# SBIF Review of the Biological Recording Infrastructure in Scotland
# Highlight Report

| SPONSORS | SBIF Advisory Group |
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| CIRCULATION LIST | SBIF Advisory Group, SBIF Working Group, Ed Mackey, Roddy Fairley |
| DATE | 17 January 2017 (covering December and January) |
| AUTHOR | Ellen Wilson |
| FREQUENCY | Monthly |
| OVERALL RAG STATUS | Amber (SBIF Advisory Group approval is needed for our revised timeline and scope/approach) |

## Latest Update

Engagement with stakeholders is well underway, with a visit to Orkney in late November to meet Orkney and Shetland LERCs, recorders and data users, and with key stakeholder interviews now in progress.  We held 6 interviews in November,  12 in December, 11 so far in January (8 more to come), then 10 are yet to be booked plus 8 more invites yet to be issued to complete all interviews in February.   55 interviews will be held in total (by country -  Scotland 32, UK 13, England 5, Wales 3, NI 2; by sector - Academia 5, National Government 11, Local Government 7, Museums/Gardens 3, Recorders /Recording Groups 3, National Recording Schemes 4, LERCs 12, NGOs 4, Commercial  4, National Data Centres 2).  The Questionnaire is nearly ready for approval at this week's Advisory Group meeting; it will be issued on 30th January (with a closing date of the 28th February).  Dates for the Stage 3 workshops have been set for the 9-11th May 2017 (for the National/Central workshop) and 16-18th May 2017 (for the Local/Regional workshop).  Workshop design and invitee lists will be determined soon.  The scope of Stage 5 and Paper 5 has changed – see below.

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.*
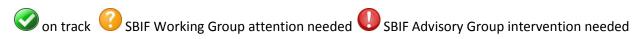
The Review will do this in such a way as to be cohesive across Scotland with support from all stakeholders and the willingness and energy to then make the transitions necessary to implement the new infrastructure by 2020.

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)** | | | |
| (on track) | Paper 1 (Brief for the Review) approved | 05 September 2016 | *Completed* | |
| (on track) | Paper 2 (high level plan for Stage 2) approved | 05 September 2016 | *Completed* | |
| (on track) | Working Group meetings established | 16 September 2016 | *Completed* | |
| (on track) | Workshop logistics confirmed for Stage 2 (Options) | 28 February 2017 | *In progress* | Revised due date |
| | **STAGE 2: Gather perspectives, requirements and other information from key stakeholders (September 2016-April 2017)** | | | |
| (on track) | Paper 2 (high level plan for Stage 2) approved | 30 November 2016 | *Completed* | |
| (on track) | Interviews with Stage 2 consultees completed | 28 February 2017 | *In progress* | Revised due date |
| (on track) | Bakground data gathering completed | 28 February 2017 | *In progress* | Revised due date |
| (on track) | Paper 3 (high level business case) approved | 30 April 2017 | | Revised due date |
| | **STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (May-July 2017)** | | | |
| (on track) | Paper 2 (high level plan for Stage 3) approved | 30 April 2017 | | Revised due date |
| (on track) | Workshops with Stage 3 consultees completed | 18 May 2017 | | Revised due date |
| (on track) | Paper 4 (detailed business case) approved | 14 July 2017 | | Revised due date |
| | **STAGE 4: Work out what is involved in implementing any preferred options (July-August 2017)** | | | |
| (on track) | Workshops with Stage 4 consultees completed | 31 July 2017 | | Revised due date |
| (attention needed) | Paper 5 (implementation plan) approved | 05 September 2017 | | Revised title and due date |
| | **STAGE 5: Consult with organisations which may be affected – this stage will now be independent (subject to approval)** | | | |
| (attention needed) | Consultation discussions completed | Locally determined | | Revised approach and due date |
| (attention needed) | Paper 5 (implementation plan) updated | As changes arise | | Revised title and due date |
| | **STAGE 6: Issue final recommendations then monitor their implementation (September 2017 onwards)** | | | |
| (on track) | Paper 6 (recommendations) approved | 31 September 2017 | | Revised due date |
| (on track) | Review of the success of the Review | 31 December 2017 | | Revised due date |
| (on track) | Paper 7 (progress) approved | 31 March 2018 | | Revised due date |
| (on track) | Paper 8 (outcomes) approved | 31 March 2019 | | Revised due date |
| (on track) | Paper 8 (outcomes) updated and approved | 31 March 2020 | | Revised due date |
| (on track) | Paper 8 (outcomes) updated and approved | As required | | Revised due date |

(green check) on track    (orange question mark) SBIF Working Group attention needed    (red exclamation) SBIF Advisory Group intervention needed

## Activities

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| COMPLETED THIS MONTH<br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br>SCOPE CHANGE →: | • Held Working Group Meetings coordinating the activities of the Review.<br>• Visited Orkney on 28-30 November to meet key stakeholders from all sectors<br>• Wrote and published eNews article about our visit to Orkney<br>• Attended the NBN conference on the 17-18 November<br>• Continued to develop the Review Questionnaire in Survey Monkey<br>• Confirmed Data Protection Act legalities for questionnaire and interview use<br>• Developed a recruitment plan to 'recruit' people to participate in the Questionnaire<br>• Issued DoodlePoll invites to set up key stakeholder interviews<br>• Continued to develop log of operational recording schemes<br>• Continued to develop log of technical and added-value services<br>• Contacted Andy Tharme at ALGE/Scottish Borders Council<br>• Set dates for Stage 3 workshops (national/central: 9-11 May, local/regional 16-18 May)<br>• Worked out how to best use Mind Genius for mind maps (used in interview notes)<br>• Spoke to Claire Lacey in CIEEM about how to engage ecological consultants community<br>• Started to use a Benefit Dependency Network approach to map drivers and objectives<br>• Created templates for Stakeholder interviews and completed interview transcripts<br>• Analysed the interviews held to date, creating issues, ideas and requirements logs<br>• Arranged a visit to Wales to meet with NRW<br>• Prepared progress update for the SBIF Advisory Group meeting on 20 January<br>• Updated the Review Timeline and changed scope and approach for Stage and Paper 5 (**subject to approval by the SBIF Advisory Group**, consultation within organisations on transition arrangements relevant to them is now out of scope of the Review; instead the Review will simply develop an implementation plan using a workshop approach) |
| NOT DONE THIS MONTH | • Book follow-up meeting with Robert Nicol at COSLA.<br>• Identify suitable journals and begin preparing a paper for publication reviewing historic documents and issues in the infrastructure<br>• Contact other countries for their ideas and lessons learned |
| TO DO NEXT MONTH | • Test and finalise questionnaire set up in Survey Monkey<br>• Obtain SBIF Advisory Group approval to issue the Questionnaire<br>• Issue the questionnaire and encourage people to respond<br>• Implement our questionnaire recruitment plan<br>• Brief NBN Trustees at their board meeting on 15 February in London<br>• Continue planning exactly how to set out our high-level business case<br>• Issue final DoodlePolls to find suitable interview slots for remaining interviews<br>• Chase any stakeholders who have not yet responded to their DoodlePoll invitation<br>• Undertake and document remaining key stakeholder interviews<br>• Complete analysis of interviews and mind maps, issues and requirement logs<br>• Start to plan the approach for the May workshops<br>• Create a long list of invitees for the May workshops (to later reduce to a short list)<br>• Notify potential workshop invitees of the May workshop dates<br>• Continue to log local and national schemes, systems and services<br>• Continue to develop and implement our communications plan<br>• Start to look at planning system and how bespoke services could offer efficiency/value<br>• 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<br>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<br>(at 05/09/2016 SBIFAG meeting) |
| Paper 2<br>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<br>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<br>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<br>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<br>Final Recommendations | Recommendations from the Review of the Biological Recording Infrastructure in Scotland (recommendations and implementation roadmap) | Not started |
| Paper 7<br>Progress Reporting | Progress reporting for the Review of the Biological Recording Infrastructure in Scotland (implementation of our recommendations) | Not started |
| Paper 8<br>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)