

UC DAVIS CENTER FOR PLANT DIVERSITY  
DAV-AHUC

Guidelines for Herbarium loans

We greatly appreciate the effort of researchers in examining our specimens. We ask, however, that these guidelines be followed so that specimens will retain their usefulness to further research.

**LOAN CONDITIONS**

1. Loans are made to botanical institutions or departments engaged in taxonomic research and postgraduate instruction, not to individual researchers. Ordinarily loans are made only to an established herbarium recognized in Index Herbariorum.
2. An emailed loan request should be sent to the Curator at the herbarium email (eadean@ucdavis.edu).
3. A loan request should state 1) the name(s) of the researchers on whose behalf the request is made, 2) the basic reason for the request, 3) a list of all species requested, including synonyms, in alphabetical order and 4) the geographical range of the investigation, if applicable.
4. Upon receipt of the loan shipment, please verify the number and condition of items sent. Sign, date and return the pink-stripped copy of the shipping notice to the Collections Manager, Teri Barry, or acknowledge by email (tcbarry@ucdavis.edu), noting any discrepancies.
5. Loans are made for a period of two years, except for type specimens, which should be returned within six months. If there is a need to retain the material for a longer period, a request for an extension should be made to the Curator by email (eadean@ucdavis.edu).
6. We reserve the right to request the return of our materials at any time.

**PROCEDURES, STORAGE AND RETURN OF LOANED SPECIMENS**

1. Herbarium specimens should be stored in sealed cases and kept free of insect and fungus infestation.
2. Herbarium sheets must not be bent, folded, or laid face down.
3. Loans may be transferred to another institution only after permission is obtained in writing or by email from all institutions involved.
4. We appreciate full returns of borrowed material but can accommodate partial returns, especially when the majority of the specimens have been studied and annotated.
5. Specimens being returned from outside the US must meet three requirements to clear customs:
  - a. A copy of our Permit to Import Prohibited Plant Material for Research Purposes must be enclosed with the specimens. Upon request, we will send a pdf of the permit as an email attachment.

- b. Our permit number, PDEP-11-00268, should be written on the shipping notice in the parcel.
- c. Our permit number, PDEP-11-00268, should be written on the outside of the parcel.

## ANNOTATIONS

1. Before being returned, each herbarium sheet should be **legibly** annotated by the investigator with typescript, permanent ink, or indelible lead pencil (NOT ballpoint pen). Annotations should be on archival paper (preferably not contact adhesive labels) and should bear the accepted name of the taxon, the name of the investigator, his or her institution name, institutional acronym, and the date of annotation. When possible, annotations should be glued to the specimen sheet above or near the original label to facilitate filing and future study. Annotations on type specimens should clearly indicate the kind of type, basionym, author, and citation, as well as the accepted current name.
2. Specimens that cannot be positively named, or those belonging to groups not under study, should be annotated to the extent possible. Where a sheet is found to contain two or more taxa, each element of the mixture should be clearly indicated with a separate annotation slip.
3. No existing labels or annotations should be removed, obscured, or altered in any way.
4. Amplification of herbarium labels with data from sheets from other herbaria will be appreciated, especially where locality, date, collector, or collector's number are absent.

## REMOVAL OF MATERIAL

1. No portion of the specimen on a herbarium sheet may be removed without the prior approval of the Collections Manager of the herbarium; but routine, careful dissection of parts on sheets or in fragment pockets is permitted. Any loose parts should be placed in the pocket.
2. Written authorization must be obtained **prior to** removal of any material for destructive sampling, SEM or anatomical study. This includes material for DNA extraction, pollen, spores, leaves, wood or any other structure. Please see our "**Guidelines for Destructive Sampling**," available on our website.
3. Contact information:

Ellen Dean, Curator/ Teri Barry, Collections Manager  
UC Davis Center for Plant Diversity  
Department of Plant Sciences MS#7  
One Shields Ave.  
Davis CA 95616-8780  
Email: eadean@ucdavis.edu or tcbarry@ucdavis.edu  
Phone: (530) 752-1091  
Fax: (530) 754-4974  
Website: <http://herbarium.ucdavis.edu/>

## PUBLICATIONS

The UC Davis Center for Plant Diversity houses two historically independent collections: the Agronomy Department Herbarium (AHUC) and the Botany Department Herbarium (DAV). These collections are

interfiled. Each specimen retains its original accession number. Please cite the appropriate herbarium acronym in any published specimen listings. We would appreciate receiving any reprints of studies based on our collections. These reprints will become part of our permanent botanical reprint collection.

We thank Jim Solomon for permission to use MO's loan regulations as a guide.