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 November 2016
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

We have completed our literature review going back to 1968 and uncovered some gems from the past for inclusion in our high-level Business Case!   Work on designing the questionnaire and its analysis is well underway, and we hope to have a version ready to pilot at the end of November or early December ready for a launch on/by the 5th December. We have completed work to identify key stakeholders and in particular the top three people per sector to interview in addition to the questionnaire (we have capacity to interview 30 people by phone). Interview slots will be available in the three week period from 5th to the 19th December. We will issue a Doodle Poll ASAP to check stakeholders' availability so that we can offer and book slots by the end of November. The questionnaire will be widely promoted in December and may now close in the New Year to give as many people as possible the chance to complete it. Ellen and Christine are visiting Orkney on the 28-30th November to meet stakeholders across all sectors over three days, including a publicly open meeting for recorders. If anyone would like a visit, please contact Christine to discuss possible dates.

Details of the Review and all highlight reports and approved papers are 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*	
STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September-December 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*	Questionnaire open into Jan-17?
✅ Background data gathering completed	15 December 2016	*In progress*	
✅ Paper 3 (high level business case) approved	18 January 2017		Date likely to move to February
STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (February-March 2017)			
✅ Paper 2 (high level plan for Stage 3) approved	24 February 2017		Date likely to move to March
✅ Workshops with Stage 3 consultees completed	24 February 2017		Date likely to move to March
✅ Paper 4 (detailed business case) approved	24 March 2017		Date likely to move to April
STAGE 4: Work out what is involved in implementing any preferred options (April-May 2017)			
✅ Workshops with Stage 4 consultees completed	28 April 2017		
✅ Paper 5 (proposal for consultation) approved	22 May 2017		
STAGE 5: Consult with organisations which may be affected (June-July 2017)			
✅ Consultation discussions completed	30 June 2017		
✅ Paper 5 (proposal outcome) updated and approved	28 July 2017		
STAGE 6: Issue final recommendations then monitor their implementation (August 2017 onwards)			
✅ Paper 6 (recommendations) approved	28 July 2017		Date likely to move to August
✅ Review of the success of the Review	30 November 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	• Held Working Group Meetings coordinating the activities of the Review. • Briefed NBN Trustees at their board meeting on 9 November in London • Gave talk to BRISC Conference on 29 October in Linlithgow • Gave talk to Highland Biological Recording Group on 12 November in Boat of Garten • Continued to develop questionnaire for use in place of most interviews for Stage 2 • Progressed stakeholder analysis to identify key stakeholders – 'top 30' now known • Reviewed previous questionnaires and historic information • Continued to develop log of operational recording schemes • Continued to develop log of technical and added-value services • Established a log of systems in use (e.g. SEWeb, NBN Atlas, BirdTrack, Merlin) • Liaised with Sydney Gauld to arrange stakeholder meetings in Orkney 28-30 November • Progressed development of a communications plan for the Review • Started to develop a 'recruitment plan' to maximise questionnaire response rates • Obtained advice on ethics of questionnaire design to understand legalities and ethics • Prepared leaflets explaining the SBIF Review for use at the NBN Conference • Began to look at how other networks operate as a network to seek ideas • Gathered background information on governance of service providers • Gathered background information on number of planning applications in Scotland • Developed the outline set of questions to be used and input these into Survey Monkey
NOT DONE THIS MONTH	• Contact taxonomic NGOs and recording groups to introduce the review. • Book follow-up meeting with Robert Nicol at COSLA. • Contact SSN, Andy Tharme at ALGE, BRISC and NFBR. • Identify suitable journals and begin preparing a paper for publication reviewing historic documents and issues in the infrastructure
TO DO NEXT MONTH	• Confirm Data Protection Act legalities for questionnaire and interview use • Complete set up and testing of questions in Survey Monkey • Confirm exactly how questionnaire results will be analysed to confirm its design • Issue the questionnaire and encourage people to respond • Start planning exactly how to set out our high-level business case • Prepare for analysing questionnaire and interview results and drawing As-Is models • Continue to prime key stakeholders and gather background information • Issue Doodle Polls to find suitable interview slots for top 30 stakeholders • Undertake and document hour long telephone interviews with top 30 stakeholders • Contact Andy Tharme at ALGE/Scottish Borders Council • Visit Orkney on 28-30 November to meet stakeholders and give a talk • Attend the NBN conference on the 17-18 November • Continue to log local and national schemes, systems and services • Continue to develop and implement our communications plan • Continue to develop and implement questionnaire recruitment plan • Contact other countries for their ideas and lessons learned • Continue to look at the ways other networks operate as a network to seek ideas • Start to look at planning system and how bespoke services could offer efficiency/value • Start working out how to use infographics to illustrate the infrastructure and how it works (e.g. creating 'spaghetti maps' and 'value chains'!) • Begin to work out timelines for any workshops in 2017

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 and Leaflets

The diagrams and leaflets 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.

- **SBIF Leaflet 1: Introducing the SBIF Review of the Biological Recording Infrastructure in Scotland** (leaflet for use at the NBN Conference and other events in 2016/17)