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	28 April 2017
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FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

Following on from completing over 40 interviews with key stakeholders, our questionnaire has closed having received 290 responses; 209 (72.1%) from Scotland, 56 (19.3%) from England, 11 (3.8%) from Wales, 6 (2.1%) from NI, 1 (0.3%) from a UKOT and 7 (2.4%) with no location given. The Working Group is busy writing up the findings of the interviews and questionnaire responses for use in informing our first major output from the Review, our **High Level Business Case** (setting out the perspectives and requirements of each Sector and the need for change) which we hope to circulate to all stakeholders for comment by mid June. The **Detailed Business Case** will be developed through a series of workshops that will collectively identify and evaluate the best potential options – dates and logistics for these workshops still to be confirmed, but we have the last two weeks of July and early August in mind. The SBIF Working Group will meet with MSP Mark Ruskill (a member of the Environment, Climate Change and Land Reform Committee) in May to brief him on the Review. We are also arranging a meeting with Scottish Government planners to discuss planning system needs.

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/*). Follow *@ellenrwilson* on Twitter for informal news on the **#SBIFReview**.

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	*Complete*	
	Paper 2 (high level plan for Stage 2) approved	05 September 2016	*Complete*	
	Working Group meetings established	16 September 2016	*Complete*	
	Logistics confirmed for Stage 2	28 February 2017	*Complete*	
	STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September 2016 to May 2017)			
	Paper 2 (high level plan for Stage 2) approved	30 November 2016	*Complete*	
	Questionnaire design completed	28 February 2017	*Complete*	
	Interviews with Stage 2 consultees completed	10 March 2017	*Complete*	
✅	Background data gathering completed	15 May 2017	*In progress*	
✅	Analysis of questionnaire + interviews completed	15 May 2017	*In progress*	
✅	Logistics confirmed for Stage 3	15 May 2017	*In progress*	
✅	Paper 3 (high level business case) approved	15 June 2017	*In progress*	
	STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (July to August 2017)			
✅	Paper 2 (high level plan for Stage 3) approved	15 May 2017	*In progress*	
✅	Workshops with Stage 3 consultees completed	31 July 2017		Key dates may now be 25-27 July
✅	Paper 4 (detailed business case) approved	15 September 2017		
	STAGE 4: Work out what is involved in implementing any preferred options (August 2017)			
✅	Workshops with Stage 4 consultees completed	31 August 2017		
✅	Paper 5 (implementation plan) approved	15 September 2017		
	STAGE 5: Publish final recommendations and review lessons learned (September to October 2017)			
✅	Paper 6 (review recommendations) approved	15 October 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	- Updated the Windmill Diagram and SBIF Review leaflet - Held evening event for CIEEM members in Edinburgh on 21st March - Met Ritchie Sommerville (Edinburgh Council) to discuss City Deal funding opportunities - Promoted the questionnaire to maximise responses; tracked response numbers - Closed the questionnaire on the 14th April having received 290 responses - Continued to hold interviews with key stakeholders (3 interviews held this month) - Booked an interview/briefing session with MSP Mark Ruskill for 10th May - Contacted Scottish Government planning department staff to request an interview - Issued remaining interview transcripts for approval by interviewees - Continued to develop use of mind mapping for analysing interview transcripts - Continued to develop log of operational recording schemes - Began writing up the findings of the interviews and questionnaire responses - Continued to work out how our literature review could be developed for publication - Tweeted from **@ellenrwilson** to share Review progress and news via **#SBIFReview** - Attended SNH Habitat Map of Scotland project board and recognised value of HabMoS for delivering detailed spatial habitat data for Scotland
NOT DONE THIS MONTH	- Book follow-up meeting with Robert Nicol at COSLA. - Contact other countries for their ideas and lessons learned
TO DO NEXT MONTH	- Hold last two interviews with key stakeholders - Complete interview mind maps, issues and requirement logs - Complete writing up the questionnaire and interview findings - Produce 'rich pictures' for each role for use in the High Level Business Case - Draft the High Level Business Case - Create a long list of invitees for the Stage 3 workshops (to later reduce to a short list) - Contact leading organisations (NBNT, BRC, BTO) regarding their technology platforms to understand how future roadmaps might align iRecord, NBN Atlas, BirdTrack etc. - Notify potential workshop invitees of the Stage 3 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'!) - Investigate NERC Capital Funding - Prepare for attending 5th July NBN Trustees meeting in London

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

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).

- **SBIF Review Questionnaire Findings** documenting the results of the questionnaire. *In prep; not yet available.*

- **SBIF Review Interview Findings** documenting the results of the key stakeholder interviews. *In prep; not yet available.*

- **SBIF Review High Level Business Case** documenting the need for change and the changes needed. *In prep; not yet available.*