EFG Trips, Visits and Events Policy

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

The current version of this policy is available at https://exoticferngroup.org/values.

1. Purpose

The Exotic Fern Group (EFG) may facilitate trips and visits, and participate in shows, plant fairs and other events, where doing so furthers the charity's objects and provides public benefit.

The EFG's charitable objects are:

- to advance the education of the public in the study, cultivation, taxonomy, ecology and conservation of exotic ferns, being ferns and allied plant species of tropical, subtropical or otherwise non-native origin; and
- to promote, for the benefit of the public, the conservation, protection and improvement of the physical and natural environment through education in ethical and sustainable cultivation, propagation, ex situ conservation and documentation of exotic ferns, particularly through collaboration between members of the public and botanic gardens, public collections and other plant conservation bodies.

The EFG's trips, visits and participation in public events are therefore intended to create opportunities to learn, document and share knowledge; engage and educate the public; encourage ethical and sustainable cultivation and conservation; and develop collaboration between growers, collections, botanic gardens and conservation organisations.

Participation in these activities may also provide opportunities to raise funds for the charity. Fundraising activity is governed separately by the EFG Fundraising Policy and is not, by itself, the charitable purpose for participating in an event.

2. Public benefit and participation

The EFG is a charity established for public benefit. Its trips, visits and events are undertaken to further its charitable objects rather than principally to provide private benefits to its members.

Trips and visits will normally be open to EFG Community Members. Trips, visits and other events organised by the EFG are for people aged 18 and over, in line with the EFG Terms & Conditions and Safeguarding Statement. Community Membership is free and provides a practical means by which members of the public can participate in the EFG's activities.

Participation may be limited where necessary because of venue capacity, accessibility, safety, the nature of the site or activity, or reasonable requirements imposed by a host, landowner or venue.

The benefit of an EFG trip or visit should not, where practicable, be restricted to those taking part. Knowledge and information arising from visits should, where appropriate, be recorded and shared through EFG's publications, Pteridobase and other educational activities for wider public benefit.

3. Trips and visits

EFG trips and visits may include:

1. visits to private collections;
2. visits to public collections;
3. visits to wild sites; and
4. visits to other appropriate venues where doing so furthers the EFG's charitable objects.

Trips and visits should have an identifiable educational, conservation, recording or collaborative purpose consistent with the charity's objects.

4. Purposes in visiting collections

Visits to private and public collections may have the following purposes.

Education for visitors

- Seeing live specimens;
- Learning to recognise and understand species;
- Learning about their cultivation, taxonomy, ecology and conservation;
- Learning from the experience and expertise of collection holders.

Education and support for collection holders

- Updating collection holders on taxonomy;
- Assisting, where appropriate, with the identification of unlabelled or uncertain plants;
- Encouraging good documentation and recording.

Exchange of knowledge

- Exchanging horticultural techniques and experience;
- Sharing knowledge about propagation, cultivation and conservation;
- Developing and documenting good practice.

Recording

- Spreading the word about the importance of recording;
- Encouraging the use of Pteridobase and other appropriate records;
- Improving information about plants held in cultivation.

Collaboration

- Exploring opportunities for collaboration, including the ethical propagation and exchange of plant or spore material where appropriate;
- Developing contact and collaboration between growers, collection holders, public collections and other relevant organisations.

Any acquisition or exchange of plant or spore material must comply with applicable law, the EFG Code of Conduct and EFG's *Towards Ethical Collections* guidance.

The Code of Conduct requires compliance with applicable laws regarding the cultivation, transport and exchange of plant material and requires members to follow *Towards Ethical Collections* when acquiring, exchanging, importing or exporting plant material.

5. Purposes in visiting wild sites

Visits to wild sites may have the following purposes:

1. Learning how to recognise species in situ;
2. Learning what ecological conditions species need to grow and thrive;
3. Learning about, recording and contributing information relevant to the conservation status of species;
4. Developing understanding of threats to species and habitats;
5. Discussing observations and conservation issues with appropriate local, national and international conservation organisations; and
6. Sharing knowledge gained from the visit for wider educational and conservation benefit.

Visits to wild sites must be undertaken in a way that minimises ecological impact and safeguards biodiversity, consistent with the sustainability principles of the EFG Code of Conduct. Those principles include ethical sourcing and propagation and minimising ecological impact.

An EFG trip or visit does not in itself authorise the collection of plants, spores or other material from the wild.

Any collection or acquisition must be lawful, appropriately authorised and consistent with the EFG Code of Conduct and *Towards Ethical Collections* guidance. Anyone bringing plant or spore material back from a trip, including from overseas, is responsible for complying with plant health, CITES and import rules.

6. Shows, plant fairs and other public events

The EFG may attend or participate in shows, plant fairs, exhibitions and other public events where doing so provides an appropriate opportunity to further the charity's objects and provide public benefit.

Purposes may include:

1. **Public education** – providing information and advice about exotic ferns, including their identification, cultivation, taxonomy, ecology and conservation;
2. **Ethical and sustainable cultivation** – promoting responsible cultivation, propagation and sourcing of exotic ferns and raising awareness of EFG's Towards Ethical Collections guidance;
3. **Conservation** – increasing public understanding of fern conservation and the value of well-documented ex situ collections;
4. **Recording and documentation** – encouraging appropriate recording of cultivated plants and promoting resources including Pteridobase;
5. **Engagement and participation** – introducing members of the public to the EFG's educational resources and activities and encouraging participation through free Community Membership;
6. **Sharing knowledge** – enabling EFG volunteers, growers and specialists to exchange horticultural and scientific knowledge with the public and other organisations;
7. **Collaboration** – developing relationships with botanic gardens, horticultural organisations, conservation bodies, growers and others whose activities are relevant to the EFG's objects; and
8. **Fundraising** – where appropriate, raising funds to support EFG's charitable activities in accordance with the EFG Fundraising Policy.

The EFG's participation in an event should be proportionate to the expected charitable benefit, taking account of the nature of the event, the audience likely to be reached and the resources required from the charity.

7. General purposes

Across its trips, visits and participation in events, the EFG aims to:

1. Advance public education about exotic ferns;
2. Develop contact and collaboration between members of the public, Community Members, growers, collection holders, botanic gardens, public collections and conservation organisations;
3. Facilitate the exchange of horticultural, scientific and conservation knowledge;
4. Improve knowledge and documentation of exotic ferns in cultivation and in the wild;
5. Encourage ethical, sustainable and effective cultivation, propagation and conservation;
6. Encourage recording and the sharing of information;

7. Increase awareness of the EFG's educational resources and activities; and
8. Make knowledge gained through EFG activities available, where appropriate, for wider public benefit.

8. Role of EFG

Depending on the nature of a particular activity, the EFG may:

1. Supply participants or volunteers with logistical and background information relevant to the activity;
2. Create introductions necessary for a trip or visit;
3. Liaise with collection holders, landowners, institutions, event organisers or other organisations;
4. Identify an appropriate person to coordinate or lead an activity;
5. Provide approved educational and promotional materials;
6. Encourage the recording of observations and information arising from the activity;
7. Promote EFG's educational resources, including Pteridobase;
8. Facilitate appropriate collaboration with other individuals and organisations; and
9. Summarise and publish an account of a trip, visit or event and the species, cultivation practices, conservation matters and other relevant subjects seen or discussed.

Publication must take appropriate account of privacy, the wishes of hosts and collection holders, and the need to protect sensitive information about species, collections or locations.

Personal information, photographs and recordings must be handled in accordance with the EFG Data Privacy Policy, the EFG Social Media, Digital Communications and Artificial Intelligence Policy and, where applicable, the EFG Terms & Conditions.

9. Approval and use of the EFG name

The EFG name, identity, logo or other branding may only be used to promote or identify a trip, visit, stand, exhibition or other event as an EFG activity with the prior agreement of the Trustees or under arrangements expressly authorised by them.

This reflects the Trustees' responsibility under the Constitution to manage the affairs of the charity and to exercise its powers in the way they decide in good faith would be most likely to further its purposes.

Approval should be proportionate to the nature of the proposed activity. In deciding whether an activity should take place or the EFG should be represented, the Trustees or those acting under their authority should consider whether the proposed activity:

- furthers one or more of the EFG's charitable objects and provides identifiable public benefit;
- is consistent with the EFG's values, Code of Conduct and other relevant policies and guidance;
- presents any significant health and safety, safeguarding, ethical, conservation, financial or reputational concerns; and
- makes reasonable and proportionate use of the charity's resources.

Where the Trustees formally delegate functions, the terms of that delegation must be determined and reviewed in accordance with the Constitution.

Community Members remain free to arrange or participate in trips, visits and events in their personal capacity. Such activities must not be represented as being organised, sponsored or endorsed by EFG unless the appropriate approval has been given.

10. Conduct

Everyone representing the EFG or participating in an EFG trip, visit or event is expected to comply with the EFG Code of Conduct and other EFG policies and guidance relevant to the activity.

The Code of Conduct applies to EFG Trustees, volunteers and Community Members and governs interactions among members and with the public when representing or taking part in EFG activities. It expressly applies to EFG-hosted events and events at which the EFG exhibits or is represented.

Participants and volunteers must also respect and comply with the reasonable requirements of hosts, landowners, collection holders, venues and event organisers.

Where volunteers are representing the EFG to the public, they should act in a way consistent with the EFG's charitable purposes and values and should take reasonable care to distinguish personal views or activities from those of the charity.

11. Health, safety and safeguarding

Appropriate consideration must be given to health, safety and safeguarding when planning and undertaking EFG activities.

The EFG Code of Conduct requires members to be familiar with health and safety policies applicable to events organised on behalf of EFG and with the policies of venues where such events are hosted. It also requires accidents and emergencies to be dealt with appropriately and incidents to be reported to the Trustees.

The safeguarding provisions of the Code of Conduct and the EFG Safeguarding Statement apply to all EFG trips, visits and events. The EFG's own activities are for adults, but some participants may be adults at risk, and at public shows and plant fairs members may meet children accompanied by a parent or guardian. The Safeguarding Statement sets out how members should conduct themselves in these situations and how concerns must be reported to the Trustees.

The level of planning and any risk assessment should be proportionate to the nature of the activity. Where a risk assessment is needed, the EFG Risk Assessment Form should be used. Exhibitors and vendors should complete the EFG Exhibitor and Vendor Form where the EFG requires it.

Where an activity is an event organised or promoted by the EFG, the EFG Terms & Conditions also apply to attendance and conduct at that event.

Together with the requirements of any venue or event organiser, this policy forms the health and safety arrangements for EFG events referred to in the Code of Conduct.

12. Costs and expenses

Unless a cost falls within a budget agreed by the Trustees for that activity, individuals participating in EFG trips, visits, shows, plant fairs or other events are responsible for their own expenses, including transport, accommodation, food and other personal costs. Participants are responsible for arranging their own travel insurance where appropriate.

The EFG holds insurance for its activities. Before an activity is advertised, the Trustees will check that it falls within the EFG's cover, or will arrange additional cover or terms where needed.

EFG may, at the charity's expense, provide approved promotional and educational materials for an authorised EFG activity and may meet other costs where the Trustees consider this appropriate and in furtherance of the EFG's charitable objects.

EFG expenditure and the reimbursement of any expenses are governed by the EFG Financial Controls and Expenses Policy.

13. Fundraising and plant sales

Where fundraising, including the sale of plants or other items, takes place as part of an EFG presence at a show, plant fair or other event, it must be conducted in accordance with the EFG Fundraising Policy.

The possibility of raising funds does not remove the requirement for the EFG's participation in an event to further its charitable purposes and provide public benefit.

Any plant material offered in association with EFG must comply with the ethical, sustainability and legal requirements of the EFG Code of Conduct and relevant EFG guidance.

14. Recording and public benefit

Where appropriate to the nature of an activity, the EFG should seek to record its educational and charitable outcomes.

This need not be burdensome. Depending on the activity, it may include:

- an account or photographs of a trip or visit;
- records of species seen or discussed;
- information added to Pteridobase;
- cultivation, taxonomic or conservation information shared with the wider community;
- an article or other educational material arising from the activity;
- a brief record of the EFG's participation in a public event; or
- other evidence of educational engagement, collaboration or conservation benefit.

Recording these outcomes helps the EFG demonstrate that its activities further its charitable objects and provide public benefit.

Information should not be published where doing so would unreasonably compromise personal privacy, the confidentiality of a private collection, or the conservation or security of sensitive plants or wild populations.

The collection, use and publication of personal information, photographs and recordings must be consistent with the EFG Data Privacy Policy, the EFG Social Media, Digital Communications and Artificial Intelligence Policy and, where applicable, the EFG Terms & Conditions.

15. Relationship with other EFG policies and terms

This policy should be read alongside the current versions, where relevant, of:

- the EFG Constitution;
- the EFG Code of Conduct;
- Towards Ethical Collections;
- the EFG Fundraising Policy;
- the EFG Financial Controls and Expenses Policy;
- the EFG Terms & Conditions;
- the EFG Data Privacy Policy; and
- any other policy or guidance adopted by the Trustees relevant to a particular activity.

EFG-organised or promoted events, and the collection and use of personal information in connection with the EFG activities, are also subject to the EFG Terms & Conditions and Data Privacy Policy as applicable.

In the event of any inconsistency, the Constitution takes precedence.

The Trustees have constitutional power to make reasonable and proper rules or byelaws for the proper conduct and management of the CIO, provided these are not inconsistent with the Constitution.

16. Approval and review

The Trustees will review the policy at least once every two years, and when there is a significant change to EFG's activities, governance documents or other relevant policies, or following an incident that indicates that the policy should be reconsidered.

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