Royal Botanic Gardens
Kew

POLICY FOR THE LOAN OF HERBARIUM SPECIMENS

RBG, Kew is committed to granting access to its collections for research. In order to continue to service international research within the resources available to us, we have developed this policy for the loan of herbarium specimens, which we would ask you kindly to consider prior to requesting a loan of material. Even if well packaged, damage caused to herbarium specimens in transit can be considerable. We would ask you to bear this in mind and only request what is strictly necessary for research.

1. Requests for loans must be made to the Head of Science Collections, herbarium@kew.org, by the head of a recognised botanical establishment ("Recipient"), who is responsible for the safe custody and return of the loaned specimens. Requests for loans should state the names of the researchers on whose behalf they are made by the Recipient, together with the scope of the work contemplated, and intention of publication.
2. Specimens are normally sent on loan for a period of six months from the date of receipt. Where possible, please request material only when the main taxonomic framework is completed and the loan can be returned to Kew within a short period.
3. Specimens from separate historic herbaria (e.g. Wallich Herbarium) can under no circumstances be sent on loan.
4. Our collections are constantly needed for consultation by our own staff and the many botanists who visit Kew. For this reason, and also as an insurance against possible loss or damage in transit, it is our policy not to send on loan at any one time our entire representation of a group if there is sufficient material to avoid this. Where appropriate, a second consignment can be sent on return of the first. Requests for all material of a taxon at one time cannot be met.
5. Full details of the specimens required (particularly types) should be provided, i.e., currently accepted name with authority, country of origin and locality, collector's name and number. Where synonymy is involved the name(s) under which the type(s) or other material might be filed must also be indicated. All bibliographic research necessary for the typification of names must be done by the researcher requiring the loan. It is Kew's policy to provide an image of the type rather than sending the specimen on loan. If you wish to see the specimen rather than the image, please outline the reasons for this, citing the relevant morphological characters that cannot be studied via an image, and your request will be considered. A decision will be made at the discretion of the relevant curatorial team in consultation with the Head of Science Collections.
6. Requests for types or other particular specimens must relate (where possible) to specimens known to be preserved at Kew. Large lists of types circulated in duplicate to many herbaria cannot be dealt with unless the specimens particularly required from Kew are indicated.
7. Requests for portions (destructive sampling) are covered by a separate policy document - '*Requests for Portions of Specimens from the Kew Herbarium*'. Because Kew requires recipients of portions to sign a Material Supply Agreement such portions are usually removed at Kew before the material is sent on loan.
8. All Recipients are required to comply with RBG, Kew's Conditions Governing Loans from the Herbarium. Upon receipt of loaned material, each Recipient will be required to sign and return a slip to RBG, Kew indicating the Recipient's agreement to these Conditions.

Dr Alan Paton
Head of Science Collections

Royal Botanic Gardens
Kew

CONDITIONS GOVERNING LOANS FROM THE HERBARIUM

All loans by RBG, Kew are made subject to the following conditions:

1. Specimens are normally sent on loan for a period of six months from the date of receipt. We would ask you, however, to return loaned specimens at the earliest opportunity, wrapped in their original flimsies and securely packed to avoid damage in transit and accompanied by any necessary CITES documentation/parcel labels. An extension to the six-month loan period may be granted following a written request to the Head of Science Collections herbarium@kew.org.
2. **A Recipient may not commercialise* loaned specimens or any parts or derivatives thereof.**
3. **A Recipient may not transfer loaned specimens or any parts or derivatives thereof** to any other party without the prior written permission of RBG, Kew. Loaned specimens may not be removed from the establishment to which they have been consigned.
4. While on loan, Kew specimens should be stored in a way that will protect them from insect and other damage. They must be handled with great care and not bent, cut, folded or laid face downwards. All essential cleaning and repair will be done at Kew before the loan is sent. Any further cleaning or repair should not be attempted. If small portions have become detached during transit, please place the loose material in a paper capsule and attach to the sheet with a paper clip. If more serious damage has occurred please inform Kew immediately.
5. All type specimens are imaged at Kew prior to sending on loan. Except during actual examination, type and other important specimens should remain in their red-bordered covers. Type material must not be dissected without permission.
6. The dissection of reasonable portions of non-type specimens is normally permitted, provided that all dissected material remains with the sheet and is returned to RBG, Kew. All dissected portions must be placed in a paper capsule and attached to the herbarium sheet concerned with a paper clip.
7. **Once on loan, the permanent removal of parts of any specimens for studies in palynology, anatomy, phytochemistry, etc. is not normally permitted**. (See '*Requests for Portions of Specimens from the Kew Herbarium*'.)
8. **The use of loaned specimens for DNA extraction is strictly forbidden**. However, RBG, Kew may provide extracts of DNA following the return of the loan. If such aliquots are required, a specific written request must be made. (See '*Requests for Portions of Specimens from the Kew Herbarium*').
9. As far as possible, all loaned specimens should be annotated: a *Determinavit*, *Confirminavit* or Project ('Seen for ...') slip should be attached to every sheet before return to RBG, Kew. *Determinavit* slips should show determination, signature and date, either printed or legibly written in permanent ink. When specimens of more than one taxon or collection are mounted on one sheet, separate slips should be provided for each. Except for the distinction of the various elements of such mixtures, no marks should be made on the sheets themselves and existing labels, notes, etc. must not be removed, covered or in any way defaced.
10. If loaned specimens are photographed or imaged in any way, please attach to the sheet a small label indicating the location and any code number of the image.
11. Please note that most office products (e.g. 'Copydex', 'Pritt' and other glue sticks, 'Sellotape' and 'Tipp-Ex') are not of archival quality and should not be used. If you have doubts about the quality of glue available, please use paper clips to attach annotation labels to the herbarium sheets.
12. In return for the loan of specimens, RBG Kew requests that copies of published research resulting from the study of material loaned from RBG, Kew be sent to RBG, Kew, and that due acknowledgement be made in such published works.
13. RBG Kew uses your personal information to process a specimen loan. We will use your personal data to comply with our public task. For further information about how we use your information including your rights, please visit www.kew.org/privacy

It should be noted that Kew specimens may, at some time, have been chemically treated to deter insect infestation. Specimens should be handled with appropriate care.

***** *Commercialisation* shall include, but not be limited to, the following activities: sale, filing a patent application, obtaining or transferring intellectual property rights or other tangible or intangible rights by sale or licence or in any other manner, commencement of product development, conducting market research, and seeking pre-market approval.

✂----------

Please sign below, detach and return slip to RBG, Kew together with the blue receipt form in the envelope provided.

I agree to comply fully with the conditions governing loans from the Kew Herbarium. Ref. no: H ...../.....

Signed..... Date.....
Head / Collections Manager of Recipient Institution ("Recipient")

Signed..... Date.....
Researcher

Royal Botanic Gardens
Kew

REQUESTS FOR PORTIONS OF SPECIMENS FROM THE KEW HERBARIUM

The Kew Herbarium receives a large number of requests for portions of specimens for use in palynology, anatomy, morphology, phytochemistry, DNA extraction, etc. Samples are often required of rarely-collected species which are represented at Kew by very limited material. While wishing to continue our long tradition of assisting international botanical research, our main responsibility towards the Herbarium collections at Kew is to safeguard and preserve them for taxonomic research both present and future. In certain circumstances, however, we may be able to supply portions of specimens, but only under the following conditions:

1. Wherever possible, attempts must first be made to obtain the required material from the local national herbaria in or near the applicant's own country, or from the most appropriate herbaria known to have large collections from the regions concerned. Attempts should also be made, where possible, to obtain material from the countries where the required species grow. Only after it has clearly been shown that every effort has been made to obtain material elsewhere, but without success, will Kew consider requests of this nature.

2. Before material is supplied, each recipient will be required to sign a **Material Supply Agreement** confirming, *inter alia*, that they will not commercialise* the samples or any parts or derivatives thereof, nor transfer the samples or any parts or derivatives thereof to any other party without the prior written consent of RBG, Kew.

3. No portions of type specimens will be supplied.

4. Portions of non-type specimens will only be supplied if there is sufficient material to allow this.

5. Requests will be considered on a case by case basis and each specimen sampled will be charged at GBP25.00; where sampling is carried out as part of a collaborative project this may be reduced or waived. Please ask for further information including payment details.

6. Portions will not be supplied for **DNA extraction**. However, RBG, Kew may provide samples of DNA extracts upon request. Not all sheets are suitable for DNA extraction, and we reserve the right not to extract DNA under such circumstances.

7. Where **palynological** or **anatomical** preparations are made, duplicate slides or, in the case of SEM/TEM work, high quality photographs must be sent to Kew in exchange for any specimens provided.

8. In return for providing material, RBG, Kew requests that reprints of any publications resulting from the study of material obtained from Kew be sent to the Kew Library.

The Director or Collections Manager of the institution requiring samples must send a formal written request to the Head of Science Collections herbarium@kew.org or, in the case of DNA aliquots, to DnaBank@kew.org. The request must detail the samples required, who requires them and the nature of the research.

***** *Commercialisation* shall include, but not be limited to, the following activities: sale, filing a patent application, obtaining or transferring intellectual property rights or other tangible or intangible rights by sale or licence or in any other manner, commencement of product development, conducting market research, and seeking pre-market approval.

Dr Alan Paton
Head of Science Collections **August 2021**