	-	114,740	(6,504)	108,236
Dimensional Global Sustainability Core Equity	-	-	162,244	23,122	185,366
Wrap Cash	-	-	5,643	219	5,862
	<u>309,940</u>	<u>(284,980)</u>	<u>282,627</u>	<u>(8,123)</u>	<u>299,464</u>
	<u>546,540</u>	<u>(513,780)</u>	<u>513,780</u>	<u>(6,652)</u>	<u>539,888</u>

The trustees' investment policy is to maximise long term total return by investing in a combination of high quality short dated bonds and a globally diversified equity portfolio.

**The Charity**

**Investment funds as above**

**Shares in Group Undertaking**

BTO Services Ltd – cost at 1 April 2014 and 31 March 2015	100
	<u>539,988</u>

The Trust owns 100% of the ordinary share capital of its subsidiary undertaking, BTO Services Ltd, which is incorporated in England & Wales. This company operates to promote the work of The British Trust for Ornithology by undertaking activities designed to raise funds in support of such work. The aggregate value of share capital and reserves at 31 March 2015 was £100 (2014: £100) and the company reported a nil profit or loss (2014: nil) for the financial period. The value of the Charity's investments in the subsidiary undertaking under the equity method of valuation is £100 (2014: £100). £315,202 (2014: £476,838) was paid to the Charity under Gift Aid.

The following is a summary of the subsidiary's results for the year:

	2015 £	2014 £
Turnover	861,022	1,149,038
Cost of sales	<u>(519,797)</u>	<u>(605,063)</u>
Gross profit	341,225	543,975
Net operating expenses	<u>(26,023)</u>	<u>(67,137)</u>
Net profit before payment under Gift Aid	<u>315,202</u>	<u>476,838</u>

Turnover includes sales to overseas markets of £18,227 (2014: £17,811)

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

<b>10. STOCKS</b>	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Group</b>		
Finished goods and goods for resale	<u>130,100</u>	<u>159,902</u>

**The Charity**

The charity itself does not hold trading stock.

<b>11. DEBTORS</b>	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Group</b>		
Trade and contract debtors	585,469	575,315
Taxes recoverable	190,935	331,610
Prepayments	55,048	58,094
Accrued income	201,451	217,734
	<u>1,032,903</u>	<u>1,182,753</u>

	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Charity</b>		
Trade and contract debtors	325,806	471,267
Amounts due from Group undertakings	442,972	300,751
Taxes recoverable	190,935	331,610
Prepayments	55,047	58,094
Accrued income	201,451	217,734
	<u>1,216,211</u>	<u>1,379,456</u>

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**12. CREDITORS – AMOUNTS FALLING DUE WITHIN ONE YEAR**

	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Group</b>		
Trade creditors	168,577	340,649
Taxes and Social Security costs	177,228	176,902
Other creditors	41,920	86,872
Accruals and deferred income	998,039	905,683
	<u>1,385,764</u>	<u>1,510,106</u>

	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Charity</b>		
Trade creditors	162,322	333,766
Taxes and Social Security costs	163,957	183,191
Other creditors	39,963	86,509
Accruals and deferred income	970,887	883,581
	<u>1,337,129</u>	<u>1,487,047</u>

**13. CREDITORS – AMOUNTS FALLING DUE AFTER ONE YEAR**

	<b>2015</b>	<b>2015</b>
	<b>£</b>	<b>£</b>
<b>The Group</b>		
Deferred income	32,022	24,881
	<u>32,022</u>	<u>24,881</u>

	<b>2015</b>	<b>2014</b>
	<b>£</b>	<b>£</b>
<b>The Charity</b>		
Deferred income	32,022	24,881
	<u>32,022</u>	<u>24,881</u>

**14. DEFERRED INCOME RECONCILIATION**

	<b>Group</b>	<b>Charity</b>
	<b>£</b>	<b>£</b>
Balance as at 1 April 2014	912,964	893,962
Amount released to incoming resources	(721,387)	(714,962)
Amount deferred in year	820,334	808,960
Balance as at 31 March 2015	<u>1,011,911</u>	<u>987,960</u>

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**15. UNRESTRICTED FUNDS**

The income funds of the charity include unrestricted funds comprising the following balances:

	Balance 1/4/14 £	Incoming Resources £	Expenditure £	Other Gains /(Losses) £	Transfers £	Balance 31/3/15 £
General funds	1,049,391	4,326,643	4,849,217	(10,478)	(249,931)	266,408
Pensions reserve	(2,311,000)	-	-	(1,704,400)	221,400	(3,794,000)
Birds in Trust Fund	1,808,288	607,380	254,710	3,826	(65,047)	2,099,737
	<u>546,679</u>	<u>4,934,023</u>	<u>5,103,927</u>	<u>(1,711,052)</u>	<u>(93,578)</u>	<u>(1,427,855)</u>

The Birds in Trust Fund is to provide long-term funding for BTO projects. Income from legacies is credited to this fund unless the will provides otherwise. £33,936 was transferred to the Out of Africa Fund, £7,184 to the House Martin Fund, £32,926 to BirdTrack fund in respect of BirdTrack International and £9,000 was received from general funds (Webbs surplus income) towards NEWS3 Development. £10,229 was transferred from general funds to the Thrush Fund and £18,302 to the Nightingale Fund, all from the Autumn Appeal. £221,400 was transferred from general funds to the Pensions reserve in respect of the pension deficit repair payment.

**16. RESTRICTED FUNDS**

The income funds of the charity include restricted funds comprising the following balances of donations and appeal monies given for specific purposes:

	Balance 1/4/14 £	Incoming Resources £	Expenditure £	Transfers £	Balance 31/3/15 £
Atlas Beyond the Maps	46,535	160,495	42,989	-	164,041
Dilys Breese Fund	112,657	2,753	12,776	-	102,634
Boddy & Sparrow Fund	1,817	-	-	-	1,817
Migration Fund	-	107,840	54,198	7,184	60,826
Nightingale Appeal	-	4,226	22,528	18,302	-
Swallow Appeal	6,797	565	-	-	7,362
Young Scientists' Fund	84,648	28,260	59,545	-	53,363
Out of Africa Fund	27,060	40,232	81,818	24,111	9,585
Thrush Fund	574	33	10,836	10,229	-
BTO Wales Fund	32,285	56,219	32,461	(8,999)	47,044
BirdTrack Fund	11,428	1,297	45,651	32,926	-
Sound Approach Fund	31,581	79,175	27,318	9,825	93,263
Ringers' Bursary	758	3,941	368	-	4,331
Thorne Ringing	4,786	-	31	-	4,755
	<u>360,926</u>	<u>485,036</u>	<u>390,519</u>	<u>93,578</u>	<u>549,021</u>

The purposes of the funds are as follows:

Atlas Beyond the Maps Appeal continues to support research into Atlas data.

The Dilys Breese Fund is for projects relating to nesting birds and £8,852 was expended for costs relating to the annual Dilys Breese Awards.

The Boddy & Sparrow Fund is for awards to the best amateur contribution(s) to either or both of the *Bird Study* and *Ringing & Migration* publications.

The Migration Fund is for research into migrating birds.



**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**16. RESTRICTED FUNDS (Continued)**

The Nightingale Appeal is to fund work on Nightingales and woodland birds. £18,302 was received from the Autumn Appeal.

The Swallow Appeal is to fund work on Swallows and migration.

The Young Scientists' Fund is to support the career development of young scientists.

The Out of Africa Fund is to fund work on African migrants. £33,936 was received from Birds in Trust in respect of Cuckoo work and £9,825 was transferred to the sound approach fund with the agreement of the funder to support migration work.

The Thrush Fund is to fund work on Thrushes. £10,229 was transferred from the Autumn Appeal to Support projects.

The BTO Wales Fund is to support a BTO presence in Wales. £8,999 was released to general funds in relation to staff costs in accordance with EW grants terms.

The BirdTrack Fund is to support the development of BirdTrack. £32,926 was received from Birds in Trust.

The Sound Approach Fund is to support a number of specific projects. A donation of £9,825 was agreed with the funder to be transferred from the Out of Africa Fund for a specific project.

The Ringers' Bursary fund is to support ringing.

The Thorne Ringing donation is to support ringing.

**17. ANALYSIS OF FUND BALANCES BETWEEN THE NET ASSETS**

	Fixed Assets	Investments	Current Assets less Total Liabilities	Pension Scheme Deficit	Total Assets
	£	£	£	£	£
<b>Unrestricted Funds</b>					
General funds	1,192,234	299,463	2,568,711	(3,794,000)	266,408
Pensions reserve	-	-	(3,794,000)	-	(3,794,000)
Birds in Trust Fund	-	240,425	1,859,312	-	2,099,737
	<u>1,192,234</u>	<u>539,888</u>	<u>634,023</u>	<u>(3,794,000)</u>	<u>(1,427,855)</u>
<b>Restricted Funds</b>	-	-	549,021	-	549,021
<b>Total</b>	<u>1,192,234</u>	<u>539,888</u>	<u>1,183,044</u>	<u>(3,794,000)</u>	<u>(878,834)</u>

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**18. PENSIONS**

A new Group Self-Invested Personal Pension Scheme run by AEGON was introduced on 1 April 2013 for all staff. Staff contribute at a minimum rate of 5% of salary, and the BTO contributes at a flat rate of 11%. The Trust made total contributions of £287,583 during the year. In the previous year, the Trust contributed £91,267 to the defined contribution scheme run by Aviva, and £129,836 to the defined benefit scheme.

**Triennial Actuarial Valuation**

A full actuarial valuation of the defined benefit scheme was carried out as at 1 April 2012. The assets of the scheme at this date were valued at £6,222,000, and the technical provisions (liabilities) at £8,378,000, giving a shortfall of £2,156,000 and a funding level of 74%. A deficit recovery plan was subsequently agreed between Council and the pension fund trustees, by which the shortfall would be made good by lump sum contributions spread over a ten year period. The third contribution, of £227,000 was paid into the scheme in May 2015.

**FRS17 Valuation**

Financial Reporting Standard 17 – Retirement Benefits (FRS17) requires the following disclosures, for which a valuation was carried out as at 31 March 2015.

**Principal Assumptions**

	<b>2015</b>	<b>2014</b>
Discount rate	3.2%	4.3%
Rate of increase in pensions in payment	3.4%	3.6%
Rate of increase in pensions in deferment	1.9%	2.3%
Inflation assumption	2.9%	3.3%

Average life expectancy, after retirement at age 65:

	<b>2015</b>	<b>2014</b>
	<b>No of years</b>	<b>No of years</b>
Male - as at the valuation date	24.6	24.5
Male - retiring in 20 years' time	26.7	26.6
Female - as at the valuation date	25.1	25.1
Female - retiring in 20 years' time	26.6	26.6

**Assets of the Scheme and expected rates of return**

	<b>2015</b>		<b>2014</b>	
	<b>Expected long-term rate of return</b>	<b>Value £'000</b>	<b>Expected long-term rate of return</b>	<b>Value £'000</b>
Bonds	4.3%	3,161	4.3%	3,327
Equities	7.4%	5,693	7.4%	4,581
Cash	0.5%	116	0.5%	33
		<u>8,970</u>		<u>7,941</u>
Present value of scheme liabilities		<u>(12,764)</u>		<u>(10,252)</u>
Deficit of scheme		<u><u>(3,794)</u></u>		<u><u>(2,311)</u></u>

**The British Trust for Ornithology**  
**Notes to the Consolidated Accounts - Continued**  
**For the Year Ended 31 March 2015**

**18. PENSIONS (Cont'd)**

<b>Analysis of amount charged to the Statement of Financial Activities under FRS17</b>	<b>2015 £'000</b>	<b>2014 £'000</b>
Service cost	-	-
Past service cost	-	-
Total operating charge	-	-
Expected return on pension scheme assets	(488)	(479)
Interest on pension liabilities	440	419
Net interest cost	(48)	(60)
(Gains) on settlements and curtailments	-	-
	<u>(48)</u>	<u>(60)</u>

**5 year history of experience gains and Losses**

	<b>2015 £'000</b>	<b>2014 £'000</b>	<b>2013 £'000</b>	<b>2012 £'000</b>	<b>2011 £'000</b>
Difference between expected and actual return on assets:					
amount £'000	361	(188)	538	(307)	114
% of scheme assets	4.0%	(2.4%)	7.2%	(5.0%)	2.0%
Experience gains and losses on scheme liabilities:					
amount £'000	97	(202)	197	78	(76)
% of scheme liabilities	0.8%	(2.0%)	2.1%	0.9%	(1.0%)
Changes in assumptions underlying scheme liabilities:					
amount £'000	(2,210)	(431)	(1,203)	(834)	300
% of scheme liabilities	(17.3%)	(4.2%)	(13.0%)	(9.6%)	4.1%
Actuarial (loss)/gain amount £'000	<u>(1,752)</u>	<u>(821)</u>	<u>(468)</u>	<u>(1,063)</u>	<u>338</u>

**Movement in deficit during year**

	<b>2015 £'000</b>	<b>2014 £'000</b>
Deficit in scheme at 1 April 2014	(2,311)	(1,769)
Movement in year:		
Current service charge	-	-
Contributions	221	219
Past service costs	-	-
Interest cost	(440)	(419)
Expected return on assets	488	479
Gain on settlements and curtailments	-	-
Actuarial gain/(loss)	(1,752)	(821)
Deficit in scheme at 31 March 2015	<u>(3,794)</u>	<u>(2,311)</u>

**The British Trust for Ornithology  
Supporters  
For the Year Ended 31 March 2015**

We are very grateful for the generous support that we have received, both in time and money, in the past year. In addition to members and other fieldworkers, there are many other individuals and companies who support the work of the BTO with financial contributions. The Trust is particularly pleased to acknowledge the following corporate and other supporters.

**Corporate Supporters 2014/15**

Anglia Sports & Schoolwear Ltd, Anglian Water, Ark Wildlife, R & E Bamford Ltd, Biotrack Ltd, BirdGuides, Birdseye, Carl Zeiss Ltd, C J Wildbird Foods, Essex & Suffolk Water, Gardenature, Gardman Ltd, Grant Arms Hotel, John E Haith Ltd, Jacobi Jayne & Co, Naked Marketing, Nature Guides, The Nestbox Company Ltd, Northumbrian Water, Opticron, Park Hill Nurseries & Garden Centre Ltd, Porzana, Serenata Commerce Ltd, Shadwell, Soar Mill Seeds, Suffolk Secrets, Swallowtail Print, Swarovski UK Ltd, Sykes Cottages, Syngenta, Thames Water Utilities Ltd, Thetford Garden Centre.

**Trusts 2014/15**

The Barbour Foundation, The Downton Banister Trust, Charles & Caroline Barratt Charitable Trust, The Benham Charitable Settlement, Rowan Bentall Charitable Trust, Clark Bradbury Charitable Trust, A S Butler Charitable Trust, Edward Cadbury Charitable Trust, Anne Coldwell Trust, County Durham Community Foundation, The John Ellerman Foundation, Esmée Fairbairn Foundation, The Fulmer Charitable Trust, The Lady Hind Trust, Raymond & Blanche Lawson Charitable Trust, The Lizandy Charitable Trust, The Lyddon Charitable Trust, The Mill Dam Trust, Jennetts Charitable Trust, Ernest Kleinwort Charitable Trust, A G Leventis Foundation, Cecil Pilkington Charitable Trust, The Sandra Charitable Trust, The Saxham Trust, The Slater Foundation, The John Spedan Lewis Foundation, John Swire 1989 Charitable Trust, The Torrs Charitable Trust, The Tucker Charitable Trust, The Udimore Charitable Trust, The Emily Weircroft Charitable Trust, The Whitaker Charitable Trust, The Valerie White Memorial Trust, Maldwyn Williams Charitable Trust.

**Legacies 2014/15**

Margaret Phillis Baillie, George Norton Barris, Graham North Bierton, Mrs Judith Anita Connell, Dr J L T Birley, Rona Dale, Terence George Ernest Fox, John French, John Buckland Heigham, Penny Hollow, David Jones, Kathleen Susan King, John Arthur Little, Elizabeth Charlotte Loosmore, Kay Mills-Hicks, Jean Palmer, Virginia Ann Parker, David Peck (in lieu), Jean Elspeth Potts, C J D Shackles, Audrey Spurgeon, Peter Sutton, Andrea Isabella Webb, John Wint.

**In Memoriam 2014/15**

Eric Angus, Miss Anne Arrell, Douglas Eric Barker, David Billett, Philip Stanley Burns, Lady Terry Collins, Roger Philip Davis, Adrian Dunk, David Horace Ellis, Arthur Wellwood Ferguson, Mark Fletcher, Jean Gaffney, David Glue, Mrs Joyce Martin Gutkowska, Mrs Muriel Elizabeth Hall, Anthony John Harris, Mr Hodgkinson, Philip Hollom, David Jones, Barrie Stevenson Kirk, Elizabeth Loosmore, Sally Mitchell, Colin Neil Murray, Peter Neatherway, Eric Pithers, Stephen Rayner, Philip John Shearwood, Sheila Springbett, Miss Mary Ellen Stacey, Mrs Mary Gladys Waller, David Wheeler, Peter John Wilkes, Dr Claire Willis, Mrs Hazel Joan Wright.

**Funders of BTO Work 2014/15**

Allies Morrison, Anglian Water Group, Animal Health & Veterinary Laboratories Agency, Animal & Plant Health Agency, APEM Ltd, Belfast City Airport, BirdLife International, Broads Authority, Brookfield Multiplex Construction Europe Ltd, Buro Happold, Butterfly Conservation, Cambridge Conservation Initiative, Cefas, Centre for Ecology & Hydrology, Countryside Council for Wales, Dartmoor National Park Authority, Defence Infrastructure Organisation, Department of the Environment, Food and Rural Affairs, Department of Energy and Climate Change, Devon Birdwatching and Preservation Society, EDF Energy, eleQtra (InfraCo) Ltd, Environment Agency, Environment Wales, Environment Resources Management, Essex & Suffolk Water, European Commission, Footprint Ecology, Forewind Ltd, Forestry Commission, Forestry Commission England, Forestry Commission Scotland, Forest Research, Foster & Partners, Fugro EMU Ltd, Galloper Wind Farm Ltd, Game & Wildlife Conservation Trust, Gardline Environmental Ltd, Gardman Ltd, Hyder Consulting, Instinctif Partners, James Hutton Institute, Joint Nature Conservation Committee (on behalf of the statutory nature conservation agencies: Natural England, Natural Resources Wales, Scottish Natural Heritage and the Department of the Environment Northern Ireland), Land Securities, London Borough of Bexley, Make Architects, Manchester Ornithological Society, Manx Bird Life, Natural England, Natural Resources Wales, Natural Environment Research Council, NJ Division of Fish & Wildlife, Northern Ireland Environment Agency, Norfolk Biodiversity Information Services, Northumbrian Water Ltd., Opticron, Ospar, People's Trust for Endangered Species, Royal Society for the Protection of Birds, RWE nPower Ltd, Scottish Government, Scottish Natural Heritage, Scottish Raptor Study Group, Scottish Renewables, Serco Ltd, Scottish Ornithologists' Club, Sound Approach, Sussex Ornithological Society, Stanny House Farm, State of Delaware (DNREC), Statoil, Swarovski UK Ltd (Swarovski Optik), Syngenta, Tasso Leventis Foundation, Tesco, Tidal Power Lagoon, University of Cambridge, University of East Anglia, University of Edinburgh, University of Exeter, US Fisheries & Wildlife, Welsh Government, Wildfowl & Wetlands Trust, The Wildlife Trusts, Waste Recycling Environmental Ltd, Zoological Society of London.