

Freshwater*Life*
Annual Report
April 2004

Freshwater*Life* team.

www.freshwaterlife.org
www.freshwaterlife.info

FreshwaterLife Annual Report

April 2004

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Annual Report 2003/4

1. Introduction - background to FreshwaterLife

The Project

FreshwaterLife is working collaboratively to create the first comprehensive source of freshwater information on the web, with an emphasis on developing common methodological approaches, developing standards for biological data, and offering access to information resources in a variety of formats. A key feature is to build on the existing informal networks and relationships which exist between freshwater specialists throughout the world.

FreshwaterLife provides the scientific and technical community and naturalists with tools to conduct their monitoring and research in a more effective and efficient way, and aims to strengthen networking and encourage collaboration and the sharing of information. It provides scientific support for devising and implementing policy. Information on FreshwaterLife, including the scoping study can be found at www.freshwaterlife.org.

The Partners

FreshwaterLife is an initiative of

- The Freshwater Biological Association (FBA), an independent international membership association founded in 1929 which promotes freshwater science.
- The Ponds Conservation Trust (PCT), a UK charity consisting of 20 non-governmental organisations and statutory bodies which conserves, restores and creates freshwater habitats with an underpinning of research activity.
- Syngenta, an international crop protection company with a long standing interest in minimising impacts on freshwater systems world wide, and in the sustainable development of products.

Principal collaborators include

- The Environment Agency for England and Wales (EA)

- WWF-UK
- National Biodiversity Network (NBN)
- United Nations Food and Agricultural Organisation (FAO)
- European Network for Biodiversity Information (ENBI)
- The Global Biodiversity Information Facility (GBIF), an international initiative promoting the sharing and exchange of biodiversity information sponsored by governments.
- The Catalogue of Life – A GBIF sponsored programme including partners such as Species2000 and Fauna Europaea. (These are taxonomic initiatives that aim to list species with synonyms, common names etc.) All contribute to the taxonomic basis of *FreshwaterLife*.
- FishBase, an international information service of 14 years standing, covering over 26,000 fish species
- The Expert Centre for Taxonomic Identification (ETI), an international organisation with a network of 1500 taxonomists world-wide,
- The *FreshwaterLife* Network – the many organisations around the world that will increasingly help to form *FreshwaterLife's* global base, in particular the FBA's sister organisations in many countries. The *FreshwaterLife* Network is a primary means by which the international community of freshwater specialists will be brought together through personal contact, virtual discussions and online conferences.

Time frames

FreshwaterLife is being developed in several stages:

- Scoping study. Completed
- 2001 - 2003 Establishment phase. Completed. This stage established the *FreshwaterLife* website and built up working relationships with major players (principally Environment Agency, FishBase, FAO, ENBI, WWF etc.) and initiated the *FreshwaterLife* Network. A Prototype database following the FishBase model was created and the foundation laid for funding of future development.
- 2003-2004 Information Management and exchange System (IMS) established in collaboration with FAO, ENBI funding achieved and the project started.

The next stages:

- 2004-05 build *FreshwaterLife* Ecological Database Mark 1 having learned from the experience of the Prototype database.
- Populate Mark 1, mainly by involving specialists within the *FreshwaterLife* Network and by establishing *FreshwaterLife* as the means of choice for storing retrieved ecological information from literature and original research.
- Completion of the Pilot Key to the *Ephemeroptera* larvae of Europe through the ENBI project.
- Completion of the Pilot key to higher taxa of freshwater fauna and possible further keys.
- Research and write a Business Plan for FwL to assist planning for the websites future maintenance and growth.
- Possible training packages, etc.

FreshwaterLife team at March 2004;

Manager – p/t Anne Powell
 Senior officer - f/t Kearon McNicol
 Officer - f/t Robert Holland
 IT specialist - p/t Ian Pettman

Advisors/consultants;

IT - Phil Heneghan
Ecology - J Biggs, P Williams

Volunteers and projects;

Hanna Lena Hartikainen (*Ephemeroptera* key/ ENBI)

Lydia King (IMS species and groups)

2. The year April 2003 to March 2004

2.1 Main events / achievements

May 2003	Delivery of Community Directory Server - CDS (now referred to as the Information Management and exchange System - IMS) software by FAO.
May 2003 – July 2003	IMS topic tree designed and implemented. Topic introductions written.
June 2003 – July 2003	Profiling <i>Cottus gobio</i> for the Environment Agency.
June 2003	Commenced image archive.
July 2003	Switched off <i>FreshwaterLife</i> present site and switched over to IMS.
July 2003	ETI and Lucid test versions of FBA <i>Ephemeroptera</i> larvae keys complete.
July 2003	SEFS3 – presentation in main programme and demonstration of <i>FreshwaterLife</i> to a large proportion of the SEFS attendees.
August 2003	EA user group exercise undertaken.
September 2003	FBA council member and honorary treasurer Ian Dunn appointed to Core Group.
September 2003	KMN attended the 6 th Water Information Summit.
September 2003	<i>FreshwaterLife</i> became a member and node of the Global Biodiversity Information Facility.
September 2003	Started development of the mark 1 Ecological Database. Included one week in October with Phil Heneghan.
September 2003	Awarded ENBI grant (region of £10,000 to come on stream Feb 04).
September 2003	HL Hartikainen left <i>FreshwaterLife</i> , interviews for replacement took place in January.
October 2003	Development of identification guide to the Higher Taxa of Freshwater Fauna began, in collaboration with Lucid and Alan Donaldson.
November 2003	WWF-UK became corresponding member of the Core Group.
November 2003	Work listing taxonomic keys completed: c.700 sources listed in IMS.
November 2003	Anne Powell joined National Biodiversity Network Trust Council on behalf of <i>FreshwaterLife</i> and the FBA, following continuous interactions with NBN, including attending various meetings and conferences.
December 2003	A trial Virtual Office for the Association Française de Limnologie (AFL) launched in Metz (KNM attended). The AFL Virtual Office was set up at the request of FBA.
December 2003	AMP gave paper to International Hydrological Society (supported by UNESCO) in Rome.
December 2003	Visit to FAO, Rome. Agreed to progress joint funding bid
January 2004	KMN visit to Natural History Museum secured agreement for access to the Species Dictionary data model, system and content.
March 2004	Anne Powell and Kearon McNicol visited UNESCO International Hydrological Programme (IHP) Paris and secured invitation to Scientific Committee meeting for IHP Ecohydrology in May.
March 2004	EA funds secured for the further development of the Mark 1 Ecological

	Database.
March 2004	Development of IT infrastructure for FBA and FreshwaterLife.

FreshwaterLife has made considerable progress over the last year in building relationships with key partners throughout the world. The relationship with the FAO has resulted in the Fisheries Department making available an instance of the FAO CDS system which, as the FreshwaterLife Information Management System is encouraging networking and sharing of information between people with an interest in freshwater. FreshwaterLife continues to build on this relationship, with the FAO providing access to their developers, for modest sums of money so that upgrades can be undertaken which increasingly tailor the CDS system to meet the needs of FreshwaterLife.

Hanna-Leena Hartikainen left FwL in September 2003 to undertake a MSc course at Portsmouth University. For various reasons it was not possible to replace her until March 2004 which caused some slippage in the work plan. Robert Holland joined the team in a part time capacity at the start of February and became fulltime on March 22nd.

FreshwaterLife has become an associate member of the Global Biodiversity Information Facility (GBIF) an organisation which aims to make primary data on biodiversity freely and universally available via the Internet. On a European scale FreshwaterLife collaborates with groups such as the European Network for Biodiversity Information (and during this year was awarded a grant of £10k), the UK based National Biodiversity Network (where FreshwaterLife represents the FBA on the Council) and the Natural History Museum. Collaborations such as this ensure FreshwaterLife is at the forefront of the development of methods for exchanging and accessing biological and ecological data and adds legitimacy to the work that FreshwaterLife is undertaking in this field.

2.2 Governance of FreshwaterLife

FreshwaterLife is responsible to the Core Group which is made up of individuals representing the founding organisations of FreshwaterLife, major funding partners and FreshwaterLife staff. During this year Ian Dunn (Hon Treasurer to FBA Council) joined the Core Group to act as a conduit between FwL and the FBA Council. John Barker (WWF-UK) joined the Core Group as a corresponding member. Karen Rouen and Penny Williams ceased being attending members and became corresponding members. The Core Group, under the chairmanship of Steve Maund (Syngenta) consists of;

All FwL staff

J Biggs, P Williams (PCT)

Roger Sweeting (FBA)

Ian Dunn (FBA Council)

Alastair Ferguson – recently replaced by Lindsey Powell (EA)

John Barker (WWF-UK)

Phil Heneghan (Syngenta) – invited to attend

Core Group meetings have taken place on;

8th April 2003

17 June 2003 – strategy meeting

9th September 2003 – included 2nd Web seminar (first one being Feb 2003)

25 November 2003 (teleconference)

4th February 2004

3. Financial report

The major portion of *FreshwaterLife*'s budget continues to come from our funding partners. The "in kind" contribution of the FBA to *FreshwaterLife* in the form of accommodation and financial services is considerable. The main expense during 2003/4 was salaries, which showed an increase due to the recruitment of a full time project officer to assist with the development of the *FreshwaterLife* network.

Spending on consultancy fees has been much lower this year, due in the main to the decision not to lead any major funding bids which was a large part of the consultancy expenditure in 2002/3. Most fees this year went to FAO to pay for changes and upgrades to the IMS software.

During this financial year a contribution of £3500 was made by the FBA to facilitate changes to the IMS software to enable branding of virtual offices (VOs) with the office owners' logo and colours. The first Virtual Office was set up for the Association Française de Limnologie, to demonstrate the value of Virtual Office facilities within *FreshwaterLife* to such organisations.

4. Forward look for 2004/5

4.1 Future staffing

The projection shows some expansion in staff numbers during the year (4 f/t staff and 2 p/t staff by end of 04/05). This increase in staff reflects the increased amount of effort that will be put into contributor management and the requirement for specialist IT staff to develop the ecological database and accompanying tools.

4.2 Main work areas for 04/05

The start of the year 04/05 coincided with the withdrawal of the Natural Environmental Research Council (NERC) from Ferry House. A request for Kearon McNicol to be released to work with Ian Pettman from February until mid April to set up the new IT system was agreed. *FreshwaterLife* will be financially compensated for this but the work programme will be delayed. Main work for the year will be;

- a) Mark 1. Drawing on the lessons of the Prototype the Ecological Database Mark1 will be designed and built.
- b) Network Development – The *FreshwaterLife* officer(s) will form partnerships with relevant people and groups to develop subjects within the IMS system.
- c) Keys – the ENBI – mayfly larval key and the family level key to invertebrates.
- d) Funding relationship development (see 4.1, above)
 - i) Local
 - ii) National
 - iii) European
 - iv) Worldwide
- e) Maintaining existing, and developing new, strategic relationships with key organisations, e.g. Comité Européen de Normalisation (CEN) – a presentation will be made by Dr. Roger Sweeting in May at a CEN meeting which will present *FreshwaterLife*'s role on standard setting and international promotion of freshwater issues. Also Anne Powell and Kearon McNicol will make a presentation/demonstration to UNESCO Ecohydrology programme's Scientific Advisory Committee on 7th May.

4.3 Governance

Previous discussions in Core Group meetings have emphasised that FBA is a suitable “home” for *FreshwaterLife*. The complete integration of *FreshwaterLife* with FBA is the aim and an integral part of the philosophy and vision of *FreshwaterLife*. The timing of, and tactics involved in this process have not been agreed in detail, but need to be addressed over the next few months.

Core group constitution. The AFL has expressed the need to feel a degree of ownership and some degree of control to ensure contributions (money or info) to *FreshwaterLife* fit with the philosophy of AFL. It is anticipated that the same will be true of other associations and relevant groups. There has been resistance to an increase in size of the Core Group. One proposal to be discussed by the Core Group is that *FreshwaterLife* adopts a management committee no larger than at present, and some form of “supporters” group that could be bigger but which meets once per year. This will be discussed at the annual strategy meeting which will take place on April 28th and 29th.

4.4 Business plan development

The necessity for a fully costed business plan for *FreshwaterLife* has been realised for some time. Recently FBA council initiated a number of *ad hoc* working groups to investigate aspects of the FBA’s future, including e-commerce and e-publications. Ian Dunn, the honorary treasurer of the FBA, and the Council’s appointee to the *FreshwaterLife* Core Group is chairman of both of these groups. He has decided to combine the groups and extend their remit to include reporting to Council the Core Group’s recommendations on the future *FreshwaterLife*/FBA relationship. It has been agreed that an “in-principle” outline business plan should be presented to the Council meeting in October 2004. (“In principle” literally means, in this context, the principles on which a fully costed business plan could be developed e.g. grant-aided, and from what sort of organisations, combined with some degree of reliance upon income streams generated from products developed by *FreshwaterLife*, or mixtures of income streams from different sources). The document would ask the Council to discuss and advise on the financial basis on which *FreshwaterLife* should go forward for the next several years. On receipt of Council feedback, a business plan should be constructed for presentation to the Core Group and eventually to the FBA Council. The Core Group should be in a position to make recommendations to FBA Council re the Business Plan. It is envisaged that Ian Dunn would conduct such recommendations to FBA Council.

The Core Group will be asked to discuss the basis of the Business Plan at their strategy meeting in April. Recommendations from the *FreshwaterLife* staff will be that the financial model for *FreshwaterLife* and governance are discussed.

4.4.1 Financial model

- a) Core costs. A small staff (6-8 FTE max), including administrative support (assuming housing by FBA) requiring an annual budget in the region of £200k - £250k. This assumes that *FreshwaterLife* continue to adopt the opposite way of working to FishBase (central control model) and stay with the collaborative philosophy and open-access model which depends on a small core staff and a lot of effort going into contributor management, (as well as free access, knowledge benefits, rewards (?) and all data must be open access, *FreshwaterLife* only charging for re-packaging, analysis of data, publications, etc.) This level of funding is the maintenance level.
- b) Aim for these core costs to be met by two income streams:
 - I. Annual contribution/membership by organisations – FBA, International organisations e.g. UNESCO, national organisations e.g. EA. A way has to be found to secure long term commitments from these core funding organisations - 50% of the core (maintenance) requirements.

- II. Income generated from sales – e-publications, data-packaging, data-analysis, electronic training. - 50% of core (maintenance) requirements.
- c) Non-core work (e.g. projects, further development) will be funded through proposals (possibly joint bids, e.g. with FAO to DfID) which are used to take on staff on shorter term contracts, pay consultants, etc.

4.4.2 Governance of FreshwaterLife

A business plan has to take account of governance, management, staffing and other issues. The FreshwaterLife staff may come to the Core Group with a number of questions in the near future but the question of the role of the Core Group requires examination at this stage. At present the Core Group represents major funders / supporters of FreshwaterLife. WWF-UK is a recent addition to the group and at present is a corresponding member. There are advantages in keeping the Core Group small but the FreshwaterLife staff would like to hear views of what maximum size might be.

FreshwaterLife has a growing number of contributors, including FBA sister organisations in Europe. One of these, the AFL, has recently taken possession of a pilot virtual office (VO). It may be that a network of VO offices will exist over the next few months. The Core Group are asked to consider how members of this network and other collaborators might be offered a voice in the development of FreshwaterLife and decision-making in the future.

5.0 Acknowledgements

FreshwaterLife would like to acknowledge the help and support throughout the year from the staff of the FBA, their colleagues on the FreshwaterLife Core Group, and the FreshwaterLife volunteers and Network members. It has been a good year despite the difficulties and great progress has been made. Thank you.

April 2004
AMP, KMN, IP, RH