

## Collections Coordinator Handbook 2017

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A series of Frequently Asked Questions is available in Appendix I to this Handbook.

## Introduction

Welcome to the Collections Coordinator Handbook. If there is anything that you need more explanation or that isn't clear to you, please ask your Regional coordinator, or contact National Office ([collections@plantheritage.org.uk](mailto:collections@plantheritage.org.uk) or 01483 447540). You should also have received your volunteer handbook, role description and expenses guidelines.

Additional resources such as copies of the application form, or templates of visit reports are available from our website, under the "Coordinator Resources" section: <http://www.nccpg.com/National-Collections/Coordinator-resources.aspx>

## 1. The Collections Coordinator role

### 1.1. Appointment

- Coordinators are appointed by their Area Group, and need to be a member of Plant Heritage

- Coordinators should be a member of, or invited to attend Group Committee meetings, to make sure that there is good communication between the Group and the Collection Holders in the area.
- The Coordinator is accountable to National Office, the Plant Conservation Committee (PCC) and the Area Group. They are the first point of communication, in many cases, between the Collection Holder and Plant Heritage.
- There is no maximum term for the role.
- Contact details of Coordinators (name, phone number and/or email address) are made available on Plant Heritage website and in the yearly National Collections Directory.

## **1.2. Responsibilities**

- Advising people who are interested in applying for a National Plant Collection, and guiding them through the application process.
- Monitoring of National Collections by regular visits and communication
- Encouraging good communication between Collection Holders, the group and National Office
- Providing information on all Collections in the area to the Plant Conservation Officer (PCO), Regional Coordinator and the PCC when required.
- Attending meetings as required
- Promoting the Threatened Plants Project, Plant Exchange and Plant Guardians scheme.

## **1.3. Tasks**

- Advising enquirers on NPC requirements
- Making visits to assess potential collections or monitor existing ones (every 2 years at least)
- Ensuring that paperwork related to applications or existing NCs (for example annual reports or plant lists) are completed
- Writing reports to National Office (NO) on your visits
- Arranging an annual meeting for NCH in your area, if possible
- Providing a short report on NCs in your area to the Regional Coordinator every 6 months (before the June and December PCC meetings).
- Attending a yearly Regional Collections Coordinator meeting
- Informing NCH regarding conservation projects such as the TPP or Plant Guardians

## **1.4. Expenses**

As explained in the PH Volunteer handbook, you are entitled to reimbursement of reasonable expenses incurred as part of your role. This may include:

- Travel to and from home to Collection Holder, prospective applicant and applicant visits
- Travel to coordinator meetings; and any trips made as part of the assessment or mentoring process.
- Reasonable costs incurred as part of the role, such as telephone calls, postage, copying and stationery.

For a copy of the expenses claim form, please see Appendix 1.

## 1.5. Managing the workload

If you are having difficulties visiting your collections or staying in touch with Collection Holders and National Office, please let us know so that we can try to help you. There are several options that can be considered such as:

- splitting your responsibilities **geographically** with one or more coordinator(s) – this can be useful if the Collections you are responsible for are spread over a large area
- splitting your collections **by type** with one or more coordinator(s) – for example you could decide to remain the point of contact for applicants and for all matters related to National Office, but have regular visits undertaken by “assistant” coordinators
- asking your Regional Coordinator, a coordinator in a nearby area or National Office to temporarily support you by visiting collections or organising a NCH meeting

## 2. The National Plant Collection scheme

### 2.1. Types of Collection

There are two types of collections registered in the scheme:

- National Plant Collection: usually held in one site by one Collection Holder (can be an individual, an organisation, a nursery...)
- Dispersed National Plant Collection: can be held in more than one site, by more than one holder.

For dispersed National Collections:

- One person needs to act as the manager of the different people/sites and communicate with Plant Heritage, for example for annual reports
- Members of the dispersed collection can decide whether they wish for their details to be public or private. For example, a dispersed NPC could be managed by a botanic garden, with plants grown by schools, private individuals, or nurseries. Anyone wishing to contact the individual growers would have to go through the garden.
- Applications can be made for dispersed collections on the normal forms

### 2.2. Status of Collection

**Applicant** – prior to being awarded status by the Plant Conservation Committee, a collection cannot be referred to as a National Plant Collection (although some applicants may choose to advertise that they are “in the process of applying” for NC status).

**Full** – a Collection that meets all the requirements of the scheme and has been awarded Full status by the Plant Conservation Committee

**Provisional (P)** – normally for a collection that is worthy of Full status but the plants are a little too young; or for an existing Collection that is a little under par and is working to regain Full status (for example a collection which has suffered recent plant losses due to a disease).

**Transitional (T)** – normally indicates a Collection that has moved recently, and is therefore not as good as it might be.

**Withdrawn** – a Collection that is no longer in the scheme.

### 2.3. Scientific National Plant Collection

Applications for Scientific NCs are made on a specific form. When a NCH indicates that he/she would like to apply for scientific status, they will be attributed a mentor (can be a member of the PCC or an external expert) who will help them through the process.

### 2.4. Recruitment of new collections

Enquiries for new collections can come directly to us at National Office or to you as coordinator. If we receive an enquiry we will acknowledge it and inform you so that you can follow it up. We encourage you to do the same by letting us know when you have been discussing with a potential applicant.

Active recruitment of Collections can be done for example through displays at shows, written communications in local newspapers, talks to gardening groups, or simply word of mouth.

### 2.5. Group support for National Collections

National Office is committed to helping Collection Holders throughout the life of their collection. However it is also important for Collection Holders to feel valued at local level. There are several ways that groups can help:

- practical support, for example help with weeding
- offering NCH slots to talk at local group meetings
- providing a platform for NCH to write or advertise their collection, for example in group newsletters
- establishing contact with local newspapers
- allowing NCH to put up displays at shows, or offering them free sales tables at plant fairs

A local group can also offer **financial support** to Collection Holders, following a set of guidelines (please contact us for an up-to-date copy). Funding can be given for purchase of plant material, emergencies related to the collection, specific projects or research. It should not be given for routine purchases (e.g. compost, pots), computing equipment or for membership subscriptions.

A range of external grants available to Collection Holders can also be found on the following site: <http://www.grantsforhorticulturists.org.uk/Home.html>

### 2.6. Recognition for Collection Holders

The **Brickell Award** is given in recognition of 'excellence in cultivated plant conservation' undertaken by Collection Holders. It is named after Chris Brickell, a founding member of the National Council for the Conservation of Plants and Gardens (NCCPG), now Plant Heritage and currently a Vice President of the Organisation. Any candidate collection should be of **scientific status or demonstrated to be of an equivalent standard** in terms of its completeness within scope, the standards of curation and record keeping and is well established as appropriate to the type of plant collection.

The key criteria considered by the awarding committee are:

- Contribution to our understanding of a plant group through research undertaken and communicated through published works with emphasis given to books, research papers and definitive articles.
- Conservation work undertaken that has secured plants in cultivation or through the rediscovery of lost cultivars or taxa.

- A significant educational role utilising the collection.
- Contributions made to the wider work of Plant Heritage
- Contribution to horticulture including work undertaken with other organisations, through advice given and provision of plant material

Group members (and in particular the Coordinator) are invited to nominate their chosen Collection Holder in spring. We ask that you submit a short citation (max two sides A4) that highlights the key achievements of the nominee. The award is given to the successful Collection Holder during a short ceremony at the Press Day of Hampton Court Flower Show.

### 3. The application process

The first contact may be made to the Coordinator, a group member or to National Office. In all cases the first paperwork that the prospective applicant will be sent will be the **Proposal Form** and **Information Sheet** (available from the “Coordinator Resources” area of Plant Heritage website)

A Proposal can be made before any plants are actually owned or planted. For example a person could approach a Coordinator with an idea for a collection of *Quercus* for which they had a plan but only a couple of actual plants.

This is designed to place the research work up front, before the expenditure on plants and the record keeping starts. This means that the applicant will need to do quite a bit of work to clarify what they want to do, and to be able to explain that to you and the Plant Conservation Committee. It is hoped that this means that applicants will be helped along the way by the comments of the PCC and also that they will no longer build up big collections only to be disappointed when they don't meet the criteria.

The Proposal Form can be used for a normal National Collection, a Scientific Collection or a Dispersed Collection but the theory is the same, in that it needs to set out the path that the proposed collection will take.

#### 3.1. Proposal stage

The proposal form is where the applicant needs to detail the scope, category and contact details for their proposal. The complete proposal is made up of the Proposal Form and an initial Plant List (see 3.4).

#### 3.2. Scope

The scope of the Collection describes what is (or is intended to be) in the Collection. It needs to be exact and well-thought through. If you need some help with working this out, do please contact National Office.

#### 3.3. Category

Collections are placed in three categories, depending on the goal that the NCH is trying to achieve:

Historic: a collection of plants that have been grown in British & Irish gardens which have a connection defined by a common history or association, or importance to society.

Horticultural: a collection of garden plants of aesthetic or functional value.

Reference: a taxonomic representation of a group with importance for both taxonomic reference and research.

A collection may appear to fit in more than one category. For example, a collection of old apple cultivars could fit under the Historic category (conserving the breeding heritage of a certain period), or the Horticultural category (conserving varieties which were selected or bred in a particular area and are locally adapted).

If you need some help deciding, try working through the questions below.

1. Is the collection primarily species? If yes, go to 2. If no, go to 4.
2. Is the accession policy to acquire a substantial representation of plants in a genus, or section (or other taxonomic category)? If yes go to 3. If no go to 9
3. The collection is probably a **reference** collection.
4. Is the collection species and cultivars? If yes go to 2. If no go to 5.
5. Is the collection based on a breeder, house/ area or period of time? If yes go to 6. If no go to 7.
6. The collection is probably a **historic** collection.
7. Is the accession policy to acquire all of the plants in a genus, section or group? If yes go to 8. If no go to 9.
8. The collection is probably a **horticultural** collection.
9. The plants may be better suited to our Plant Guardians scheme.

### 3.4. Plant list

The plant list shows what the applicant already has (if anything) in the way of plants to form the potential Collection. It also demonstrates the research that they have done towards the making of the Proposal.

At the Proposal stage the plant list does not need accession numbers, dates or sources but these will be needed later, so the applicant should be encouraged to start recording this information.

- The list should show the full correct name of the plant, preferably arranged in alphabetical order for ease of reference.
- It should show all the plants that are currently in the collection, and all the plants that would, in the applicant's mind, constitute an ideal collection.

There is no set format to follow, but the list could show:

Column One: Plants owned

Column Two: Plants that can be acquired but are not yet in the collection

Column Three: Plants that are not available but would fit the scope.

Therefore the applicant needs to have done enough research to find out what is on the market and available to them from other sources. We would expect them to have covered most obvious areas of research to complete their lists.

At this point in the application process it does not matter if the applicant has no plants at all; what matters is that they are able to demonstrate what they think would constitute 100% of their scope

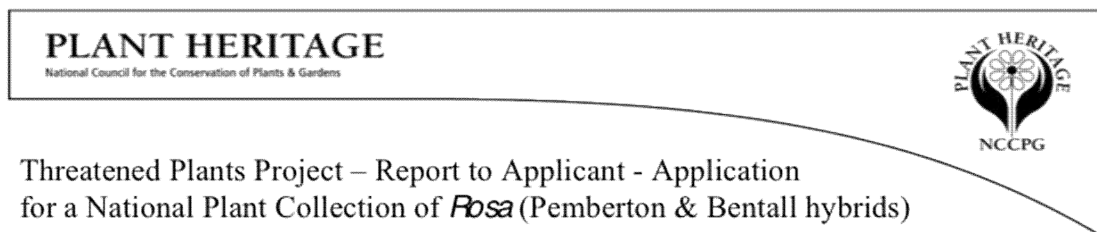
in an ideal world, and which of those plants they realistically think they can obtain. If the proposal is approved they could then spend the next 10 years collecting the plants before making a full application, but they can do so with the help and advice of the Plant Conservation Committee and the coordinator.

### 3.5. Threatened Plants Project report

Once the proposal form and plant list are received at National Office, they are checked. If the collection contains cultivars, a TPP report can be done, which on completion is copied to the applicant, coordinator and regional coordinator. This (as of 2017) includes the following information:

- How many known threatened cultivars there are in the scope
- Which known threatened cultivars are included in the collection as proposed
- Which of these are uniquely held by the applicant
- Additional cultivar names which appear to be within the scope and if they may be threatened
- Relevant references used and additional information obtained from those: for example data from the Plant Finder since 1987; the RHS horticultural database; plant record information from more than 1,600 UK and Irish collections, historic and botanic gardens and conservation schemes; online International Cultivar Registration Authority (ICRA) information; specialist references such as monographs
- Various conservation actions are recommended, for example where we know a current location for a missing threatened cultivar which may be able to be obtained for a new Collection
- Discrepancies in names are highlighted

TPP reports are also available for withdrawn collections, to help assess cultivars of particular rarity in order to encourage their continued conservation.



### 3.6. Legislation: CITES & CBD, Plant imports

If you receive a proposal for a collection containing the plant groups listed below, please contact us as there may be implications in terms of legislation (particularly with CITES, the Convention on International Trade in Endangered Species):

- |            |                    |
|------------|--------------------|
| Cacti      | Medicinal Plants   |
| Succulents | Bulbs              |
| Orchids    | Carnivorous Plants |
| Cycads     | Tree ferns         |
| Bromeliads | Cyclamen           |



### 3.7. The Plant Conservation Committee

The Proposal Form, Plant List and TPP report if relevant are sent to the Plant Conservation Committee for opinion and approval. The PCC has 4 meetings a year (2 teleconferences, 2 in person), and is able to make decisions in most cases without reference to outside opinion.

The responses and comments from individual members of the Committee are collated and are designed to offer encouragement and advice to applicants. If the proposal and plant list require additional research or amendment in some way this will be stated here. If there are plants or groups of plants that the PCC feel could be usefully added to the collection, they will be included. The Committee may suggest that the applicant gets in touch with a Collection Holder, former CH or expert in the field to verify their plants, or share material. This information should be taken with the TPP report as help for the applicant to make their collection suitable for National Plant Collection status.

They will recommend one or several possible courses of action:

- The applicant should make a full application
- They need to make a few changes or do some additional work before making a full application.
- They should make more radical changes or research and return to the PCC with a revised proposal.

### 3.8. Application form

A full application is made up of the Application Form, Accession List and Coordinator review.

## NATIONAL PLANT COLLECTION APPLICATION FORM

<p>The requirements of holding a National Plant Collection are shown in <i>italics</i> in this form, with additional requirements for Dispersed Collections also shown. If you need an explanation of these, please either speak to your Coordinator (listed on website under the National Collections tab, or contact National Office on 01483 447540). For a definition of the terms used, please see the notes.</p>
<ul style="list-style-type: none"><li>o <i>It is the responsibility of the applicant to use this form to demonstrate the value of their Collection, and to provide all of the information necessary for assessment.</i></li><li>o <i>The applicant must be a member of Plant Heritage before making an application. Non-payment of subscriptions will result in the Collection being withdrawn from the scheme. Ring 01483 447540 to join.</i></li></ul>
<p><b>Name of applicant</b>- who will become the Collection Holder; and may be the name of a person, organisation or group</p>

The application form is designed to provide as much information to the Plant Conservation Committee as possible. As they will never see the potential Collection this information is what they will base their decision on, so the form should be filled in as comprehensively as possible. If you need to know why a specific question has been included, do please contact National Office to ask.

### 3.9. Accession list

The accession list is crucial to making a good impression, it shows that the applicant is organised, meticulous, can spell the names of their plants, and is up to date on nomenclature and orthography.

Unless the applicant is dyslexic or has vision problems (which we can offer assistance with if needed) then the list needs to be perfect.

As always it should include as a minimum: accession number, full and correct name of plant, date acquired, source of plant and collectors number for wild-source material. A template and examples of plant lists are available.

You need to bear in mind that the Committee have to use it to decide:

- if there are enough plants
- if the plants are named correctly
- the age of the plants,
- whether they come from a range of sources or just one
- if there are enough back-up plants,
- if they are geographically or genetically diverse

### **3.10. The Coordinator visit report**

As the coordinator, you need to act as the eyes and ears of the Plant Conservation Committee and provide them with the information on the application that they might reasonably want to know. The aim of the visit is to verify the information provided by the applicant on their form, and assess whether or not the NC fits the standards of the scheme.

The form has been redesigned to help remind you of some of the information you could include, but can you think of other things that you might usefully check and record to help the committee consider the collection. What would you want to know if you were in their position?

### **3.11. Application stage**

The full application (form + accession list + coordinator review report) is then referred to the Plant Conservation Committee for their approval. They will make one of the following decisions:

- Full status National Plant Collection
- Provisional status National Plant Collection
- Requesting further research or information from the applicant before making a decision.

### **3.12. New Collection Holder**

After the PCC meeting a letter will be sent to the applicant, explaining the decision made by the Committee. As Coordinator you will receive a copy.

A new Collection Holder will receive the following:

- Signboard (A3 or A4)
- Certificate
- Annual Report Form (electronic)
- Contact/Visitor Information/Publicity form
- Electronic copies of logos to use in their own publicity material

## **4. Changes to National Collections**

### **4.1. Withdrawal of a Collection**

Withdrawal of a collection may be requested for various reasons: ill health, death, financial problems, moving, loss of interest, pests or diseases. The Coordinator or Collection Holder should notify National Office as soon as possible. The Collection will be removed from the website and scheduled for withdrawal at the next meeting of the Plant Conservation Committee. A TPP report will be prepared (if appropriate) and forwarded to the Coordinator (and Collection Holder if appropriate) highlighting the plants in the Collection that are most important to conserve. If succession has been effectively planned National Office will be able to advise on how to proceed (very dependent on what has been planned!)

### **4.2. Change of Collection Holder**

In most cases this will require the completion of a new application form, unless the site and facilities of the collection remain the same.

### **4.3. Change of location**

This will mean that the Collection's status will change to Transitional until the Collection is established at the new location. The time taken for this will depend on the Collection. To return the Collection to Full status, a complete Accession List and a favourable Coordinator report will be needed.

### **4.4. Change from Full to Provisional status**

This may be necessary if the Collection is a little below par, for example due to plant losses.

### **4.5. Change from Provisional to Full status**

This may be required if the Collection was made Provisional due to the youth of the plants, or if a Collection previously of Full status was placed temporarily in Provisional status. A full Accession List and favourable Coordinator report will be needed to achieve this.

### **4.6. Application for Scientific Collection status**

An intention to apply for Scientific Status should be passed to National Office; they will then arrange for a mentor to be appointed by the Plant Conservation Committee. This mentor will help the applicant through the process. Achieving Scientific Status recognises the research work done by the applicant and it can take several years to get the level required, this is why guidance is offered.

## **5. Collection topics**

### **5.1. Nomenclature and orthography (or naming and writing)**

- The correct naming of plants in a collection is imperative; there is no point in applying for a National Plant Collection if the applicant feels otherwise.
- The nomenclature in a plant list should be in the same form as that of the RHS Plant Finder, or any other relevant publication (to be mentioned on the application form).

Please make sure that the full name is shown and it is spelt correctly - Italics, single quote marks, etc should all be used in the right place. If you are uncertain, there is a helpful guide on the Hortax website (<http://www.hortax.org.uk>), or staff in the office are always happy to help.

## 5.2. Plant health and quarantine

Many National Plant Collections are effectively monocultures (many of the same plant in one place, like a wheat field) and as such are likely to be devastated by a pest or disease outbreak. Add to this the requirement for the Collection to be open to visitors and to offer plant material and the potential for spreading pests and diseases is high. We therefore expect that all potential and existing National Collection Holders will maintain good standards of hygiene, practise quarantine with new plants, and stay up to date on information about new problems. Further information on all these issues can be obtained from National Office or APHA (the Animal and Plant Health Agency).

## 5.3. Plant records

Collection records can be held on different supports, for example: computer database, computer spreadsheet, record book, card index, filing cabinet.

If possible, please encourage Collection Holders to use an electronic form of recording rather than paper. Plant Heritage has two types of free software available to Collection Holders for them to record data about their plants, depending on whether they wish to work on a PC based programme or online:

- Demeter is a PC based software. Visit [www.demeterpr.com](http://www.demeterpr.com) for further information.
- Persephone is a secure online database. See this short presentation: [www.youtube.com/watch?v=L4zLrdrTb5s](http://www.youtube.com/watch?v=L4zLrdrTb5s)

We also welcome the use of mapping systems by Collection Holders, particularly in the case of trees. These can be computer generated via GPS data, sketched or based on aerial photographs.

## 5.4. Labelling

Different forms of labelling can be used for National Collections, which will have to be adapted to the plant type, for example: plastic T-labels for perennials, tied-on metal engraved labels for trees, buried labels for bulbs in pots...

## 6. Succession and passing on a National Collection

A National Plant Collection conserves plants for the future. An important part of this is to ensure from the beginning, that there is a plan for passing on the Collection to the next Collection Holder before it becomes difficult for the current one to look after it. There are several options, but all require planning and work on the part of the Collection Holder and Coordinator.

- Create a duplicate Collection held by another person with the intention of them applying for National Collection status.
- Agree with a large institution such as a botanic garden, that they will take on the Collection (including records and research) when needed. It is important to agree this at institutional level, or the future development of the Collection may not be a priority within the garden.

- Arrange for the Collection to be dispersed within a specialist society. This will need forward planning and written agreement from the people in question. Most specialist societies will not have the resources to take on a Collection without a few years warning.
- Create a charity or Community Interest Company to act for the charity in the future. While National Office can't advise on this, they can offer contacts within existing Collection Holders who can talk about their experience in doing this.
- Arrange for the plants to be registered into the Plant Guardians scheme instead

These are just a few suggestions; there may be many more options that you can offer.

## 7. Collection monitoring

### 7.1. Annual reports, accession lists and Directory information

It is important that Collection Holders maintain and develop their Collections, and it is part of the role of the Coordinator to monitor, help and encourage them in this.

#### **Annual report**

This is a brief update from the Collection Holder to National Office that should be done on an annual basis. It allows Plant Heritage to keep records of what each Collection has achieved during the year and also allows the Collection Holder to flag up any issues they might have. The annual report form can be sent back by the Collection Holder in an email, by post, or can also be filled directly via our website. Although a reminder is usually sent in autumn, annual reports can be returned at any time of the year, as the best time to fill it can depend on the type of collection.

#### **Accession lists**

These are required on a regular basis, and act as an update to National Office about what is actually in the National Plant Collection. The timing of these is largely dependent on the composition of the Collection (tree collections may change less frequently than herbaceous ones) but should be a minimum of every 5 years.

#### **Directory information**

It is important that Plant Heritage offers up-to-date information to members and the public in the National Collections Directory and on the website. To do this we ask that we are notified of changes when necessary and also that the Directory information requested is provided promptly when needed. Chasing requests for this information is a major cost for Plant Heritage, so the sooner we get them the better.

### 7.2. Coordinator visits

Coordinators are required to visit the collection at least biennially.

- It strengthens the relationship with the NCH & the feeling of community within the scheme.
- It acts as a check on the quality of the collection, ensuring it is still worthy of its status.
- It allows the NCH to bring up any issues with the Coordinator which they feel they cannot with National Office.

If you have visited a Collection, please let us know by sending us a visit report form, or even simply an email/phone call. We record dates of visit reports in order to ensure that Collections are visited regularly.

### **7.3. Collection Holder meetings**

If possible the Coordinator should arrange regular meetings of the Collection Holders in their area. This enables the Collection Holders to get to know each other, find out what is happening in the group and generally build an active community within the Area Group. The meetings are immensely rewarding, but often very difficult to arrange.

### **7.4. Regional meetings**

Regional meetings are arranged once a year by the Regional Coordinator and they give Coordinators the chance to share experiences and be updated on any new training or policies. They are normally arranged at a place of interest so there is time for chat and looking at plants. They are important to attend as it is not easy to offer training or updates on a personal basis.

### **7.5. Collection Holder Communications**

Regular updates on legislation, plant health, upcoming events relevant to Collection Holders are posted on a blog: <https://collectionholdernews.wordpress.com/>. Please remind Collection Holders to follow the blog (via a box on the right hand side) if they wish to be kept informed of new posts.

A newsletter, the NCH News, is sent to Collection Holders quarterly, coordinators will also receive it. Past newsletters (since 2009) are available from this link: <http://www.nccpg.com/National-Collections/Collection-Holder-Resources/Collection-Holder-Newsletter.aspx>

## **8. Other Conservation activities**

### **8.1. The Plant Guardian scheme**

The Plant Guardian scheme was created in 2012 to allow all members to take part in plant conservation, including those who do not have the space, time or financial resources to care for a National Collection. The scheme is aimed at recording plants conserved by Plant Heritage members and making those plants available to others (gardens, Collection Holders, other members...). The registration process is very simple, and we only ask Plant Guardian to tell us at the end of the year if their plant is still alive.

As coordinator, you can invite your Collection Holders to:

- register the plants that are not part of their NC into the PG scheme
- have a look at the list of Plants registered in the scheme (the list is available on the website and regularly updated) and request material to add to their NC
- make use of the PG scheme as locations to hold back-up plants for their collection.

The PG scheme can also be an option for applicants who realise that they will not be able to meet the requirements of the NC scheme (for example if they have insufficient space to grow three plants of each taxon); or for existing Collection Holders who have decided to withdraw their NC, but still want to be involved in plant conservation.

### **8.2. The Plant Exchange**

The annual Plant Exchange that takes place at the AGM in May is a great conservation tool, allowing for plants to be spread around the UK and grown by many members.

Collection Holders can add material to their collection by requesting plants that may be grown by other members. They are also encouraged to put into the Plant Exchange plants from their collection

– please remind this to your Collection Holders in summer, so that they can plan propagation accordingly.

# Appendix 1: Frequently Asked Questions for Collection Coordinators

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What to do if...

## I visit a potential collection and I think it does not meet the requirements

- if possible, discuss the issues with the applicant directly: for example if they do not have enough plants for their proposed scope, could you suggest a rescoping?
- if you are not comfortable discussing this with the applicant, or if you have tried unsuccessfully to do so, please email National Office who will contact the applicant directly
- Do remember that in the case of applicants, any issues can also be taken up to the PCC which will provide guidance and answers

## I visit a current collection and I think it does not meet the requirements

- If possible, discuss this with the Collection Holder directly: have any changes occurred in the collection recently (staff changes, extreme climate events, diseases...)?
- Is any action possible to bring the collection back to standards (for example: reacquiring lost plants, waiting for new staff to review the collection...)? It is usually possible to put the collection in "Provisional status" for a few months or years
- If you are unable to discuss with the NCH, please email National Office who will contact the Collection Holder directly

## A Collection Holder indicates that they wish to withdraw their NC

- Ask the NCH (if possible) to tell us in writing (letter or email) that they intend to withdraw
- The withdrawal will be notified at the following PCC meeting and the NCH (or relatives) will receive a formal confirmation letter
- Discuss this with the NCH to obtain additional information: what is the reason behind the withdrawal? Would they be willing to pass on plants to another NCH or to an applicant? If yes, would they allow us to advertise the fact that a NC is looking for a new home?

## A Collection Holder is moving the collection to a new home

- Are they transferring the whole collection and are they remaining the NCH? The NC will need to be placed in Transitional status (notified at the next PCC meeting).
- Once the Collection has re-established in the new location, we will need a Coordinator visit report and up-to-date to bring the Collection back to Full status
- If the NC is moving to a different county, we will inform the relevant coordinator and make sure they establish contact with the NCH

## A Collection Holder is passing a Collection to a new Holder

- The new Holder will first of all need to be a member of Plant Heritage.
- If the scope and content of the collection are not changing, the new owner will need to fill an application to inform PH of the new location and facilities and provide a new plant list.



- If the scope and content of the collection are changing as part of the transfer, we will request more information. Depending on the scale of the change, we may ask the new holder to fill a proposal form to provide more background on the change.

#### A Collection Holder indicates that he/she is struggling to maintain their collection

- Discuss this with the NCH: have the circumstances changed (illness, work, financial problems...)?
- Several solutions can be offered depending on the reasons behind the NCH issues:
  - non-financial help from the local group or students: weeding, propagation, labelling...
  - financial support from the group: for specific projects which are essential for the maintenance of the NC
  - specific support: for example specialist advice in disease management.
  - dispersal of the collection: does the NCH have fellow collectors who they could associate with in a dispersed collection? This offers several advantages: a security against plant losses, less back-up plants needed, spreading of the propagation work...
  - duplication of the collection: this is a great way of ensuring continuation of the NC when the NCH can no longer maintain it, as well as providing an opportunity for the NCH to pass on their knowledge
- Please feel free to inform us at National Office - the earlier we learn about potential issues, the best support we are able to give to you as coordinator and to the NCH

#### A Collection I visit has an old and damaged signboard or no signboard at all

- Signboards are guaranteed for three years; after that a new one can be ordered for free.
- Please give the Collection Holder (or ask us to send them) a copy of the signboard order form – we will order a new signboard for them, either in A3 or A4 format.
- Extra signboards can also be ordered at a reasonable cost.

## Appendix 2: Coordinator Expense Form



# Plant Heritage Coordinator Expense Form

Name: \_\_\_\_\_

Group: \_\_\_\_\_

Month: \_\_\_\_\_

Receipt No	Date	Collection	Description	Amount
			<b>(sub) Total:</b>	0.00

**Notes for claiming expenses:**

Please refer to the Coordinator Expense Policy as to what can be claimed. The current mileage rate is 45p per mile for the first 10,000 miles and 25p per mile above 10,000. If you are concerned about the possible cost of an activity, please obtain confirmation from the Plant Conservation Officer before incurring the expense. If you have any queries about completing the form, please contact the Finance Officer on 01483 447540.

**How to complete form:**

Please complete the form, with a full description as to which collection the expense relates to or whether it is an expense appropriate to the general management of the scheme in your area. Please number all receipts & attach to the back of the form. In the case of a mileage claim, put in NR.

**When to put in a claim:**

Claims must be submitted within two months of the expense; however October claims **must** be submitted by 20th October.

Claims over two months will be accepted only if there are extenuating circumstances - Plant Heritage reserves the right to refuse reimbursement of expenses that have been submitted two months after the cost is incurred.

Please send to Finance Officer, Plant Heritage, 12 Home Farm, Loseley Park, Guildford GU3 1HS.

\_\_\_\_\_  
Checked

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorised

\_\_\_\_\_  
Date

## Appendix 3: Frequently used acronyms

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CBD: Convention on Biological Diversity

CITES: Convention in the Trade of Endangered Species

NCH: National Collection Holder

NO: National Office

NC or NPC: National Plant Collection

PCC: Plant Conservation Committee

PCO: Plant Conservation Officer

PG: Plant Guardians

TPP: Threatened Plants Project