



Collection Coordinator's Handbook

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Frequently used acronyms

CITES: Convention in the Trade of Endangered Species

CH or NCH: (National) Collection Holder

CO: Central Office

NC or NPC: National (Plant) Collection

PCC: Plant Conservation Committee

PCO: Plant Conservation Officer

PG: Plant Guardians

TPP: Threatened Plants Programme

Introduction

Welcome to the Collections Coordinator Handbook. If there is anything that needs more explanation, please ask your regional coordinator, or the conservation team at central office. The general conservation email is collections@plantheritage.org.uk or the office phone is **01483 447540**.

Website— www.plantheritage.org.uk

Additional resources such as copies of the application form, and templates for visit reports etc. are available from the website, under [Coordinator Resources](#)

Please also familiarise yourself with the [Collection Holder's resources](#) section of the website, including the Collection Holder's Handbook.

Social media: we are on: Facebook @OurPlantHeritage, Twitter @PlantHeritage and Instagram @PlantHeritage

There is a private [Collection Holders Facebook group](#) which you are welcome to join

1. The role of the Collections Coordinator

1.1 Appointment

Coordinators are appointed by their local group, or by central office if no group or if support is requested by the group. Coordinators need to be members of Plant Heritage as this gives you insurance cover when visiting sites.

The coordinator is accountable to central office (CO) and to the Plant Conservation Committee (PCC) and report to their local group. Coordinators should attend local group committee meetings, to ensure good communication between the group and the National Collection Holders (NCHs) in their area. There is no maximum term for the role.

They are the first point of communication, in many cases, between the Collection Holder and Plant Heritage. Contact details of coordinators (name, phone number and/or email address) are made available on Plant Heritage website and in the annual National Collections Directory.

1.2 Responsibilities

- Advising people who are interested in applying for a National Plant Collection (NPC) and guiding them through the application process ([section 3](#))
- Promoting and supporting use of electronic plant records ([section 5.3](#), [appendix ii](#))
- Monitoring of National Collections by regular (biennial) visits and communication ([section 7](#))
- Encouraging good communication between Collection Holders, the group and central office
- Providing information on all Collections in their area to the Plant Conservation Officer (PCO), their regional coordinator and the PCC when required
- Attending meetings as required
- Promoting the Threatened Plants Programme, Plant Exchange and Plant Guardians scheme ([section 8](#))

1.3 Tasks

- Advising enquirers on NPC requirements ([see also Collection Holder's Handbook](#))
- Making visits to assess potential collections or monitor existing ones (every 2 years at least) ([section 7.2](#) and see [FAQ](#))
- Ensuring that paperwork related to applications or existing NCs (for example annual reports or plant lists) are completed ([section 3](#))
- Writing short reports to central office on your visits
- Arranging an annual meeting for NCH in your area, if possible ([section 7.3](#))
- Providing a short report on NCs in your area to the regional coordinator every 6 months (before the June and December PCC meetings)
- Attending a yearly regional collections coordinator meeting ([section 7.4](#))
- Informing NCHs regarding conservation projects such as the TPP or Plant Guardians
- Keep an eye out for potential new collections ([section 2.3](#))

1.4 Expenses

Expenses are offered for travel to visit collections, overnight stays (by prior agreement), room hire and limited catering for collection holder meetings and stationery and postage. For full details of what can be claimed for, please see the Volunteer Agreement.

1.5 Managing the workload

If you are having difficulties visiting your collections or staying in touch with Collection Holders and central office, please let the office or PCO know so that we can try to help you. There are several options that can be considered such as:

- splitting your responsibilities geographically with one or more coordinator(s) – this can be useful if the Collections you are responsible for are spread over a large area
- splitting your collections by type with one or more coordinator(s) – for example you could decide to remain the point of contact for applicants and for all matters related to the PCC, but have regular visits undertaken by “assistant” coordinators
- asking your regional coordinator, a coordinator in a nearby area or Central office to help by visiting collections or organising a NCH meeting.

2. The National Plant Collection scheme

Please also refer to the Collection Holders handbook for more details on managing a National Plant Collection

2.1 Types of Collection

There are two types of collections registered in the scheme:

- National Plant Collection: most commonly held in one site by one Collection Holder (can be an individual, an organisation, a nursery or private garden etc.)
- Dispersed National Plant Collection: held at more than one site, by several members.

For dispersed National Collections, one person will manage and be the point of contact for the different people/sites and communicate with Plant Heritage, for example for annual reports. Members of the dispersed collection can decide whether they wish for their details to be public or private.

Applications can be made for dispersed collections on the normal forms

2.2 Status of Collection

Applicant – prior to being awarded status by the Plant Conservation Committee, a collection cannot be referred to as a National Plant Collection (although some applicants may choose to advertise that they are “in the process of applying” for NC status).

Full - awarded National Collection status – this Collection meets all the requirements of the scheme and has been awarded Full status by the Plant Conservation Committee

Provisional (P) – awarded National Collection status - this represents a collection that is worthy of Full status but the plants are a young; or for an existing Collection that is a under par and is working to regain Full status (eg. a collection which has suffered recent plant losses).

Transitional (T) – normally indicates a National Collection that has moved recently and is therefore not currently meeting required curatorial standards.

Withdrawn – a Collection that is no longer in the scheme.

Scientific National Plant Collection—applications for Scientific NCs are made on a specific form. When a NCH indicates that they would like to apply for scientific status, they will be attributed a mentor (can be a member of the PCC or an external expert) who will help them through the process.

2.3 Recruitment of new collections

Enquiries for new collections can come directly to us at central office or straight to you as coordinator. If we receive an enquiry we will acknowledge it and inform you so that you can follow it up. We encourage you to do the same by letting us know when you have been discussing with a potential applicant.

We encourage the active recruitment of new collections. Places to reach out to potential new collection holders could be through garden visits, displays at shows, talks to gardening clubs and specialist societies. We even have schools and community groups getting involved. Person to person contact is often the best place to start though.

The advantages of having a NPC include:

- being recognized for expertise in a group of plants as part of a well-connected network of horticulturalists
- being part of a structured conservation programme for plants
- access to a support network, both practical and technical
- added ‘plant interest’ for visitors to a garden or nursery

2.4 Group support for National Collections

Central office is committed to helping Collection Holders throughout the life of their collection. However, it is also important for Collection Holders to feel valued at local level. There are several ways that groups can help:

- practical support, for example help with weeding
- offering NCHs slots to talk at local group meetings
- providing a platform for NCHs to write or advertise their collection, for example in group newsletters

- establishing contact with local newspapers
 - allowing NCH to put up displays at shows, or offering them free sales tables at plant fairs
- A local group can also offer financial support to Collection Holders, following a set of guidelines (please contact the office for an up-to-date copy). Funding can be given for purchase of plant material, emergencies related to the collection, specific projects or research. It should not be given for routine purchases (e.g. compost, pots), computing equipment or for membership subscriptions. A [range of grants](#) are available to Collection Holders - see the website for links

2.5 Recognition for Collection Holders

The Brickell Award is given in recognition of ‘excellence in cultivated plant conservation’ undertaken by Collection Holders. It is named after Chris Brickell, a founding member of the National Council for the Conservation of Plants and Gardens (NCCPG, now Plant Heritage) and currently a Vice President. Any collection should be of scientific status or demonstrated to be of an equivalent standard in terms of its completeness within scope, the standards of curation and record keeping and is well established as appropriate to the type of plant collection.

The key criteria considered by the awarding committee are:

- Contribution to our understanding of a plant group through research undertaken and communicated through published works with emphasis given to books, research papers and definitive articles
- Conservation work undertaken that has secured plants in cultivation or through the rediscovery of lost cultivars or taxa
- A significant educational role utilising the collection
- Contributions made to the wider work of Plant Heritage
- Contribution to horticulture including work undertaken with other organisations, through advice given and provision of plant material

Group chairs and coordinators are invited to nominate their chosen Collection Holder in spring. We ask that you submit a short citation (max two sides A4) that highlights the key achievements of the nominee. The award is presented to the successful Collection Holder at the Press Day of Hampton Court Garden Festival.

3. The application process

The first contact may be made to the coordinator, a group member or to central office. In all cases the first paperwork that the prospective applicant will be sent will be the proposal form and information sheet (available from the [Coordinator Resources](#) area of the Plant Heritage website)

3.1 The proposal can be made before any plants are owned or planted and is intended to set out the direction the proposed collection will take. For example, a person can approach a coordinator with an idea for a collection of *Quercus* for which they have a plan but only a few plants. This is designed to place the research work up front, before the expenditure on plants and the record keeping starts. The applicant will need to do quite a bit of work to clarify what they want to do, and to be able to explain that to you, PCO and the Plant Conservation Committee. It is hoped that this ensures applicants will be helped by feedback and recommendations from PCC and that they won't build up big collections only to be disappointed when they don't meet the criteria at the application stage.

The proposal form can be used for a National Collection, Scientific Collection or Dispersed Collection.

The applicant will use the proposal form to detail the scope, category and contact details. The complete proposal is made up of the proposal form and an initial plant list (see 3.4).

3.2 Collection Scope (title)

The scope of the Collection describes what is (or is intended to be) in the Collection. It needs to be exact and well-thought through. If you need some help with working this out, do please contact central office.

3.3 Collection Category

Collections are placed in three categories, depending on the aims the NCH hopes to achieve:

- **Historic:** a collection of plants that have been grown in British & Irish gardens which have a connection defined by a common history or association, or importance to society
- **Horticultural:** a collection of garden plants of aesthetic or functional value
- **Reference:** a taxonomic representation of a group with importance for both taxonomic reference and research

A collection may appear to fit in more than one category. For example, a collection of old apple cultivars could fit under the Historic category (conserving the breeding heritage of a certain period), or the Horticultural category (conserving varieties which were selected or bred in a particular area and are locally adapted).

If you need some help deciding, try working through the questions below.

1. Is the collection primarily species? If yes, go to 2. If no, go to 4.
2. Is the accession policy to acquire a substantial representation of plants in a genus, or section (or other taxonomic category)? If yes go to 3. If no go to 9
3. The collection is probably a reference collection.
4. Is the collection species and cultivars? If yes go to 2. If no go to 5.
5. Is the collection based on a breeder, collector, house/ area or period of time? If yes go to 6. If no go to 7.
6. The collection is probably a historic collection.
7. Is the accession policy to acquire a broad range of any of the following:
 - cultivars of a particular genus, species, section or group.
 - related cultivars from a geographic area, such as Essex apple cultivars.
 - plants in a horticultural category, such as dwarf Hosta
 If yes go to 8. If no go to 9.
8. The collection is probably a horticultural collection.
9. The plants may be better suited to our Plant Guardian® scheme.

3.4 The plant (accession) list

The plant list shows what plants the applicant already has (if anything) to form the potential Collection. It also demonstrates the research that they have done towards the making the proposal.

The list should show the full correct name of the plant, preferably arranged in alphabetical order for ease of reference. Dates acquired are recommended at proposal stage, to assist PCC in their recommendations.

At the proposal stage the plant list does not need accession numbers or sources, but these are a requirement at the application stage, so the applicant should be encouraged to record this information

from the start.

It should show all the plants that are currently in the collection, and all the plants that would, in the applicant's mind, constitute an ideal collection. There is no set format to follow, but the list could show:

- Column One: Plants owned
- Column Two: Plants that can be acquired but are not yet in the collection
- Column Three: Plants that are not available but would fit the scope

Therefore, the applicant needs to have done enough research to find out what is on the market and available to them from other sources. We would expect them to have covered most obvious areas of research to complete their lists, eg. RHS Plant Finder

At this point in the application process it does not matter if the applicant has no plants at all; what matters is that they are able to demonstrate what they think would constitute 100% of their scope in an ideal world, and which of those plants they realistically think they can obtain.

If the proposal is approved they could then spend several years collecting the plants before making a full application, but they can do so with the help and advice of the PCC, coordinators and the PCO.

3.5 Threatened Plants Programme (TPP) report

If the collection contains cultivars, the PCC may request a TPP report, which on completion is copied to the applicant, coordinator and regional coordinator. This (as of 2017) includes the following information:

- How many known threatened cultivars there are in the scope
- Which known threatened cultivars are included in the collection as proposed
- Which of these are uniquely held by the applicant
- Additional cultivar names which appear to be within the scope and if they may be threatened
- Relevant references used and additional information obtained from those
- Various conservation actions are recommended, for example where we know a current location for a missing threatened cultivar which may be able to be obtained for a new Collection
- Discrepancies in names are highlighted

TPP reports can be requested by PCC for withdrawn collections, to help assess cultivars of rarity in order to encourage their continued conservation.

3.6 Legislation: CITES and plant imports

You should be aware of current plant legislation relating to plant collecting and movement of plant material. Please see the website for details in the [conservation and cultivation advice](#) section.

If you receive a proposal for a collection containing the plant groups listed below, please contact us as there may be implications in terms of legislation (particularly with CITES, the Convention on International Trade in Endangered Species):

Bromeliads	Bulbs	Cacti
Carnivorous plants	Cycads	Cyclamen
Medicinal plants	Orchids	Succulents
Tree ferns		

3.7 The Plant Conservation Committee

An independent committee, chaired by and made up of professional horticulturalists, nurserymen and plantsmen, the remit of PCC is to assess and award National Plant Collection status.

The proposal form and plant list are sent to the Plant Conservation Committee for assessment and approval. The PCC meets 4 times a year (2 teleconferences, 2 in person), and is able to make decisions in most cases without reference to outside opinion.

The responses and comments from individual members of the PCC are collated and are designed to offer encouragement and advice to applicants. If the proposal and plant list require additional research or amendment in some way this will be stated here. If there are plants or groups of plants that the PCC feel could be usefully added to the collection, they will be included. They may suggest that the applicant gets in touch with a Collection Holder, former CH or expert in the field to verify their plants or share material. This information should be taken with the TPP report (if done) as help for the applicant to make their collection suitable for National Plant Collection status.

They will recommend one or several possible courses of action:

- The applicant should make a full application
- The applicant should make few changes or needs additional work and/or plants before making a full application.
- They should make more radical changes or research and return to the PCC with a revised proposal.

3.8 Application

A full application is made up of the application form, accessioned plant list and coordinator review.

The application form is designed to provide as much information to the Plant Conservation Committee as possible. As they will never see the potential Collection this information is what they will base their decision on, so the form should be filled in as comprehensively as possible. If you need to know why a specific question has been included, contact the PCO to ask.

3.8 Accessioned plant list

The accession list is essential for all collections. It demonstrates that the applicant is organised, meticulous, spells correctly the names of their plants, and is up to date on taxonomy, nomenclature and orthography. If a collection holder is likely to have any difficulties with this, for example through dyslexia, please get in touch and we can provide extra support.

The plant list should include as a minimum: accession number, full and correct name of plant, date acquired, source of plant and if there is wild sourced material, a collectors number.

You need to bear in mind that the PCC use it to decide:

- if there are enough plants
- if the plants are named correctly
- the age of the plants
- whether they come from a range of sources or just one
- if there are enough back-up plants
- if they are geographically or genetically diverse

We recommend that new collection holders who are not already using a horticulture database (such as IrisBG or BG-BASE) put their records onto Persephone, which can help with getting nomenclature and orthography correct. See [appendix II](#).

More information on accession numbers, plant lists and databases is on the website—[collection holder resources](#).

3.9 The coordinator statement (applications)

As the coordinator, you need to act as the eyes and ears of the PCC and provide them with the information on the application that they might reasonably want to know. The aim of the visit is to verify the information provided by the applicant on their form and assess whether or not the collection fits the standards of the scheme.

The form has been redesigned to help remind you of some of the information you could include, but can you think of other things that you might usefully check and record to help the committee consider the collection. What would you want to know if you were in their position?

3.10 Submitting the application

The full application (form + accession list + coordinator review report) is then referred to the Plant Conservation Committee for their approval. They will make one of the following decisions:

- Full status National Plant Collection
- Provisional status National Plant Collection
- Requesting further research or information from the applicant before making a decision.

3.11 New Collection Holder

After the PCC meeting a letter will be sent to the applicant, explaining the decision made by the Committee. As coordinator you will receive a copy.

A new Collection Holder will receive the following:

- Signboard (A3 or A4)
- Certificate
- Annual report form (electronic)
- Contact/visitor information/publicity form
- Electronic copies of logos to use in their own publicity material

4. Changes to National Collections

4.1 Withdrawal of a Collection

Withdrawal of a collection may be requested for various reasons: ill health, death, financial problems, moving, loss of interest, pests or diseases.

The coordinator or Collection Holder should notify central office as early as possible. The Collection will be removed from the website and scheduled for withdrawal at the next meeting of the PCC. A TPP report may be prepared if requested by PCC and forwarded to the coordinator (and Collection Holder if appropriate), highlighting the plants in the Collection that are most important to conserve. If succession has been effectively planned, central office will be able to advise on how to proceed (see 6. Succession below).

4.2 Change of Collection Holder and/or change of site

If a new Collection Holder takes on a Collection which is staying on the same site, the PCC needs to be informed of the change of collection holder.

If a Collection moves location with the original Collection Holder, its status will change to transitional until the Collection is established at the new location. The time taken for this will depend on the collection. To return the Collection to full status, a current accessioned plant list and coordinator report will be needed.

If a collection is relocated to a new collection holder **who already holds a NPC**, this would move into transitional status; a new application is not necessarily required. To return the Collection to full status, a current accessioned plant list and coordinator visit report will be needed. If the scope and content of the collection are changing as part of the transfer, we will request more information. Depending on the scale of the change, we may ask the new holder to reapply, in order to provide more background on the change

If a collection moves in its entirety to a new site with a new collection holder **who does not already holds a NPC**, this would require a new application to be made to ensure that the new collection holder is familiar with all the requirements of holding a NPC.

If a collection is duplicated and passed on to a new collection holder, that would require a new application to be made.

4.3 Change from Full to Provisional status

This may be necessary if the Collection is a little below par, for example due to plant losses. If you feel that a collection is not fulfilling the requirements of NPC status, let us know, and we can work with you and the collection holder to produce a set of actions and a timeline required to bring the collection back to full status from provisional.

4.4 Change from Provisional to Full status

This may be required if the Collection was made provisional due to age and establishment of the plants, or if a Collection previously with full status was placed temporarily in provisional status. A current accessioned plant list and coordinator report will be needed

4.5 Application for Scientific Collection status

An intention to apply for Scientific Status should be passed to central office; they will then arrange for a mentor to be appointed by the Plant Conservation Committee. They will help the applicant through the process. Scientific status primarily recognises research by the applicant and it can take several years to achieve the level required, this is why guidance is offered.

5. Collection topics

Please see the Plant Heritage website under [resources for Collection Holders](#) and [conservation and cultivation advice](#) for more detailed and up-to-date look at some of the subjects in this chapter.

5.1 Nomenclature and orthography (or naming and writing)

The correct naming of plants in a collection is imperative; there is no point in applying for a National Plant Collection if the applicant feels otherwise.

Please make sure that the full name is shown and that it is spelt correctly - italics, single quote marks etc should all be used in the right place. If you are uncertain, there is a helpful guide on the Hortax website (<http://www.hortax.org.uk>), or conservation staff in the office are always happy to help.

The nomenclature in a plant list should be in the same form as that of the RHS Horticultural Database or for species, Plants of the World Online (Kew), or other relevant and appropriate publication (referenced on the application form).

5.2 Plant health and quarantine

Many National Plant Collections are effectively monocultures (many of the same plant in one place) and as such are likely to be devastated by a pest or disease outbreak. Add to this the requirement for the Collection to be open to visitors, and to offer plant material and the potential for spreading pests and diseases is high. We therefore expect that all potential and existing National Collection Holders will maintain good standards of hygiene, have a system of quarantine for new plants, and stay up to date on information about new problems.

Further information on all these issues can be obtained from central office or the [PH website](#).

5.3 Plant records

Collection records are held in various ways: computer database, excel spreadsheet, record books. However, Collection Holders should be encouraged to use an electronic format for recording (other methods can always be there as well). Plant Heritage has a free to use system designed specifically for Collection Holders: Persephone.

Coordinators can get read only access to records on Persephone for collections in their area. Please contact persephone@plantheritage.org.uk to get set up. If you are comfortable with plant lists and databases, coordinators can also be a local point of support for collection holders wanting to use Persephone and we can provide you with training for this—please let us know. Another system, Demeter, is still in use, but no longer open to new users.

Please go to [Appendix ii](#) for contacts, information and details about Persephone

There are several other plant recording systems that you will come across, which include:
 IrisBG , used by private and public gardens and botanic gardens, inc: National Trust, English Heritage, Royal household and Gardens (Saville, Highgrove etc.)
 BGbase - principally used by botanic gardens and institutes inc. RBGE, Hillier Gardens
 Brahms: - Oxford University & Botanic Gardens

Some collection holders use their main system and Persephone (additionally) for their National Collections

We also welcome mapping of collections by Collection Holders, particularly in the case of trees. These can be computer generated in Persephone, via GPS data, sketched or based on aerial photographs.

5.4 Labelling

Different forms of labelling can be used for National Collections, which will have to be adapted to the plant type, for example: plastic T-labels for perennials, tied-on metal engraved labels for trees, buried labels for bulbs in pots... please [see the website](#) or contact the conservation team for more information.



Engraved plant label

6. Succession and passing on a National Collection

A National Plant Collection conserves plants for the future. An important part of this is to ensure from the beginning, that there is a plan for passing on the Collection to the next Collection Holder before it becomes difficult for the current one to look after it. There are several options, but all require planning and work on the part of the Collection Holder and coordinator.

- Create a duplicate Collection held by another person with the intention of them applying for National Collection status
- Agree with a large institution such as a botanic garden, that they will take on the Collection (including records and research) when needed. It is important to agree this at institutional level, or the future development of the Collection may not be a priority within the garden
- Arrange for the Collection to be dispersed within a specialist society. This will need forward planning and written agreement from the people in question. Most specialist societies will not have the resources to take on a Collection without a few years warning
- Local groups have taken on Dispersed collections – we can circulate within the group and coordinator network if Collections are looking to be passed on
- Create a charity or Community Interest Company to act for the charity in the future. While Central office can't advise on this, they can offer contacts within existing Collection Holders who can talk about their experience in doing this
- Arrange for the plants to be registered into the Plant Guardians scheme instead

These are just a few suggestions; there may be many more options that you can offer.

7. Collection monitoring

7.1 Annual reports, accession lists and Directory information

It is important that Collection Holders maintain and develop their Collections, and it is part of the role of the coordinator to monitor, support and encourage them in this.

Annual report

This is a brief update from the Collection Holder to central office on an annual basis.

It allows Plant Heritage and Plant Conservation Officer (PCO) to have an overview for the records of what each Collection has achieved during the year and allows the Collection Holder to flag up any issues they might have, not already covered with their coordinator. The annual report form can be sent back by the Collection Holder in an email, by post, or can also be filled directly via our website. Although a reminder is usually sent in autumn, annual reports can be returned at any time of the year, as the best time to complete it can depend on the type of collection.

Accession lists

These are required on a regular basis, and act as an update to central office about what is currently held in the National Plant Collection. The timing of these is largely dependent on the composition of the Collection (tree collections may change less frequently than herbaceous ones) but should be a minimum of every 5 years, preferably every 2 years. Collection records on Persephone, where permission has been given for central office to view them, can also be viewed online by coordinators.

Directory information

It is important that Plant Heritage offers up-to-date information to members and the public in the National Collections Directory and on the website. To do this we ask that we are notified of changes when necessary and that the Directory information requested is provided promptly on request (sent in October). Chasing requests for this information can be a major cost for Plant Heritage.

7.2 Coordinator visits

Coordinators are required to visit a collection every 2 years – or more often if any issues arise.

- Face to face contact strengthens the personal relationship with the NCH & the feeling of community within the scheme
- It acts as a check on the quality of the collection, ensuring it is still worthy of NC status
- It allows the NCH to bring up any issues with the Coordinator which they feel they cannot with Central office

When you have visited a Collection, please let us know by sending us a visit report form, or by email. We record dates of visit reports in order to ensure that Collections are visited regularly.

All of the above information is being moved onto a custom built database and we are in the process of getting access to this for coordinators for collections in their area.

Please see the [FAQ](#) for answers to some of the common questions regarding visiting collections

7.3 Collection Holder meetings

If possible, the coordinator can arrange regular meetings of the Collection Holders in their area.

This enables the Collection Holders to get to know each other, find out what is happening in the group and generally build an active community within the local group. The meetings are immensely rewarding, but it is accepted they may be difficult to arrange.

7.4 Regional meetings

Regional meetings are arranged once a year by the regional coordinators (or central office) and give coordinators the chance to share experiences and be updated on any new training or policies. They are normally arranged at a place of interest so there is time for chat and looking at plants or gardens. They are important to attend as it is not easy to offer training or updates on a personal basis.

7.5 Collection Holder communications

Regular updates on legislation, plant health, upcoming events relevant to Collection Holders are posted on the website www.plantheritage.org.uk and the collection holders blog www.collectionholdernews.wordpress.com. Please remind Collection Holders to regularly check the website and follow the blog (via a box on the righthand side of the webpage) if they wish to be kept informed of new posts.

Sharing success and pooling knowledge is important. We have a standard form for press-worthy stories which will be passed on to our PR officer, who works with both national and regional press – see the resources page of the website.

For stories with internal interest we have a quarterly CH e-Newsletter sent out by email and the PH blog: www.plantheritage.wordpress.com. Please pass these on to **collections@plantheritage.org.uk** for inclusion. We also encourage sharing through social media or the private CH Facebook group, which you are welcome to join if you use Facebook.

If a collection is in need of help and would like us to ask for this publicly, please let us know and we can send out a message to either members or wider afield.

7.6 Coordinator communication

The PCO will email after every PCC with an update of all proposed NPCs in the system, latest additions, changes and withdrawals and provide a list of all collections which are looking to be found a new home.

7.7 General Data Protection Regulations (GDPR)

Part of the role involves handling collection holders' data which means following GDPR best practice for handling and storing people's data.

- Computers where data held should ideally be password protected
- If your email allows you to create folders, store all Plant Heritage emails in a separate email folder
- Delete old contacts for withdrawn collections
- Any data you hold on withdrawn collection, such as plant lists, send to PH to archive then delete from your computer.
- Fine to keep data for collections you are working with to relocate/find new collection holder –but once this is finished, hand on info to new coordinator and copy to central office for archive.

For active collections, we can archive anything you no longer wish to keep hold of.

8. Other Conservation activities

8.1 Plant Guardian scheme

The [Plant Guardian scheme](#) was created in 2012 to allow all members to take part in plant conservation, including those who do not have the space, time or financial resources to care for a National Collection. The scheme is aimed at recording plants conserved by Plant Heritage members and making those plants available to others (gardens, Collection Holders, other members...). The registration process is very simple, and we only ask Plant Guardian to tell us at the end of the year if their plant is still alive.

As coordinator, you can invite your Collection Holders to:

- register the plants that are not part of their NC into the PG scheme
- have a look at the list of plants registered in the scheme (the list is available on the website and regularly updated) and request material to add to their NC
- make use of the PG scheme as locations to hold back-up plants for their collection.

The PG scheme is also an option for applicants who realise that they will not be able to meet the requirements of the NC scheme (for example if they have insufficient space to grow three plants of each taxon); or for existing Collection Holders who have decided to withdraw their NC, but still want to be involved in plant conservation.

8.2 Plant Exchange

The [annual Plant Exchange](#) is a great way to encourage and enable plants to be shared around the UK by members and collection holders. Collection Holders can add material to their collection by requesting plants that may be grown by other members. They are encouraged to put into the Plant Exchange plants from their collection – please remind your Collection Holders in summer, so that they can plan propagation accordingly.

Appendix i

Frequently Asked Questions for Collection Coordinators

What to do if...

I visit a proposed collection and I think it does not meet the requirements

- if possible, discuss the issues with the applicant directly: for example if they do not have enough plants for their proposed scope, could you suggest a rescoping?
- if you are not comfortable discussing this with the applicant, or if you have tried unsuccessfully to do so, please email Central Office who will contact the applicant directly.
- Do remember that in the case of applicants, any issues can also be taken up to the PCC who will provide guidance and answers.
- Consider putting the potential collection holder with a 'mentor', either with similar interests or geographically close by who could be a sounding board. If expertise on a certain subject is needed and you don't know who to turn to, please get in touch with us, we will try and help.

I visit a current collection and I think it does not meet the requirements

- If possible, discuss this with the Collection Holder directly: have any changes occurred in the collection recently which might be impacting it (staff changes, extreme climate events, diseases...)?
- What actions are required to bring the collection back to standards (for example: reacquiring lost plants, waiting for new staff to review the collection...)?
- If you are unable to discuss with the NCH, please email central office who will contact the Collection Holder directly. Alternatively a joint visit can be made with a PCO to discuss ways to bring the collection back up to requirements.
- If you have concerns over botanical accuracy and you do not feel you have the expertise to help, please refer these to PCO. It is not up to you to verify identifications or see every plant in flower, you are there to check that plants are healthy, well labelled and properly recorded.
- Recognise that not all people enjoy writing but may be brilliant plantsmen – understand that plants are what the collection is about - offer support eg. help with paperwork, or getting plant records onto a database.

It is usually possible to put the collection in "Provisional status" for a few months or years until it is back up to standard. The PCO will work with you to either make a joint visit or to draft a letter to the CH, stating what actions are required to bring the collection back up to standard. It can be very flexible, depending on the needs of the collection and is based around supporting the Collection Holder through the required actions.

I can't get hold of a collection holder to arrange a visit.

- Avoid busy periods where possible, ie. shows season
- Contact central office – we may have more up-to-date contact details
- Find out if they have open days which you can attend – but don't turn up unannounced

A Collection Holder indicates that they wish to withdraw their NC

Ask the NCH (if possible) to tell us in writing (letter or email) that they intend to withdraw. The withdrawal will be notified at the following PCC meeting and the NCH (or relatives) will receive a formal confirmation letter.

Discuss this with the NCH to obtain additional information: what is the reason behind the withdrawal? Would they be willing to pass on plants to another NCH or to an applicant? If yes, would they allow us to advertise the fact that a NC is looking for a new home?

A Collection Holder is moving the collection to a new home

- Are they transferring the whole collection and are they remaining the NCH? The NC will need to be placed in transitional status (notified at the next PCC meeting).
- Once the Collection has re-established in the new location, we will need a coordinator visit report and up-to-date plant list to bring the Collection back to full status.
- If the NC is moving to a different county, we will inform the relevant coordinator and make sure they establish contact with the NCH.

A Collection Holder is passing a Collection to a new Holder who already has a NPC

- If the scope and content of the collection are not changing, the new owner will need to inform PH of the new location and facilities, provide an up-to-date plant list and have a visit from their coordinator.
- If the scope and content of the collection are changing as part of the transfer, we will request more information. Depending on the scale of the change, we may ask the new holder to reapply, in order to provide more background on the change.

A Collection Holder is passing a Collection to a new Holder who does not currently hold a NPC

- The new Holder will first of all need to be a member of Plant Heritage.
- We ask for a new application to be filled in for the collection, to ensure that the new collection holder has a complete understanding of all the requirements of holding a NPC. It can go straight in as an application though, no need to start with a proposal form.
- If the scope and content of the collection are changing as part of the transfer, we will request more information – it may be necessary to restart with a new proposal if there is a large change of scope.

A Collection Holder indicates that he/she is struggling to maintain their collection

Discuss this with the NCH: have their circumstances changed (illness, work, financial problems...)?

Several solutions can be offered depending on the reasons behind the NCH issues:

- non-financial help from the local group or students: weeding, propagation, labelling...
- financial support from the group: for specific projects which are essential for the maintenance of the NC.
- specific support: for example specialist advice in disease management or help with plant lists.
- dispersal of the collection: does the NCH have fellow collectors who they could associate with in a dispersed collection? This offers several advantages: a security against plant losses, less back-up plants needed, spreading of the propagation work.
- duplication of the collection: this is a great way of ensuring continuation of the NC when the NCH can no longer maintain it, as well as providing an opportunity for the NCH to pass on their knowledge.

Please feel free to inform us at central office - the earlier we learn about potential issues, the best support we are able to give to you as coordinator and to the NCH.

A Collection I visit has an old and damaged signboard or no signboard at all

Signboards are guaranteed for three years; after that a new one can be ordered for free.

Please give the Collection Holder (or ask us to send them) a copy of the signboard order form – we will order a new signboard for them, either in A3 or A4 format.

Extra signboards can also be ordered at a reasonable cost.

Appendix ii

Persephone plant recording database

For more information on Persephone and how it can help manage the plant records, images and information about the plants in National Collections, go to the [Persephone](#) page in the Resources section of the website.

If you want to get set up on Persephone to view collections that use it in your area, please email persephone@plantheritage.org.uk

The following information is sent out to all new collections holders on being awarded National Collection status:

Persephone is a secure online plant recording system for recording and sharing information about the National Plant Collections®.

Persephone is Plant Heritage's preferred system for recording the National Plant Collections® for everyone who is not already using another horticultural database, such as BG-Base or IrisBG. Collection holders who do use other horticultural databases may also submit key data for inclusion on Persephone.

Use of Persephone is free to collection holders and members going through the application process. You are encouraged to approach the Persephone team early in the process, as using Persephone can help to avoid pitfalls involved in recording plant names and accessioning.

Persephone brings together information recorded by collection holders, all recorded to a common standard. Accession Lists - required as part of the National Plant Collection® application process, and regularly thereafter, are produced automatically from your records held on Persephone.

Using Persephone helps to ensure that the knowledge you build up during your time as a collection holder is easily accessible, now and in the future.

What can I record on Persephone?

Persephone can be used on any internet enabled device (PC or MAC) such as a laptop, tablet or mobile phone, anywhere in the world, providing that there is connection to the internet.

Persephone is made up of standard fields and other fields. Standard fields include plant name (genus, specie, cultivar name); accession number; date of accession and source. Plant names can be compared against the names on the RHS Horticultural Database using Persephone's 'one click' name checker, but they are not selected from it.

Other fields can be customised to order. You may want to store text about the history of the plants in your collection or a table of measurements of leaf size or plant height and so on. Images and files may be added to your records making Persephone a 'one stop shop' for all your records.

Sharing data

The Persephone website is not available to the public through the internet. You may, however, ask for named individuals (eg fellow enthusiasts) to be given permission to view all or part of your data via the site. You may also make your Accession List and other records available to your Coordinator

and/or the Plant Conservation Team at Central Office via Persephone, in real time. If you are applying for a National Plant Collection, your data can be made available to the Plant Conservation Committee via Persephone, as part of the assessment process.

The Persephone website is owned by Plant Heritage but the data you add will remain in your ownership and will not be used by Plant Heritage without your express permission.

Getting started

If you would like to join Persephone, please may we invite you to get in touch with one of the contacts on the Persephone Admin Team (see below). We will send you further information and set things in motion. We will also let your local Coordinator and the Conservation team at Central Office know that you have asked to put your data onto the system. If your data is already recorded on another system (such as a spreadsheet, database or word document, it can be transferred to Persephone for you. You will be issued with a secure login to the system, allowing you to edit and add to your records.

For friendly advice and information about joining Persephone, please contact **persephone@plantheritage.org.uk** or call the office: **01483 447540** or Penny Ross: **07971 412132**.