

# SBIF Review of the Biological Recording Infrastructure in Scotland

## Highlight Report



SPONSORS	SBIF Advisory Group
CIRCULATION LIST	SBIF Advisory Group, SBIF Working Group, Ed Mackey, Roddy Fairley
DATE	15 August 2016
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Amber (due to the potential need to secure workshop funding)

### Latest Update

A potential framework for the Review, and the terms of reference and approach of a working group to undertake it, have been proposed in Paper 1 circulated to the SBIF Advisory Group at the beginning of August. Paper 1 is due for approval along with a high level plan to be issued as Paper 2 at the Advisory Group meeting on the 5<sup>th</sup> September. Once approved, Stage 1 of the Review, the planning stage, will be complete and so the Review can then get underway. Stage 2 will involve the gathering of perspectives and requirements across all sectors followed by workshops to evaluate what could and should be on offer centrally, nationally and locally. We have flagged one issue for attention - that we may need to secure funding for the workshops. We are in the process of identifying who we will need to consult with during Stage 2 and how best to design the interviews and workshops needed. Information from these will allow us to develop a high level business case setting out the need for change and the aspects that most need improvement.

The NBN website now has a page where details of the Review and all highlight reports and approved papers will be shared publicly (see <https://nbn.org.uk/about-us/where-we-are/in-scotland/review/>).

### Overview

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.*

The Review will do this in such a way as to be cohesive across Scotland with support from all stakeholders and the willingness and energy to then make the transitions necessary to implement the new infrastructure by 2020.

Our objectives are:

- To build the energy and confidence of key stakeholders in the potential for an improved infrastructure that delivers the original vision of SBIF (above).
- To establish a register of all operational recording schemes and their operators so that data flows in Scotland are well-understood.
- To establish what funding and other income sources sustain the current infrastructure and what sources may continue to be available, or become available, in future.
- To hold stakeholder interviews to gain their current perspectives and to consult stakeholders on the infrastructure that they and their sector would need to meet their requirements.
- To run stakeholder workshops to identify the options for how these needs could best be fulfilled centrally, nationally and locally, and to evaluate these options in order to identify the preferred one(s).
- To identify where improved use of technology can help reduce duplication of effort and increase the efficiency of the biological recording infrastructure (so that data are made available for use and re-use).
- To identify what transition arrangements would be necessary to implement the preferred option(s).

## Stages and Milestones

STAGE/MILESTONE	DUE/DONE	STATUS	NOTES/RISKS/ISSUES
<b>STAGE 1: Set up the Working Group and complete planning for the Review (August 2016)</b>			
 Paper 1 (Brief for the Review) approved	05 September 2016		
 Paper 2 (high level plan) approved	05 September 2016		
 Working Group meetings established	16 September 2016		
 Workshop logistics confirmed for Stages 2 and 3	30 September 2016		We may need funding to cover potential workshop costs.
<b>STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September/October 2016)</b>			
 Interviews with Stage 2 consultees completed	31 October 2016		
 Background data gathering complete	31 October 2016		
 Paper 3 (high level business case) approved	30 November 2016		
 Paper 2 (high level plan) updated and approved	30 November 2016		
<b>STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (November/December 2016)</b>			
 Workshops with Stage 3 consultees completed	23 December 2016		
 Paper 4 (detailed business case) approved	31 January 2017		
 Paper 2 (high level plan) updated and approved	31 January 2017		
<b>STAGE 4: Work out what is involved in implementing any preferred options (January 2017)</b>			
 Workshops with Stage 4 consultees completed	28 February 2017		
 Paper 5 (proposal for consultation) approved	31 March 2017		
<b>STAGE 5: Consult with organisations which may be affected (February/March 2017)</b>			
 Consultation discussions completed	30 April 2017		
 Paper 5 (proposal outcome) updated and approved	31 May 2017		
<b>STAGE 6: Issue final recommendations then monitor their implementation (April 2017 onwards)</b>			
 Paper 6 (recommendations) approved	31 July 2017		
 Review of the success of the Review	30 September 2017		
 Paper 7 (progress) approved	31 December 2017		
 Paper 8 (outcomes) approved	31 December 2018		
 Paper 8 (outcomes) updated and approved	31 December 2019		
 Paper 8 (outcomes) updated and approved	31 December 2020		
 on track  SBIF Working Group attention needed  SBIF Advisory Group intervention needed			

## Activities

<p>COMPLETED THIS MONTH</p>	<ul style="list-style-type: none"> <li>• Confirmed date of next SBIF Advisory Group meeting when the Advisory Group will discuss and sign-off Paper 1 for the Review as the 5<sup>th</sup> September 2016.</li> <li>• Drafted and issued Paper 1 (covering formation of a Working Group for the Review).</li> <li>• Created a Value Model diagram to illustrate the Biological Recording Infrastructure.</li> <li>• Obtained business analyst advice on the potential approach for requirements gathering.</li> <li>• Contacted Michael Cook (vice-president of COSLA) for advice on how to engage with Local Authorities and COSLA who arranged for Ellen and Christine to meet with Robert Nicol at COSLA.</li> <li>• Met Robert Nicol at COSLA to explain the Review and to obtain advice on liaising with COSLA going forward.</li> <li>• Established spreadsheets to aid recording and project management of tasks, activities, responses, issues etc.</li> <li>• Began the development of Paper 2 (covering success criteria, activity planning and timelines) ready for initial discussion and sign-off at the 5<sup>th</sup> September Advisory Group meeting and further development once the Working Group convenes.</li> <li>• Began the development of Paper 3 (high level business case) to work out what information and structure it may need in due course.</li> </ul>
<p>NOT DONE THIS MONTH</p>	<ul style="list-style-type: none"> <li>• Begin blog on the SBIF Review web page to share updates and news</li> <li>• Write NBN eNews article explaining the Review and sharing August highlights</li> <li>• Identify who can help create a register of recording schemes and operators.</li> <li>• Book meeting with NBN Trustees to brief them for their November meeting.</li> </ul>
<p>TO DO NEXT MONTH</p>	<ul style="list-style-type: none"> <li>• Begin blog on the SBIF Review web page to share updates and news</li> <li>• Write NBN eNews article explaining the Review and sharing August highlights</li> <li>• Identify who can help create a register of recording schemes and operators.</li> <li>• Book meeting with NBN Trustees to brief them for their November meeting.</li> <li>• Remind SBIF Advisory Group to provide comments on Paper 1.</li> <li>• Identify dates for SBIF Advisory Group meetings to coincide with key milestones.</li> <li>• Brief LERCs about the Review at their meeting on 23<sup>rd</sup> August.</li> <li>• Book follow-up meeting with Robert Nicol at COSLA.</li> <li>• Hold first meetings of the full Working Group.</li> <li>• Issue Paper 2 as a paper for the next Advisory Group meeting</li> <li>• Obtain approval for Papers 1 and 2 at the next SBIF Advisory Group meeting</li> <li>• Update Paper 2 (plan) and work further on Paper 3 (high-level business case).</li> <li>• Complete and maintain lists of contacts and consultees.</li> <li>• Set up task group to develop list of recording schemes and operators.</li> <li>• Set up task group to develop list of infrastructure services and service providers.</li> <li>• Contact SSN, ALGE, ALERC, BRISC and NFBR.</li> <li>• Begin planning and designing the Workshops for Stage 2.</li> <li>• Identify and prioritise consultees for Stage 2 so that we can book interview dates.</li> <li>• Begin exploring options for workshop e.g. venue, accommodation, travel, cost.</li> <li>• Approach possible funders to help cover the costs of workshops.</li> <li>• Confirm who to contact at JNCC, DEFRA, NE, NRW, NIEA and EA for UK perspectives.</li> <li>• Contact taxonomic NGOs and recording groups to introduce the review.</li> </ul>

## Key Documents

The documents below will be available via <https://nbn.org.uk/about-us/where-we-are/in-scotland/review/> once each one is approved by the SBIF Advisory Group as the Review progresses:

DOCUMENT	TITLE	STATUS
Paper 1 Brief	Initiating a Review of the Biological Recording Infrastructure in Scotland (formation of, and Terms of Reference and Brief for, a Working Group to undertake this Review)	AWAITING APPROVAL (at 05/09/2016 SBIFAG meeting)
Paper 2 Plan	Detailed plan for the Review of the Biological Recording Infrastructure in Scotland (success criteria, activity plans, and timeline)	DRAFT PREPARED for initial discussion prior to further development by the Working Group
Paper 3 High level Business Case	The High Level Business Case for a Review of the Biological Recording Infrastructure in Scotland (reporting on the perspectives and requirements of each Sector and the need for change)	IN PREP; will be developed during Stage 2.
Paper 4 Detailed Business Case	The Detailed Business Case for Changes to the Biological Recording Infrastructure in Scotland (reporting on the options evaluated and our preferred option)	Not started
Paper 5 Proposal for Consultation Consultation Outcome	Consultation on the transition to our preferred option for a Biological Recording Infrastructure in Scotland (proposal for consultation with the organisations affected/ Outcome of the consultation with the organisations affected)	Not started
Paper 6 Final Recommendations	Recommendations from the Review of the Biological Recording Infrastructure in Scotland (recommendations and implementation roadmap)	Not started
Paper 7 Progress Reporting	Progress reporting for the Review of the Biological Recording Infrastructure in Scotland (implementation of our recommendations)	Not started
Paper 8 Outcomes	Outcomes and benefits from our Review of the Biological Recording Infrastructure in Scotland (successes and lessons learned)	Not started

## Key Diagrams

The diagrams below will also be available via <https://nbn.org.uk/about-us/where-we-are/in-scotland/review/> and are listed here for ease of reference:

- **SBIF Value Model** (the 'windmill') illustrating the components of our biological recording infrastructure that provide value for various communities (decision-makers, biological recorders, data users and service providers).
- **SBIF Review Timeline** setting out the framework of activities involved in the Review and their timing.