

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 June 2017
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

Analysis of our questionnaire and interviews is now nearing completion and should be written up we hope now by the end of June so that we can then focus on preparing the **High Level Business Case** (setting out the perspectives and requirements of each Sector and the need for change) in early July. We have developed an outline plan for the workshops needed in Stage 3 to identify and evaluate options. Subject to approval by the SBIF Advisory Group at their next meeting on the 21st June, our plan is to hold four workshops at the Battleby Conference Centre. These will focus on each of: **data flows** (18-19 July), **services** (29-30 August), **governance** (18-19 September) and **funding** (17-18 October). Invitations to potential participants will go out as soon as possible - we are seeking representation from all sectors and for all roles. Each participant will need to complete some pre-work and thinking so that they come to the workshops with a high level of commitment and knowledge of the Review findings to date. Ellen will attend the next NBN Trustees board meeting in London on the 5th July and will continue to work with Jo Judge to develop the high-level business case.

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 [@ellenwilson](#) 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	
Logistics confirmed for Stage 3	21 June 2017	Complete	
 Analysis of questionnaire + interviews completed	30 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 (July to November 2017)			
 Paper 2 (high level plan for Stage 3) approved	21 June 2017	In progress	
 Workshops with Stage 3 consultees completed	18 October 2017		Now four workshops in July-Oct
 Paper 4 (detailed business case) approved	November 2017		Sign-off likely to be by email
STAGE 4: Issue recommendations and plan their implementation (December 2017 to March 2018)			
 Paper 5 (Review recommendations) approved	December 2017		
 Workshops with Stage 4 consultees completed	January 2017		
 Review lessons learned from doing the Review	January 2017		With SBIF AG and Working Group
 Paper 6 (Implementation Plan) approved	March 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

<p>COMPLETED THIS MONTH</p>	<ul style="list-style-type: none"> • Contacted leading organisations (NBNT, BRC, BTO) regarding their technology platforms to understand how future roadmaps might align • Met Jo Judge to begin planning how we will draft the High Level Business Case • Met Christine Johnston (Outer Hebrides Biological Recording) to share Review progress • Completed mind map analysis and requirements log for all stakeholder interviews • Continued to develop rich pictures and supporting outputs from the interviews • Continued writing up the findings of the interviews and questionnaire responses • Booked Battley Conference Centre for the likely dates for Stage 3 workshops • Created a long list of invitees for the Stage 3 workshops (to later reduce to a short list) • Designed the Stage 3 workshops (on data flows, services, governance and funding) • Devised the workshop approach and wrote an overview of the Stage 3 workshops for approval by the SBIF Advisory Group • Updated Paper 2 (Detailed Plan for Stage 3) for approval on 21 June at the next SBIF Advisory Group meeting and updated the SBIF Review Timeline diagram • Prepared content for an NBN Network News article on Review progress for 2nd June • Requested a slot at the NBN Conference in November to give an update on the Review • Tweeted from @ellenrwilson to share Review progress and news via #SBIFReview
<p>NOT DONE THIS MONTH</p>	<ul style="list-style-type: none"> • 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 • Notify potential workshop invitees of the Stage 3 workshop dates • Investigate NERC Capital Funding and other funding sources • 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
<p>TO DO NEXT MONTH</p>	<ul style="list-style-type: none"> • Continue working out how to use infographics to illustrate the infrastructure and how it works (e.g. creating 'spaghetti maps' and 'value chains'!) • Complete writing up the questionnaire and interview findings • Complete 'rich pictures' for each role for use in the High Level Business Case • Draft Paper 3 (the High Level Business Case) for review and approval by the SBIF Advisory Group by 15th July • Notify potential workshop invitees of the Stage 3 workshop dates and confirm who participants will be • Prepare facilitator plans for each of 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 • Book date with Scottish Government planning department staff • Start to look at planning system and how bespoke services could offer efficiency/value • Continue to log local and national schemes, systems and services • Continue to develop and implement our communications plan • 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; due for approval by the SBIFAG during July 2017
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)	IN PREP; workshops to consider detailed options now being planned
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.*
- **SBIF Review Detailed Business Case** documenting the options evaluated and our preferred option. *In prep; not yet available.*