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 May 2017
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

The Working Group is continuing to analyse the information gathered through the questionnaire and interviews and to write up our findings. We estimate that this will take us until the beginning of June, after which we will focus on preparing the **High Level Business Case** (setting out the perspectives and requirements of each Sector and the need for change) for discussion on 21st June at the SBIF Advisory Group meeting. This document and the questionnaire and interview findings will then be finalised and made available to all stakeholders via the NBN Scotland web pages in advance of the July workshops. We hope to confirm the arrangements and design of the workshops so that we can issue invitations to key stakeholders as soon as possible. Workshop dates have adjusted a little; we now have SNH's Battleby Conference Centre booked as the venue for these on the **18-20th July** and **29th August**. Our understanding of the time and activities involved continues to improve and we have revised the **Review Timeline** to give a better estimate of when each stage will start and end (see the 'Stages and Milestones' section below for the latest 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/*). 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 July 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	*Complete*	
✅ Analysis of questionnaire + interviews completed	02 June 2017	*In progress*	
✅ Logistics confirmed for Stage 3	21 June 2017	*In progress*	
✅ Paper 3 (high level business case) approved	15 July 2017	*In progress*	Sign-off likely to be by email
STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (June to October 2017)			
✅ Paper 2 (high level plan for Stage 3) approved	21 June 2017	*In progress*	
✅ Workshops with Stage 3 consultees completed	29 August 2017		Key dates: 18-20 July + 29 August
✅ Paper 4 (detailed business case) approved	20 October 2017		At: SBIF AG on 20/10/2017, date tbc
STAGE 4: Issue recommendations and plan their implementation (November 2017 to February 2018)			
✅ Paper 5 (Review recommendations) approved	15 November 2017		
✅ Workshops with Stage 4 consultees completed	December 2017		
✅ Review lessons learned from doing the Review	December 2017		With SBIF AG and Working Group
✅ Paper 6 (Implementation Plan) approved	January 2018		
STAGE 5: Support implementation of recommendations and monitor progress (April 2018 onwards)			
✅ Monitor implementation against key milestones	From April 2018		
✅ Paper 7 (progress report) approved	September 2018		
✅ Paper 7 (progress report) updated	March 2019		
✅ Paper 8 (outcomes) approved	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 SBIF Review Timeline diagram - Met MSP Patrick Harvie (in lieu of Mark Ruskell) to find out about parliamentary needs - Completed documentation for all key stakeholder interviews - Began to develop rich pictures and supporting outputs from the interviews - Continued 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** - Created a long list of invitees for the Stage 3 workshops (to later reduce to a short list) - Prepared an update on progress with the Review for the June BRISC Recorder News - Continued to develop log of operational recording schemes - Updated the milestones and stages to reflect our latest thinking (see table above)
NOT DONE THIS MONTH	- Book follow-up meeting with Robert Nicol at COSLA. - Contact other countries for their ideas and lessons learned - Booking of date with Scottish Government planning department staff not yet fixed - 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 - Investigate NERC Capital Funding
TO DO NEXT MONTH	- Complete interview mind maps, issues and requirement logs - Complete writing up the questionnaire and interview findings - Update **Paper 2** (Detailed Plan for Stage 3) for approval on 21 June at the next SBIF Advisory Group meeting - Produce 'rich pictures' for each role for use in the High Level Business Case - Draft **Paper 3** (the High Level Business Case) with first draft circulated for review to the SBIF Advisory Group in advance of their 21 June meeting - Prepare content for an NBN Network News article on Review progress for 2nd June - Book date with Scottish Government planning department staff - 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 - Devise the workshop approach and prepare facilitators' plan for the Stage 3 workshops - Start to think about the way in which we will put together **Paper 4** (the detailed business case) in due course - 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'!) - Continue to tweet about the SBIF Review and maintain updates on the NBN Scotland web pages.

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.*