

BRITISH PTERIDOLOGICAL SOCIETY

GUIDELINES FOR THE ORGANISATION OF BPS MEETINGS

Thinking about leading a BPS meeting? Why not? It's an excellent way to introduce yourself to the Society's membership, meet new members, make new friends and help to introduce others to the pleasures of ferning. Don't be put off by any lack of knowledge or experience. You almost certainly have local knowledge and particular areas of interest which other members do not.

Leading a meeting is challenging, rewarding, and should be, above all, fun. These guidelines have been produced by the BPS Meetings Sub-committee and are an attempt to make the organisation simpler and as effective as possible. The guidelines are intended for guidance only, not as fixed rules. As appropriate, they cover national, overseas and regional meetings. The main difference for regional meetings is that organisation and liaison will be done through the Regional Organisers rather than the Meetings Secretary and Meetings Sub-committee. The process set out here, which applies in particular to field meetings, can be divided into 5 stages:

1. Initial planning

a) For national or overseas meetings, discuss with, or present your idea to the Meetings Secretary or Sub-committee. For regional meetings, discuss with your Regional Organiser. Details are on your membership card, and in the Bulletin and journals.

b) The Sub-committee meeting is normally held in February and ideas for national and overseas meetings are considered for the following year, and possibly for the year after that (e.g. February 2012 for meetings in 2013 and 2014).

c) You should have an idea of:

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| Nature of meeting | - botanical (e.g. hunting for old records, habitat visiting, seeing rare species, varieties, hybrids etc., recording as part of a survey) - horticultural (e.g. visit to a fern garden or nursery) - laboratory, or indoor with speakers, social, or a mixture - something quite different! |
| Duration of meeting | - day, weekend, long weekend, week |
| Location | - including an idea for a centre |

2. Outline meeting plan

a) Since the meetings programme for national and overseas meetings is included in the Autumn mailing and in the Bulletin, more detailed information must be provided in time for the Autumn mailing (e.g. by September 2012 for 2013 meetings).

b) The Meetings Secretary will need to have the following:

- 1) Title of meeting, geographical area, and a few sentences to "advertise" the meeting to members and describe its content.
- 2) Date and starting times, at least for the first evening and/or morning.
- 3) Details of the meeting centre, if available. Normally this is a hotel, ideally with a room or facilities for members to meet and perhaps to eat together in the evening. Where advance booking is essential, provide full address, telephone number and price of rooms.
- 4) Your contact details and details of any deadlines for booking etc.
- 5) Estimate of any specific expenditure that the BPS might be expected to incur.

3. Detailed planning and reconnaissance

a) Research and reconnaissance

- 1) This can be one of the most enjoyable, if time-consuming, aspects of leading a meeting. However, the load can be spread and the process made more enjoyable by enlisting the help of others. The following are strongly recommended:
 - Local BSBI County Recorder – they know all the habitats!
 - BPS members living locally, or anyone with local knowledge.
 - Tourist Information Centre(s)
 - People from local naturalist/conservation societies or trusts
 - Previous BPS Bulletins - these contain a fund of information
 - Historical data and reports, including local Natural History Society archives, which may be contained in local libraries.

b) Detailed planning

- 1) Plan the overall programme and then each site visit. To some extent this is a matter of timing. The temptation is always to try to fit too much in, but the following points may be of help:
 - a) Don't travel too far from the centre – you may need 2 centres for a week-long meeting. Half an hour is a rough limit, but there are always exceptional circumstances.
 - b) Don't underestimate the time spent setting off, travelling or walking, or overestimate the fitness or speed of your group. In general, it takes half a day to visit one site; longer if substantial travelling or walking is involved.
 - c) Sites should be safe and accessible, as well as interesting. Potential hazards need to be noted and this information passed to participants prior to the meeting. Examples include steep ground, loose underfoot, boggy areas, loose rock or even ticks/midges. Your group may contain elderly or even infirm members. The itinerary may need to be tailored accordingly. If some fitness or experience of walking is required, this should be clearly stated in the outline plan.
 - d) Unless the site is open to the public, or is on a public right of way, permission must be obtained from the owner or manager of a site before a visit. Conservation or other sensitivities of a site must also be respected. A visit by 2 or 3 people may be acceptable when a large group is not. It may provide reassurance to site owners that the Society does carry Third Party insurance.
 - e) Plan suitable locations for lunch. Some members appreciate an appropriate hostelry – such places should be notified in advance. Other members prefer a packed lunch and in any case a pub is not always available. Make this clear in your instructions.
 - f) Don't forget to include provision for toilet stops!
 - g) Discuss with the centre hotel the likely attendance, and requirements for meals, room, slide projector etc.
 - h) For national and overseas meetings, you will have been contacted initially by a member of the BPS Meetings Sub-committee assigned to liaise with you. Don't hesitate to contact him/her if you need help or advice.
 - i) Identify someone who can lead the meeting in case you are unable to do so (e.g. through illness).

c) **Meeting schedule**

- 1) At the beginning of the year of the national or overseas meeting, the Meetings Secretary will give you a list of members who have expressed their interest in your meeting (in addition to those who may have contacted you direct), and a copy of their signed Meeting Attendee's Declarations form for that year. You will then need to provide them as soon as possible with the following information:
 - Complete information on centre hotel, and alternative accommodation, including other hotels, B & Bs, camping sites, with price guide, addresses and telephone numbers.
 - Detailed programme with starting times, grid references, arrangements for lunch (with times and grid references) and evening meals. (NB: Do not 'round up' grid references if you are converting from GPS readings to a 6- or 8-figure reference, just knock off the extra numbers!).
 - Details of how to get to the centre, and if possible maps of the sites and recommended routes.
 - Requirements for special clothing or footwear.
 - A request that members confirm that they have signed the annual Meeting Attendee's Declarations form for the year of the meeting.
- 2) You should make clear to participants that BPS Third Party insurance only covers BPS members within the UK and the Republic of Ireland. It does not cover non-BPS participants, and it does not apply to other parts of the world. For overseas meetings, a letter explaining this is available (see Appendix for BPS website link).

4. The Meeting

a) Before a week or weekend meeting:

- 1) Aim to meet people the previous evening at the Centre hotel – this is useful for a briefing on the meeting and for getting to know your fellow members.
- 2) Persuade /co-opt people to write a report on the meeting for the Bulletin – this can be different people for each day. If possible, and especially for indoor meetings, this should be arranged before the start of the meeting. Guidance is available on species recording.
- 3) For overseas meetings, make sure that everyone knows the appropriate numbers for contacting emergency services.

b) Before travelling to the site:

- 1) Reduce the number of cars as far as possible by sharing.
- 2) Ensure that each driver knows exactly where to go and at what time you are meeting or setting off.
- 3) Travelling in convoy may not be desirable or possible, but the rule is – each driver is responsible for the one behind him!
- 4) Make sure that there is a contact point (mobile telephone number) in case of difficulties.
- 5) Leave details of the route and site with the centre hotel, or at an appropriate place for the benefit of latecomers.
- 6) Be prepared for a change of plan, for example in case of inclement weather.

c) At the site:

- 1) You are the leader! Keep everyone together and keep everyone informed! Tell people what you are to do, where to go, and what they should look out for. Try to keep at the front, but remember there are always stragglers, and it is easy to get lost, especially when a change of direction is made.
- 2) Always make sure that everyone knows where they are going, and when and where is the next

rendez-vous. You may like to assign someone to watch out for stragglers! Take a head count before setting out and when you get back to the start.

- 3) As leader you have a responsibility for the enjoyment of the group, but particularly for its safety. At the beginning of the meeting, inform the group of potential hazards including those previously noted beforehand (see section 3b) or newly apparent (e.g. rocks made slippery by rainfall). You should also take account of the physical abilities of the participants. Meeting arrangements and itinerary may need to be adjusted accordingly. Never exceed the speed of the slowest member, and avoid arduous walks or climbs unless you have warned your group and are satisfied of their capabilities and fitness. It may be advisable to avoid potentially hazardous situations altogether.
- 4) All participants must have signed the current annual Meeting Attendee's Declarations form which will have been sent to you early in the year (see section 3c). This refers to the BPS Safety Code (see Appendix for BPS website link). Take copies of spare forms to be filled in as necessary.
- 5) Remind participants about general conduct, e.g. countryside code, shutting gates etc, and that people on a site visit are ambassadors for BPS.
- 6) Inform participants of any particular bio-security issues, such as preventing the spread of *phytophthora ramorum* which affects larch.
- 7) Suggest people send photos taken during the trip to the BPS Website Editor.
- 8) If minors (16 years or under) attend the meeting, they must be accompanied by their parent(s) or Legal Guardian(s).
- 9) It is desirable but not compulsory that the Leader or a member of the group should have basic training in First Aid. Courses are run by the St. John Ambulance Brigade and the Red Cross.
- 10) Make sure that new or inexperienced members are receiving education or encouragement. Remember, some may be shy and afraid to ask questions.
- 11) Check your reporter is doing his job.
- 12) Recording of species and reporting to BSBI is strongly encouraged. A recording form with instructions on completion, and where to send it, is available (see Appendix for BPS website link).

A special word on collecting:

*As a matter of principle you should permit **NO** collection of material other than spores.* Please refer to the conservation 'Code of Conduct' (see Appendix for BPS website link). Copies are also available from the Meetings Secretary. The only exceptions are for conservation where a plant or habitat is in imminent danger of destruction or loss; or for *bona fide* scientific purposes under the auspices of a qualified botanist. The Society has a unique responsibility for the protection of rare ferns and habitats and responsible access to such plants by the BPS membership is more likely to achieve these ends than exclusion or restriction to an elite. Members and recorders should exercise discretion over, for instance, disclosure of grid references of sensitive sites outside the Society.

5. After the meeting

- 1) The Meetings Secretary would appreciate informal advice on the success of national and overseas meetings, numbers attending, any problems encountered and ideas/suggestions for future meetings.
- 2) The report of any meeting, for the BPS Bulletin, should be written as soon as possible after the meeting and submitted to the Bulletin Editor via, or copied to, the meeting leader as appropriate, by October of the year of the meeting. As a guide, half to one page of the Bulletin (about 300-500 words) should cover a day of the meeting for either national, overseas or regional field meetings, and 350 words maximum for regional indoor meetings. The report should include:

- Numbers attending and highlights, particular events, items of humour or general interest, and reasons for visit.

- Description of sites, including geology and other site background, with grid references (but see above at end of 4c, and note under 3c)
- Names of species, subspecies and varieties seen with comments as appropriate.

Don't be afraid to make the report entertaining and/or original! Encourage members taking photographs to submit some for potential inclusion in the Bulletin; ensure you know the names of attendees for inclusion in captions! More information is available from the Editor:

Bulletin@eBPS.org.uk.

3) A short report, preferably with photos, should be sent as soon as possible for topical interest, to the BPS Publicity Officer.

4) BPS Recording Forms should be sent to the BPS recorder and relevant BSBI VC recorder (see Appendix for BPS website link).

Finally, remember that your primary task is to bring pleasure to others, and thereby to yourself. Enjoy!

Appendix: Other Relevant Documents Available on the BPS Web Site

BPS Safety Code

Code of Conduct –BPS Summary

Code of Conduct –Full BSBI Version

BPS Recording Form

Letter about BPS Insurance

The latest versions of all these documents are available to download on the Meetings page of the BPS Web Site: www.eBPS.org.uk .

BPS Meeting Leader Guidelines Version: April 2012 (references updated February 2013)