



## Organising & Leading BSBI meetings



A visit to Graig Fawr, Flintshire, during the 2017 ASM (Laura Gravestock)

## BOTANICAL SOCIETY OF BRITAIN AND IRELAND

This document offers practical guidance for organisers and leaders of BSBI meetings, concentrating on field meetings. It was compiled from guidance produced by Jim McIntosh (Scottish Officer) and Jill Sutcliffe (Hon. Field Meetings Secretary 2012-2014), with further input from other contributors.

Edited and extended by Jonathan Shanklin (BSBI Hon. Field Meetings Secretary, 2015 – )

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## Executive Summary

Most of the requirements for organising a successful meeting are common sense. In the event of any problems however, insurance and the law require that this can be demonstrated with evidence. It is therefore worthwhile being familiar with the issues discussed in this guidance, particularly those relating to health and safety and the need for risk assessment. For the BSBI a report of the meeting will make interesting reading for other members when published in the Yearbook, and perhaps encourage others to lead or attend a meeting.

This document includes many hints and tips and is designed to be dipped into, rather than being read from start to finish. It is not intended to be prescriptive. Each meeting will be different and will have different requirements, but every organiser needs to be familiar with health & safety. Whilst H&S can sometimes seem like over-bearing bureaucracy, it is usually a matter of following simple common sense. The key thing is to show that you have followed common sense, and for most meetings this can be simply done by reviewing and completing the generic risk assessment form. If something does go wrong, our insurers may want to audit that we are following best practice and see your documentation that shows you have followed this best practice.

In general a meeting should not be organised for the sake of having a meeting. The objectives of meetings will vary, and could include helping beginners, showing off local rarities, recording in an area, training new experts or simply having a nice day out. It is important to make sure that the participants know what the purpose of the meeting is, and that the leader knows what the expectations and abilities of the participants are. Skimming through this document will help both leader and participants to make the most of the Meeting and may give ideas for future activities.

The document is not set in stone and will be reviewed annually, as is required by best health and safety practice. Please send feedback or suggestions for additional material to the Hon. Field Meetings Secretary [Jonathan Shanklin [fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org) ]

Please feel free to plagiarise and customise any of the Appendices to suit your field meeting.

## 1. Introduction

The aim of this guidance is to help make BSBI meetings, particularly those for beginners, productive, safe and enjoyable, for everyone – including the leaders! It is for all those interested in leading BSBI meetings – with particular reference to leading educational or beginners' field meetings. The information in this document will help you make BSBI meetings less daunting and more welcoming for beginners and new members. Whilst it may be a challenge to organise a meeting for a group with differing background knowledge, expectations and abilities, the guidance will help reduce the time and effort required on your part.

This guidance is derived from notes and points made during a BSBI workshop entitled *Training the Leader* held in the Royal Botanic Garden Edinburgh on 2013 April 14 and the *BSBI Guidance for Leaders of field meetings* which was drawn up by the Meetings (now Events & Communications) Committee. It has been expanded by Jonathan Shanklin in his role as Hon. Field Meetings Secretary. There are many different possible approaches to organising and leading field meetings, but there are some points that all organisers must consider. Included here are many of the points, issues and ideas that were raised and discussed during the Edinburgh workshop. The Guidance is not intended to be read cover to cover, so an indexed *Contents* section allows you to jump directly to any particular aspect of leading BSBI meetings.

The original guidance only covered day field meetings, but has been expanded to cover residential, indoor and online meetings.

Organising a meeting can incur costs and where these are not recovered from participants, they can be reimbursed by the BSBI. If your meeting is likely to incur such costs (eg producing information sheets, reconnaissance visits, etc.) you should provide an advance estimate to the [Finance Manager](#) and if she is satisfied that they are legitimate expenses she will authorise you to proceed.

Thanks are due to Jill Sutcliffe and the then BSBI Meetings Committee for producing the initial guidance and to Liz Lavery, Ruth McGuire, Jane Jones, Barbara Sumner, Dot Dahl, Faith Anstey, Jenny Farrar, Maria Long and Gill Smart who attended the Edinburgh workshop and to Jim McIntosh for collating the guidance from it.

### 1.1 Quick look guidance.

There have been requests for a shorter version of the full document as it does cover a very wide range of subjects and gets longer with each iteration. Meeting organisers and leaders will need to dip into it, but this section gives a quick bullet point guide to organising a meeting.

- Choose an objective for the meeting. Is it for local members, beginners, training etc?
- Select a date for the meeting. Are there clashes with already organised meetings?
- Select a venue for the meeting that is suitable for the objectives. You may need to liaise with a landowner.
- Decide whether you need to ask people to book.
- Write a paragraph to advertise the meeting. This may be for your local newsletter, a web page or the BSBI Yearbook.
- Take bookings if applicable.
- Make a risk assessment based on the weather, venue and those booked. In most cases you can use the simple generic risk assessment. See 7.2 for further details.
- Provided the meeting is under full control of the BSBI and you have carried out a risk assessment, you and all participants will be covered by the BSBI third party liability insurance. This does not cover use of motor vehicles. See 7.1 for further details.
- Remind participants about the meeting about a week before the event and provide them with any additional information.
- On the day, welcome participants and give them a short safety brief before enjoying the botany.
- After the meeting write a report for your local newsletter or the BSBI Yearbook.
- Make sure any records that are collected end up on the DDb.

More steps are needed for a residential meeting, including drawing up a budget. Further details on all aspects of organising and leading a meeting are given in the following pages. Do dip into them as necessary.

## 2. Why hold BSBI field meetings? What's in it for:

### 2.1 Participants?

BSBI field meetings are a great opportunity for participants to meet other members, including botanical experts and recorders, and learn from them. Some participants may be visiting a new part of the country and will be seeing unfamiliar plants. Ideally participants will learn more than just names of species but how to actually identify them (possibly using keys), what their distinguishing features are, and perhaps learn something about their ecology, distribution, status, cultural uses, etc. Hopefully it is a sociable and **enjoyable** occasion that takes participants to see nice plants, habitats and sites. For some participants the objective may be to "tick" a plant that they have not previously seen.

### 2.2 Leaders?

Enjoyment is just as crucial for those leading as for those participating. Field meetings are social occasions and a chance for leaders to meet (possibly new or local) members and recorders. It is often said that there is no better way to learn than to teach. In addition because everyone is on a different learning curve with different groups and species it would be unusual not to learn from participants. Many leaders particularly enjoy helping to train the next generation of botanists and find the experience of giving something back rewarding. More practically, perhaps, survey and recording field meetings can be enormously helpful to leaders.

### 2.3 The BSBI?

The BSBI is very keen to promote field meetings. They are important in building a diverse community of botanists because our members and recorders enjoy them, they promote learning, they can encourage new people to join and they can help with recording projects and gather useful records.

## 3. What makes a field meeting enjoyable?

- Good site – botanically interesting – nice habitats/landscape – satisfying route of appropriate length – accessible site (see below for more on this).
- Good leader – positive leadership – welcoming – enthusiastic – encouraging – friendly – patient – makes you feel safe and looked after.
- Good atmosphere for learning – fun – friendly – relaxed – not competitive – a good teacher-pupil ratio.
- Well organised with good advance information.
- Opportunities for socialising e.g. visits to cafes, restaurants or pubs afterwards.
- A field meeting which successfully achieved its aims.
- Nice weather! (OK, at least not horrible weather!)



## 4. Assessing the site

Unless you know the site well it is almost always essential to undertake a reconnoitring visit to assess a proposed site. Ask yourself whether the site has some or all of the following aspects:

- Is botanically interesting with nice habitats and landscape?
- Is accessible with a nearby car park, railway station or bus stop?
- Has a satisfying circular route that is not too long (do not underestimate how slow botanists, particularly beginners, can go!)?
- Has reasonably wide paths that are better for groups (and those trying to get past!)?
- Is suitable for those with disabilities, eg terrain (for the physically disabled) or noise environment (for those hard of hearing).
- **Is safe?**

A reconnoitring visit is a good opportunity to meet and ask the land owner or manager about any site hazards that are not immediately obvious and to seek access permission. Even in Scotland where the [Scottish Outdoor Access code](#) gives a right of *responsible* access, it is still politic and recommended that you ask for access permission. It may be, for example, that the land manager is planning management work which would upset or endanger the field meeting. You might also like to ask about the history of site management or even ask the manager to speak to your meeting about it. You should, of course, involve the local BSBI Vice-county Recorder.

## 5. When to hold BSBI field meetings

- Depends on the aim of the field meeting (which should be clearly set out).
- During the flowering season is usually best for beginners.
- Spring can be a good time to encourage beginners to make a start on plant id.
- Try to avoid clashes with public holidays, other events and perhaps even other BSBI meetings (see the [BSBI meetings page](#)).
- Out-of-season field meetings (e.g. on vegetative id or conifers) can be arranged to extend the field meeting season.
- Meetings at a herbarium may be of interest.
- Weekends are generally better for younger (working/studying) members.
- Weekdays can suit retired members better.
- Saturdays are often better than Sundays for public transport.

Having chosen a date and site, draw up a paragraph for the Field Meeting Programme and send it to the appropriate country Field Meetings Secretary by mid November of the year preceding the meeting.

## 6. Who should lead?

- Local Recorders and members are often best placed to lead BSBI field meetings – as they have the local knowledge of sites and flora.
- Field meetings on particular species groups by invited experts are especially popular; experts such as Mike Porter on Sedges, or Nick Stewart on Aquatics, Mark Duffell for Conifers, John Poland for Vegetative Plants, John Richards on Dandelions, etc.
- BSBI Staff (e.g. Country Officers) can play a very useful supporting and organising role – particularly where recorders are new (and haven't led meetings before) or infirm or where experts are invited.
- You don't need to be an expert to lead (but obviously that helps and commands respect). The main thing you should teach is *the process* of how to identify plants, not the identification of individual species.

### 6.1 How many should lead?

- The number of leaders required depends on the purpose of the meeting; numbers attending and the site being visited. Leaders should normally be BSBI Members.
- Generally groups should have no more than 12 participants per leader.
- More leaders are generally required for training field meetings to keep the pupil to teacher ratio down to manageable levels - no more than 6:1, and less if possible. In such cases Country Officers, local members and neighbouring recorders can help.
- More leaders are generally required on difficult sites. The BSBI recommends no more than 10 participants per leader in mountainous, boggy or aquatic habitats.
- The maximum manageable size of *any* field meeting (with co-leaders) is probably about 24. However this will be much reduced for montane or difficult sites.
- Appoint a participant as a back-marker in larger groups.

## 7. Making field meetings safe

### 7.1 At your own risk?

You should be aware that members (and non-members) attend all BSBI field meetings and workshops at their own risk. This is clearly stated in the BSBI Field Meetings section of the Yearbook and on the BSBI website. This point should probably be re-iterated on the Field Meeting Information email (see **Appendix 1: Example of Field Meeting Information email**).

The BSBI does have insurance – employer's and third-party liability – so it covers the BSBI against any claims that might arise from BSBI organised activities. If you want to be covered by this insurance you must follow BSBI Policies at all times for the insurance to be valid. The insurance covers all individuals (members and non-members) who are participating in BSBI directed activities (field meetings, workshops, country projects, NYPH etc) and leaders of such events whether they are a VCR or not. The insurance will also cover a VCR, and may cover any other authorised member, whilst carrying out field work where the records will be contributed to the BSBI. The insurance policy DOES NOT cover individuals on non-BSBI arranged activities and it DOES NOT cover any activity carried out by BSBI

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local groups UNLESS they are clearly carried out under BSBI direction. It DOES NOT cover any event which is directed by another organisation, even if the BSBI is a partner. It DOES NOT cover the use of motor vehicles whilst undertaking BSBI activities; such coverage must be included in your own vehicle insurance. If you are unsure please contact the Hon. Field Meetings Secretary or Chief Executive Officer. The insurance policy covers meetings held in Britain, the Republic of Ireland, the Channel Islands and the Isle of Man. It does NOT cover overseas trips, so leaders of such trips need to organise their own cover and stress that individuals also need to organise their own cover. Participants from the UK in meetings outside the UK are recommended to carry a [UK Global Health Insurance Card](#), and participants from Ireland at meetings outside Ireland are recommended to carry a [European Health Insurance Card](#).

However it is not sufficient just to say that people attend at their own risk. You need to assess the risks (and their likelihood and severity) and explain what those risks are, and how to avoid them. After all people often travel long distances to attend BSBI field meetings – and may not be aware of local hazards – such as [the prevalence of ticks in most areas](#). Or if it's a field meeting for beginners or those who have never been on a BSBI field meeting before they may be completely unaware of the risks of wandering about a site looking at an id guide rather than where they are putting their feet! (ALWAYS remind every group that simple slips and trips are THE major cause of accidents on BSBI field meetings.). There is further guidance on risk assessment in Appendix 2: HEALTH AND SAFETY GUIDANCE.

A potential risk is that participants may not supply details of medical conditions that could impact on safety. For example someone who is hard of hearing may not consider it a condition, but it could lead to an accident if they don't stop when instructed because they haven't heard you.

It is particularly important to create a safe and trusted environment for all children (those under the age of 18) and vulnerable adults who come into contact with BSBI activities. You may need to carry out an additional risk assessment if such people are taking part. Further information is given in section 7.5, including information about our Safeguarding policies and code of conduct.

Leaders have the right to exclude participants on safety grounds. For example, if attendees are not adequately shod or clothed, particularly on rough or mountainous terrain. Vehicles and their contents are parked at their owners' risk but draw attention to the need to secure vehicles before leaving them.

For further advice, see the BSBI document "[Safety in the Field](#)", which is particularly aimed at those undertaking field recording. Where there is demand or need the BSBI may be able to organise appropriate online training in risk assessment.

### 7.2 Assessing the Risks

You will sometimes need to undertake a full risk assessment – preferably after a reconnoitring trip and perhaps in discussion with the local recorder and land manager, but for straightforward meetings a generic risk assessment may be sufficient (See **Appendix 2.1: Field Meeting Generic Risk Assessment Form**). The full risk assessment should take each identified hazard in turn; assess what the risk is and how significant it might be. Then importantly it should consider control measures and whether these reduce the risks to acceptable levels. The form to use is given in **Appendix 2.2: Full Risk Assessment Form**; this assumes no professional H&S knowledge. Once you've made the assessment you need to decide whether your proposed route will be safe even with all control

measures implemented. If not a revision may be needed, or an alternative in case of bad weather on the day. You should give your fellow leaders a copy of the Risk Assessment, treating it as a tool for you and your co-leaders. Its main aim should be to identify ways to reduce the risks. At the start of the meeting give a safety briefing to the group (see 12.5), drawing their attention to the key hazards and safety mitigation measures.

### 7.3 Measures to reduce the risks

The main measures to take are:

1. **Describe the terrain** in the field meeting advert. You should mention whether the day will be easy, moderate or strenuous and the nature of the terrain, whether it is rough or steep. If you describe a meeting as for beginners then the expectation is that it will normally be fairly easy. We are trialling a traffic lights system on the meetings webpage in order to help members decide which is best for them: Red, Yellow or Green. A “Green” meeting would be largely on level, even ground, though may include public footpaths and gentle ascents over a short distance. A “Red” meeting could include mountainous terrain, uneven ground or a long hike. A “Yellow” meeting would be somewhere in-between.
2. **Don't try to do too much.** Accidents often happen towards the end of the day when people are tired. If at this point you are rushing to complete the route, an accident becomes more likely. Plan to do less and keep a late diversion as a back-up if there is plenty of time.
3. **Take bookings** (See section 10. **Taking bookings**) as it is important to be able to limit group to a safe number.
4. **Mobile phones:** while taking bookings use the opportunity to get mobile phone numbers and/or emergency contacts and give all leaders a note of everyone's number on the day. And ask folk to take them on the day. Not everyone will have a mobile phone. Please also refer to section 10 Bookings re data protection.
5. **Group number** (See section 6.1 **How many should lead?**) Appoint sufficient co-leaders as necessary so that it is easy for each co-leader to keep tabs on the number in their group at all times.
6. **An information email** (See section 11. **Pre-event information email** and **Appendix 1: Example of Field Meeting Information email**) to all participants that includes
  - a brief description of the length of the walk, the height climbed and the terrain.
  - a warning of any particular risks.
  - a checklist of equipment that participants should take (include lunch!)
7. **A safety briefing** (See section 12.5 **Safety briefing**) at the outset of the day, with appropriate reminders during the event (If in a tick infested area, which now covers much of Britain, remind the group before dispersing to check for ticks at the first opportunity and remove them.) Also check any unsafe behaviour seen during the day (e.g. members of the group scrambling on cliffs).

### 7.4 Accidents, incidents and near misses

There is always a possibility that something untoward will occur, even if you have taken all reasonable precautions. If this happens to a person it is regarded as an accident (causing an injury), if to equipment or vehicles as an incident (causing damage), and if something occurs that could have produced a significant accident or incident then it is a near miss. All these need to be reported using the form in **Appendix 2.4: BSBI Accident Report Form**. The form should be self explanatory, but it is confidential and must only be sent to the Hon. Field Meetings Secretary and Chief Executive Officer (See section 16. **Field Secretary contact details**:).

## 7.5 Safeguarding

On occasion young people or vulnerable adults may participate in a field meeting and we welcome their attendance as it may start a life-long interest in plants. It is important as a meetings organiser that you read and familiarise yourself with BSBI safeguarding policies and codes of conduct and follow these to create a safe and trusted environment for all. These policies are not included in this document, but there are links to them on the right hand side of the [Governance web page](#). Here we give some practical guidance.

Under health and safety law a Young Person is defined as anyone under the age of 18. If you are notified that a member is bringing a young person, consider any additional risks that they may encounter because of their age, and notify the parent or guardian of any such hazards. Some meetings may have to exclude young people, possibly because of difficult terrain or because of restrictions by the landowner. Parents or guardians have full responsibility for any young person attending a meeting and must have given their permission. They do not necessarily have to attend the meeting themselves, but must have appointed someone to stand in loco parentis. Similar considerations as for Young Persons need to be applied to vulnerable adults.

- If there is just occasional attendance of a young person or vulnerable adult at a day meeting, then check that your risk assessment includes the fact that they will need closer supervision and follow the Safeguarding Code of Conduct.
- If there is more frequent attendance (for example a series of weekly meetings) you should keep a log of their attendance.
- If there is a proposed attendance at a residential meeting you must notify the BSBI Safeguarding leads (Julia Hanmer and Jonathan Shanklin) in advance. They will check the risk assessment and then confirm whether it is possible for the attendance to go ahead.
- Young people must be accompanied by a parent or guardian.
- If during the course of the meeting you have concerns over any issue covered by the Safeguarding Policies, you should contact the Safeguarding leads for advice within 24 hours. Do not alert anyone else and only tell those who need to know. Keep a record of what you observed, your concerns and your actions.

## 8. Dogs

Because many field meetings are held in nature reserves or where there are grazing animals, dogs are not normally allowed on field meetings. Registered guide dogs are exempt from this requirement, unless they are prohibited by the landowners. In exceptional circumstances a dog may be brought to a meeting, provided that there is explicit advance agreement with the leader and all other party members. The agreement of all party members is necessary because some may be deterred from attending if dogs are present.

## 9. Advertising field meetings

BSBI field meetings can be advertised in a number of places. The copy you provide to the BSBI Hon. Field Meetings Secretary is used in the BSBI Yearbook and on the BSBI website. Field meeting programmes may also be promoted to the Botanical Society of Scotland, Wild Flower Society or Plantlife members and, as appropriate, with local Natural History Societies and Flora Groups.

Other ways to advertise field meetings include:

- E-mail reminders to local BSBI members. This can either be done locally or via the BSBI membership database. If the latter contact the [BSBI Fundraising Manager](#).
- Social media networks – There are BSBI Facebook pages for [Britain](#) and for [Ireland](#), and several Facebook groups that regularly promote BSBI events. There is a [BSBI X \(Twitter\) account](#) and the Country Officers for [Ireland](#), [Scotland](#) and [Wales](#) also have X (Twitter) accounts. You can promote under-subscribed meetings at short notice via these channels. It is worth encouraging any participants who use social media to take photos of the meeting and share them, along with a comment about how much they're enjoying themselves! They can either post on one of the BSBI Facebook pages or tweet to @BSBIbotany and their comment will be shared with thousands of botanists across Britain and Ireland.
- Word of mouth. Ask members to tell colleagues and friends who might be interested – or, better still, to bring them along!

The advert needs to set out some (or all) of the following details of the field meeting: where, when, who for (members, non-members, beginners, recorders, those who have never been on a BSBI field meeting before), aim, who to contact to book and what information to send them. If you ask for mobile numbers and home towns then you can make this information available to others to facilitate car sharing, help participants get to know each other and it is useful for leaders to have a note of everyone's mobile and emergency contact in the event of an incident.

You may not wish to include a precise start time and place to force people to book and so you can remain in control of numbers. The advert should be attractive and stand out and sell the field meeting. Including the (scientific and common) names of a few attractive species always helps – but beware of creating hostages to fortune! A good title and snappy colour image (if appropriate) also helps. As a guide for the Yearbook, use about 100 words of text for a one day meeting, and 150 words for a longer meeting (this excludes the header lines). An example is given in **Appendix 8: Example advert for the Yearbook**. There is a different format for the web page and this is also shown in the Appendix.

Joint excursions with other field societies need to be carefully planned and responsibilities clearly defined.

You may wish to create a web page for the meeting (See for example the [Annual Summer Meeting web page](#)). This could include:

- The meeting advert
- Site location map
- Blank record card
- Existing record cards or species lists
- Safety brief

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- Weather information
- Useful links, e.g. Field Meeting Guidance, Guidance for Participants etc

If it looks as if your meeting may be under-subscribed contact the [Communications Officer](#), Louise Marsh who can tweet the availability of spaces to her wide network of contacts.

### 10. Taking bookings

The BSBI has an event booking system that all meeting leaders are welcome to make use of, which can take payment from attendees and capture all booking information, as well as allowing for follow up emails to be sent to all attendees. If you wish to use this system, please contact the [Fundraising Manager](#) (Sarah Woods) in the first instance. A staff member will ensure you receive updated information on the number of bookings made so that you can manage numbers. In the event of an event becoming fully booked, it is also possible to operate a waiting list.

Either through the BSBI system and liaising with staff, or through your own efforts, try to fulfil the following steps. Promptly thank those booking for their interest in the field meeting. Assuming the booking will not result in the field meeting number limit being exceeded, confirm the reservation and say that fuller details will be sent out nearer the time. Otherwise tell the applicant that the event is fully booked and ask them if they would like to be added to the waiting list for any cancellations.

Participants will normally need to arrange their own transport to the meeting and any necessary accommodation, which they themselves must cancel if they are unable to attend the meeting or if the meeting itself is cancelled. See section 15.1 for further information on residential meetings.

Ask (unless gathered via the BSBI booking system) all those with confirmed bookings for details of mobile numbers (including an emergency contact number), home town and permission to use them to promote car sharing by sending them out with the information email. These details are useful on the day as an attendance register and as a handy list of the group's mobile numbers for leaders.

As an event organiser you will be handling people's personal data (name, contact details etc) on behalf of the BSBI. The way we collect, manage and work with people's personal data is covered by the Data Protection Act and the General Data Protection Regulation (GDPR). Please read and follow the BSBI's [Privacy Policy](#) and [Data Handling Policy](#). If you have any questions or would like support in understanding data protection in relation to events, please contact Julia Hanmer, BSBI Data Protection Officer. Some practical points from you to note include:

- Always use a data privacy notice (see example below) in any communication where you are collecting personal data so people understand why we are collecting their data and how we will handle it.
- Information should only be gathered from individuals with their consent and only that which is specifically needed for a given purpose.
- When you collect personal data to organise an event, make sure you hold it in a safe and secure format. This is especially important for any medical data that you ask for.
- Information must be deleted as far as is reasonably practicable and no back up copies retrieved when:

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- no longer required for the purpose for which it was collected (for example within 6 months of the event being held) or
- upon request of the person it relates to or
- on vacation of a voluntary role in leading or organising BSBI events
- If you are emailing participants, always blind copy (BCC) recipients so as not to share their email addresses with other participants. A minor exception is when putting individuals in touch with each other to arrange shared transport, where they have given their consent for this.
- **If you ever become aware of a data breach, or if there is a risk of a breach, please notify the Data Protection Officer, by emailing [Julia Hanmer](#) immediately or calling 07757 244651.**

### **Template Data Notice to be used on any communication, form or place where requesting data.**

Text in the square brackets should be amended as appropriate. Note that as a meeting organiser you are acting on behalf of the BSBI, so “We” refers both to yourself and the BSBI corporately.

This information is being requested [to organise the XXX field meeting/event]. We will only hold the information to fulfil this purpose. Please see the [BSBI Privacy Policy](#) for further details of how your data will be handled and stored. You can request to see the data we hold, request its removal or update your contact preferences at any time by contacting [YOUR CONTACT DETAILS or [BSBI enquiries](#)].

## 11. Pre-event information email

- Thank folk for booking.
- Meeting time and date – Usually add “prompt”, as late arrival will inconvenience other participants. You can always make this 10 minutes before your planned departure time.
- Meeting place with grid reference and directions from nearest major road.
- Directions from nearest railway station (if appropriate).
- Finishing time. Helpful if participants are expecting to be picked up. Usually good to make it a little vague e.g. 15:30-16:00 in case of over-run.
- Restate aim of meeting (from advert).
- What the day will entail (distance, ascent, and description of terrain).
- Any initial safety information, eg See the advice given in [Safety in the Field](#).
- Advice on essential equipment to take, including clothing and footwear.
- List of recommended equipment (e.g. map, ruler, GPS, hand lens, id guide, first aid or medical supplies and mobile phone).
- Leader’s contact number – and request a call if not going to make to meeting place on time.
- Lunch arrangements, emphasizing packed lunch, if required!
- Location and directions to nearest public toilets.
- Opt in/out on photographs of people
- Privacy notice (see above template)
- Please let the leader(s) know of any relevant medical conditions that they should be aware of.
- Let the organiser know if you cannot attend, as folk on the waiting list may be available.



**See Appendix 1a: Example of Field Meeting Information email**

## 12. Organising the day

As leader you need to be there to meet participants whatever the weather. On a general point, you should follow the [Countryside Code](#) or the [Scottish Outdoor Access Code](#); there is no direct equivalent in Ireland, but [this advice](#) is helpful. Respect no access signs, avoid damage to property and ensure that livestock does not escape. When you are on a road you should follow the [Highway Code](#) or the [Rules of the Road \(Ireland\)](#), paying particular note to the [section on pedestrians](#) (this link takes you to the code for the majority of the UK. However you organise the day, every event should have an Introduction, Main Program and Conclusion (typically 5-10 minutes). It can start indoors – in a café, or hotel, or education centre near your site – especially if you want to cover some basics about the identification of the group you are covering. It might finish in a café – which is a nice way to round the day off. When people arrive, review the risk assessment in the light of conditions on the day, and the ability of the participants, particularly if any have notified you of disabilities. In unsafe conditions a decision may need to be taken to cancel the event.

### 12.1 What to bring

As Leader you may want to have additional items with you. These could include:

- Site map
- Whistle (to round up stragglers!)
- Compass (useful if fog comes down and you are off a footpath)
- Mobile phone. In some areas signals can be weak or non-existent. Not everyone will have or want a mobile phone.
- GPS
- Field identification keys
- Record cards or BSBI Recording app
- First-aid kit

### 12.2 Introduction

You could ask a couple of volunteers to keep a register of those arriving and issue sticky label (no expense spared) name badges! Where appropriate (e.g. in difficult terrain), give the information to a third party together with an expected time of return.

Once everyone has arrived (without waiting too long for any stragglers) you should round up your group somewhere safe (e.g. out of the way of parking cars) and away from traffic noise. A site information board is often an obvious place. A large scale site map can be really useful for making sure everyone knows the route you are planning to take.

### 12.3 Introductory Talk

- Start with a warm welcome, thanking folk for coming.
- Introduce yourself and fellow leaders (or get them to introduce themselves).

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- You might want to have an introduction round robin –this takes time, but can be an icebreaker. Ask folk to *briefly* introduce themselves – just name, where from and if confident, particular interest (i.e. why they're here), what their experience is and anything else that is relevant.
- Explain aim of day.
- Explain the arrangements for the day.
- Describe the proposed route.
- If planning to be away from the cars at lunchtime remind folk to take packed lunch.
- Tell folk when and where you are planning to have lunch – if splitting into groups it is always nice if all groups re-unite for lunch.
- You might also want to remind folk to take waterproofs, spare warm clothes, etc – especially if the weather is forecast to deteriorate during the day.
- Ask for volunteers (to take photos, write report, back-marker).
- Main thing to do is re-assure folk that it is alright to be a beginner and not know – that's what the meeting is all about! Talk about learning curves.
- The talk is not just what you say but how you say it – be friendly & smiling!

### 12.4 Introduction to the Site

It is nice to invite any site managers or rangers to say a few words about the site, its history, management, habitats and hopefully something about its particularly notable flora!

### 12.5 Safety briefing

The important thing about safety briefings is that they ARE brief and to the point. Simply highlight the hazards identified in the Risk Assessment that require greater awareness and what individuals should do to minimise the risks. If the site manager is available then you can ask them for a contribution – useful with their more intimate knowledge of the site.

Always mention *simple slips and trips* as being the major cause of accidents on field trips, especially if people are looking at plants, engrossed in books, taking notes or completing a record card – and not paying attention to where they put their feet.

Walking along roads and crossing roads are important hazards to address in a group situation – where folk are often engrossed in conversation or looking at plants and not paying attention to traffic. You may need to stop the group and then usher them across in a single orderly group when there is a comfortably large gap in the traffic. To do this effectively you need to be quite loud and forceful.

It is worth reminding folk to take mobile phones as even if there is no coverage on their home network they can use *any* available network to make an emergency call.

## 13. Teaching principles

### 13.1 Grouping by ability

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With training field meetings for beginners it is good to try to divide the group up by ability. Mixed ability groups can de-motivate beginners and inhibit the more advanced. Equal ability groups provide a better environment for learning.

But how do you split the field meeting up? It is no good asking participants to group themselves (e.g. by asking for complete beginners, beginners and beginner-improvers) as everyone will assess themselves differently. Some will err on the side of caution while others will be over confident. Members-of-the-public beginners are quite different from Plantlife beginners and different again from BSBI beginners.

A better approach is to ask how many species people can identify (approximately). First remind folk just how many species they already do know and need to include. Like dandelions, daisies, common cleavers, primrose, nettles, common dock, hawthorn, beech, rowan, ash, heather, etc. Give wide option ranges – like 0-25; 25-100; more than 100. Then after minor adjustments to equalize group sizes, assign a leader to each. If the local Recorder is present, usually ask them to lead the most advanced group and make a species list. Otherwise leave it up to co-leaders preferences and lead whichever group is left.

### 13.2 Teach how to identify plants

It is crucial to teach *how* to identify plants and NOT merely the identification of plants (i.e. the names). Just telling beginners the names of plants is pointless; it will go in one ear and straight out the other! In order for something to stick you need to get participants actively involved and their brains fully engaged.

### 13.3 Other teaching principles

Make your session fully interactive and fun. Try to avoid telling your group anything other than how to identify plants (e.g. use the keys), and possibly some help with botanical terms to avoid repeatedly consulting the glossary. Ask them questions and probe their knowledge as deeply as you can. As the group tires (often after lunch) make the session easier.

### 13.4 Hand-lens

It is good to have at least a few spare hand-lenses, because almost certainly someone won't have one or will have forgotten to bring it! You may have to show participants, even the more experienced, how to use them.

### 13.5 Which family?

You can begin by asking if anyone in the group recognises the family of a flower selected for identification. You may need to give clues. Often someone will know and that allows you to jump straight to that family in the flora where they can flick through the images and see if they guess the right one, and then confirm that by going through the key. And finally by confirming the full description fits in every respect - particularly the key characters in bold in *The Wild Flower Key*.

If no-one knows the family then it is an opportunity for teachers to start at the very beginning of the flora in the general key, if your beginners are brave. However this isn't recommended for complete

beginners! Instead ask them to describe the plant. Get them to look at characters such as leaf arrangement, form and margin, hairiness, whether petals are free or fused, and the symmetry of the flower. Reiterate why these make it the given family, then go to that family in your key and key it out with them.

### 13.6 Using keys

There are a couple of important points to make when using keys:

- You should look at more than one specimen. You can sometimes operate the key while getting the entire group to look at different specimens of the same species.
- Read all options in full first before deciding which to select.
- Check the glossary for any unknown terms – in particular check any diagrams.
- Where not all characters in each option fit, then you may need to go on the balance of probabilities; i.e. go with the option that is more correct.
- You should teach what to do if the key results in the wrong identification.

### 13.7 Scientific or common

You can teach either or both, according to the group. If the group knows the common name ask if anyone knows the scientific name (and vice-versa). If no-one knows get them to look it up. Give clues. We will all have to get used to the new Stace IV names at some point, however many participants will have older id books, so it may be best to continue using the older Latin names to avoid confusion. When written down it may help to use the style *Latin name* [former *Latin name*] **Common Name**.

### 13.8 Working in groups

It is often helpful to split your group up into pairs or threes, with one going through the keys and the others looking at specimens. Then swap over roles within the group for the identification of the next specimen. That way everyone is encouraged to get involved.

### 13.9 Collecting

It is good if the opportunity arises, and it is appropriate, to demonstrate when, where and how to collect a specimen. It is also an opportunity to mention the [BSBI Code of Conduct for the conservation and enjoyment of wild plants](#).

## 14. Rounding off the field meeting:

It is good to conclude the day with a brief talk otherwise it will feel unfinished. But “brief” is important because folk may be anxious to get home. Even if you have over-run you should however always take a couple minutes to conclude the day. Check that everyone has returned! You may wish to cover some or all of the following points:

### 14.1 Feedback

- Ask for feedback from each group in turn on interesting plants seen, on any surprises or problems experienced using the keys, etc.

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- Ask for feedback on other notable wildlife (birds, mammals, amphibians, etc.) seen.
- Brief recap and whether you met the aim of the day!
- You might ask for feedback on the event itself – either by handing out a feedback questionnaire form (see **Appendix 3: Field Meeting Feedback Form**) and pens or by asking folk to give you comments (good and bad) in an e-mail.

### 14.2 Developing your interest

- You might talk briefly about how folk can continue to develop their botanical expertise. Use the key points in the “Developing your interest” leaflet (**Appendix 7: Developing your Wildflower Identification Skills - Handout**) which can itself be handed out – or subsequently e-mailed, or point people to the “Get Involved” page on the BSBI website.
- Publicise forthcoming (BSBI) educational field meetings (which aren’t fully booked!)
- You might ask if there are any folk present who are not BSBI members – and make a bit of a joke about giving them a BSBI membership form or a BSBI bookmark. Supplies of both are available from the Communications Officer.

### 14.3 Equipment Return

- If you loaned hand-lens or books out then now is the time to ask for them back!

### 14.4 Thanks

Finally you need to say a few words of thanks:

- Fellow leaders (by name) and any others present who helped with the organisation.
- Site managers present for speaking about their site (if appropriate).
- Site owners present for granting permission (if appropriate).
- To any volunteer who agreed to record a species card – ask for them now!
- To any volunteer who agreed to do a field meeting report (by way of reminder!).
- To any volunteer who agreed to take photographs and post them online, subject to the permission of those photographed (ditto!)
- To everyone who took part. You might say something along the lines “Finally I want to thank you all for participating so enthusiastically and I hope you enjoyed it as much as I have!” Finish on a positive high!

Finally, finally, wish folk a safe journey home!

## 15. Other types of meeting

Some field meetings are best held as residential meetings or as indoor workshops. Other indoor meetings may include Country seasonal meetings, or the BSBI British & Irish Botany Conference (Annual Exhibition Meeting) and the Annual General Meeting. The organisation of most of these is devolved to the Country Committees and/or Events & Communications Committee, but some of the Guidance given in this document will need to be considered. You may also consider organising an online meeting, via Zoom or other platform.

## 15.1 Residential meetings

Most residential meetings are the equivalent of several consecutive day meetings and the same principles will apply. You will need to consider a few additional points.

- If there are any young people or vulnerable adults taking part you must notify the BSBI Safeguarding leads. It is then worth knowing who your local authority Safeguarding contact is.
- Consider whether participants have any special needs, medical conditions or dietary requirements. Sometimes participants don't let you know that they have a condition, for example they may be hard of hearing, suffer from sleeplessness etc. You can then only plan for these conditions once the participant is in residence. It may be worth considering whether a roll-call is required each morning in case someone oversleeps. Medical information is sensitive personal data and must be kept securely.
- The location of the nearest hospital, doctor's surgery, chemist etc.
- The cheapest nearby petrol station.

Jim McIntosh compiled the following detailed guidance. He notes that there are many different ways to arrange recording weeks but here gives some ideas based on experience of organising them.

### 1. Planning & Preparation

**Venue:** You can either go for a non-residential option, where participants arrange their own accommodation or residential; for either option you will need a base that can be used by all. Choosing suitable, well-priced and located accommodation is important. Possible options might be self-catering houses, FSC or other outdoor centres, hostel-type accommodation or cheap hotels. Most folk prefer single or twin rooms in reasonable comfort. It is great socially if everyone can sit round a large table and have a meal together, either at the accommodation or in a pub. Ideally the venue will have Wifi – useful for checking weather forecasts and the BSBI DDb, etc.

**Cancellation - venue:** If you are hiring a venue, check what their cancellation policy is. If it is acceptable to you and the Finance Manager then monitor bookings to make sure that you meet their requirements. If it looks as if you may not meet the minimum number of agreed participants, then either mount an advertising campaign to attract additional participants, or consider cancellation.

**Cancellation – participants:** On occasion a participant may need to cancel because of unexpected circumstances. BSBI policy is to give a refund if sufficient notice (at least two weeks) is given for you to fill the place or to cancel with the venue. Participants are advised to have insurance cover in the event that they have to cancel at short notice. BSBI may still consider offering a partial refund, depending on the circumstances.

**Cost:** Try to make the week as cheap as possible. Sometimes big private landowners or organisations like the National Trust can offer free accommodation in exchange for a survey of their land. When looking for charged accommodation, always ask for a discount on the list price – explain that we are a charity, what we are doing and why we are doing it! Fill every bed, and have a waiting list in

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case of late cancellations. State your cancellation policy clearly at the outset (e.g. no refunds within 4 weeks if unable to refill place.) Having a volunteer cook buy ingredients and prepare meals keeps food and drink costs down – but remember to cover the cost of the volunteer’s food in what you charge others. It’s also nice to take any volunteer cook out once during the week – perhaps the final night - to give them a night off – and to celebrate a successful week!

**Cooking Arrangements (residential):** Meals should be a highlight of the week. But cooking for large groups (e.g. more than 10) is pretty difficult and can be time consuming and distracting from the botany. It is better if you can arrange for the group to be catered for. In Scotland we have often been able to employ a friend of a group member as a volunteer cook (who is paid travel and other out of pocket expenses). However for smaller groups, participants could take turns at cooking, which might be a pleasant break from intensive botany, and may waste less time than eating out.

**Budget:** You should prepare a budget for food and accommodation for the week, for anything you have agreed to pay leaders or others and any other costs, and levy a registration charge per head so that even with one or two places unfilled it will still break even. If a deposit is required it may be possible for this to be paid in advance by the BSBI, particularly for major country meetings or the ASM. Send a draft budget to Julie Etherington, BSBI Finance Manager [julie.etherington@bsbi.org](mailto:julie.etherington@bsbi.org) for consideration. Julie will help answer any questions you have about the event’s finances, guide you on any additional costs, and work with you to arrive at the right ticket price(s). Always allow a cost contingency; £100-£250 is recommended. A BSBI Event Budget Template is provided to help you – see Appendix 10. Once Julie & you are both happy with everything, ask Julie to pay the deposit or the full amount for accommodation, on behalf of the BSBI.

**Deciding which squares/sites to survey:** Generally it is best to shortlist target squares or sites well in advance to allow plenty of time to prepare maps & lists of notable records, etc. Factors to consider include:

- Distance from accommodation
- Distance from road / parking (so time isn’t wasted by long walks in).
- Botanical (or geological, e.g. limestone) interest
- Contains habitats and species rare or absent elsewhere in the area or hectad.
- Located in poorly or previously under-recorded areas or hectads

**Detailed Preparation:** It is important that groups go out well briefed and equipped with:

- At least a copy of a 1:25,000 map. It is useful to have the target square(s)/sites clearly marked and labelled so no-one strays out of the square.
- A customised recording card ([for the VC from the BSBI website](#) or specific to area) or the BSBI Recording app.
- A list of *all notable records* for the target squares from the DDb or MapMate – ideally marked up
- A list of *all records* for the area (e.g. hectad) from the DDb may also be useful.

## 2. Advertising & Bookings

**Aim:** Clearly state the aim in the Yearbook and any other advertising e.g. “The aim of this field meeting is to gather records for Atlas 2020 – primarily in Wester Ross, v.c.105 but also in nearby parts of Westernness, v.c.97.” You should also make it clear that “equally important will be the mutual learning, socialising and generally having an enjoyable time!”

**Botanical expertise:** For any recording week to be successful you need sufficient recorder level botanists. If you have too many improvers (or beginners) it will slow progress as more time has to be spent teaching than recording. Ideally no more than 50% are enthusiastic improvers. The absolute minimum would be one recorder level botanist in each group. If you have plenty of interest, you may wish to establish what level folk are before taking their booking. It is worth stating in the advert that we are looking for recorder level or enthusiastic improvers.

**Transport:** Remember to consider travel arrangements and ensure there are sufficient cars (minimum one per group plus one reserve) and encourage car sharing and/or public transport.

**Fitness:** The required fitness level needs to be made clear at the outset. Whilst we can offer a range of different options every day – just going out botanising for 6 days in a row (never mind botanising in upland environments) can be very tiring. So state in the advert – “A reasonable level of fitness is required as we will aim to go out recording every day.” You might also mention the possibility of climbing mountains if it is a mountainous area (even in mountainous areas there needs to be at least one low level alternative on offer each day). Having given that warning, at the beginning of the week you should re-iterate that folk are there to enjoy themselves – not to totally tire themselves out, and if they want or need to take time out, or finish early – they should do so (but let others know). Remember the fun bit.

**Taking bookings:** If at all possible use the BSBI online booking system by contacting the [Fundraising Manager](#) (Sarah Woods) in the first instance. You will need to provide a list of what booking questions to ask, then all the information will be provided to you in a single spreadsheet. On occasions where card payment does not work for some members, direct bank transfer is an option and can also be organised via a BSBI staff member.

Alternatively, create a bookings spreadsheet, and once you confirm those interested have a place ask for payment straight away. You could ask for deposits but that is twice the amount of work, and it is better just to ask for the full amount at the outset. If cheques are used they should be made payable to “BSBI”. Confirm and thank folk on receipt of cheques. Batch cheques up and send to Julie Etherington, BSBI Finance Officer, Church Folde, 1 New Street, Mawdesley, Lancashire L40 2QP.

**Joining Information:** Shortly after taking bookings and again nearer the time, you need to send out joining information. This ought to include:

- Aim of the week
- Directions to the accommodation, arrival and departure times
- Domestic & field work arrangements
- A checklist of equipment (both what the Organiser is bringing and what participants should bring), clothing and footwear and a reminder about BSBI Insurance.

An example is appended (Appendix 1b) - feel free to plagiarise!

### 3. Organising the Week

**On arrival:** Try and make sure that all participants introduce themselves to the rest of the group so that everybody knows who is who.



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**Introductory Talk:** It is always good to kick off the week on the first evening with an illustrated introductory talk from the local VCR about the area and its flora. Then in an introductory briefing cover and discuss the following points:

- What the aim of the week is: reminding folk that they are there to enjoy themselves!
- Domestic arrangements
- Recording arrangements
- Transport arrangements
- Health & Safety briefing (including warnings about ticks, simple slips and trips, etc)

**Organising Field Work:** It is generally best to go out in small groups of threes and fours (i.e. a carload) and aim to record one tetrad or one or two monads in a day. Bigger groups are less efficient in terms of skill use, while smaller groups may lack skill. Getting the right mix of recorder level and improvers in each group is important. From the H&S point of view three is a good minimum in case someone has to go and get help. Ideally you want to change the groups around from day to day so everyone goes out with everyone else and also sees different habitats – which is much more sociable and enjoyable.

Aim to offer a mix of difficulty levels each day, but leave the choice to the night before when you can see up to date weather forecasts. Do exposed coasts, upland and montane squares at the first opportunity when the weather is good. On days when the forecast is particularly bad choose low and sheltered habitats, if possible. If *really* bad you might want to suggest the group stays indoors and catches up with identifying specimens. Always have a wet day plan in reserve (sites near cafes, etc).

**Evenings:** After (or before) dinner it's good to get improvers looking at the collected specimens with recorder-level folk with the help of microscopes, keys and guides, (which the organiser will need to arrange to provide) and reviewing and tidying up their recording cards. I also like to arrange for each group to give a short (5 minute) talk on their day, most interesting or unusual finds (botanical and non- botanical). Folk often say this is one of most enjoyable parts of the week. These talks can be illustrated with maps and photos if there is a digital projector available. It's important this is not too late as folk will be tired after their day(s) out. Say 9:30pm-ish.

**Reporting and digitisation:** It is good if this can be done straightaway. Ideally each group leader would write a short note about their day, including (as a *minimum*) who was in the group and where the group went. Otherwise, if there are any queries participants will have long forgotten. A report for the Yearbook with the key findings is always read with keen interest.

**Specimens:** Arrange for them to be sent to the referees with record details.

**Delegation:** With so much to organise it's important for the organiser to delegate as much as possible. None of the participants will mind helping.

### 15.2 Indoor meetings

During the winter, or as a prelude to some field meetings it may be worth holding an indoor workshop, to give an introductory talk or to look at herbarium specimens. Evening workshops are an almost essential component of residential meetings to identify specimens collected during the day. There are several practical points to consider for indoor meetings:

- Choosing a suitable venue
- Provision of microscopes or hand-lenses
- Provision of id guides
- Provision of specimens
- Catering
- Ventilation and social distancing (during a pandemic)
- Whether face-masks should be worn or not (during a pandemic)

### 15.3 Online meetings

An online meeting is a good way to reach a larger audience. There are many possible platforms that can be used, with people finding Zoom a convenient one. The BSBI has a Zoom account, which it uses for staff, committee and country meetings. These are mostly run as simple meetings (maximum 100 participants) or as a webinar, with one or more people acting as hosts, which gives additional privileges. For meetings with more than 100 participants you will need to host the meeting as a webinar. The BSBI is developing online safety guidelines and these will be on the Governance web page.

Some practical points:

- It is worth testing the link with the speakers before the meeting, particularly if they are showing a PowerPoint presentation. You will need to check their audio levels and that the presentation shows clearly. Make sure that they have not enabled auto slide change.
- If you have been asked to set up a meeting for others it is essential that all can attend even if you are subsequently unable to do so. For most committee meetings there is no need to use waiting rooms, nor is there a requirement for the host to start the meeting.
- Not everyone has the same bandwidth, so with a big meeting it is worth starting with participants audio and video set to off.
- Consider whether you want an open meeting (which is less secure), a closed meeting that requires registration or a webinar. If it is a closed meeting the url for the registration will be subtly different to that for the meeting itself. You may also need to manually approve each registration.
- For further information and guidance on preparing for online meetings contact [James Harding-Morris](#), the Countries Support Manager.

### 15.4 Other meetings

The detailed arrangements for other meetings (eg the BIBConf, AGM, Recorders' Conference or Country meetings) are left to the appropriate BSBI Committees. Particular points to consider include:

- Safeguarding
- Registration
  - Make sure you include a request for any special requirements
  - A consent waiver for children (for attendance and photography)
  - Appropriate GDPR consent

## 16. Feedback to participants

It is great to follow up a field meeting with feedback to those who participated. The feedback can take a number of formats but might include:

### 16.1 Field meeting Summary Report

If there have been any issues that need to be brought to the attention of the Hon. Field Meeting Secretary please complete a Field Meeting Summary report immediately after your meeting and while the information is still fresh. This form (**Appendix 4: Field Meeting Summary Report Form**) asks four questions: How many applied; How many attended; How many dropped out; What were the problems and asks for any comments. Forward this, together with your **Appendix 2.3: Field Meeting Risk Review**, to your Field Secretary. This documentation also provides our insurers with the formal evidence that we have followed this best practice guidance.

### 16.2 Field Meeting Report

It is great to have a report of the field meeting and its most interesting findings. Such reports are published annually in the Yearbook, but may also be published in country newsletters or on the BSBI webpages, with synopses of major meetings in BSBI News. Guidance on drafting these reports is given in **Appendix 5: A guide for contributors of field meeting reports** and an example is given in **Appendix 6: Example report**. If you have asked for a volunteer to write the report, then the draft will probably need a thorough check to ensure the species names and other details are correct. Submit the report to the Hon. Field Meetings Secretary and/or your country Field Secretary, together with any photographs as soon as possible after the meeting, and at the latest by the end of November.

### 16.3 Photographs

It is good to make a selection of photographs available online (on flickr Dropbox, Google drive or Facebook) to those attending – of people and plants. If of people, you must have their permission. If of plants, then it is helpful to name the plants in photographs using both scientific and common names. If you have asked a volunteer to take photographs during the field meeting then you can ask them to do this for you (but check that the details are correct.). Photographs will also help illustrate meeting reports in the Yearbook and it would be wonderful if each report could be accompanied by a couple of images.

### 16.4 Records

A useful bit of feedback is a list of records seen during the field meeting by way of *aide-memoire* to those who attended. This is particularly useful to those on educational field meetings, and in this case the list should include both common and scientific names. MapMate or the DDb can be used to generate a suitable list. Of course a complete list of all records made should go to the local BSBI Vice-county Recorder.

17. Field Secretary and other contact details:

**Hon. Field Meetings Secretary:** Jonathan Shanklin, 11 City Road, Cambridge CB1 1DP  
[fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org)

**England:** Mary Dean, 4 Moss Green, Formby, Merseyside L37 8BU [themarydean@aol.com](mailto:themarydean@aol.com)

**Ireland:** Mark McCorry, [Mark.McCorry@bnm.ie](mailto:Mark.McCorry@bnm.ie)

**Scotland:** Beccy Middleton, [beccy.a.middleton@gmail.com](mailto:beccy.a.middleton@gmail.com)

**Wales:** Andy Jones, [aberystwyth1234@gmail.com](mailto:aberystwyth1234@gmail.com)

**Yearbook:** Jonathan Shanklin, 11 City Road, Cambridge CB1 1DP [fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org)

**Chief Executive Officer:** Julia Hanmer, [Julia.hanmer@bsbi.org](mailto:Julia.hanmer@bsbi.org)

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**Hon. General Secretary:** Barry O'Kane, [hongensec@bsbi.org](mailto:hongensec@bsbi.org)

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**Safeguarding Leads:**

Julia Hanmer, [Julia.hanmer@bsbi.org](mailto:Julia.hanmer@bsbi.org) or 07757 244651

Jonathan Shanklin, [fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org) or 01223 571250 or 0758 648 6338

Appendix 1a: Example of Field Meeting Information email letter

Royal Botanic Garden Edinburgh  
20A Inverleith Row  
Edinburgh  
EH3 5LR



25 April 2013

Hello! Thank you for booking on this meeting.

**BSBI Roslin Glen Country Park Field Meeting on Saturday 1st June 2013**

**Timing:** We will meet at 10.15 (prompt) and will aim to finish between 15.30 and 16.00. Please let me know if you cannot make the meeting place on time to avoid an unnecessary wait for everybody. My mobile phone number is 0791 7152580.

**Meeting Place:** the Roslin Glen Country Park car park at NT273628

**Directions:** At the Gowkley Moss roundabout on the A701, 4 km south of Edinburgh Bypass, turn east onto the B7003 signed Roslin and Roslin Country Park. Continue 1 km and turn (second) right – again signed to Roslin Country Park. Follow the road down, around hairpin bend, across bridge over the River North Esk and turn immediate left into the Roslin Glen car park. Once in the carpark proceed straight ahead under a height barrier and park near the sign.

**Route:** We will take a short circular walk through the ancient woodlands on the banks of the River North Esk and past relics of the area's rich industrial heritage and will return on the Penicuik-Dalkeith disused railway path and a minor road. The round trip is about 3 km and mostly on paths and tracks – some of which are a little rough and steep.

**Aim:** The emphasis on this field meeting will be on learning and fun! So we'd prefer not to tell you what all the plants are - at least not initially! Rather we would like you to work in groups using identification books to work that out for yourself. After all, that is the best way to learn. We will of course be on hand to help and confirm.

**Introductory Talk:** Alan Krumholds, the Site Ranger for Roslin Glen Country Park, has agreed to say a few words about the site, its history, habitats and management.

**Equipment Checklist:** here is a shortlist of some of things you should remember to bring. You should check the weather forecast beforehand and adjust accordingly!

- Boots
- Waterproof jacket and trousers

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- **Packed lunch** and flask or cold drink, etc
- Spare warm top (fleece or similar)
- Hat and gloves?
- Sunglasses, sun hat, sun cream and lip sunblock?
- Mobile phone (fully charged)
- Any medication that you need

If available:

- OS Map of the local area
- Plant identification books – The Collins Flower Guide or *The Wild Flower Key* by Francis Rose are good for beginners.
- X10 magnification hand-lens
- Notebook & pen
- GPS, binoculars, etc

**Toilets:** There are no public toilets in Roslin. The nearest are

- 2B Station Road, Loanhead EH20 9RQ
- 5 Bank Street, Penicuik EH26 9BG

**Coffee:** we would welcome you to join us for a coffee immediately after the field meeting in The Original Rosslyn Hotel in Roslin village, on the corner just before the lane to the Chapel. The main road does a dog-leg at this corner (NT272632). Needless to say, the hotel has loos.

**Medical conditions:** Please let me know of any medical conditions or other special requirements that you may wish to make me aware of.

**Insurance:** Remember that on all BSBI field meetings, those attending do so at their own risk.

**Photography:** Images of participants may be used to illustrate the meeting on the BSBI Blog, or in the meeting report. If you do not wish to feature in such images please let me know.

**Cancellation:** Please let Jane Jones know if you are no longer able to come as there is a limit on numbers and a waiting list as that will allow another to attend in your place.

**Leaders:** We look forward to seeing you on the day, Barbara Sumner, BSBI Midlothian Recorder & Jim McIntosh, BSBI Scottish Officer

**Cars:** Here is a list of contact details of everyone booked on the meeting, so you can arrange to share cars. **Remember that you must have the participants' permission to circulate these details.**

**List of participants:**

Name	Surname	Email Address	Town	Mobile No
Jim etc	McIntosh	<a href="mailto:Jim.mcintosh@bsbi.org">Jim.mcintosh@bsbi.org</a>	Edinburgh	07917152580

## Appendix 1b: Example of a Residential Field Meeting Information email letter



Royal Botanic Garden Edinburgh  
20A Inverleith Row  
Edinburgh  
EH3 5LR

14 March 2014

Hello!

### **BSBI Scottish Recording Week: Glen Shiel Lodge on Sunday 29th June– Sunday 6th July 2014**

Thank you for booking on the 2014 Scottish Recording Week.

This year's Scottish Recording week will be based at Shiel Bridge, Kintail, the most southerly district of Wester Ross and only a few miles from the Glenelg peninsula in Westernness. These areas are remote from their recorders, Duncan Donald and Ian Strachan, and include a rich variety of coastal, grassland, woodland, aquatic, upland and mountainous habitats.

We will be based at the splendid Shiel Lodge ([www.glenshieestate.com](http://www.glenshieestate.com)) near Shiel Bridge at the head of Loch Duich. There are two double rooms; four twin rooms, one triple bedroom and one single room and an extra bed can be fitted in the triple room.

**Aim:** The aim of this field meeting is to gather records for Atlas 2020 – primarily in Wester Ross, v.c.105 but also in nearby parts of Westernness, v.c.97. But equally important will be the mutual learning, socialising and generally having an enjoyable time!

**Directions:** From the south, take the A82 from Fort William and turn onto the A87, signposted Kyle of Lochalsh. Or from the north on the A82, turn right onto the A887 at Invermoriston.

After about 33 miles (either way) enter Shiel Bridge. Go past entrance to Shiel Bridge Caravan & Camping site, Shiel Shop and petrol filling station and after 500 metres turn next left, signposted Glenelg Scenic Route. Cross Shiel Bridge and 180 metres from main road, where the road veers round to the right, go straight ahead and through the stone gateposts. Follow track round to left and park at rear.

**Arrival Time:** I will arrive at 17:00 and welcome arrivals between from then until 19:00. We will aim to eat at 19:00 so please arrive before then! Please let me know if you are going to be late and we *may* save some food for you! My phone number is [phone number].

**Introductory Talks:** I will give a welcome talk after dinner on the first evening. During which we will discuss domestic arrangements, survey method & arrangements, collecting and identifying

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specimens and health & safety. Afterwards, Ian Strachan, Joint Recorder for Westernness and Duncan Donald, Recorder for Wester Ross will give an illustrated talk about the flora of the area.

**Meals:** Hilary Hawker is again kindly offering her services as food buyer and cook. She does this without recompense but her place and travel expenses are covered and paid for by the BSBI. You should note that she is only the cook **not** the cleaner, table layer, waitress, dish washer or general servant and I would expect *everyone* to take their turn in helping!!

Breakfasts will be at 08:00 and dinners will be at 19:00 each day. Materials will be set out at breakfast time for making your own packed lunches. On the final evening (Saturday 5<sup>th</sup> July) we will take Hilary out for dinner to a local restaurant (cook's night off!)

**Field Work:** We will generally go out in small groups of threes and fours (a carload), leaving about 09:00 or 09:15. Each team will record a few monads in a day. With 16 of us in total that means 4 or 5 teams will go out each day and we cover as much ground as possible. At least one team will go into Westernness every day but the main effort will focus on Wester Ross.

Both recorders have prepared a list of monads and information about each of them. We will decide which squares to visit each morning depending on the forecast. As I previously said, a reasonable level of fitness will be required but a range of different ability routes will be on offer each day. Each group will include at least one 'expert' and we will try to arrange the groups differently every day so everyone goes out with everyone else at least once over the week.

**Field Recording:** We want you to record in monads within tetrads using the provided Recording Cards. We will discuss and agree the precise method at the outset. It is important that all Rare & Scarce species are given full details (including a detailed grid ref) on the front of the record card.

**Local specialities:** We will arrange a group trip to see the local specialities such as the *Carex salina* (Saltmarsh Sedge) – just a few miles away.

**Departure Time:** We have the lodge for the whole of Sunday 6<sup>th</sup> July, our departure day. Folk can leave as soon as we've all helped to clean and tidy the house up. However, depending on the weather, and how far folk have to travel, some may like to mop up another monad?

**Equipment Checklist:** here is a list of some of things you should remember to bring.

- Boots & Wellies
- Waterproof jacket and trousers
- Spare warm top (fleece or similar)
- Warm, waterproof hat and gloves
- Sunglasses, sun hat, sun cream and lip sunblock
- Sandwich box, flask, water bottle
- Hand-lens, Weatherwriter or clipboard, notebook, pen, pencils, etc
- Mobile phone, GPS, camera and chargers / spare batteries, Binoculars

If available/possible:

- OS Map of the local area (but we will supply maps of the target monads or sites)
- Your preferred plant identification books



What you do not need to bring:

- Bed linen and towels are provided.
- Specialist id books
- Microscope

**Insurance:** Remember that, as usual on all BSBI field meetings, those attending do so at their own risk. We will however explain what these risks are likely to be at the outset.

**Appendix 2: HEALTH AND SAFETY GUIDANCE**

Leaders are advised to consider the following points in order to satisfy the requirements of Health and Safety legislation:

**1. Safety**

It is important that members are made aware of what the hazards are and how to minimise their risks. General information regarding potential hazards should be sent to people planning to attend the field meeting and more specific and detailed information can be included in a Safety Briefing at the outset of the excursion. Such a briefing should focus on the major or unusual risks and will normally take only a few minutes. When necessary take into account the fact that young people are generally less aware of hazards than most adults.

Hazards to consider include:

- Traffic
- Slippery surfaces
- Boggy ground
- Stony or uneven paths or routes
- Steep banks
- Cliffs
- Falling branches or boulders
- High winds
- Treacherous weather – storms, blizzards
- Sunstroke, sunburn
- Cold
- Puncture wounds (barbed wire, thorns)
- Adders and other venomous creatures
- Biting and stinging insects
- Ticks and Lyme disease
- Weil's disease if near water
- Unfenced waterways
- Tides
- Time to complete route

## 2. Risk Assessment

Provided that the hazards associated with the Field Meeting are no different to those that would be encountered during a family walk in the country, you may use the Generic Field Meeting Risk Assessment. You should advise all members of the party to wear appropriate footwear and clothing and to bring sufficient water, food, sun-block, insect repellent, medical or other essentials etc. They should notify you of any relevant medical conditions that require due consideration. If additional or unusual hazards are present you should carry out a formal risk assessment prior to the meeting and may need to carry a first aid kit and have a first-aider in the party.

## 3. Safety Briefing

At the start of all meetings, the leader should give a safety briefing, in which members should be reminded and given more detailed information about known hazards and how to deal with them. The risk assessment should then be reviewed in the light of conditions on the day, and the actual ability of members of the group. An assistant must be appointed when the group contains more than **ten** members for meetings in mountainous, boggy or aquatic habitats and especially tidal zones, where conditions could be difficult. The safety briefing should include details of grouping arrangements. It may also be advisable to split the group up if there is a wide range of ability. Leaders have the right to refuse further participation in the meeting to anyone who ignores safety advice.

## 4. Contingency Plans

The leader should prepare a contingency plan for the meeting in case the weather is unsuitable for the intended route and be prepared to alter arrangements if the weather deteriorates during the course of the meeting. It is worth having clear directions to the nearest hospital with A&E available as occasionally things happen that require a participant to get emergency medication. If an accident does occur, take appropriate action and later report the details to the Hon. Field Meetings Secretary and the Chief Executive on the *Field Meeting Summary Report (Appendix 4: Field Meeting Summary Report Form)*.

For most meetings members will arrive by car, so that back-up transport will be available in the event of an emergency, poor weather or other contingency. When coach travel is arranged consideration should be given to the availability of shelter or transport should any member need to return to the starting point.

## 5. Epidemic situation

Outbreaks of coronaviruses, foot & mouth disease, plant pathogens or other disease may lead to restrictions on movement and controls on assembly. These circumstances may impact on the ability to hold field or indoor meetings in safety. The first thing to establish is what restrictions apply in your local area and in the area of the meeting. If these clearly prohibit the meeting then you must cancel it. The BSBI may additionally cancel all or some main meetings for a defined period and this will usually be advised to VCRs and meeting leaders by email and posted on the BSBI web pages.

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If a meeting is permitted, you will still need to consider whether it can be safely held, and whether all prospective attendees are equally safe. Numbers may need to be limited to fewer than were originally planned. The circumstances may identify groups that are particularly vulnerable (eg those over 70, those with immune deficiencies, expectant mothers etc) and where possible arrangements should be made to keep them safe, *e.g* by everyone wearing face-masks. If suitable arrangements cannot be made they should be advised not to attend. It is worth reminding prospective attendees that they should not participate if they are currently showing any symptoms of illness, or have been in recent contact with others who have an illness. It is also worth reminding participants that they must advise the leader of any medical condition that may affect their or others participation. If social distancing is in force, consider whether the objectives of the meeting can be met, for example it may not be possible to show a detailed feature of a plant (but see protocol below). Under such circumstances a recording meeting may work better, and might need to be restricted to local members. Finally, if the meeting has been previously advertised, but can now only accept a limited number of participants, consider changing the time and location of the meeting place and only provide this information to those who booked first.

Although accidents are rare on field meetings, they may occur. You should have a contingency plan in place for those occasions when social distancing is in force. Different responses might be appropriate depending on whether immediate aid is required, or just simple first aid. You might consider whether to bring surgical gloves and face mask or shield in such circumstances.

At the safety brief, remind participants that they must follow the guidance that is in place and that their failure to do so may put others at risk. There will always be the temptation to get close to show a feature, so be aware of this specific risk. There is little evidence that face masks have a significant benefit in outdoor conditions when socially distanced, but they may help participants feel more comfortable.

In several of the circumstances envisioned in this section, it is unlikely that an indoor meeting could be held safely. In a pandemic situation a key requirement for an indoor venue is good ventilation. Many residential meetings rely on group accommodation or indoor classrooms, so these are unlikely to be able to proceed even if the outdoor part is practicable. Equally, in other circumstance (eg foot & mouth) indoor meetings may be the only ones that are practicable.

If you as leader are not happy to continue with the meeting, either in advance or on the day, do not feel obliged to do so. The BSBI will support any cancellations made on safety grounds. You may also eject any participant from the meeting if they refuse to follow the guidance in force. If additional guidance is required, please contact the Hon. Field Meetings Secretary or Chief Executive.

5.1. Social distancing protocol

When social distancing is in force additional precautions must be considered for meetings where participants may need to get closer than the recommended distance in order to be shown features of a plant. This applies to both indoor and outdoor meetings. Under such circumstances only one person should be shown the feature at a time. Both demonstrator and participant should wear a face covering and there should be no hand to hand contact. If the plant is to be handled, all participants should hand sanitise before contact with the plant is made.

Appendix 2.1: **Field Meeting Generic Risk Assessment Form**

The activities being conducted during the meeting are assessed as being broadly comparable to those that might occur during a family walk in the country. No hazards capable of causing more than minor injury are reasonably likely to be encountered by any member of the party. Those attending will be advised to wear appropriate footwear and clothing, to bring sufficient water, food, sun-block, insect repellent or other essentials etc. This generic assessment will be reviewed in the light of conditions on the day, and the abilities of individual members of the party.

If significant hazards are likely to be encountered, or more than 20 people are participating in the event then the full risk assessment form in Appendix 2.2: **Full Field Meeting Risk Assessment Form** must also be completed.

Reviewed and found suitable.

Signed ..... Date.....

Place of Field Meeting

.....

Appendix 2.1a: **Indoor Meeting Generic Risk Assessment Form**

The activities being conducted during the meeting are assessed as being broadly comparable to those that might occur during normal attendance at a scientific society meeting. No hazards capable of causing more than minor injury are reasonably likely to be encountered by any member of the group. This generic assessment will be reviewed in the light of any information provided by individual participants in the meeting.

If significant hazards are likely to be encountered, or more than 40 people are participating in the event then the full risk assessment form in Appendix 2.2a: **Full Indoor Meeting Risk Assessment Form** must also be completed.

Reviewed and found suitable.

**Signed** ..... **Date**.....

**Place of Indoor Meeting**

.....

Appendix 2.2: **Full Field Meeting Risk Assessment Form**

**For identifying the possibility of harm to attendees at Field Meetings**

This outline form covers all the likely risks that may occur on a typical BSBI field meeting, but for some meetings there may be additional hazards. You should add these under “site specific hazards”. An example of this might be fire risk after a long drought. To complete the form, go through each hazard and decide whether it is a likely one or not. If you say no, then no further measures are needed. If you say yes, consider whether the suggested measures are sufficient and if necessary add to them.

Identify significant hazards	Likelihood Yes or No:	Measures to reduce risk
<p><b>Slips, trips and falls:</b></p> <p><b>Steep ground / banks</b></p> <p><b>Rough / Uneven ground</b></p> <p><b>Slippery ground</b></p>		<p>In the advert, state whether the day will be easy, moderate or strenuous and the nature of the terrain, whether it is rough or steep. If you describe a meeting as for beginners then the expectation is that it will be fairly easy. If people need to be particularly fit to attend your meeting then say so.</p> <p>In the information letter, state the distance, amount of ascent, nature of terrain. Include guidance on suitable footwear. E.g. list “strong boots” in equipment checklist. On the day check that participants are wearing the appropriate footwear.</p> <p>In the safety briefing remind participants that the most frequent cause of accidents are simple slips and trips and that those attending BSBI field meetings are particularly prone if looking at plants or books and not paying attention to where they are putting their feet! Mention the risks of slippery wet rocks &amp; grass, steep, rough or uneven ground, unstable rocks, banks, cliffs, etc. Include mention of the nature of the site and route.</p>
<p><b>Traffic</b></p>		<p>Avoid routes along or over roads as far as possible. In the safety briefing warn people about traffic. When necessary, the walk leader and “back” and “front” markers to wear high viz jackets. Guide walkers across roads etc. Walk on right hand side of road to face oncoming traffic. Wait for farm vehicles to pass if agricultural work is taking place.</p>
<p><b>Cliffs</b></p>		<p>In the safety briefing, warn people NOT to climb cliffs (like those on Arthur’s Seat).</p>
<p><b>Falling objects</b></p>		<p>Wear hard hats, if necessary, when walking close to cliffs. In the safety briefing remind participants that care must be taken to avoid dislodging stones, and if this does happen, what to do (shout warning!) (Particularly relevant to sites like Arthur’s Seat.)</p>
<p><b>Contact with branches or twigs</b></p>		<p>Brief walkers on the risk to eyes from twigs, and of possible allergic reaction to puncture wounds e.g. from Blackthorn. Take care passing such bushes.</p>



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		Assess danger from falling branches, particularly when in Ash woodland in windy conditions.
<b>Scrapes or abrasions</b>		Warn when crossing barbed-wire fences and appoint a minder if needed.
<b>Personal attack (by assailant or animal)</b>		Leave no-one isolated. Lock personal valuables out of sight. Be aware of the movement of farm animals. Carry a mobile phone.
<b>Infection (especially diseases carried on faeces)</b>		The safety briefing should remind folk of the risks (which includes Weil's disease). Ensure cuts are protected and instruct all to wash/clean hands before eating and drinking. You may want to take a supply of sanitising wipes.
<b>Contact with poisonous plants or fungi</b>		Take care in the vicinity of any hazardous plants or fungi, particularly Parsnip and Giant Hogweed
<b>Adders</b>		Do not disturb any Adders you find. Wear sturdy shoes and thick socks
<b>Ticks (Lyme disease)</b>		<p>The information letter's equipment checklist should include long trousers / long sleeved shirts and the suggestion that where possible trousers should be tucked into boots so as to reduce risk.</p> <p>The safety briefing should give advice on ticks, how to minimise bites and safe tick removal and <a href="#">the symptoms of Lyme disease</a>. There are other, rare, tick-borne diseases, which can have symptoms similar to flu.</p> <p>Closing talk should mention the need to check for (and remove) ticks at first opportunity. You can pick them off, but special tick snares to remove them are available on the market.</p>
<b>Insect sting or bite</b>		Consider whether you may disturb a Hornet or Wasp nest, or whether there are biting insects such as midges and mosquitos. If there is a high risk, bring an antihistamine tablet and vacuum venom extractor. Advise susceptible participants to bring an epi-pen.
<b>Sunburn / sunstroke</b>		Advise participants to bring adequate drinking water, wear a sunhat and long-sleeved shirts and put on sun protection cream including lip block, re-applying sun-screen as required during the day.
<b>Bad weather: Exposure / Hypothermia / Discomfort</b>		<p>In the information letter include guidance on suitable food and clothing. E.g. include "lunch, flask, warm clothes, waterproofs, hats &amp; gloves" in equipment checklist.</p> <p>Brief those on the walk and advise them to wear suitable clothing, particularly in cold or wet conditions. Be aware that weather conditions can change rapidly.</p> <p>The Leader should check the forecast carefully and be prepared to alter plans if necessary.</p>

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<p><b>Bad weather:</b></p> <p><b>Getting lost</b></p>		<p>The information email's equipment checklist should include maps, compasses, GPS and mobile phones (where available).</p> <p>Arrange to have small groups (i.e. plenty of leaders). Ask group leaders to keep tabs on numbers in their group. Appoint back markers.</p> <p>Each leader should take a full list of names and mobile numbers of those in group.</p> <p>Each leader should take map, compass, whistle, phone &amp; GPS and be able to use them competently.</p> <p>Safety briefing should stress importance of the individual groups staying close together and within sight of each other.</p>
<p><b>Water hazards</b></p>		<p>Wear buoyancy aid if appropriate. Assess tidal situation prior to meeting and ensure that safe access is possible. Assess water levels and do not walk close to rivers in spate. Safety briefing should include appropriate warnings.</p>
<p><b>Minor injuries</b></p>		<p>Take, and recommend others take, simple first aid kits and blister treatment packs.</p>
<p><b>Manual handling</b></p>		<p>Manual handling should not normally be a requirement for participants on field meetings. Consider whether members who advise of a medical condition need help to view specimens.</p>
<p><b>Site specific hazards (complete as necessary)</b></p>		

Appendix 2.2a: **Full Indoor Meeting Risk Assessment Form**

**For identifying the possibility of harm to attendees at Indoor Meetings**

This outline form covers all the likely risks that may occur on a typical BSBI indoor meeting, but for some meetings there may be additional hazards. You should add these under “meeting specific hazards”. An example of this might be holding a meeting during a heatwave. To complete the form, go through each hazard and decide whether it is a likely one or not. If you say no, then no further measures are needed. If you say yes, consider whether the suggested measures are sufficient and if necessary add to them.

Identify significant hazards	Likelihood Yes or No:	Measures to reduce risk
<p><b>Slips, trips and falls:</b></p> <p><b>Slippery ground</b></p>		<p>Slips and trips are the most likely risk. Do participants have to travel across kerbs or ascend stairs?</p> <p>During winter is snow or ice a hazard?</p> <p>Open the meeting with a safety briefing and remind participants that the most frequent cause of accidents are simple slips and trips. Also warn them about evacuation procedures in the event of a fire alarm.</p>
<p><b>Traffic</b></p>		<p>At any well managed site traffic control should separate pedestrians and motor vehicles.</p>
<p><b>Heat / cold</b></p>		<p>Not all venues will have air conditioning. If necessary make sure that there is good ventilation by opening windows or closing them if it is too hot outside.</p>
<p><b>Hot drinks</b></p>		<p>Spilling a hot drink is a possibility, particularly in a crowded environment. Reduce this risk by keeping good spacing at the serving point.</p>
<p><b>Medical condition</b></p>		<p>Some participants may notify you that they have a medical condition. The measure required will depend on what this is: for example you may need to ask participants not to bring certain foodstuffs with them or you may need to ask participants who are hard of hearing to sit at the front.</p>
<p><b>Medical emergency</b></p>		<p>If there are more than forty participants you should ensure that there is someone present who has first aid training.</p>
<p><b>Vulnerable participants</b></p>		<p>On occasion a participant will notify you that they are vulnerable. This can take various forms. If a participant is shielding from Covid you may need to ask <u>all</u> participants to wear a face-mask. See also the BSBI safeguarding guidance on Young Persons and vulnerable adults.</p>
<p><b>Disability</b></p>		<p>Participants who have a disability may need assistance to access the meeting place.</p>
<p><b>Manual handling</b></p>		<p>Manual handling should not normally be a requirement for participants at an indoor meetings. Helpers may need to move items and if so they should be briefed on safe lifting practices.</p>

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<b>Meeting specific hazards (complete as necessary)</b>		
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Appendix 2.3: **Meeting Risk Review**

This risk review should be completed before setting out on a field meeting or starting an indoor meeting and if necessary sent to the Hon. Field Meetings Secretary, together with a copy of the full risk assessment if this was required. Many of the checks are not required for an indoor meeting.

CHECK	YES	NO	N/A
Have names of participants been listed?			
Have any medical conditions been advised?			
Have clothing and footwear been reviewed?			
Has age profile of participants been reviewed?			
Have weather conditions been assessed?			
Have deputy leaders been appointed and briefed?			
Has party been briefed on safety and staying together?			
Has the group been given the leader's and deputy's (if applicable) mobile number?			
Has the leader got directions to A&E and the number of the local Mountain Rescue Team if necessary?			
<b>Taking the above into account</b>			
The intended route is still appropriate			
An alternative route has been chosen			
The excursion has been cancelled			

Signed ..... Date.....

Place of Field Meeting

.....

Appendix 2.4: **BSBI Accident Report Form**

**Confidential**



**BSBI ACCIDENT REPORT FORM**

Return to: [Hon. Field Meetings Secretary](#) and the [Chief Executive](#)

Date and time of occurrence:
Location of occurrence:
Full name(s) of injured person(s) and their contact details:
Name of person reporting and their contact details:
Name(s) of witnesses and their contact details:
What was the injury, damage or nature of the near miss ?
What first aid treatment was given (if applicable) ?
Description of what happened (who, what, where, why, when and how), including possible immediate and underlying causes:

## Appendix 3: Field Meeting Feedback Form



### BSBI Roslin Glen Country Park Field Meeting Saturday 1st June 2013

#### Feedback

How would you rate the following: (Circle or tick: 5 = excellent / yes, 1 = poor / no)

Have you enjoyed the field meeting?	5	4	3	2	1
Was it well lead?	5	4	3	2	1
Was it well organised?	5	4	3	2	1
Was it pitched at the right level for you?	5	4	3	2	1
How suitable was the site?	5	4	3	2	1
How suitable were the timings?	5	4	3	2	1

What did we do well?

What could we do better? List at least one thing. Comment on any score of 3 or less.

Thank you and safe journey home!

## Appendix 4: Field Meeting Summary Report Form

If there has been a problem of any sort at meetings listed in the BSBI Yearbook this information should be sent to the Hon. Field Meetings Secretary [fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org) immediately after the meeting. The details are needed to alert the Society to the issues that have arisen. The form could be completed electronically at <https://goo.gl/forms/qbdzneyimgCOGWIP22> but this currently doesn't have the right access permission. If applicable an accident report form (Appendix 2.4: **BSBI Accident Report Form**) must also be completed.

Report on Field Meeting

at ..... on .....

How many applied? .....

How many attended? .....

Of which ..... were not members of the BSBI

How many dropped out? .....

What were the problems? .....

.....  
.....

Any other comments?

.....  
.....

..... Leader



## Appendix 5: A guide for contributors of field meeting reports

The following notes are intended to help authors prepare suitable reports of field meetings for inclusion in the BSBI Year Book. The reports **are intended for a general reader**, not just for participants at the meeting. Authors should send material to Jonathan Shanklin (contact details below) as soon as possible after the meeting to ensure inclusion and to allow time for any editing. The latest date for guaranteed inclusion is the end of November. It may be possible to publish reports with additional images on the Society web pages. Some meetings may be reported in BSBI News, but this will usually only feature major meetings such as the ASM, and a synopsis of important results from other field meetings. To be included in this section you must send your report in promptly after the meeting.

### 1. STYLE AND CONTENT

This is very much a personal matter and the Editor will not change the prose unless the meaning is ambiguous. You should include the name of the leader(s), if different from the author, and you should acknowledge specific help given in organising the meeting and, in particular, permission to enter sites or help with identification following the meeting. An indication of the number of participants should be included, but you don't need to name them all. If the meeting is held jointly, then this should be mentioned. Some background to the site, e.g. its ecology, ownership, history, conservation status etc. is desirable. Try to avoid long un-annotated lists of species in the report. Vice-county records or rarities are worth mentioning, but **not hectad or tetrad records** unless they demonstrate a significant extension in range. It is probably better to name fewer species and to comment specifically on these, e.g. whether they were flowering or not, flower colour variation, habitat characteristics, etc. If the leader is not the v.c. recorder, it would be appreciated if a separate full species list were sent to the recorder. Do not include too many details on the weather (which is usually awful!) or the gastronomic details of lunch or detailed travel arrangements.

### 2. LENGTH

The Editor does not wish to be too specific about the length of reports, but generally a one day field meeting should be reported in about half a page (350 words), a two day meeting in three quarters of a page and a week long excursion in one to two pages of the BSBI Yearbook. Meetings to places of considerable botanical interest, or places overseas, may warrant more space. An interesting and well-written piece that is a little bit longer than the guidance will generally be accepted.

### 3. FORMAT AND SPECIFIC POINTS

- a. **Reports** should preferably be Word documents, but text does not need to be specifically formatted as this will be adjusted prior to publication. Style generally follows [that given for B&I](#).
- b. **Title:** This should include, in the correct order: **Site name, vice-county name and number, date(s)**, e.g. Ben Hope, West Sutherland (v.c.108). 16-17 July. The site name should correspond to the site name used in the Field Meetings Programme incorporated each year into the Yearbook. The name of the author(s) should appear in mixed case at the end of the report on the left hand side.

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- c. **Species names:** Latin names should be given priority followed by common names in parentheses e.g. *Digitalis purpurea* (**Foxglove**). The names should conform as far as possible to those in Stace, C. A. 2019. *New Flora of the British Isles (4<sup>th</sup> Edition)*. C & M Floristics., or accepted names in [Plants of the World](#) for those not listed in Stace. If neither of these sources gives the name of the species you want to mention, then use the name given in Sell & Murrell. Special attention should be given to the spelling of species names particularly those which cannot easily be checked, e.g. species of *Rubus*, *Hieracium* etc. Where the Latin name has recently changed it may be helpful to readers to put the previous name in square brackets, eg [*Filago vulgaris*].
- d. **Place names:** Whilst it is comparatively easy to check the spellings of species names, checking the names of places is much more difficult and authors should give special attention to these to ensure that they are correct. If possible, only use place names that appear on Ordnance Survey maps.
- e. **Distances:** All distances, altitudes, lengths and heights etc must be in metric units.
- f. **Grid references** should conform to the style used by the Ordnance Survey e.g. TL57, TL5570 or TL555705 for Wicken Fen.
- g. **References** should be included in the text in parentheses and not listed at the end of the report, e.g. (Swan, G.A. & Walters, S. M. 1988. *Watsonia 17*: 133-138). Books should include the title and place of publication, e.g. (Trist, P.J.O. ed. 1979. *An Ecological Flora of Breckland*. Wakefield).
- h. **Photographs** Good photographs are welcome so if possible send a couple of suitable images with the report. Please also send them separately at full resolution, *i.e.* not embedded in the text, but with a caption in the text. If any participants are included in the image, their permission must have been given for its use.

**Reports should be sent promptly, with a final deadline of the end of November, to:**

The [Hon. Field Meetings Secretary](#) preferably in Word format

## Appendix 6: Example report

Farndon, Cheshire (v.c.58), 1 April

Jonathan Shanklin

Snow during the preceding week had left the Welsh and mid-Cheshire hills coated in white down to 100 m, but fortunately the starting point for this meeting, lying mid-way between the two, was just 20 m in altitude. The meeting was aimed at teaching recording practices to beginners, and learning how to use vegetative keying. The spring thus far had been the coldest for many decades so we were put to the test rather more than expected.

A group of nine braved the cold to meet at Farndon church, where Jonathan Shanklin began by explaining the elements of recording. We then went into the churchyard and began to put theory into practice. For a relatively average churchyard we did quite well, managing to identify 87 species. A creeping plant by the church tower was spotted, which we thought was *Acaena novae-zelandiae* (**Pirri-pirri-bur**), but decided that confirmation would be needed in the summer as this would only be the 5<sup>th</sup> county record. Given the choice between a cold and windy picnic on the banks of the River Dee, or visiting the warmth of a pub for lunch, the group wisely chose the latter. During lunch, a Speedwell was inspected, having been collected because “it looked a bit different”. Although initially dismissed as a small *Veronica persica* (**Common Field Speedwell**), the fruits gave a clear diagnosis – it was *V. polita* (**Grey Field-speedwell**), scarce for Cheshire.

Fortified by hot chocolate the group set off for a walk along the River Dee. We had not gone far when one of the targets for the day, *Umbilicus rupestris* (**Navelwort**) was spotted on an abandoned roof, with more on the cliffs above. Passing through a wooded glade some ferns caught our eyes, and after some debate, the more mature specimen was identified as *Polystichum setiferum* (**Soft Shield-fern**). Emerging onto flood meadows the skeletal remains of *Brassica nigra* (**Black Mustard**) on the river bank were identified by the apressed erect pods. With time passing, the short version of the route was chosen to lead us back to a second site for the Navelwort. Although it had looked un-promising from Google Earth, ground truth revealed the plant, and we even managed to find it in the adjacent tetrad. Two of the party decided that it was necessary to check out a Sweet-grass in a shallow pond, with the Vegetative Key pointing towards the hybrid *Glyceria x pedicillata*, though as County Recorder, Graeme Kay wanted stronger evidence before recording it as such. Now lagging behind the rest, the two passed a swamp with a tussock which looked a bit odd for *Deschampsia cespitosa* (**Tufted Hair-grass**). Closer inspection showed that it was a sedge, which fortunately was just coming into flower to provide identification as *Carex paniculata* (**Greater Tussock-sedge**), a scattered species in Cheshire, and this apparently its westernmost current tetrad.

Given the delayed start to spring, we had not expected to find much, but the total list for the day totalled over 150 species, and the challenge given at the start of the day to find 30 species in flower was just exceeded.

**Note:** This account is actually 500 words rather than the 350 requested and is shortened a little from the printed version.



- Get *The Wild Flower Key*, Francis Rose (2006, so now a bit dated) or *The Collins Wild Flower Guide* (2016, but weighs 1.22 kg) and invest in a x10 hand-lens. [www.summerfieldbooks.com](http://www.summerfieldbooks.com) For other books see [https://bsbi.org/wp-content/uploads/dlm\\_uploads/BSBI-News-145-Beginners-Corner.pdf](https://bsbi.org/wp-content/uploads/dlm_uploads/BSBI-News-145-Beginners-Corner.pdf)
- Take your identification book and hand-lens with you *whenever* you are out.
- Stop and use them, whenever you see a flower you can't identify. Try using the keys. Check the likelihood of that species being found in the area and at that time of year by reading the information on distribution and flowering period.
- Recording apps such as iRecord have automatic image recognition, but they don't always get it right. They can however point you in a possible direction. The BSBI Recording app assumes that the identification has been made, but can alert you if the plant is new for the hectad.
- When you are out, regularly remind yourself of the names of the plants you see and know.
- If you haven't already got a digital camera buy a super-macro one for taking very close-up shots. Many people are using the Olympus TG-6 with excellent results. If you can't identify a plant take a digital photo and e-mail it to [James Harding-Morris](mailto:James.Harding-Morris) who is very happy to help with identification.
- Join the BSBI! Everyone interested in wildflower identification and conservation is very welcome to join the Botanical Society of Britain & Ireland and go out on their field trips (you can even come along on these without being a member if you are thinking of joining and would like a taster). These are great fun – and a great opportunity to check your understanding is correct. A number of field meetings are organised every year specifically for beginners and people who haven't been on BSBI field meetings before. For information about the BSBI, its field meeting programme and to join, see <http://bsbi.org/>
- Go out on wildflower walks organised by local Wildlife Trust groups, local Natural History Societies and ranger services.
- Go on a wildflower identification course: another great way to learn and a lot of fun! The Field Studies Council runs a variety of courses. See <http://www.field-studies-council.org/individuals-and-families/natural-history/plants.aspx> or Identiplant at <https://identiplant.co.uk>
- Check the species distribution maps for the local area at <http://bsbi.org/maps> for the likelihood and significance of your botanical finds! Also see the [Online Plant Atlas 2020](#).

Happy Botanising!

Jim McIntosh, Scottish Officer, Botanical Society of Britain & Ireland (BSBI)

Royal Botanic Garden Edinburgh, 20A Inverleith Row, Edinburgh EH3 5LR  
[jim.mcintosh@bsbi.org](mailto:jim.mcintosh@bsbi.org) 0791 7152580

## Appendix 8: Example adverts for the Yearbook or the meetings web page

Some points to bear in mind for the Yearbook:

- For a one day meeting please supply one paragraph of about 100 words. A residential meeting may use two paragraphs, or refer readers to a web page for more information.
- Please use Stace 4 names when you mention plants, with Latin names first and common names in brackets.
- Style will generally follow that used in other BSBI publications, eg *B&IB*.
- The final sentence gives booking information in the form: For further information or to book please contact **Somebody email@address** or on **0123-456-789**. You can also give a postal address if you wish to, but we are encouraging electronic booking.
- Do provide web links as necessary. All links will be enabled in the online version of the Yearbook, which is in the members area.
- Normally a date and location are need for the BibConf by early November, with full details for the Yearbook (in Yearbook format) by the end of November.

### Yearbook format

**Friday 8 to Sunday 10 June (Recording, Yellow)  
Haddington, [East Lothian](#) (v.c.82)**

This long weekend meeting (starting on Friday morning) aims to help the County Recorder improve [Atlas 2020](#) coverage in East Lothian. We will be based in the old county town of Haddington, which is a conveniently central base. East Lothian is one of the smallest vice-counties and has a rich and varied coastline – with dune systems, marshes, scrub and grassland to the west of North Berwick – and a rockier coastline to the east. The hinterland is largely farmland, with small woodlands, and scattered settlements and gently rises to moorland of The Lammermuir Hills. So there will be a good variety of habitats to visit and record.

**Leaders:** Jim McIntosh & Helen Jackson

**Contact:** [Jim McIntosh](#), BSBI Scottish Officer to book.

Similar considerations as above apply to adverts to go on the web page, but additionally:

- Web adverts can be longer if more detail is needed.
- Web only adverts can be submitted at any time. They are particularly suited to joint meetings with a local group, which are often only planned after the Yearbook deadline.
- Only embed web links in the main body of the text. Others should be given in full.
- The Communications Officer will add other appropriate web links, eg to the vice-county web page etc.

### Web page format

This is of the form:

Event title (excluding v.c.)  
Text about the event  
Start date  
End date (for multiple-day meetings)  
Type of meeting (Beginner, General, Recording, Specialist, Training)  
Taxon group (if applicable for a specialist meeting)  
Vice-county or -counties number

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Leader(s) names  
Booking required (Y/N)  
Contact name  
Email address  
Contact phone (optional)  
Contact mobile (optional)  
Contact address (optional)

For the above meeting this becomes:

Haddington, East Lothian

This long weekend meeting (starting on Friday morning) aims to help the County Recorder improve [Atlas 2020](#) coverage in East Lothian. We will be based in the old county town of Haddington, which is a conveniently central base. East Lothian is one of the smallest vice-counties and has a rich and varied coastline – with dune systems, marshes, scrub and grassland to the west of North Berwick – and a rockier coastline to the east. The hinterland is largely farmland, with small woodlands, and scattered settlements and gently rises to moorland of The Lammermuir Hills. So there will be a good variety of habitats to visit and record.

Friday 8 June

Sunday 10 June

Recording

82

Jim McIntosh & Helen Jackson

Booking Y

Jim McIntosh

[jim.mcintosh@bsbi.org](mailto:jim.mcintosh@bsbi.org)

## Appendix 9: Example residential meeting booking questions

We are eliminating the use of printed flyers and encourage meeting organisers to use electronic booking. Members without internet access can contact the [Fundraising Manager](#) to make their booking. In order to set up a booking page we will need:

1. Event name
2. Dates and Timings
3. Location
4. Blurb for event page and where appropriate full details (*e.g.* for the [Killarney ASM](#))
5. Ticket types, numbers and costs (including currency and any registration fee)
6. Any specific questions we want to ask to bookers *e.g.*:
  - a) Name
  - b) Address
  - c) Email
  - d) Phone
  - e) Emergency contact number
  - f) Number of places required
  - g) Whether they have been on a BSBI meeting before
  - h) Their level of botanical skill (Beginner / Improver / Competent at recording / Expert)
  - i) Their terrain preferences (Easy terrain / Rough going / Prefer to potter at small sites)
  - j) Whether they will have a car and take passengers
  - k) Whether they have any special requirements (dietary or medical)
  - l) Whether they consent to any images taken during the meeting being used in BSBI publications
7. Who the contact is for any queries about the meeting
8. What schedule of reminder emails they'd like (*e.g.* a week before, the day before etc)
9. Who should be kept up to date with booking numbers and how regularly?
10. What is the closing date for booking?

See for example the Annual Summer Meeting booking page.

**Appendix 10: Example budget spreadsheet**

This Excel spreadsheet is available from the [Hon. Field Meetings Secretary](#) and is also on the [BSBI meetings page](#).

**BSBI Event Budget -**

**Event name:**

*Key: Yellow cell = to input information or £*

Category	Type	Reason / notes	£ Per person	Attendees	£	GL code
					TOTAL	
Income	Course, Conference & Event Income	Accommodation			-	4603
		Registration (member)			-	
		Meals			-	
	Accommodation			-		
	Other income	Registration (non member)			-	4603
					-	
Costs	Course, Conference & Event - Catering	Cakes			-	5604
		Leader / Visitor meals			-	
					-	
	Course, Conference & Event - Accommodation	Accommodation			-	5605
					-	
					-	
					-	



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Course, Conference & Event - Travel	Coach hire Fuel		<b>5601</b>
Course, Conference & Event - Room Hire	Day hire		<b>5602</b>
Course, Conference & Event - Publicity	NB. Try to advertise digitally, to reduce paper usage		<b>5606</b>
Other Costs	Contingency Projector	<b>250</b>	<b>TBC</b>
		<b>250</b>	
<b>SURPLUS / (DEFICIT) ON EVENT (* SEE BELOW)</b>		<b>-</b>	<b>250</b>

Prepared by:   
 Date:

**\*IF THE BUDGET IS IN DEFICIT, PLEASE THINK HOW THIS CAN BE ELIMINATED  
 SO THE EVENT AT LEAST BREAKS EVEN  
 Could we increase the registration fee? Ask for a discount  
 on costs? Borrow equipment?**