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 September 2016
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

The SBIF Advisory Group gave the go ahead on the 5th September for the Review to get underway. The Working Group met on the 15th September to discuss ways of working (we'll meet weekly on Monday mornings) and to plan the logistics for gathering perspectives and requirements across all sectors. During the remainder of September, we will prepare briefing documents so that interviewees are well-prepared and familiar with the background and scope of the Review. We have adjusted the timeline to allow sufficient time for the interviews and for preparing the high level business case. BRISC have offered funding towards the cost of any workshops which is much appreciated. As we get underway with the interviews during October and November we will be in touch with each Advisory Group member to check who we are involving within the sector that they represent. We are currently collating all past questionnaires and reports relevant to the Review – if you have any historic documents that would be pertinent please do send them in.

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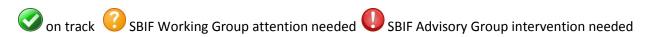
The Review will do this in such a way as to be cohesive across Scotland with support from all stakeholders and the willingness and energy to then make the transitions necessary to implement the new infrastructure by 2020.

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
STAGE 1: Set up the Working Group and complete planning for the Review (August 2016)				
✅	Paper 1 (Brief for the Review) approved	05 September 2016	*Completed*	
✅	Paper 2 (high level plan for Stage 2) approved	05 September 2016	*Completed*	
✅	Working Group meetings established	16 September 2016	*Completed*	
✅	Workshop logistics confirmed for Stage 2 (Options)	25 November 2016	*In progress*	BRISC have offered some funding to help offset workshop costs
STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September/October 2016)				
✅	Paper 2 (high level plan for Stage 2) approved	30 November 2016	*Completed*	
✅	Interviews with Stage 2 consultees completed	15 December 2016	*In progress*	Due date altered from 31/10/2016
✅	Background data gathering completed	15 December 2016	*In progress*	Due date altered from 31/10/2016
✅	Paper 3 (high level business case) approved	18 January 2016		Due date altered from 30/11/2016
STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (November/December 2016)				
✅	Paper 2 (high level plan for Stage 3) approved	24 February 2017		Due date altered from 31/01/2017
✅	Workshops with Stage 3 consultees completed	24 February 2017		Due date altered from 23/12/2016
✅	Paper 4 (detailed business case) approved	24 March 2017		Due date altered from 31/01/2017
STAGE 4: Work out what is involved in implementing any preferred options (January 2017)				
✅	Workshops with Stage 4 consultees completed	28 April 2017		Due date altered from 28/02/2017
✅	Paper 5 (proposal for consultation) approved	22 May 2017		Due date altered from 31/03/2017
STAGE 5: Consult with organisations which may be affected (February/March 2017)				
✅	Consultation discussions completed	30 June 2017		Due date altered from 30/04/2017
✅	Paper 5 (proposal outcome) updated and approved	28 July 2017		Due date altered from 31/05/2017
STAGE 6: Issue final recommendations then monitor their implementation (April 2017 onwards)				
✅	Paper 6 (recommendations) approved	28 July 2017		Due date altered from 31/07/2017
✅	Review of the success of the Review	30 November 2017		Due date altered from 30/09/2017
✅	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

COMPLETED THIS MONTH	• Write NBN Network News article explaining the Review and sharing August highlights • Allocate task of creating a register of recording schemes and operators. • Identify dates for SBIF Advisory Group meetings to coincide with key milestones. • Brief LERCs about the Review at their meeting on 23rd August. • Hold first meeting of the full Working Group. • Issue Paper 2 as a paper for the next Advisory Group meeting • Obtain approval for Papers 1 and 2 at the next SBIF Advisory Group meeting • Update Paper 2 (plan) and work further on Paper 3 (high-level business case). • Complete and maintain lists of contacts and consultees. • Set up task group to develop list of recording schemes and operators. • Set up task group to develop list of infrastructure services and service providers. • Begin planning and designing the Workshops for Stage 2. • Identify and prioritise consultees for Stage 2 so that we can book interview dates. • Confirm SBIF Advisory Group meeting dates for 2017 • Establish document sharing page on NBN website for SBIF Review • Create 'parking area' to log remaining/future actions for any future action plans • Complete list of stakeholders for the Review • Contact Mandy Rudd (ALERC/GIGL) to arrange a date to discuss the Review
NOT DONE THIS MONTH	• Book meeting with NBN Trustees to brief them for their November meeting. • Book follow-up meeting with Robert Nicol at COSLA. • Contact SSN, ALGE, ALERC, BRISC and NFBR. • Confirm who to contact at JNCC, DEFRA, NE, NRW, NIEA and EA for UK perspectives. • Contact taxonomic NGOs and recording groups to introduce the review.
TO DO NEXT MONTH	• Book meeting with NBN Trustees to brief them for their November meeting. • Book follow-up meeting with Robert Nicol at COSLA. • Contact SSN, ALGE, ALERC, BRISC and NFBR. • Meet Mandy Rudd (ALERC/GIGL) and key others (arrangements yet tbc) • Confirm who to contact at JNCC, DEFRA, NE, NRW, NIEA and EA for UK perspectives. • Confirm how to engage with planners in national and local government • Contact taxonomic NGOs and recording groups to introduce the review. • Begin exploring options for workshop e.g. venue, accommodation, travel, cost. • Monthly NBN Network News article • Confirm consultees for Stage 2 interviews and allocate interviewers to book dates • Commence interviews with initial stakeholders per sector • Review previous questionnaires and historic sources of information • Document infrastructure arrangements in other countries • Draft background briefing material for interviewees and 'script' for interviewers • Establish log of operational recording schemes • Establish log of technical and added-value services • Establish log of requirements for the infrastructure in Scotland • Prepare for the BRISC, ALERC and NBN conferences • Prepare briefing paper for NBN and LERC Trustees • Continue planning and designing the Workshops for Stage 2

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)	APPROVED (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)	APPROVED (for Stage 2)
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.