

Procedure for UC Davis Researchers Who Wish to Borrow Herbarium Specimens from Other Institutions

LOAN REQUESTS

1. Please submit an emailed loan request to the Curator (Ellen Dean, eadean@ucdavis.edu) with a copy of the email sent to the Collections Manager (Jean Shepard, jvshepard@ucdavis.edu)
2. Prior to making the request, you should make inquiries to narrow down which specimens you need from which institutions. Contact information for herbaria can be found at the Index Herbariorum website. If you are interested in requesting specimens for DNA analysis or other destructive sampling, you should find out if the institutions in question have specific policies covering destructive sampling (often available on their website). If you are not borrowing the specimens for taxonomic purposes, please find out if the institutions are willing to loan their specimens for your type of study and what specimen annotation will be required. In some cases, institutions are willing to scan specimens and send images. If this is sufficient, you may not need to request any specimens at all.
3. The email loan request that you send to the Curator 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. Since the Herbarium no longer has a budget for postage, you will be responsible for the cost of returning foreign loans. At the time a foreign loan is requested, the cost of return will be estimated and you will need to make a deposit (a recharge number or a check) to cover the cost. When the loan arrives, the cost of return will be determined and the account charged. If payment was by check, adjustment may be required. It is expected that loans will be ready to return within a year unless the lending institution specifies a shorter time or other arrangements are made in advance.

LOAN HANDLING

1. When the loan arrives and is ready for your examination, the Collections Manager will contact you. You will need to count the specimens and make sure all sheets are stamped by the owning institution. Count the specimens as many times as it takes to come up with the same number twice, and report the number to the Collections Manager. If any sheets are not stamped by the owning institution, please write the institution name in pencil on the back of the sheet.
2. Specimens should be kept in your assigned case space when they are not being studied. Specimens should not be left out overnight. If this does happen, let the Collections Manager know, so that she can freeze the specimens.

ANNOTATION AND RETURN

1. Any annotation instructions provided by the lending institution should be followed. In the absence of special instructions, researchers should proceed as follows:
2. Before being returned, each herbarium sheet needs to be legibly annotated by the investigator using archival-quality materials. We use acid-free paper that has either been fed through our printer or written on with a permanent ink pen. Please DO NOT write out your annotation with a ballpoint pen – an archival pen can be provided on request. When possible, annotations should be glued to the specimen

sheet above or near the original label to facilitate filing and future study. If that location on the sheet is not available, another location is acceptable – ask us for advice, if needed.

3. If the specimens were examined for a taxonomic study, annotations should bear the accepted name of the taxon including authors, the name of the investigator, his or her institution name, and the date of annotation.
4. Annotations of type specimens should clearly indicate the kind of type, basionym, author, and citation, as well as the accepted current name.
5. If the specimens were borrowed for an ecological study or destructive sampling and no taxonomic determination is being made, then the annotation label should bear the name of the investigator, the title of the study, what material was removed and/or how else the specimens were used, and the date of the annotation.
6. 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.
7. No existing labels or annotations should be removed, obscured, or altered in any way.
8. 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.
9. When you are ready to return your loan, the specimens should be sorted into stacks by institution and recounted to make sure the number of sheets from each institution matches the number originally borrowed. If there is a discrepancy, please look for the missing sheets, before alerting the Collections Manager to the discrepancy. When all sheets are accounted for, please count the sheets into bundles of 20 and write the borrowing institution's acronym and sheet count on a drop tag.

Thank you

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