

# Species Survival Fund Monitoring Data Collection Guidance

## **Version**

This version collates comments and questions that were outstanding when we sent the draft guidance out to projects in November 2024.

It also displays any changes made since then (e.g. where projects have fed back that the guidance was unclear).

**Last updated:** January 2025

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## Introduction

For the Species Survival Fund (SSF), the Heritage Fund will collect a range of monitoring data directly from projects – on project outputs – to understand what has taken place across all funded projects, and to feed into the analysis of the impact the programme is having overall.

We want to understand the activities and outputs that you have delivered as part of your project to inform both the programme evaluation and progress against Defra habitat targets, so we can evaluate the benefits for nature, people, and employment.

This document details what data we need from you, when we will need it, and how we and the evaluators, Wavehill, will use it.

**Only sites where you have completed all actions should be submitted in the interim data collection period (January 2025).**

## Key Principles

### Types of data you need to submit

There are two main types of data you will need to provide to us annually on your project's activities:

- **Spatial data on habitat actions.** There are two ways to submit this depending on whether, and how, you currently capture spatial data: through an online web tool created in ESRI's Survey123 **or** through ArcGIS Online Collaboration. There is one form to submit data expressed via polygons and a separate form for polylines. We will provide you with the links to both forms.
- **Data on other project activities and outputs.** These have been organised into three themes: employment and skills, connecting people with nature, and habitat actions not covered by spatial data. We will email you an Excel Workbook template to fill out.

Your submissions will be due:

- 31 January 2025 (interim data collection phase)
- And February 2026 (as part of your project completion)

You can add your spatial data at any time, but you must send us all the data for work completed up to this point by the deadlines above.

Both sets of data will be used for the evaluation of the SSF.

## Species Survival Fund (SSF) programme evaluation overview

The Heritage Fund have appointed and are managing external evaluation consultancy Wavehill to deliver the programme evaluation for the SSF.

This evaluation will cover how the SSF programme has been delivered and its impact overall. In addition to the data requirements in this document:

- Wavehill will engage with you at key points in the delivery of the evaluation to understand more about your project. For example, the outcomes you anticipate, and challenges you have faced. This will include two surveys, at least one site visit, group workshops and online meetings with your dedicated Wavehill contact. These elements will provide qualitative data for the evaluation.
- We are working collaboratively with Wavehill on the data you provide directly to us (to streamline data collection and avoid duplication, for example).
- The two types of output data covered in this document (as above) will be used by Wavehill as part of their quantitative analysis of the impact of the SSF overall. Additionally, the spatial data provided will be used to support our understanding of how the SSF contributes to Defra's habitat target.

## Defra's habitat target

The Species Survival Fund is one of the key programmes designed to make progress towards Defra's interim habitat target:

**To restore or create 140,000 hectares of a range of wildlife-rich habitats outside of protected sites by 2028.**

The spatial data you will need to send us has two main purposes.

1. Informing the SSF programme evaluation (as above).
2. Demonstrating your project's contribution, and the contribution of the SSF overall to the habitat target.

Not all the spatial data you submit will count against the habitat target, but all the data you submit will be used in the programme evaluation.

The Heritage Fund has reviewed, with Defra and other partners and stakeholders, what spatial data is needed to both report on the habitat target, and feed into the programme evaluation on the wider range of benefits that projects are delivering for habitats.

We are asking for the same data to be submitted for every type of action for habitat, and analysis of this data will determine whether it will be reported against the target or not.

## Spatial data collection: habitat actions

### Definitions and data requirements

We need you to submit spatial data for all actions you have taken to create, restore, or manage habitat. Submit Shapefiles with accompanying information about the habitat and action taken as shown in the table below.

The principle area the Shapefile should cover will be the same for any action you submit (whether it meets the habitat target criteria or not). The reported action area will be **the area of influence expected from the action**, i.e., the area of habitat that will be created, restored, or managed by the action.

## Definitions

Further guidance on the habitat target that the SSF reports against is detailed in the [Environment Act Habitat Target – Definitions and Descriptions](#) report.

This report defines wildlife-rich habitat, and what activities constitute habitat creation and restoration.

**We strongly recommend that projects familiarise themselves with this as projects are required to report on habitat type and activity type as per the definitions in this document.**

## The target

The target is an action-based (rather than outcome based) target, so we need information about the actions taken to restore or create wildlife-rich habitat and the size of the area intended to become wildlife-rich habitat as a result of those actions.

As this target seeks to record the size of the area intended to become wildlife-rich habitat following actions, the reported area will be the area of influence expected from the action.

- In many cases, the size of the intervention area will align closely to the size of the influenced area that is expected to become wildlife-rich habitat. For example, for an intervention involving planting native species to create a wildlife-rich native woodland habitat, the area of intervention (the area planted) aligns well with the area of influence (the area expected to become wildlife-rich woodland).
- However, there may be cases where the creation or restoration of wildlife-rich habitat requires intervention on a smaller area than that which might be expected to become wildlife-rich habitat (i.e. the intervention has an influence over a larger area than the intervention area). For example, for peatland restoration where the intervention is creating leaky dams, the intervention itself may be a point with a small actual area, but with influence over the surrounding body of peat that could be larger in extent. In these cases, your expert judgement should be used to determine the influenced area where it can be reasonably expected for wildlife-rich habitat to be created or restored in response to the action taken.

## Wildlife-rich habitat

- This refers to any of a range of specific natural and semi-natural habitats found in England. It is based on Priority Habitats and is expanded to include other habitat types listed in Schedule 1 of the Environmental Targets Regulations 2023.
- Wildlife-rich habitats generally equate to UK Habitat Classification level 4 habitat types, with the exclusion of some modified habitats, and including some level 5 habitats.
- Wildlife-rich habitat excludes heavily modified or degraded habitats.

The full list of wildlife-rich habitat is detailed in the [Environment Act Habitat Target – Definitions and Descriptions](#) report.

## **Habitat creation**

- Actions to establish wildlife-rich habitats that are of sufficient quality to support the species that are typically found in that habitat.

## **Habitat restoration**

- Action on sites which support relict habitat that leads to the expansion of wildlife-rich habitat.
- Action on degraded habitat where single or multiple actions need to be undertaken to address on or off-site pressures so that wildlife-rich habitats of sufficient quality can become established.
- Action on existing habitat (possibly wildlife-rich) that has developed in a degraded ecosystem.

## **Habitat management**

- Habitat management includes actions intended to maintain or enhance existing wildlife-rich habitat and may follow those specific actions related to restoration and creation.
- It is recognised that, whilst these actions to improve the condition, structure or composition of existing wildlife-rich habitats will be important in delivering the statutory species targets and are to be encouraged, they are out of scope of the habitat target. This activity is also an important part of the impact evaluation of the SSF.

## **Submitting your spatial data**

Spatial data can be submitted to the Heritage Fund through an online web tool created in ESRI's Survey123 or through ArcGIS Online Collaboration.

- Survey123 is accessed online through a web browser and allows you to draw project extents and describe the individual areas on which work has taken place. We will give you links to the forms we have set up using Survey123. Once you have submitted a boundary you are unable to edit it. An online dashboard will be created allowing you to see the extent of submitted areas.
- To use the ArcGIS Collaboration method, you will need to be an existing Esri customer and have a Professional or Creator licence. This method will give you access to feature layers that you can use to map and describe area on which work has taken place. The Collaboration will allow you to continue to edit your project extents through to the submission deadline.
- Both Survey123 and the ArcGIS Online Collaboration contain drop down menus that ensure that you provide all the information listed in the tables in the 'Spatial data requirements' section.

## **Spatial data requirements**

The key data requirements are:

- Spatial habitat data should be recorded in ESRI Shapefile format (using one of the methods detailed above)

- Two types of GIS vector data should be used to represent the habitat areas and features: polygons and polylines. Polygons should be used for areas of habitats and large habitat features (i.e. ponds, banks etc. a minimum size of 25 m<sup>2</sup>), and polylines of linear habitats (i.e. hedgerows, ditched and similar, longer than 5 m). River activity, such as river restoration should be reported as a polygon. Each polygon or line should represent a patch of habitat expected to result from the action taken on the site to which the record relates.
- Polygons and polylines are captured in separate web forms, each of which contain only the habitat types relevant to that geometry. The polygon survey contains a link to the polyline survey and vice versa.
- This should be accompanied by relevant information about the habitat and activity type and level of confidence in the outcome.
- The creation of very small-scale features such as nest boxes, log piles, bare ground scrapes and bee banks should not be mapped (but should be submitted as part of the wider project monitoring data collection, see [here](#)). However, features larger 25m<sup>2</sup> in area or more than 5m in length should be mapped as above as polygons or polylines, respectively.
- Polygons should not overlap with one another. The only instances in which GIS features should be overlapping is where a polyline is overlapping a polygon. For example, a hedge is planted around a restored species-rich grassland. The new hedge is digitised as a polyline and will overlap with the polygon of restored grassland. The spatial data capture section of the Survey123 form shows the extent of polygons and polylines already submitted, which can be traced with the form to avoid overlaps.
- Any location should only be submitted once during the life of the project. Shapefiles should only be submitted once capital works on that specific area are completed.
- Where condition assessments have been conducted on sites, this data may be used in the relevant habitat condition field of the spatial data. Where condition assessments have not been undertaken, this data may also be provided through an informal ecological assessment of a site by project staff. This might use [Statutory biodiversity metric condition assessments](#) categories Good/Moderate/Poor, [JNCC Common Standards Monitoring](#) categories favourable/unfavourable (recovering condition)/unfavourable (no change)/unfavourable (declining condition)/part destroyed/destroyed, or other appropriate categories or scales.

**Table of data to be provided along with shapefiles**

<b>Field name</b>	<b>Field type (number of characters)</b>	<b>Values and format</b>	<b>Description</b>
Organisation	Text	List of organisations	Drop down menu of SSF funded organisations.
Boundary ID	Text (10)	n/a	Projects should assign each feature a unique ID number.
Site Name	Text (200)	n/a	Optional: Projects can choose a site name, if relevant.
Do you use UK Hab Classifications?	Text (3)	Yes/No	Determines what baseline and target habitat options will be available.
Base UK Habitat	Text (200)	Level 2 List of UKHab habitats  Level 3 List of UKHab habitats  Level 4 List of UKHab habitats  Level 5 List of UKHab habitats	Starting baseline habitat. You will have an option for UKHab: complete to the highest level in the UKHab hierarchy that you are able. If you do not use UKHab, there are options for other classification systems: choose and describe as applicable.
Can you provide a condition using the BNG Condition Assessment metric?	Text (3)	Yes/No	Determines what habitat condition options will be available.
Baseline Condition using BNG condition assessment metric	Text (200)	Poor Moderate Good	Optional: Starting condition assessment score using BNG condition assessment, where available.
Baseline Condition	Text (200)	n/a	Optional: where the BNG metric has not been used, please describe the habitat condition and tell us what methodology you used.
Target Habitat	Text (200)	List of wildlife rich habitats using UKHab Level 2, Level 3, Level 4, Level 5	Optional: Target wildlife-rich habitat to result from actions.
Target Habitat Classification	Text (200)	Free text field	Optional: Non UKHab target habitat.
Type of Action	Text (20)	Creation Restoration Management	Projects should use the <a href="#">Environment Act Habitat Target Definitions</a> document to ascertain which of these actions applies.



<b>Field name</b>	<b>Field type (number of characters)</b>	<b>Values and format</b>	<b>Description</b>
Action	Text (200)	n/a	High-level description of all action/ interventions taken e.g. 1. Blocked ditches 2. Ceased applications of fertilizer 3. Dug pond 4. Reduced grazing pressure 5. Initiated non-native species control programme List all actions completed within the polygon.
Confidence Measure	Text (20)	Low Medium High	Measure of confidence at end of project the actions taken will achieve habitat of sufficient quality to support typical species.
Created Date	Date	dd/mm/yyyy	Date of polygon creation.
Created By	Text (50)	n/a	Name of person entering data.

## Species data

The evaluation of the nature outcomes of the SSF focusses on habitats. The key reason for this is that the SSF delivery timeframe is short, and species data in that timeframe would not give as clear an indication of the benefits of SSF.

Projects' survey data should be submitted to NBN Atlas, as detailed in your additional grant conditions.

## Monitoring data collection: other project activities

**Please add the data asked for here to the Excel Workbook template accompanying this guidance document. The data we're asking for comes under three main categories: 1. nature, 2. people (connection and access), and 3. employment and skills.**

### Nature

Below is the data we are asking you to provide for the Nature category.

#### Habitats: small scale actions

- Small scale interventions - this includes the creation of very small-scale features such as nest boxes, log piles, bare ground scrapes and bee banks. These should not be mapped (size threshold: features smaller than 25 m<sup>2</sup> or 5m if linear) but be added here instead. Please include:
  - Location (OS grid ref) and:
    - Number (if relevant)
    - Short description
  - Work involves creation/restoration of wildlife-rich habitat – Yes/No
    - If Yes, need baseline and target habitat. Please use UKHab Level 4 or 5 where possible

#### Habitats: trees planted

- Tree planting which is smaller than 25m<sup>2</sup> or 5m if linear in coverage. Please include:
  - Location (OS grid ref) and:
    - Number of trees planted
    - Planting type: lone trees, groups of trees, small wood, or hedgerow
    - Percentage which is broadleaf
    - Percentage which is conifer

### Surveys

- Please include location (OS grid ref) and:
  - Frequency/number of times completed
  - Type of survey: species, habitat, or other
  - Short description
  - Wildlife-rich habitat: Yes/No
  - Undertaken by: staff, supplier, or volunteers

## People

Below is the data we are asking you to provide for the People category.

### Connecting people with nature

- Location (postcode or OS grid ref) and:
  - Type of event (options: Workshop, Talk (in-person), Talk (online), School or youth organisation-specific activity e.g. school visit, Health and wellbeing activity e.g. walks, Festival or large-scale event e.g. open day, Other)
  - Short description
  - Number of events
  - Number of people attending
  - Target audience (options: Young people and children (aged 18 or under), Landowners, General public, Local communities, Other)
  - Short description of 'other' target audience

### Volunteering

- Location (postcode or OS grid ref), and:
  - Volunteer numbers (e.g. total number attending in that location)
  - New volunteers (e.g. recorded when it is their first time attending)

### Access infrastructure

- Location (postcode or OS grid ref), and:
  - New footpaths: length in metres
    - Of this: length in metres of accessible footpath
  - New buildings: visitor centre/toilets
    - Of this: number of accessible buildings/facilities
  - New signage and/or interpretation

## Employment and skills

Below is the data we are asking you to provide for the Employment and Skills category. Employment and paid training roles are both included on the same sheet in the Excel Workbook template. Please complete one line per person.

### Employment

- Job location (postcode or OS grid ref), and:
  - Role title
  - Employee (e.g. lead or partner)
  - Created, retained, supported through FCR
  - Job level (entry, mid-level, senior)
  - Hours (FTE)
  - Contract length
  - Equalities data (options to select from: Aged 25 years or under, socioeconomically disadvantaged, Black, Asian or from another ethnic minority, LGBT+, A disability, Aged 60 years or over, Other, None of the above, Not known)

## **Apprenticeships and Traineeships**

- Apprenticeship location (postcode or grid ref), and:
  - Apprentice or trainee
  - Role title
  - Employee (e.g. lead or partner)
  - Qualification/level
  - Hours (FTE)
  - Contract length
  - Equalities data (options to select from: Aged 25 years or under, socioeconomically disadvantaged, Black, Asian or from another ethnic minority, LGBT+, A disability, Aged 60 years or over, Other, None of the above, Not known)

## **Staff and volunteer training**

### **Formal training (training resulting in a qualification or certificate)**

- Location (postcode or grid ref), and:
  - Short description
  - Name of qualification or certificate gained
  - Number of staff taking part
  - Number of staff who gained qualification or certificate
  - Number of volunteers
  - Number of volunteers who gained qualification or certificate

### **Informal training**

- Location (postcode or grid ref), and:
  - Short description
  - Numbers of staff
  - Numbers of volunteers

## Further Reading

Here are a few key documents for reference. Click on each link for further information.

- [Environmental Improvement Plan 2023](#)
- [Environment Act Habitat Target – Definitions and Descriptions](#)
- [Statutory biodiversity metric condition assessments](#)

## Keeping in touch

We can support you if you need any assistance or guidance on any of these requirements. Please do get in touch with Insight Manager [holly.atkinson@heritagefund.org.uk](mailto:holly.atkinson@heritagefund.org.uk) if you need anything or have any questions. Both the Heritage Fund and the appointed evaluator, Wavehill, have dedicated capacity to support projects.

This data is collected centrally by the Heritage Fund's Research, Data and Insight team, for all projects funded by the SSF.

Please discuss your submission of this data to the team as part of your project monitoring reporting to your Grant in Aid Manager to help ensure you're not duplicating any reporting.

## Frequently Asked Questions (FAQs)

These FAQs have been compiled after draft guidance was circulated to all projects and explained at a webinar on 21 November 2024.

### General queries

**Question: Have there been any changes from Green Recovery Challenge Fund data collection?**

Answer: Yes, there has been a considerable shift in the data collection approach from the Green Recovery Challenge Fund (GRCF) to ensure that data capture meets requirements to report against Defra's statutory biodiversity targets and reflect the themes of the SSF.

**Question: The data collected looks mostly quantitative. What about qualitative data collection to capture outcomes?**

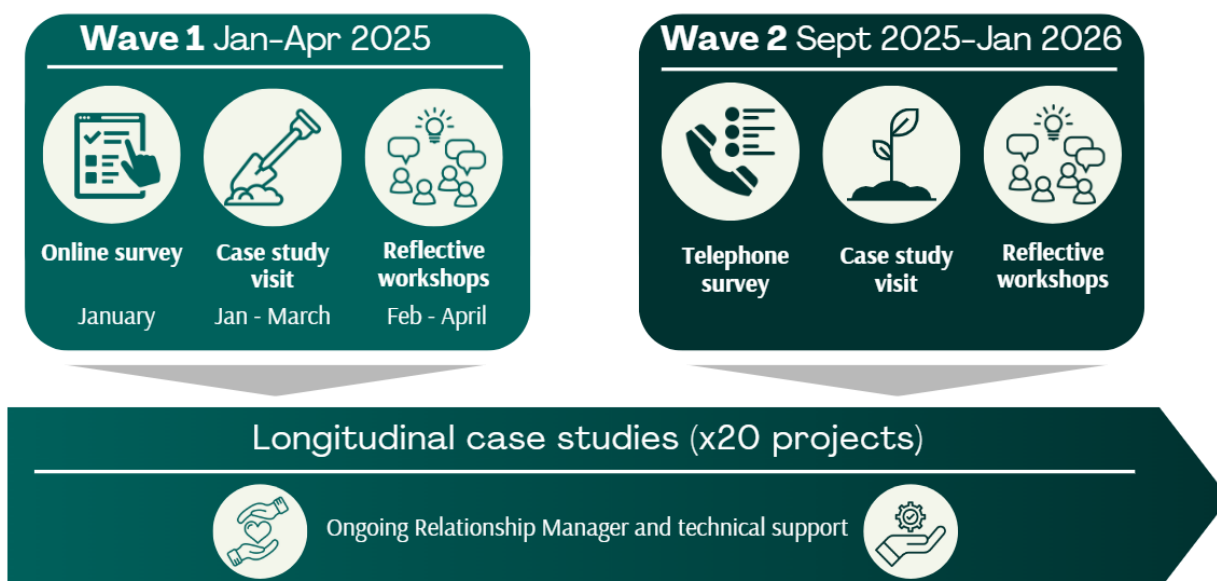
Answer: Please be assured that the evaluation will capture a wide range of quantitative and qualitative data. Whilst data captured through the data template and Survey123 is typically more quantitative, the evaluation will also be asking for qualitative project feedback through reflective workshops, during site visits and interviews. The full list of evaluation fieldwork is provided below.

**Question: Is there a summarised list of all evaluation fieldwork?**

Answer: Yes, the evaluation fieldwork includes:

- **The Wave 1 Survey.** This will be distributed to all project managers in December and will be due on the 31<sup>st</sup> January 2025.
- **Site visits.** There will be two site visits, one should be scheduled for between January and April 2025 and the subsequent visit should be scheduled for between September 2025 and January 2026. Site visit dates should be determined between each project and their Wavehill relationship manager based on availability and project activity delivery.
- **Reflective workshops.** There will be two rounds of reflective workshops. The first round of workshops will be held on pre-determined dates between February and April 2025 and the second round will be held between September 2025 and January 2026. Please note that all project managers will be sent a brief outline of the reflective workshop themes and their suggested dates and times in December 2024. It is anticipated that project managers and staff will attend workshops which have themes that are relevant to them and their project delivery but will **not** be expected to attend every workshop.
- **The Wave 2 Interview.** This will be scheduled between November 2025 and January 2026 between the project manager and their evaluation relationship manager.

The evaluation fieldwork is further summarised in the infographic below.



For any further queries on the evaluation fieldwork, please ask your Wavehill Relationship Manager for more details.

## Spatial data queries

**Question: Projects need to submit spatial data either via GIS Shapefile or using the Survey123 currently being created – do projects also need to record spatial data on the Excel form supplied?**

Answer: No, please only submit the spatial data via GIS Shapefile or using Survey123. Anything larger than the minimum mapping unit 25m<sup>2</sup> should be mapped spatially, and anything smaller than this should be included in the monitoring information (Excel form supplied). There should be no (or very limited) duplication in what is submitted between the spatial data and the monitoring information.

**Question: Where the guidance asks for expert judgment on the area of influence, who can provide this expert judgement?**

Answer: We defer to the expertise of the project teams on this judgment call. We anticipate that grantees have the relevant expertise for making the judgment on the area of influence based on their understanding of the project area and the activity being delivered.

**Question: Where projects have employed an individual to engage with local stakeholders e.g., farmers, but no SSF funding has been provided to those stakeholders, can a project include this in area of influence?**

Answer: No, only SSF-funded habitat activity that has occurred during the funding period can be included in the spatial data.

**Question: If projects have a large site, can they add in different polygons to make filling in metadata easier?**

Answer: Yes, grantees may use as many polygons as appropriate (greater than the minimum mapping unit 25m<sup>2</sup>) to represent the area over which habitat action has occurred.

**Question: If an area was managed under two practices, how can a project demonstrate that without overlapping polygons? E.g. if project activity included clearing scrub from an area and then planting trees.**

Answer: Where multiple actions have been carried out over the same area, these should be included in the same polygon and described in the 'Action' field in the metadata.

**Question: If a project has a polygon that contains different habitats can the project include all the habitats in there?**

Answer: Each polygon must contain only one habitat type. In this example, the site should be split into multiple polygons.

**Question: Do projects have to provide the habitat type using UK Hab classification?**

Answer: It is not a formal requirement that projects use UK Hab classification, but we have a strong preference that projects use it where possible. If projects have completed habitat surveys using an alternative habitat classification methodology, there will be an option to provide this in the spatial data metadata.

**Question: Do projects have to provide UK Hab Level 4 categorisation?**

Answer: When providing habitat classification using UK Hab, projects should provide the most detailed level of the UK Hab hierarchy possible (Level 5 being the most granular). We have asked for Level 4 (and Level 5 for scrub) because this aligns with priority habitats and will enable us to report against the statutory target. Where you are not able to classify your habitats at Level 4 categorisation or above, please provide the Level you have available – it will not discount the area from being included in the evaluation. For example, we recognise that Level 3 is the most granular level for modified grassland.

**Question: If actions on the sites take place over the 2 years, should a project wait until all actions are completed before submitting their data?**

Answer: Yes. Only sites where **all action** has been completed should be submitted in the interim data collection (January 2025). If there is any further activity expected on a site after January 2025 then it should be included in the final data collection (January 2026). There will be no conclusions drawn from monitoring information submitted either earlier or later than might be expected based on project plans. Whilst we encourage projects to submit as much completed action in the interim phase as possible (to get used to the approach to submitting data and reduce the burden for the final phase) if grantees are in any doubt as to whether an action is completed or not, please submit the data in January 2026.

**Question: Can you import shapes for existing areas e.g. reserves or does it have to be done from scratch?**



Answer: You cannot import existing boundary data into the Survey123 form. However, if you are accessing the spatial data through the ArcGIS Online Collaboration you can open the data in ArcPro and trace around boundaries that you add to your map and then use the drop-down menu in the layer to provide the necessary metadata.

**Question: Can the polylines overlap with the polygons?**

Answer: Whilst polygons cannot overlap with other polygons, polylines can overlap with polygons. This allows parts of a project, such as hedgerows surrounding a meadow, to be captured together and for us to record distance and area outputs together. [OBJ]

**Question: The Survey123 form asks for the name of the user to be added, but there is no GDPR statement visible. Will this be added?**

Answer: Please review the evaluation's Privacy Notice (which includes detail on GDPR) [here](#).

## Monitoring information queries

**Question: Within the data template, there is a tab called 'Habitat: surveys conducted' - does this relate only to surveys within the capital works delivery locations, or can it include wider surveys delivered as part of the funded roles or revenue streams e.g. water vole surveys?**

Answer: Yes, this includes all surveys conducted with SSF funding, including both habitat and species surveys.

**Question: Is there a GDPR issue with projects providing equalities data for job roles? You ask for location and role title. Is it okay to leave this blank for home-based staff?**

Answer: Please refer to the evaluation's privacy notice, available [here](#). All personal data supplied through this evaluation is handled sensitively and securely by Wavehill and Heritage Fund staff. Only required staff will have access to this data and all personal data will be deleted within 6 months of the completion of the evaluation.

Where possible, we do require the location and role title of home-based staff. Where this is of concern, please provide only the first section of the respective staff member's postcode e.g. NE1 1DF would become NE1. Please contact your Wavehill Relationship Manager if you have any further concerns.

**Question: Within the data template, how much detail is needed for location for volunteers and events? I.e. does this need to be at a habitat-level?**

Answer: No, it does not need to be at a habitat level. If possible, please provide the postcode and OS grid reference for the volunteer or event activity.

**Question: For volunteering data, we are asking for a grid reference. How do we treat volunteering activities that take place over a large area or multiple sites?**

Answer: Please provide a single point location if possible. If volunteering happens over a large area or multiple sites, please provide the location of a meeting point or the most frequent site where volunteering occurs.

**Question: A project may have the same volunteers engage across different sites, should they still include those volunteers on the data template for each location?**

Answer: Yes. On the data template we would like projects to tell us the total number of individual volunteers that have engaged with at each site. Where there have been volunteers that have been **new to the project** these should be counted in the column that reads 'Of total number of volunteers, how many were attending for the first time?'

**Question: What to do if projects did not collect data on new volunteers, one off volunteering, and/or established volunteers previously?**

Answer: If you have been unable to collect data on new volunteers for the first months of the project, please leave blank for this round of data collection. Please endeavour to collect this data for subsequent months and submit in the second round of data collection.