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 November 2017
AUTHOR	Ellen Wilson
FREQUENCY	Monthly
OVERALL RAG STATUS	Green

Latest Update

Three of our four workshops – focusing on options for **Data Flow**, **Service Provision** and **Governance** – have now taken place. Thank you to all participants and sponsors for their contributions! Key messages from each workshop have been that data flows should be centralised with improved feedback for Recorders (Workshop 1), that service delivery should be at a regional level to obtain economies of scale and local value, with every service having an online presence and automation where appropriate (Workshop 2); and that we collectively believe in, and want to realise asap, our vision of an improved infrastructure by 2025, and believe that a new organisation is needed to supersede current governance arrangements, with a national hub/innovation centre (in Stirling) and four regional hubs (in Aberdeen, Highland, Glasgow and Edinburgh). Due to the Workshops taking precedence, we have yet to publish our Interview and Questionnaire findings but we aim to do so during December. The SBIF Advisory Group next meets on the 18th January to review the first draft of our **Detailed Business Case** and to help develop the final **recommendations** of the Review.

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/the-SBIF-review/). Follow @ellenrwilson on Twitter for informal news on **#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	20 August 2017	*Complete*	
✅	Paper 3 (high level business case) approved	18 January 2018	*In progress*	Final draft to be approved by SBIF Advisory Group on 18 Jan
	STAGE 3: Hold workshops to find and evaluate options at central, national and local levels (July to December 2017)			
	Paper 2 (high level plan for Stage 3) approved	21 June 2017	*Complete*	
✅	Workshops with Stage 3 consultees completed	15 December 2017	*In progress*	Complete: 18-19 Sep, 17-18 Oct and 9-10 Nov; still to happen: 4-5 Dec
✅	Paper 4 (detailed business case) approved	18 January 2018	*In progress*	First draft to be approved by SBIF Advisory Group on 18 Jan
	STAGE 4: Issue recommendations and plan their implementation (December 2017 to March 2018)			
✅	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		
	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	• Held Workshop 2 on Service Provision options and wrote up and issued its outputs • Held Workshop 3 on Governance options and wrote up and issued its outputs • Confirmed final logistics for Workshop 4 attendees • Prepared detailed facilitator notes and presentation for Workshop 4 • Compiled a facilitators kit and printed all materials needed for Workshop 4 • Collated information on current funding streams for LERCs and recording groups • Collated information on SNH's funding for biodiversity • Tweeted from @ellenrwilson to share Review progress and news via #SBIFReview • Presented an update to the November board meeting of the NBN Trust • Gave a presentation on Review progress at the NBN annual conference • Published an article on Workshop 2 in NBN Network News • Prepared article on Workshop 3 for December's NBN Network News • Re- formatted the SBIF Review pages on the NBN website to improve navigation • Collaborated with SNH on content of communications about the Review • Confirmed location and timing of next SBIF Advisory Group meeting (18/01/2018)
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 • Investigate NERC Capital Funding and other funding sources • Start to look at planning system and how bespoke services could offer efficiency/value • Plan communications for the needs of each stakeholder group in the coming months • Proof-reading interview and questionnaire findings • Redacting any sensitive content within the Questionnaire appendices • Produce summary infographics for the questionnaire and interview findings • Update the first draft of the High Level Business Case with workshop findings • Continue to plan the structure and content of the Detailed Business Case
TO DO NEXT MONTH	• Complete the discussion section and conclusions of the Questionnaire • Finish proof-reading the Questionnaire and Interview Findings • Finish redacting any sensitive content within the Questionnaire appendices • Publish the Interview and Questionnaire Findings on the SBIF web pages • Produce summary infographics for the questionnaire • Update the draft High Level Business Case following Workshops 1-4 • Plan communications for the needs of each stakeholder group in the coming months • Continue to tweet about the SBIF Review • Contact Scottish Government planning department staff • Prepare content to go into the Detailed Business Case

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; being updated for SBIF Advisory Group approval on 18/01/18
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; being drafted for SBIF Advisory Group comment on 18/01/18
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/the-sbif-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: Introducing the SBIF Review of the Biological Recording Infrastructure in Scotland** (leaflet for use at the NBN Conference and other events).

- **SBIF Review Workshop Outputs** documenting the key messages from each workshop.

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

- **SBIF Review Interview Findings** documenting the results of 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 attendees for Workshops 1 and 2.*

- **SBIF Review Detailed Business Case** documenting the options evaluated and our preferred option. *In prep; first draft due 18/01/2018.*