

A South African National Animal Checklist Policy

DIVISION: *Foundational Biodiversity Science, Research and Scientific Services*

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Policy Details

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Policy Review

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Approved/ Reviewed by:

Committee / Division	Date	Signature	Review / Approved
<i>Foundational Biodiversity Science</i>	<i>22 May 2024</i>	<i>Signature of Chief Director</i> 	<i>Approved</i>

A South African National Animal Checklist Policy

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1. Preamble

The South African National Biodiversity Institute (SANBI) is mandated in the National Environmental Management: Biodiversity Act (2004) to co-ordinate and promote the taxonomy of South Africa's biodiversity. To form a basis for fulfilling the mandate, SANBI is coordinating a process to provide a comprehensive and regularly updated checklist of animal species that occur in South Africa. In collaboration with partner institutions and collaborators, a checklist of South African animal taxa is compiled and shared as an open, freely accessible and trusted digital resource. Documented and consistently implemented policy and procedures for generating, coordinating and updating national Animal Checklists are critical to ensure that all contributors and users understand the rationale for the inclusion of data and for changes or additions made, and also to ensure that there is some degree of standardization across taxa. A policy for national checklist compilation and updating is necessary to ensure transparency, consistency and credibility in decision-making relating to the checklist.

2. Purpose of the policy

To provide standard guidelines for the compilation, updating, verification, and management of the South African National Animal Checklist, as well as its updates to ensure consistency, transparency and credibility.

3. Legislation & standards

National Environmental Management: Biodiversity Act, 10 of 2004

4. Link to other SANBI policies and procedures

A South African National e-Fauna Policy.
ToR - South African Animal Checklist Committee.

5. Scope of application

This Animal Checklist policy covers all wild animals, i.e., vertebrates (mammals, birds, amphibians and fish), invertebrates (insects and non-insect) in marine, freshwater and terrestrial ecosystems of South Africa, excluding alien species.

6. Definitions

Alien species (syn. not indigenous, non-native): a species whose documented natural range does not include South Africa, but that is now here as a result of human action that has enabled it to overcome a biogeographic barrier.

7. Abbreviations

South African National Biodiversity Institute (SANBI)
National Biodiversity Information System (NBIS)
Zoological Database of Southern Africa (ZODATSA)

8. Policy

8.1 South African Animal Checklist Guidelines.

- 8.1.1 Designated Scientist (Animal Checklist) will take responsibility for compiling, updating and managing the animal checklist as the Checklist Co-ordinator at SANBI (Section 8.2), using ZODATSA (<http://zodatsa.sanbi.org.za/>) as our database.
- 8.1.2 The higher classification system [above genus (Kingdom, Phylum, Class, Order, Family, Genus, Species, Sub-species)] will be used in the South African National Animal Checklist.
- 8.1.3 The core fields are mandatory and must be populated for each species; supplementary fields maybe added (Section 8.3).
- 8.1.4 The checklist will be updated on an ongoing basis by the Animal Checklist Co-ordinator at SANBI, as informed by published literature, within a reasonable amount of time, following the procedures outlined in Section 8.2.

- 8.1.5 Once every year, a South African Animal Checklist verified and approved by the South African National Checklist Committee (Section 8.4: ToR - South African Animal Checklist Committee) will be published online through the NBIS.
- 8.1.6 The published checklist file will have a “Metadata sheet”, which provides the background of the information captured and the details of all contributors and verification experts.
- 8.1.7 External users are welcome to comment on the National Animal checklist. The Animal Checklist Co-ordinator will be responsible for responding to comments.
- 8.1.8 The National Animal Checklist should not be seen as a copyrighted product, and should be open access, with credited references when the data is used elsewhere.
- 8.1.9 Where applicable, the Animal Checklist contributors will aim to publish the checklist in a peer reviewed scientific journal.
- 8.1.10 Taxon experts from inside and outside of SANBI are encouraged to send published articles with new species descriptions or revisions to the Animal Checklist Co-ordinator to be incorporated into the checklist.
- 8.1.11 Only changes and species names published in peer reviewed scientific publications will be incorporated in the Animal Checklist; where a publication leaves unresolved taxonomic issues this may be stated in notes field.
- 8.1.12 The latest published, evidence-based classifications will be followed, and species names will be added to the checklist as currently accepted names and synonyms, with references.
- 8.1.13 In cases where taxon experts are not available and classification changes need to be treated with caution, or where the latest published treatment is not followed, a preamble will be given in the appropriate notes field in ZODATSA and discussed by the South African Animal Checklist Committee.
- 8.1.14 The sources of information will be referenced, and a list of references be provided. The reference list will be formatted following the Harvard referencing standards.
- 8.1.15 This Policy will be reviewed annually by the Animal Checklist Co-ordinator and the Zoological Research Scientists, with contributions from the South African National Animal Checklist Committee.
- 8.1.16 The annual published checklist policy will be dated before it is published on the SANBI website.

8.2 The SANBI procedure for maintaining the South African Animal Checklist.

- 8.2.1 Any corrections or additions to the Animal Checklist should be communicated to the Animal Checklist Co-ordinator, providing the necessary information and reference for the updates or corrections to be made.
- 8.2.2 ZODATSA (<http://zodatsa.sanbi.org.za/>) database, is the repository for the Animal Checklist data. It has the ability to:
 - Manipulate and update large sets of data,
 - Convert data compatible with other systems using biodiversity information standards such as Darwin Core Archive,
 - Export information into appropriate formats while still ensuring interoperability through a common set of terms.
- 8.2.3 The Animal Checklist Co-ordinator’s duties:
 - Continuously scan the published literature to which SANBI subscribes or other open-source databases for identification of relevant publications on South African animal species.
 - Establish and communicate regularly with a network of researchers and institutions who publish taxonomic papers on South African animals to request copies of newly-published work not in the list of journals to which SANBI subscribes.
 - Lead and manage the compilation of Animal Checklist and collate all contributions from taxon experts ensuring that they meet the guidelines and standards outlined in Section 8.3.
 - Curate the animal species data in the ZODATSA and other official SANBI systems, with the assistance of technical support from the SANBI’s Biodiversity Information Management unit and e-Fauna Co-ordinator.
 - The checklist will be updated on an ongoing basis, and dated versions will be published on an annual basis. Input maybe provided by uses through NBIS.

8.3 Composition of the South African Animal Checklist (* = mandatory core fields):

8.3.1 **Classification***, all individual classification will follow the latest published treatment. Catalogue of Life main classification system [above family and below family levels] as follows:

- Kingdom
- Phylum
- Class
- Order
- Family
- Genus
- Subgenus
- Species
- Subspecies
- Continuously scan the published literature to which SANBI subscribes or other open source database

8.3.2 **Authorship, date***: citation for the original description of the species (author, year)

8.3.3 **Reference (full reference for original description)***: full reference for the original description of the species with date, title, journal, volume and pagination.

8.3.4 **Synonyms***: synonyms (widely used taxonomically alternative names). As certain groups may have many name synonyms, only taxonomically accepted synonyms will be accepted. Wrongly recorded names not to be included under synonyms.

8.3.5 **Reference for synonymy***: details of author, year and pagination indicating the name change or synonymising for each name reported.

8.3.6 **Distribution***: Total range of the species on land, listing provinces, for aquatic species (names of river, streams, sea and locality to be included) within the borders of South Africa. Distribution patterns (including fragmentation/gaps).

8.3.7 **Global Countries***: global distributions from which the taxon is also recorded other than in South Africa.

8.3.8 **Vernacular/Common name**: a widely used English non-scientific name/s for a species used in everyday speech by non-scientists. Where non-English names exist, Animal Checklist coordinator, and only in agreement with taxon experts, may use other non-English and non-offensive common names from other official languages of South Africa.

8.3.9 **Native status**: native species can be either endemic (found only within South Africa) or indigenous (found both within the region and elsewhere), semi/ cosmopolitan, widespread, etc.

8.3.10 **IUCN Red listing Status**: if unknown, it should be recorded as such or as "not evaluated".

8.3.11 **Web reference links**: contains information and pictures of the recorded species.

8.3.12 **Comment box**: any additional information that relates to the specific taxa and may have taxonomic implications.

8.4 Composition of the South African Animal Checklist committee.

An Animal Checklist committee including selected taxon experts will meet twice a year to verify and confirm scientific correctness of the Animal Checklist and that the taxonomy is at the time of verification up to date and in line with the guidelines set in Section 8. The process of verification and sign off will be guided by the Terms of Reference of the South African Animal Checklist committee.

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The South African Animal Checklist Committee, governed by the Animal Checklist Committee Terms of Reference, is comprised of the following members:

- 8.4.1 Chair: Deputy Director, Zoological Research.
- 8.4.2 Technical Co-ordination: Animal Checklist Co-ordinator and Senior Scientist Zoological Systematics.
- 8.4.3 SANBI committee members/taxonomists: Dr Ian Engelbrecht, Dr Monica Mwale, Dr Theresa Sethusa, Prof Krystal Tolley and Prof Michelle Hamer.
- 8.4.4 Non-SANBI taxonomists or/ Systematists: to be invited each year subject to priority taxa, numbers subject to availability of taxon experts