

# 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 September 2017
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

### Latest Update

We are ready for our first workshop next week! All the preparations and materials needed (e.g. creating 'Data Flow Models' for current and future scenarios, and detailed facilitation plans and slide decks to support both days) have been completed, with papers issued to attendees earlier this week. Analysis of the Interviews and Questionnaire is now complete with just the 'Discussion' and 'Conclusions' sections of the Questionnaire left to prepare as soon as we can. The first version of our **High Level Business Case** has been produced and issued to Workshop 1 attendees. Although some sections will only be completed once workshop outputs are available, the sections on 'Historic Context' and 'Current Situation' are complete and 'Drivers, Objectives and Benefits' within the 'Business Case Diagram' have been defined for review next week. Workshops 1 and 2 will identify our preferred models for data flows and service provision, plus the business changes needed to achieve them, to inform Workshops 3 and 4 on governance and funding. The High-level Business Case will be published in November with the Detailed Business Case to follow in January.

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
<b>STAGE 1: Set up the Working Group and complete planning for the Review (August 2016)</b>			
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	
<b>STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September 2016 to July 2017)</b>			
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	20 August 2017	Complete	
 Paper 3 (high level business case) approved	20 October 2017	In progress	By SBIF Advisory Group on 20 Oct
<b>STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (July to November 2017)</b>			
Paper 2 (high level plan for Stage 3) approved	21 June 2017	Complete	
 Workshops with Stage 3 consultees completed	15 December 2017	In progress	18-19 Sep, 17-18 Oct, 9-10 Nov, 4-5 Dec
 Paper 4 (detailed business case) approved	February 2018	In progress	Sign-off likely to be by email
<b>STAGE 4: Issue recommendations and plan their implementation (December 2017 to March 2018)</b>			
 Paper 5 (Review recommendations) approved	March 2018		
 Review lessons learned from doing the Review	May 2018		With SBIF AG and Working Group
 Workshops with Stage 4 consultees completed	June 2018		
 Paper 6 (Implementation Plan) approved	August 2018		
<b>STAGE 5: Support implementation of recommendations and monitor progress (April 2018 onwards)</b>			
 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"> <li>• Completed analysis of the Questionnaire and prepared Appendices</li> <li>• Confirmed final logistics and issued papers to Workshop 1 attendees</li> <li>• Developed a data flow model representing the ‘current situation’</li> <li>• Developed data flow models representing ‘potential future situations’</li> <li>• Prepared detailed facilitator notes and Workshop presentation</li> <li>• Compiled a facilitators kit and printed all materials needed for Workshop 1</li> <li>• Completed the first draft of the High Level Business Case</li> <li>• Continued to plan the structure and content of the Detailed Business Case</li> <li>• Developed our thinking on communications for the coming months</li> <li>• Began proof-reading the questionnaire and interview findings reports</li> <li>• Tweeted from <b>@ellenwilson</b> to share Review progress and news via <b>#SBIFReview</b></li> <li>• Began developing service design principles for Workshop 2</li> </ul>
<p>NOT DONE THIS MONTH</p>	<ul style="list-style-type: none"> <li>• Book follow-up meeting with Robert Nicol at COSLA.</li> <li>• Contact other countries for their ideas and lessons learned</li> <li>• Booking of date with Scottish Government planning department staff not yet fixed</li> <li>• Investigate NERC Capital Funding and other funding sources</li> <li>• Start to look at planning system and how bespoke services could offer efficiency/value</li> <li>• Plan communications for the needs of each stakeholder group in the coming months</li> <li>• Proof-reading interview and questionnaire findings</li> <li>• Redacting any sensitive content within the Questionnaire appendices</li> <li>• Produce summary infographics for the questionnaire and interview findings</li> </ul>
<p>TO DO NEXT MONTH</p>	<ul style="list-style-type: none"> <li>• Complete the discussion section and conclusions of the Questionnaire</li> <li>• Finish proof-reading the Questionnaire and Interview Findings</li> <li>• Finish redacting any sensitive content within the Questionnaire appendices</li> <li>• Publish the Interview and Questionnaire Findings on the SBIF web pages</li> <li>• Produce summary infographics for the questionnaire</li> <li>• Update the draft High Level Business Case following Workshops 1-2</li> <li>• Prepare detailed workshop design and facilitation plan for Workshops 2, 3 and 4</li> <li>• Prepare detailed agenda and facilitation notes for Workshop Facilitators for W2-4</li> <li>• Liaise with Workshop 2 attendees to update the logistics plan for the next workshop</li> <li>• Prime attendees with advance information and agenda for the second Workshop</li> <li>• Keep in touch with later Workshop attendees</li> <li>• Plan communications for the needs of each stakeholder group in the coming months</li> <li>• Continue to tweet about the SBIF Review and maintain updates on the NBN Scotland web pages</li> <li>• Contact Scottish Government planning department staff</li> </ul>

## 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; to be updated by Workshops 1 and 2; due for approval by the SBIFAG on 20 <sup>th</sup> October 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; first draft issued to Workshop 1 attendees.*
- **SBIF Review Detailed Business Case** documenting the options evaluated and our preferred option. *In prep; not yet available.*