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	17 February 2017
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

Interviews with key stakeholders are nearing completion with 41 completed, 3 due and the last 11 to be arranged and held by mid March (if all requests are accepted). The interviews are proving incredibly useful with lots of common themes emerging. We have continued to underestimate how long the questionnaire will take to develop!! Over the last month, the SBIF Working Group has worked together to finalise the questions and with a last push we should soon be ready to go. We are now aiming to run it during 1st-31st March. Dates for the Stage 3 workshops have been set in May 2017 however our thinking on these is evolving. We may now use one week in May (9-11th) as a creative session to generate possible options before then sharing these options online to get collective input and feedback from all sectors during June. A later workshop in July (4-6th and/or 25-27th) may then evaluate feedback and find a preferred option. We will focus on workshop design and invitee lists once preparation of the questionnaire is complete. The SBIF Working Group and Claire Lacey will hold an event for CIEEM members to attend in Edinburgh or by phone at 6pm on 21st March.

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)	28 February 2017	*Completed*	
STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September 2016-April 2017)			
✅ Paper 2 (high level plan for Stage 2) approved	30 November 2016	*Completed*	
✅ Questionnaire design completed	28 February 2017	*In progress*	New milestone given level of effort
✅ Interviews with Stage 2 consultees completed	10 March 2017	*In progress*	
✅ Background data gathering completed	31 March 2017	*In progress*	
✅ Analysis of questionnaire results completed	17 April 2017		New milestone given likely effort
✅ Paper 3 (high level business case) approved	28 April 2017		Co-author will be Jo Judge
STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (May-July 2017)			
✅ Paper 2 (high level plan for Stage 3) approved	28 April 2017		
✅ Workshops with Stage 3 consultees completed	18 May 2017		Key dates = 9-11 May and 4-6 July
✅ Paper 4 (detailed business case) approved	07 July 2017		
STAGE 4: Work out what is involved in implementing any preferred options (July-August 2017)			
✅ Workshops with Stage 4 consultees completed	31 August 2017		Key dates = 25-27 July
✅ Paper 5 (implementation plan) approved	05 September 2017		
STAGE 5: Publish final recommendations and review lessons learned (September 2017)			
✅ Paper 6 (review recommendations) approved	22 September 2017		
✅ Review lessons learned from doing the Review	15 December 2017		
STAGE 6: Monitor the progress and success of implementing our recommendations (January 2018 onwards)			
✅ Monitor implementation against key milestones	31 March 2018		
✅ Paper 7 (progress report) approved	31 March 2018		
✅ Paper 7 (progress report) updated	28 September 2018		
✅ Paper 8 (outcomes) approved	31 March 2019		
✅ Paper 8 (outcomes) updated	As required		

✅ on track   ❓ SBIF Working Group attention needed   ❗ SBIF Advisory Group intervention needed

Activities

COMPLETED THIS MONTH	- Finished development of the questions needed in the questionnaire - Decided against using SurveyMonkey due to DPA issues and page logic needs - Transferred the questionnaire from SurveyMonkey to SmartSurvey - Obtained advice from NBN Trust staff on use of twitter to promote the Questionnaire - Started to segment the SBIF Mailing list by audience ready to send out questionnaire - Booked a date for an open meeting in Edinburgh to brief CIEEM members in Scotland - Continued to book interviews with key stakeholders - Continued to hold interviews with key stakeholders (12 interviews held this month) - Continued to develop use of mind mapping for analysing interview transcripts - Continued to develop recruitment plan to promote the questionnaire to all audiences - Met with Barny Letheren (NRW), Colin Chapman (WGov) and Roy Tapping (COFNOD) - Met with Tim Hill, Andy Webb and Oli Grafton (Natural England) - Met with Chris Cheffings and Mary Campling (JNCC) - Continued to develop log of operational recording schemes - Identified local events at which to circulate our SBIF Leaflet for information - Briefed the Biodiversity Data User Group in London to promote the SBIF Review - Continued to work out how our literature review could be developed for publication - Developed approach for Stage 3 workshops (to facilitate creating/selecting options) - Booked provisional workshop sessions in May and July at RSPB Scotland and Battleby
NOT DONE THIS MONTH	- Book follow-up meeting with Robert Nicol at COSLA. - Contact other countries for their ideas and lessons learned - Identify suitable journals and begin preparing a paper for publication reviewing historic documents and issues in the infrastructure
TO DO NEXT MONTH	- Test and finalise questionnaire set up in SmartSurvey - Issue the questionnaire and encourage people to respond - Implement our questionnaire recruitment plan - Brief NBN Trustees at their board meeting on 22 February in London - Continue planning exactly how to set out our high-level business case - Book and hold last remaining interviews with key stakeholders - Complete analysis of interviews and mind maps, issues and requirement logs - Create a long list of invitees for the May workshops (to later reduce to a short list) - Notify potential workshop invitees of the May workshop dates - Continue to log local and national schemes, systems and services - Continue to develop and implement our communications plan - Start to look at planning system and how bespoke services could offer efficiency/value - Continue working out how to use infographics to illustrate the infrastructure and how it works (e.g. creating 'spaghetti maps' and 'value chains'!)

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 Implementation Plan*	Implementation Plan for our preferred option for a Biological Recording Infrastructure in Scotland (reporting on the transition arrangements needed and potential roadmap for their implementation)	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

* Originally called the 'Proposal for Consultation/Proposal Outcome', now simplified to be an Implementation Plan (subject to approval by the SBIF Advisory Group)

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)