Terms of Reference:
Pteridobase Curation 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 Pteridobase Curation Team

The Pteridobase Curation Team is responsible for the evidence-based curation of the EFG Extension to the Pteridobase taxonomic backbone: the cultivars, cultivar groups, trade designations, horticultural names and misapplied names that the EFG maintains alongside the World Ferns backbone. Pteridobase identifies these records as EFG-curated.

Its purpose is to ensure that cultivars and other horticultural information associated with Pteridobase are consistently represented, appropriately evidenced and clearly documented. The Team reviews cultivars and other names contributed by Pteridobase users, and decides whether each is accepted into the EFG-curated treatment, merged with an existing record or left unverified.

The Team's role is primarily curatorial rather than taxonomic. It does not seek to establish a parallel taxonomy for ferns, but to determine how horticultural information should be represented within the taxonomic framework adopted by Pteridobase.

2. Scope of curation

The Team's remit encompasses cultivars and horticultural names, including trade designations, patents and trademarks, as well as names that are misapplied or otherwise used incorrectly in the horticultural trade.

Pteridobase covers all ferns and allied species. Whether a fern is exotic depends on where it is grown: a species native to one country is of non-native origin in another, and the EFG's community of growers and institutions is worldwide. The Team's remit therefore extends to cultivars and horticultural names of any fern or allied species, in furtherance of the EFG's objects.

Its deliberations may include:

- **orthographical matters** — concerning the spelling, form or presentation of names and epithets;
- **nomenclatural matters** — concerning the establishment, status, precedence and accepted application of names under the relevant nomenclatural codes, such as the International Code of Nomenclature for Cultivated Plants (ICNCP) and, where relevant, the International Code of Nomenclature for algae, fungi, and plants (ICN);
- **cultivar identity and record reconciliation** — concerning whether differently named or recorded plants represent the same cultivar, and the consequent reconciliation or synonymisation of Pteridobase records;
- **trade and documentary matters** — concerning the relationship between accepted cultivar names and trade designations, trademarks, patents, plant breeders' rights and other identifiers used in horticultural commerce; and
- **misapplication and identification issues** — concerning names that have become attached to the wrong plant, or cases where the identity represented by a horticultural or trade name requires clarification.

The Team is not intended to determine questions of species taxonomy. Where such questions affect the treatment of cultivated plants, the Team may document the issue and its implications for the EFG Extension without seeking to resolve the underlying taxonomic question itself.

Information recorded about trade designations, trademarks, patents and plant breeders' rights is provided for convenience. It is not a legal determination of whether any right exists, is in force or has been infringed. Pteridobase and other EFG resources must always advise users to check the relevant primary source. The Team's treatments do not confer legal protection on any name or plant.

3. Deliberations and evidence

The Team will publish a compendium of its deliberations twice yearly, in spring (31 March) and autumn (30 September).

The compendium will record changes to the canonical treatment of cultivars and horticultural names arising from the Team's deliberations. These may include orthographical and nomenclatural changes, the synonymisation or reconciliation of cultivar records, correction of misapplied names, and changes concerning trade designations or associated intellectual-property information.

Each deliberation should record, as appropriate, the evidence on which the Team's conclusions are based. This may include original descriptions and publications, bibliographic references, photographs, catalogues, herbarium or collection evidence, patent or plant-variety-rights documentation, trade literature and other relevant sources.

Conclusions are not intended to be immutable. Treatments should be reconsidered where new evidence, authoritative registration data or improved documentation materially affects an earlier decision.

4. Relationship to the Pteridobase taxonomic backbone

The Pteridobase taxonomic backbone is aligned with World Ferns (Hassler), the specialist checklist of ferns and lycophytes, and with the systematic framework developed through the work of the Pteridophyte Phylogeny Group (PPG) and subsequent taxonomic research reflected in that checklist.

The EFG Extension extends this framework into the cultivated and horticultural sphere; it does not establish a competing species taxonomy. The work of the Curation Team therefore begins with the taxonomic treatment provided by the Pteridobase backbone.

Where changes to the backbone alter the taxonomic context of a record within the EFG Extension, the Team will review the associated horticultural treatment where necessary so that the extension remains aligned with its underlying backbone.

Where the Team encounters evidence that may be relevant to the underlying species taxonomy, that evidence may be recorded or referred to an appropriate specialist, but alteration of the underlying taxonomic treatment falls outside the Team's remit.

5. Relationship with cultivar registration authorities

The Pteridobase Curation Team does not seek to displace, duplicate or undermine the work of any existing or future International Cultivar Registration Authority (ICRA) or other recognised cultivar registration body. Where a recognised registration authority covers a genus or group, the Team will follow and reference its register rather than create a parallel treatment.

At present, there is little formal registration coverage for the breadth of fern cultivars represented within the EFG Extension. The Team therefore brings together information from published, historical, horticultural, commercial and other documentary sources in order to provide a coherent treatment where comprehensive authoritative registration data are unavailable.

Where authoritative registration data exist or subsequently become available, they should be incorporated and referenced within Pteridobase. Such information may result in existing treatments within the EFG Extension or previous deliberations being reviewed and revised.

Pteridobase is designed to provide an environment in which structured cultivar-registration data can be maintained, linked to the underlying taxonomic backbone, supported by

appropriate evidence and made accessible to users. It may therefore provide useful infrastructure for an existing or future registration authority.

Becoming or establishing a formal cultivar registration authority is not a current objective of the Curation Team. This is not ruled out as a future development, but would require separate consideration of need, resources, expertise and existing registration arrangements.

6. Development of the EFG Extension

The Team's immediate priorities are:

1. Data development and documentation

Develop the breadth and quality of the EFG Extension by consolidating published cultivar data, establishment references, historical records, patent and plant-variety-rights information, trade designations and other relevant documentation.

2. Specialist review

Undertake detailed reviews of particular genera, cultivar groups or other defined areas where the available evidence warrants closer examination.

Such reviews may seek to resolve questions of cultivar identity and synonymy, clarify relationships between accepted cultivar names and names used in commerce, document historical and contemporary usage, and resolve conflicting or uncertain records.

Results should be incorporated into the EFG Extension and documented through the Team's published deliberations where appropriate.

3. Consolidation

Develop the EFG Extension as a durable, evidence-based resource for fern cultivar information, capable of accommodating authoritative registration data and supporting future registration activity should a need for this arise.

The emphasis remains on broad curation rather than on actively pursuing registration-authority status.

7. Relationship with the EFG Development Team

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

The Curation Team is responsible for the evidence, documentation and consistent treatment of horticultural information within the EFG Extension.

The Development Team considers how Pteridobase and the knowledge generated through its curation can contribute to the EFG's wider charitable purposes, including education, conservation, research, publication and external collaboration.

Work in either team may give rise to matters relevant to the other. A Curation Team deliberation may identify material suitable for research or publication, a conservation issue, or an opportunity for collaboration with an institution or specialist. Conversely, work initiated through the Development Team may generate evidence, publications, relationships or datasets relevant to the EFG Extension.

The 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. Matters principally concerning the treatment of information within the EFG Extension fall to the Curation Team; matters concerning the wider development and application of that work in furtherance of the EFG's charitable purposes fall to the Development Team.

8. Curatorial principles

The Team's work should be guided by the following principles:

- **evidence** — treatments should be supported by the best information reasonably available;
- **traceability** — significant decisions should be documented so that their basis can subsequently be understood and reviewed;
- **consistency** — comparable cases should, so far as possible, be treated consistently across the EFG Extension;
- **proportionality** — the level of investigation should reflect the significance and complexity of the issue;
- **openness to revision** — treatments should change when better evidence justifies doing so; and
- **collaboration** — the Team should draw on specialist knowledge and authoritative external sources rather than attempting to reproduce expertise that already exists elsewhere.

Through these principles, the Curation Team provides a transparent and reviewable basis for the horticultural extension of Pteridobase while respecting the boundaries between curation, species taxonomy, formal cultivar registration and the wider charitable development of the EFG.

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.

Members of the Curation Team 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.

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.

Charity trustees remain subject to the specific requirements of clause 7 of the EFG Constitution. All Team members are expected to comply with the EFG Code of Conduct.

The Team will maintain appropriate records of declared conflicts and how they have been managed.

11. 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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