

Draft Plan for the Review of the Biological Recording Infrastructure in Scotland: Paper 2: Success criteria, activity plans and timeline.

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1. Purpose of this paper

The SBIF Advisory Group has undertaken to drive the review and redesign of the biological recording infrastructure in Scotland¹ in order to inform any realignment of structures and resources necessary to achieve our vision:

High quality species and habitat data will be collected and managed through a sustainable, co-ordinated and integrated local and national framework of organisations, partnerships and initiatives. These data will be available to ensure that Scotland's biodiversity, ecosystems and people benefit.

Following on from the formation of a Working Group to undertake this Review (as per *Paper 1: Formation of, and Terms of Reference and Brief for, a Working Group to undertake this Review*) the Working Group will develop and maintain a detailed plan of action and timeline for the Review.

The purpose of this paper is to share emerging plans and timelines. Prior to the first meeting of the Working Group, this paper was issued for early comment by the SBIF Advisory Group. It was then circulated for formal review and first approval by the SBIF Advisory Group on 5th September 2016. It was updated to reflect revised timelines for second approval by the SBIF Advisory Group on 20th January 2017, and **is being further issued to provide updated timelines for third approval by the SBIF Advisory Group on 21st June 2017.**

Third approval of the Plan will allow the Review Working Group to proceed to complete Stage 2 (through the development and publication of a high level business case setting out the need for change) and to complete the planning for Stage 3 (developing and evaluating options and confirming our preferred option in a detailed business case). The Plan and its timeline will continue to be kept up to date by the Working Group for the duration of the Review. Fourth approval of this plan will be sought to proceed with Stage 3 and commence the planning for Stage 4 (implementation planning).

All comments on this paper should be provided to Ellen Wilson (SBIF Chair) or Christine Johnston (NBN Scottish Liaison Officer) at the earliest opportunity.

2. Recommendations

This Paper makes two recommendations for consideration at the SBIF Advisory Group meeting on 21st June 2017:

¹ One of three recommendations in SBIF Paper 2016/01 of 7th February 2016 entitled 'Bringing together SBIF and the NBN'

- i. that the SBIF Advisory Group should approve the revised timeline in the attached Review Roadmap.
- ii. that the SBIF Advisory Group gives approval for the Review to proceed to complete Stage 2 and the planning of Stage 3.

3. Success criteria

Our vision for the Review is that it determines the optimum infrastructure for biological recording in Scotland, an infrastructure that in turn will attract the necessary belief, commitment and investment by stakeholders to be sustainable and successful in fulfilling the original vision of SBIF:

High quality species and habitat data will be collected and managed through a sustainable, co-ordinated and integrated local and national framework of organisations, partnerships and initiatives. These data will be available to ensure that Scotland's biodiversity, ecosystems and people benefit.

Although the Review is of interest to a wide range of stakeholders with an equally wide range of views on what success may mean, it may be useful to agree some common criteria against which we can measure our success. This paper proposes the following as potential success criteria that may be common to everyone:

- The Review should be project managed, with formal approval to proceed sought at key milestones and progress reported through monthly highlight reports.
- The Review should be efficient, concluding in a reasonable timeframe (within 12 months) unless there are exceptional reasons that necessitate a longer period.
- The Review should be fair, giving equal opportunity to representatives from all sectors to participate and input.
- The Review should be supportive, allowing people to express their views in a safe space and giving individual attention while keeping everyone energised, involved and informed.
- The Review should be thorough, defining the different entities and processes involved in operating the infrastructure so that attention can be given to each component of significance.
- The Review should facilitate resolution of the following issues:
 - Lack of resilience, complexity and unsustainability of the current infrastructure.
 - Lack of easy access to discover data of high value for insights and decision-making.
 - Complexity and challenge of provision of open data through the current infrastructure.
 - Patchy provision and/or duplication of services through the current infrastructure.
 - Lack of alignment and degree of challenge within and between stake-holding sectors.
 - Lack of certainty and action on localising, nationalising and/or centralising services.
- The Review should enable us to improve ease of operation and use of the biological recording infrastructure so that more data reach more people for more benefit for Scotland and its people, ecosystems and biodiversity, hugely increasing not only the economic, social and environmental value of the infrastructure but also hugely increasing user and provider satisfaction.
- The Review should obtain perspectives from all four countries of the UK while remaining focused on recommendations that are optimised for Scotland.
- The Review should minimise costs through operating efficiently, designing workshop arrangements to minimise the time and travel involved, and making use of easily available resources such as existing staff time, meeting rooms and other facilities.

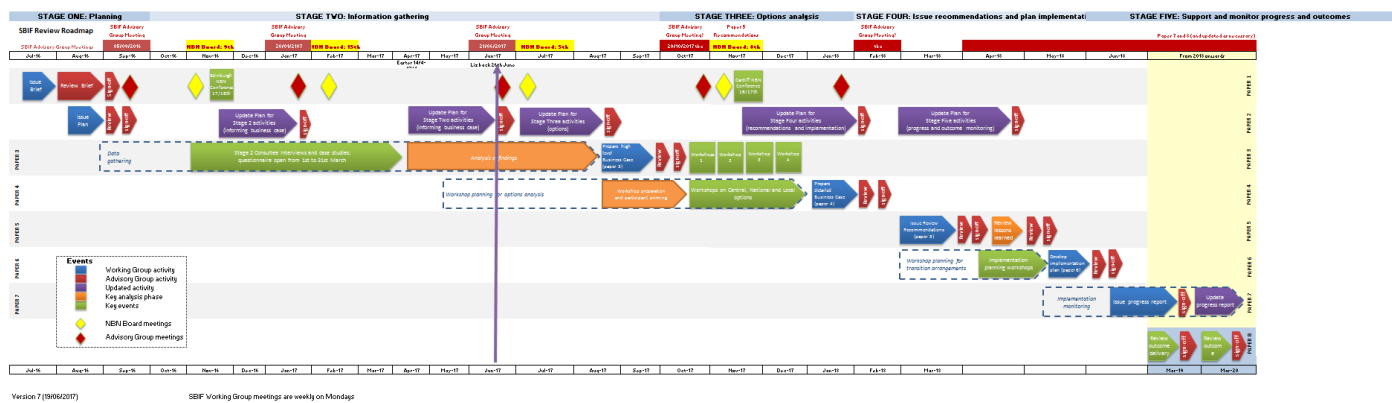
4. Activity plans

The Working Group proposes the following list of activities to facilitate and report on the Review. The full plan is available from the Working Group on request:

STAGE	ACTIVITY	STATUS
Ongoing Activities	1. Issue monthly highlights reports and NBN eNews; maintain SBIF Review web pages	Ongoing
	2. Maintain lists of contacts and consultees	Ongoing
Stage 1: Set up the Working Group and complete planning for the Review	3. Confirm membership of the SBIF Advisory Group	Done
	4. Establish and maintain web page to share Review documents	Done
	5. Create Value Model to illustrate infrastructure communities	Done
	6. Draft Paper 1 (the Brief) and share for comment	Done
	7. Approve Paper 1 (the Brief) and post on NBN page	Done
	8. Draft and maintain Paper 2 (the Plan and timeline) and share for comment	Done
	9. Establish and induct the Review Working Group	Done
	10. Identify stakeholders and create and maintain mailing lists	Done
	11. Approve Paper 2 (the Plan) and post on NBN page	Done
	12. Design workshops needed to evaluate options and prioritise Stage 3 Consultees	In progress
	13. Book interview dates with Stage 3 Consultees	In progress
	14. Design workshops needed on transition arrangements and prioritise Stage 4 Consultees	Not started
	15. Book workshop dates with Stage 4 Consultees	In progress
	16. Design future monitoring of recommendations	Not started
Stage 2: Gather perspectives, requirements and other information from key stakeholders	17. Interview Stage 2 Consultees (key stakeholders)	Done
	18. Review material from previous questionnaires, reviews etc	Done
	19. Develop and run a questionnaire with Stage 2 Consultees (all stakeholders)	Done
	20. Create and maintain log of requirements from consultee responses	Done
	21. Create and maintain log of operational recording schemes and operators	In progress
	22. Create and maintain log of services currently offered by the infrastructure	In progress
	23. Develop case studies (<i>focus of case studies to be confirmed</i>)	Not started
	24. Document and illustrate Business Case supporting information	In progress
	25. Draft and maintain Paper 3 (High-level Business Case) and share for comment	In progress
	26. Approve Paper 3 (High-level Business Case) and post on NBN page	Not started
Stage 3: Hold workshops to find the options at central, national and local levels and our preferred option	27. Workshop on central services and data flows	Not started
	28. Workshop on national-level services and data flows	Not started
	29. Workshop on local-level services and data flows	Not started
	30. Draft Paper 4 (Detailed Business Case) and share for comment	Not started
	31. Approve Paper 4 (Detailed Business Case)	Not started
Stage 4: Work out what is involved in implementing any preferred option(s)	32. Workshop(s) on implementation arrangements	Not started
	33. Draft Paper 5 (Implementation plan) and share for comment	Not started
	34. Approve Paper 5 (Implementation Plan)	Not started
Stage 5: Issue final recommendations then monitor their implementation	35. Draft Paper 6 (Final Recommendations)	Not started
	36. Approve Paper 6 (Final Recommendations)	Not started
	37. Share Final Recommendations with affected organisations and other stakeholders	Not started
	38. Review whether we achieved the objectives of the Review	Not started
	39. Monitor implementation progress and further support needs	Not started
	40. Draft Paper 7 (Implementation Progress) and share for comment	Not started
	41. Approve Paper 7 (Implementation Progress) and post on NBN page	Not started
Stage 6: Update Advisory Group on delivery of outcomes	42. Review whether we achieved the outcomes of the Review	Not started
	43. Draft Paper 8 (Delivery of Outcomes) and share for comment	Not started
	44. Approve Paper 8 (Delivery of Outcome) and post on NBN page	Not started

5. Draft Timeline

The Working Group proposes the following sequence and timing of activities, with a main period of activity taking place over **18 months from July 2016**. Points at which input from the SBIF Advisory Group will be required to review and sign-off papers are marked in red.



NB: A full size diagram (in Excel) has been circulated with this paper and will be available from the [SBIF Review](#) page on the NBN website.

6. Circulation of this paper

Draft versions of this paper will be circulated to our primary stakeholder, the SBIF Advisory Group for their comment and approval. Once approved, this paper will be available from the [SBIF Review](#) page on the NBN website and circulated to a wider set of stakeholders for their information:

VERSION	CIRCULATED TO	PURPOSE
Pre-approval drafts	SBIF Review Working Group (via email)	For drafting
Pre-approval drafts	SBIF Advisory Group (via email)	For comment and improvement
Version for approval	SBIF Advisory Group (via email)	For approval
Approved version	Senior stakeholders in Scotland and key stakeholders in other UK countries (via email)	For information
Approved version	All stakeholders (via the SBIF Review webpage)	For information

7. Approvals

This Plan will be updated throughout the Review and requires the approval of the SBIF Advisory Group at three key milestones:

- After approval of Paper 1 and prior to detailed planning for the Stage 2 Workshops
- After approval of Paper 3 and prior to detailed planning for the Stage 3 Workshops
- After approval of Paper 4 and prior to detailed planning for any monitoring phase

NAME	ROLE	ORGANISATION	DATE APPROVED		
			Milestone a	Milestone b	Milestone c
Jo Porter	Academia rep	Heriot-Watt University			
Guy Harewood	Local Authorities rep	Stirling Council			
Jonathan Willet	BRISC rep	BRISC			
Nick Fraser	Museums rep	National Museums Scotland			
Jo Judge	NBN rep	NBN Trust			
Ellen Wilson	NGOs rep/SBIF Chair	RSPB			
Craig Macadam	NGOs rep	BugLife			
Sandra Marks	Scottish Gov rep	Scottish Government			
Iain MacGowan	SNH rep	SNH			

Sebastian Howell	Scottish Gov rep	Marine Scotland			
Scot Mathieson	SEPA rep	SEPA			
Graeme Wilson	LERCs rep	TWIC			
David Roy	Academia/iRecord rep	BRC/CEH			
Gill Dowse	NGOs rep	SWT			
Andy Ford	National Parks rep	CNP			
Claire Lacey	CIEEM rep	Scottish Windfarm Bird Steering Group			

Plan updated by:
 Ellen Wilson, SBIF Chair
 Christine Johnston, NBN Scottish Liaison Officer
 15th June 2017