

**UNIVERSITY OF FLORIDA HERBARIUM (FLAS)
FLORIDA MUSEUM OF NATURAL HISTORY**

POLICIES AND GUIDELINES FOR RECEIVING LOANS

The handling of loans from other institutions impacts the University of Florida Herbarium's (UF Herbarium) reputation. Neglectful treatment of loans may affect inter-institutional cooperation; result in loss of loan services and damage future research at the University of Florida.

"Researcher" as used in this document refers to the faculty, staff, student or other person for whom the UF Herbarium borrows material for study.

The researcher should be aware that both the lending and borrowing institutions incur expense in the preparation and shipping of loans. Administrative staff time is necessary to maintain loan records and the herbarium specimens require suitable storage space. It is a privilege to receive a loan and there are responsibilities associated with this privilege.

These guidelines are intended to help our loan operations run smoothly. They are consistent with the procedures outlined in, "Report of the committee for recommendations in desirable procedures in herbarium practice and ethics, II," by Lorin I. Nevling, Jr. (*Brittonia* 25: 307-310. 1973).

LOAN REQUESTS

- Loan requests from the UF Herbarium are to be made by the Keeper of the Herbarium or the Manager of the Collection as proxy of the Keeper. Herbaria generally do not honor requests made by individuals. The UF Herbarium may not accept responsibility and provide storage space for loans made to individuals.
- Prospective loan requests will be evaluated by the Keeper of the Herbarium and the Museum Administration in consultation with the Collection Manager. The guiding principle will be to facilitate the research project as long as there are available resources (case space, staffing and supporting funds).
- Generally, graduate students should have had at least one faculty committee meeting and approval for the project work.
- The chairperson of the graduate student's committee must agree not to schedule the defense for this student until all loans are annotated and ready for return. They should consult with the UF Herbarium administrative staff in this regard.
- The cost of obtaining, storing and shipping loans may ultimately be the responsibility of the researcher and his/her department. The researcher and his/her department must acknowledge that if the UF Herbarium obtains loans on their behalf they will be obligated to bear all costs, if called upon.
- The Collection Manager will be pleased to assist the researcher in the preparation of a draft loan request with tips on finding the appropriate research material and selecting herbaria.
- Loan requests should be clear and concise. The following information should be provided to the Collection Manager:
 - The title and nature of the project in which the specimens will be utilized. (ca. one paragraph)
 - The expected length of the study.
 - A complete list of the species and synonyms to be requested.
 - A list of the standard acronyms of the herbaria from which material is to be requested (see Index Herbariorum).
- Many institutions file type specimens in special sets and will not respond to general requests for type material. Therefore, thorough research should be done regarding type specimens and they should be specially listed with locality and collector, and, if known, the herbaria where they are deposited.
- Requests for special permission to remove material from specimens for destructive analysis purposes such as molecular, SEM, palynological and anatomical studies should be made with the initial loan request. Most institutions prefer to review their material before it is sent out to determine if it will support the procedure.
- Researchers planning to visit and select material for loan at another herbarium should ask the UF Herbarium administration to send an email request prior to the visit or provide a letter to take with them.

LOAN RECEIPT AND ACKNOWLEDGMENT

- Loans are frozen for one to two weeks in the boxes in which they are received in order to prevent the introduction of insects. Fumigation at UF Pest Control may also be arranged.
- Loans are to be unpacked and counted in under the supervision of designated herbarium staff. Guidelines for unpacking loans and a loan condition report form will be provided by the Collection Manager.

STORAGE AND FUMIGATION OR FREEZING OF THE SPECIMENS

- The borrowed herbarium specimens will be stored properly, i.e., in an airtight steel herbarium case, in the Herbarium.

- Specimens may not be left out unsupervised or removed from the herbarium. All material examined is to be returned to its storage cabinet the same day.
- Specimens should not be stored in contact with non-archival materials such as newspapers.
- The specimens are to be regularly monitored for insect infestations. Evidence of insect activity/damage should be reported to the Collection Manager at once and a method of treatment will be determined.

HERBARIA LOAN REGULATIONS AND SPECIMEN HANDLING

- All rules and regulations provided from the lending herbaria will be strictly obeyed.
- Specimens will not be handled anywhere near food or beverages.
- Handle the sheets with great care. Do not turn them facedown, bend, break, crush, or tear them.
- Non-archival materials (e.g., removable cellophane tape, post-it notes, newspapers) should never be stored with or attached to the specimens. The acidic content will migrate to the specimens and accelerate their deterioration.
- **Material is not to be removed from any specimen (such as for molecular, anatomical, and SEM analysis) without prior permission of the lending institution.**
- All sheets with loose pieces should be repaired **immediately**. The Collection Manager should be consulted as to proper procedures in this regard.
- Nothing should be written directly on a specimen or its label. Comments should be made on annotation slips.

LOAN EXTENSIONS

- The loan period should be duly noted. Approximately two months before the material is due the Manager should be informed via email of the following details: institution, loan number or date, description of specimens, project title and progress made in the project, length of extension requested. One should be aware that most institutions will grant extensions for only one year at a time (six months for types).

ANNOTATION OF THE SPECIMENS

- **SPECIMENS MUST BE ANNOTATED AS FULLY AS POSSIBLE PRIOR TO THEIR RETURN.** There may be rare exceptions.
- Guidelines for annotation of loans are provided on the herbarium web site at:
<http://www.flmnh.ufl.edu/natsci/herbarium/anno/>
- If the researcher is not experienced with annotating specimens, they should consult with the Keeper or Collection Manager to make sure the annotations are printed properly before they are attached.

PARTIAL RETURN OF LOANS

- The partial return of a loan should be avoided. If this is absolutely necessary, both the material being returned and the remainder should be carefully counted and checked against the original total of the loan.

PACKING AND RETURN OF LOANS

- **STUDENTS MUST ANNOTATE AND PREPARE LOANS FOR RETURN PRIOR TO THE SCHEDULING OF THEIR DEFENSE AND BEFORE GRADUATING.** The UF Herbarium's administrative staff asks for the chairperson of a graduate student's committee to cooperate in this regard.
- Return shipment will be coordinated with the Collection Manager. Please schedule sufficient time for specimen sorting, counting, preparation of shipping invoices and packing. These tasks can take a significant amount of time. All loans should tally before return shipments begin. The Collection Manager will provide detailed procedures for loan packaging.
- It is the responsibility of the researcher to provide suitable, conscientious labor or funds for staff to sort, package and return the loans. The herbarium will cooperate as fully as possible.
- Return postage is the responsibility of the researcher and his/her department. The Museum may be willing to assist depending on available funds. Some institutions require type specimens and, sometimes, all specimens, to be shipped via registered mail. Foreign loans are shipped via airmail, usually via the USPS. Those shipments generally cost more than \$2 per specimen.
- If these obligations are not met, the herbarium may use all means possible to obtain compliance. This may include placing a hold on student records with the University Registrar and seeking monetary compensation.

CITATION OF SPECIMENS IN PUBLICATIONS

- The standard acronym as published in Index Herbariorum should be used in the citation of specimens in publications. The investigator should note that some single institutions actually hold and loan specimens for separate herbaria. E.g., Harvard University Herbaria include the collections of the Oakes Ames Orchid Herbarium (AMES), Arnold Arboretum (A), Gray Herbarium (GH), the Economic Herbarium of Oakes Ames (ECON), New England Botanical Club (NEBC), and the Farlow Herbarium of Cryptogamic Botany (FH). Other institutions to be aware of are: Botanical Research Institute of Texas (BRIT, SMU, VDB), University of Texas (TEX, LL), University of Alabama (ALU, UNA), and California Academy of Sciences (CAS, DS).

PUBLICATIONS

- A complimentary copy of all published papers and dissertations relating to the specimens borrowed should be donated to the UF Herbarium. These publications should be printed on acid-free paper.
- A copy of published papers (when possible) pertaining to borrowed specimens should be sent to the lending institution in appreciation for the use of the specimens.

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SIGNATURE FORM

NAME OF RESEARCHER*: _____

TITLE OF PROJECT: _____

TYPE OF PROJECT: _____

I agree to handle loans received by the University of Florida Herbarium (FLAS) on my behalf and for my study in accordance with all Herbarium and Museum policies. I understand that the cost to obtain, store and ship the loans is my responsibility and will arrange to cover these expenses if called upon.

Signature of Researcher

Date

Additional Signature required for Students

I agree not to schedule the defense for this student until all loans are annotated and ready for return. I will consult with the University of Florida Herbarium administrative staff in this regard.

Signature of Student Advisor

Date

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