Terms of Reference:
EFG Development Team

Version 1: Last reviewed and adopted by the Trustees on 1 November 2026.

The current version of this document is available at https://exoticferngroup.org/team.

1. Purpose of the EFG Development Team

The EFG Development Team supports the Trustees in developing the activities, relationships and resources through which the Exotic Fern Group advances its charitable purposes.

The Trustees retain overall responsibility for the governance and strategic direction of the EFG. Within that framework, responsibility for developing opportunities and strategy relating to education, conservation, research, publication, collaboration and fundraising is delegated to the Development Team.

The Team's role is both strategic and practical: to identify where the EFG can make a useful contribution, develop the relationships and projects through which that contribution can be made, and bring appropriate proposals and recommendations to the Trustees.

2. Areas of activity

The work of the Development Team encompasses:

- **Education and public benefit** — developing ways to share knowledge of ferns, their cultivation and conservation with EFG members and the wider public.
- **Conservation** — developing the EFG's contribution to fern conservation, including the roles of botanic gardens, specialist collections and private growers.
- **Publications and knowledge** — providing strategic oversight of the EFG's publishing activity, including *The Glasshouse*, and supporting the publication and preservation of knowledge generated by the EFG and its wider community.
- **Ethical collections** — maintaining and developing *Towards Ethical Collections* and promoting responsible approaches to the acquisition, provenance, cultivation, documentation and conservation of ferns.
- **Research** — encouraging, facilitating and disseminating research relevant to the EFG's purposes and identifying opportunities for work undertaken or supported by the EFG to be published.
- **Institutional relationships and collaboration** — developing connections and projects with botanic gardens, herbaria, universities, conservation organisations, horticultural bodies, plant societies and others whose work overlaps with the EFG's objectives.
- **Fundraising and resources** — developing fundraising strategy and identifying grants, sponsorship, donations, partnerships and other appropriate sources of support.
- **Project development** — helping to turn opportunities arising from members, Trustees, other EFG teams or committees, or external partners into defined projects with clear objectives, collaborators, resource requirements and anticipated public benefit.

3. Relationship with the Trustees

The Development Team operates under authority delegated by the Trustees. This enables the Team to explore opportunities, develop strategy, establish relationships and formulate proposals without transferring the Trustees' ultimate responsibility for the governance, finances or charitable direction of the EFG.

The Team maintains a continuing view of EFG activities against its charitable objects, identifying opportunities to further those objects and considering how existing activities might deliver greater public benefit.

Matters requiring expenditure outside a budget agreed by the Trustees, creating substantial ongoing commitments, establishing formal external relationships, or otherwise reserved to the Trustees will be referred to them for approval.

The Development Team therefore acts as a bridge between the EFG's charitable purposes and the practical activities through which those purposes are advanced.

4. Publications and knowledge

The Development Team has strategic oversight of the EFG's publication programme, including its journal, *The Glasshouse*.

The Glasshouse is an important means through which the EFG fulfils its educational objectives, records and disseminates specialist knowledge, publishes original work, and connects horticultural experience with wider botanical and conservation interests.

Day-to-day editorial decisions remain the responsibility of the editorial team. The Development Team's role is to consider the journal's strategic development, its contribution to the EFG's mission, and opportunities to strengthen its content, reach and relationship with the EFG's other activities.

The Team may also identify research, projects, collaborations and work arising from the EFG community that merit development for publication through *The Glasshouse* or other appropriate channels.

5. *Towards Ethical Collections*

The Development Team is responsible for maintaining and developing *Towards Ethical Collections* and for disseminating the principles and knowledge contained within it.

Towards Ethical Collections provides a framework for responsible approaches to the acquisition, provenance, cultivation, documentation and conservation of ferns. It should remain responsive to developing conservation practice, horticultural experience and scientific knowledge.

The Team will keep the work under review, draw on relevant expertise from within and outside the EFG, and publish revisions or supporting material where appropriate.

Its principles should also inform the EFG's wider conservation and educational activities, including work with growers, collections and institutions.

6. Conservation, research and collaboration

The Development Team will develop the EFG's contribution to fern conservation by drawing on its particular strengths in horticultural knowledge, specialist collections, publications, digital resources and its community of growers.

This includes exploring how botanic gardens, specialist collections and private growers can contribute more effectively to conservation, and identifying opportunities for research, documentation, ex situ cultivation, knowledge exchange and collaborative projects.

The Team will seek to strengthen connections with the wider botanical, horticultural, academic and conservation communities. It may initiate relationships and projects with relevant institutions and individuals, encouraging the exchange of expertise, information and resources.

The intention is to collaborate rather than duplicate: to identify areas in which the EFG can make a distinctive contribution while recognising and supporting the expertise and responsibilities of established institutions and specialist bodies.

Research and knowledge generated through these activities should, where appropriate, be shared through *The Glasshouse*, Pteridobase, *Towards Ethical Collections* or other suitable channels.

7. Relationship with the Pteridobase Curation Team

The Development Team and the Pteridobase Curation Team have distinct but complementary functions.

- The **Pteridobase Curation Team** is primarily concerned with the evidence, documentation and consistent treatment of horticultural information within Pteridobase.
- The **Development Team** is concerned with the broader opportunities through which Pteridobase, the EFG's publications, its membership and its external relationships can contribute to the EFG's charitable purposes.

Work in either team may give rise to matters relevant to the other. A curatorial investigation may identify an opportunity for research, publication, education, conservation or institutional collaboration; a Development Team project may generate information, relationships or research requiring consideration by the Curation Team.

The two teams will therefore maintain an open exchange of information. Members of either team may attend meetings of the other where matters of shared interest are being considered, and joint work may be undertaken where appropriate.

Neither team is subordinate to the other. Their relationship is collaborative, with each contributing its particular remit and expertise to the wider work of the EFG.

8. Membership and roles

Membership of the Development Team should bring together experience relevant to the EFG's charitable development, including education, conservation, horticulture, research, publication, institutional engagement, fundraising and project development.

Two principal roles support the Team's work:

- **Development Secretary** — oversees the development of the EFG's mission and educational objectives, helping to connect its charitable purposes with publications, projects, partnerships and other activities. The Development Secretary also maintains a close relationship with the EFG's editorial and publishing work.
- **Conservation Secretary** — leads the development of the EFG's conservation activity, with particular emphasis on how botanic gardens, specialist collections and private growers can contribute to fern conservation. The Conservation Secretary also helps connect conservation work with the EFG's research, publications and external collaborations.

Other members and advisers may contribute according to the requirements of particular projects. The Team should draw on relevant expertise from within and beyond the EFG where this will strengthen its work.

Members of the Development Team, including the Development Secretary and the Conservation Secretary, are appointed by the Trustees. The Trustees will appoint one member of the Team to chair its meetings. A meeting of the Team is quorate when two members are present, at least one of whom is a Trustee. The Team may spend EFG funds only within a budget agreed by the Trustees, in accordance with the EFG Financial Controls and Expenses Policy.

9. Accountability, reporting and governance

The Team operates under authority delegated by the Trustees in accordance with clause 14 of the EFG Constitution. At least one member of the Team must be a charity trustee.

The Team will maintain appropriate records of its meetings, activities and decisions. Minutes will be circulated to the Trustees following each meeting, and the Team will provide a summary of its activities and progress at least annually.

Significant matters requiring Trustee consideration, including those involving expenditure outside a budget agreed by the Trustees, organisational commitments, material risks or decisions falling outside the Team's delegated authority, will be referred to the Trustees promptly and, where approval is required, before any commitment is made.

The Trustees will review the Team's remit, delegated authority and effectiveness at least once every two years, ensuring that its work continues to advance the EFG's charitable objects and remains appropriate to the organisation's needs and resources.

10. Conflicts of interest

All members of the Team must declare any actual or potential conflicts of interest arising from personal, professional, commercial or institutional relationships.

Declarations will be recorded, and appropriate arrangements made to manage any resulting conflicts. These may include withdrawal from relevant discussions or decisions, or referral of the matter to the Trustees.

Trustee members of the Team must also comply with clause 7 of the Constitution, which requires them to absent themselves from any discussion in which a conflict of interest may arise.

11. Development priorities

The Development Team will maintain a forward view of opportunities through which the EFG can increase the reach, quality and public benefit of its work.

Priorities will be shaped by the EFG's charitable objects, the direction set by the Trustees, the expertise and resources realistically available, and opportunities arising through relationships with other organisations and individuals.

The Team is not expected to pursue every opportunity it identifies. Its role includes helping the EFG make deliberate choices about where its particular strengths can have useful impact, developing opportunities sufficiently for informed decisions to be made, and ensuring that ambition remains connected to the EFG's charitable purposes and practical capacity.

12. Approval and review

These terms of reference are approved by the Trustees of the Exotic Fern Group under clause 14 of the Constitution and establish the remit and delegated responsibilities of the Team.

The Trustees may review, amend or revoke these arrangements at any time in accordance with the Constitution.

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