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Bat survey planning and readiness

Checklist 01 | 16 November 2026 | Version 1.0

Agree the question, map coverage and resolve access, competence and data arrangements before deployment.

Project and survey ID	Date and lead ecologist

Mark D = done, N = not applicable, or O = open. Add evidence and actions on the record page; explain N and O.

Check and evidence to retain	D / N / O
Define the decision Record the survey question, proposed works, current drawing revision and relevant impact pathways.	
Review the starting evidence Identify records, assessments, features, habitats and remaining uncertainty. Record source dates and access limits.	
Set a justified method Record the applicable guidance, edition and any specialist protocol. Explain method, timing and effort; justify departures.	
Map the coverage Give features, stations and routes stable IDs. Mark views, occlusions, access restrictions and how each question will be covered.	
Confirm people and permissions Name the lead and review roles. Check competence, access consent and any licence or supervision requirements for the chosen activity.	
Agree safe working Complete the site risk assessment, communications and check-in arrangements. Include lone working, roads, water, structures and rest where relevant.	
Prepare equipment and contingencies Allocate devices, batteries, storage and spares. Agree equipment tests, failure responses and conditions for stopping or rescheduling.	
Plan evidence management Agree file naming, time reference, backup, reviewer, secure access, retention and handover. Record privacy and sensitive-location restrictions.	

Original ACP recording aids for competent ecologists. Adapt them to the survey question, current guidance, licence conditions and site risk assessment. They do not prescribe survey effort or establish competence, legal compliance or absence of bats.

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Survey planning record

Project and survey ID	Date and lead ecologist

Survey question and current plans

Decision to inform; work description; drawing revision and date; design options considered.

Method and effort rationale

Guidance and edition; method; seasonal window; planned effort; justification for departures.

Feature and coverage plan

Map reference; feature and station IDs; intended views; blind spots and unresolved access.

Readiness decision and actions

Proceed, amend or hold; reasons; unresolved issue; action owner and due date. This is a readiness decision, not permission for works.

Approval and arrangements

Lead and checker; permissions; risk assessment reference; storage, retention and confidentiality plan reference.

Method references: BCT survey guidelines fourth edition; BCT night vision aids technical guide; Natural England bats planning standing advice. Links are clickable in the PDF.

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