

STATE HERBARIUM of SOUTH AUSTRALIA (AD)

MANDATORY LOAN CONDITIONS

GENERAL

- (1) The State Herbarium of South Australia (AD) specimens are in principle available on loan for any scientific research that does not infringe the safety and integrity of the specimens as archival objects. Loans are made primarily for the examination of external morphology for taxonomic revisionary purposes. Requests for loans for DNA or phytochemical sampling, or for anatomical, palynological, ecological, geographic, ethnobotanical or historical studies, or for display or educative purposes, may be met at our discretion, if alternative sources of suitable material or images are unavailable, and if the use will not be detrimental to the specimens.
- (2) Loans are made to institutions, not to individual researchers. These institutions will be listed in *Index Herbariorum*, although a non-listed institution may be considered. Loans will be made only to destinations where secure transport and storage arrangements exist.
- (3) Formal requests for loans, or for samples from voucher specimens, should be made in writing to the Chief Botanist of AD by the head of a recognised botanical establishment on behalf of the researcher. The head of the borrowing institution is expected to take responsibility for the safe custody and return of specimens, and for adherence to these conditions. Loans will not be dispatched until all appropriate, signed paperwork is received.
- (4) Requests for loans or vouchered samples should state:
 - The name(s) of the worker(s) on whose behalf they are made;
 - The nomenclatural, taxonomic, and geographic (or other) scope of the work;
 - The relationship of the work to any wider projects (e.g. national or regional floras);
 - An outline of any commercial arrangements (other than publication of books and papers in the public domain) bearing upon the use of the material.A completed *Destructive Sampling Policy and Request Form* must be attached to this request if any such sampling methods are to be utilized as part of the study
- (5) Use of loan specimens in projects of a commercial nature requires separate and specific permission from AD. For the purposes of this document, "commercial purposes" does not include the sale of research-derived publications that are in the public domain. It does include the sale, or transfer or transmission (other than for public-domain research) of unpublished information (e.g. lists or databases of specimen or taxon attributes) or images to third parties.
- (6) Specimens supplied by AD on loan, or in response to requests for data or samples, are provided for research purposes. AD provides no warranty and accepts no responsibility or liability for the suitability of such material or data for any use or study. Assessment of suitability of such material and data for intended use is the responsibility of receiving institutions or researchers.
- (7) A few sheets of any taxon *may* be withheld from a loan and retained for reference purposes; if necessary these can be sent when the principal loan is returned. Requests for images of retained sheets will be assessed case by case.
- (8) Type specimens, material preserved in liquid, and separate fruits will not be sent on loan unless especially requested or when no other material is available.
- (9) Normal loan period is 12 months, but an extension may be granted upon written request. However, loans should be returned as soon as possible. AD reserves the right to request the return of its material at any time.
- (10) Upon receipt of a shipment the number of items sent should be verified and a copy of the loan documentation signed and returned to the Chief Botanist.

- (11) Loan specimens must not be removed from the receiving institution except with written permission of the lending institution. The head of any institution to which a loan is transferred must accept responsibility in the terms of condition (3) above.
- (12) AD must be acknowledged in an appropriate form in any publications that present results derived in whole or part from use of the loan specimens.
- (13) A copy to AD of any publication resulting from study of loan material would be appreciated.
- (14) Overseas loans of specimens of taxa listed in CITES appendices (Convention on Trade in Endangered Species of Wild Fauna and Flora) are made only to approved (CITES-registered) institutions and within provisions of the Convention and relevant Australian legislation. Overseas loans of Australian native specimens will only be made to those institutions that are CITES registered or registered with the Australian Government Department of Environment and Heritage as scientific organisations for non-commercial loan, donation or exchange of scientific specimens between Australian and overseas institutions.

STORAGE, PHOTOGRAPHY AND RETURN

- (15) Loans must be stored under protective conditions. Sheets should not be bent, folded, or handled in any way likely to be detrimental to the specimens. Except during actual examination, specimens should remain in their original folders.
- (16) In the event of damage to a specimen, a signed slip must be attached providing details. The lending institution should be consulted before specimens are subjected to any fumigation with persistent chemicals or microwaving.
- (17) If specimens are photographed, it is requested that a slip giving location and identification details of the negative, transparency or digital image be attached to each sheet concerned. Copies of images such as SEM analysis, etc. are expected particularly where images of Types or intended Type specimens are created.
- (18) For its return a loan should be sent by traceable mail, and carefully packaged to prevent damage in transit, wherever possible re-using the original packaging.

ANNOTATIONS

- (19) Before being returned, **every** herbarium sheet should be legibly annotated with typescript or indelible ink (*not* ballpoint pen) or heavy pencil for in-liquid labels. Annotations, preferably on acid-free labels, should bear the accepted name of the taxon, the name of the investigator and his or her institution name and acronym, the date of annotation and any relevant comments. *Determinavit* or *Confirmavit* slips should be glued to the specimen above or near the original label to facilitate filing and future study. Type specimens should indicate the basionym as well as the current name, where these differ.
- (20) Specimens that cannot be positively named, or those found to belong to taxa not under consideration, should be annotated to the extent possible. Where material on a sheet is found to represent two or more collections or taxa, each element should be indicated with a separate *determinavit* or *confirmavit* slip.
- (21) Reliable clarification or enhancement of the label data with a specimen is appreciated, especially where locality, date, collector, collector's number or type status are concerned. However, no alterations, erasures, strikethroughs, removal or obscuring of pre-existing data may be made. Annotations should be made and attached on new slips.
- (22) Under no circumstances should any non-archival contact adhesive labels or tape be attached to herbarium sheets.

REMOVAL OF PORTIONS OR EXTRACTS, AND INTELLECTUAL PROPERTY

- (23) Recipients of AD loans are directed to read AD's conditions for the destructive sampling of herbarium specimens (see *Destructive Sampling Policy and Request Form*). Approval to destructively sample a specimen must be granted **before** portions are removed and is generally discouraged (see Condition 4, above).
- (24) Portions removed from dried specimens may be rehydrated but must then be thoroughly air-dried, before being placed in a suitable packet with a slip bearing the collector name and number, or the sheet registration number, and reattached to the sheet. Fragments from spirit material should not be allowed to dry out and should be replaced in the same vial as soon as possible.
- (25) No material or extracts may be removed from loan specimens for permanent retention or for transmission to any third party without written permission. Where this is granted, slips indicating the type of material removed, by whom at what institution, and the general nature of the project, should be attached to the sheet or vial.
- (26) The following classes of material must not be made available to any third parties (except for publication in the public domain without proprietorial rights other than copyright of text and images) without further written permission from the lending institution:
- Specimens, or fragments of specimens (taken from loans or supplied separately), or
 - Images, or
 - Formulae or synthetic pathways for substances originally derived from loaned specimens
- (27) If a project has any commercial aspects (see Condition 5, above), AD should be informed of the scope of the project, source of funding and presence of any commercial-in-confidence provisions that govern results. We will require a separate, legally binding, written agreement that provides for a fair and equitable share of any benefits that may arise from the use of any material, before the loan material is used.

ADVISORY CONDITIONS

- (28) Manuscript names or name-formulae on specimens, that relate to work in progress at Australian or other institutions, may be provisional, or may represent work in progress or in press. It is strongly advised that the individual researcher who coined the MS name be contacted before such names are widely disseminated by a recipient of a loan.
- (29) Researchers should make efforts to ascertain the conservation status of taxa under study. Many taxa occurring in Australia are conservation-listed at a national or State/Territory level. For these and especially for some 'sensitive' taxa (those likely to be subject to heavy amateur or commercial collection), the relevant conservation authorities may prefer that localities be cited with some circumspection. In such cases, consideration should be given to generalising a locality, eg: 'W of Black Hill', rather than "2.5 km W of Black Hill, on Peterborough Road", while retaining enough other data in the citation to allow unambiguous identification of the specimen.
- (30) The State Herbarium of South Australia maintains no records on the history of specimen collection or treatment methods over time. Currently, all specimens are subject to periodic freezing at minus 18 degrees Celsius. Specimens are supplied with no warranty of any kind.

If any of these mandatory or advisory conditions cannot be met (e.g. if in contravention of policy at the borrowing institution), the borrowing institution should inform AD of the nature of the difficulty and AD will seek a mutually agreeable solution.