



## Leading BSBI field meetings



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

BSBI field meetings and events are planned for 2021, subject to Government guidance specific to England, Scotland, Wales, Northern Ireland and the Republic of Ireland. [BSBI guidance is available here](#). Details of any advertised meeting may change suddenly – check online or by contacting the meeting leader(s). You must follow all current Government guidance for the locality, including social distancing and [other Covid-19 prevention measures](#) and more general safe practices. For further information, contact the meeting leader(s) and/or BSBI Hon Gen Sec [Steve Gater](#).

This document offers practical guidance for leaders of 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 field 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 Field 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 field meetings, particularly those for beginners, productive, safe and enjoyable, for everyone – including the leaders! It is for all those interested in leading BSBI field meetings – with particular reference to leading educational or beginners' field meetings. The information in this document will help you make BSBI field 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 Committee. 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 field meetings.

Thanks are due to Jill Sutcliffe and the 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.

## 2. Why hold BSBI educational 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 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 diary](#)).
- 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 Field 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, Matthew Parratt 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 letter (see **Appendix 1: Example of Field Meeting Information letter**).

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. The insurance policy DOES NOT cover individuals on non-BSBI arranged activities and it DOES NOT cover any activity carried out by BSBI local groups. 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.

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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 – see <http://www.bigtickproject.co.uk/ticks-in-the-uk/uk-tick-threat-map/>. 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.

Coming to a BSBI meeting may start a life-long interest in plants in a young person. 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.

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.

### 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, but probably those participating would not read it. So treat it as a tool for you and your co-leaders. Its main aim should be to identify ways to reduce the risks.

### 7.3 Measures to reduce the risks

The main measures to take are:

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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 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.
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 letter** (See section 11. **Pre-event information letter** and **Appendix 1: Example of Field Meeting Information letter**) 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**).

## 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, Wildflower 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.
- 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 Twitter account](#) and the Country Officers for [Ireland](#), [Scotland](#) and [Wales](#) also have 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 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**.

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 <https://bsbi.org/annual-summer-meeting>). This could include:

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

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- Safety brief
- 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 [louise.marsh@bsbi.org](mailto:louise.marsh@bsbi.org) who can tweet the availability of spaces to her wide network of contacts.

### 10. Taking bookings

A residential meeting, or a meeting with associated costs, may wish to use on-line booking and payment by PayPal. The M&C Committee has developed a Google Form for taking bookings, which can be linked on a BSBI web page with an appropriate PayPal button. If you wish to use a system like this, please contact the Communications Officer to set up the web page and Google Form, and the Chief Executive Officer to set up the PayPal button. The Google Form will compile all the information into a single spreadsheet.

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 and accommodation which they themselves must cancel if they are unable to attend the meeting or if the meeting itself is cancelled.

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

*This information is subject to the BSBI GDPR guidance: We only hold the information requested in order to administer the event. We will treat your information as confidential, hold it securely and will never pass it on to third parties. Your information will be deleted within 6 months of the event taking place. The lawful basis for processing this data is defined under GDPR regulations as contractual. You can request to see the data we hold on you at any time and we will remove you from our systems and discontinue contact at your request if you email the meeting organiser.*

### 11. Pre-event information letter

- 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).

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- 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 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 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
- 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 1: Example of Field Meeting Information letter**

## 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](#), avoiding damage to property and ensuring that livestock does not escape. When you are on a road you should follow the [Highway Code](#), paying particular note to the [section on pedestrians](#) (the links take 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
- 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).
- 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-mark).
- 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 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

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



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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!

### 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.
- 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. 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:

### 15.1 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.

### 15.2 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 on the BSBI webpages, with synopses 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, your country Field Secretary, and to the BSBI Communications Officer together with any photographs as soon as possible after the meeting, and at the latest by the end of November.

### 15.3 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.

### 15.4 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

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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.

### 16. Field Secretary 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 [deanm@edgehill.ac.uk](mailto:deanm@edgehill.ac.uk)

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

**Scotland:** Aileen Meek, [aileenammeek@gmail.com](mailto:aileenammeek@gmail.com) (pro tem – the role is being handed over)

**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)

**Communications Officer:** Louise Marsh, [louise.marsh@bsbi.org](mailto:louise.marsh@bsbi.org)

**Chief Executive Officer:** Contact Steve Gater, [steve.gater@bsbi.org](mailto:steve.gater@bsbi.org) (until April 6). Julia Hanmer, [Julia.hanmer@bsbi.org](mailto:Julia.hanmer@bsbi.org) (from April 6).

## Appendix 1: Example of Field Meeting Information 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, 4km south of Edinburgh Bypass, turn east onto the B7003 signed Roslin and Roslin Country Park. Continue 1km 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 3km 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 Wild Flower Key* by Francis Rose is 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 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.

**List of participants:**

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

**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 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 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 meetings in safety. The first thing to establish is what restrictions apply in your local area. If these clearly prohibit the meeting then you must cancel it. The BSBI may additionally cancel all 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, or expectant mothers) and they should be advised not to attend. It is worth reminding prospective attendees that they should not participate if they are in a vulnerable group, are currently showing any symptoms of illness, or have been in recent contact with others who have an illness. 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. 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 Officer.

### 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

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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 then the full risk assessment form in Appendix 2.2: **Full Risk Assessment Form** must also be completed.

Reviewed and found suitable.

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

**Place of Field Meeting**

.....

Appendix 2.2: Full Risk Assessment Form

For identifying the possibility of harm to attendees at Field Meetings

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>
<b>Traffic</b>		<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>
<b>Cliffs</b>		<p>In the safety briefing, warn people NOT to climb cliffs (like those on Arthur’s Seat).</p>
<b>Falling objects</b>		<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>
<b>Contact with branches or twigs</b>		<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. Assess danger from falling branches.</p>
<b>Scrapes or abrasions</b>		<p>Warn when crossing barbed-wire fences and appoint a minder if needed.</p>
<b>Personal attack (by assailant or animal)</b>		<p>Leave no-one isolated. Lock personal valuables out of sight. Be aware of the movement of farm animals. Carry a mobile phone.</p>

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<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>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>
<b>Bad weather: Getting lost</b>		<p>The information letter’s equipment checklist should include maps, compasses, GPS and mobile phones (where available).</p> <p>Arrange to have small groups (i.e. plenty 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>

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		<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>
<b>Water hazards</b>		<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>
<b>Minor injuries</b>		<p>Take, and recommend others take, simple first aid kits and blister treatment packs.</p>
<b>Manual handling</b>		<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>
<b>Site specific hazards (complete as necessary)</b>		



Appendix 2.3: **Field Meeting Risk Review**

This risk review should be completed before setting out and if necessary sent to the Hon. Field Meetings Secretary, together with a copy of the full risk assessment if this was required.

<b>CHECK</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
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

[fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org)

Date and time of occurrence:
Location of occurrence:
Full name(s) of injured person(s):
Name of person reporting:
Name(s) of witnesses:
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 can be completed electronically at <https://goo.gl/forms/qbdzneyimgCOGWIP22> 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. There will be a meetings section in BSBI News, but this will 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 Year Book. As a rough guide, one typed A4 sheet, double spaced, contains between 250 and 300 words. 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. If typewritten, they should be double-spaced with wide margins. If typing facilities are not available, hand-written reports are acceptable but they must be legible and all species names and all place names must be written in upper case to prevent mistakes.
- 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<sup>th</sup>-17<sup>th</sup> JULY. The site name should correspond to the site name used in the Field Meetings Programme incorporated each year

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into the Year Book. The name of the author(s) should appear in upper case at the end of the report on the left hand side.

- 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.
- 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. Please send them separately at full resolution, ie 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 [fieldmeetings@bsbi.org](mailto:fieldmeetings@bsbi.org) preferably in Word format

## Appendix 6: Example report

Farndon, Cheshire (v.c.58), 1<sup>st</sup> April

JONATHAN SHANKLIN

Snow during the preceding week had left the Welsh and mid-Cheshire hills coated in white down to 100m, but fortunately the starting point for this meeting, lying mid-way between the two, was just 20m 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.

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### Appendix 7: Developing your Wildflower Identification Skills - Handout



- Get *The Wild Flower Key*, Francis Rose (most recent edition) and invest in a x10 hand-lens. [www.summerfieldbooks.com](http://www.summerfieldbooks.com)
- 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.
- 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. If you can't identify a plant take a digital photo and e-mail it to Jim McIntosh [jim.mcintosh@bsbi.org](mailto:jim.mcintosh@bsbi.org) 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 Atlas of the British & Irish Flora [www.brc.ac.uk/plantatlas](http://www.brc.ac.uk/plantatlas)

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 advert for the Yearbook

Some points to bear in mind:

- 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.
- During covid we are not normally giving starting times or places to ensure that booking takes place.
- 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.
- For the web version the Communications Officer will add appropriate web links, eg to the vice-county web page etc. Where possible links will also be enabled in the online version of the Yearbook, which is in the members area.

### Friday 8 to Sunday 10 June (Recording, Yellow)

Haddington, [East Lothian](#) (v.c.82)

**Leaders:** Jim McIntosh & Helen Jackson

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. To book please contact Jim McIntosh, BSBI Scottish Officer [jim.mcintosh@bsbi.org](mailto:jim.mcintosh@bsbi.org).