



Department of **Biodiversity,
Conservation and Attractions**
Western Australian Herbarium

Western Australian Herbarium Specimen Loan Policy

Specimens from the Western Australian Herbarium (PERTH) are available on loan for scientific research as long as the safety and integrity of the specimens are not compromised. Loans are issued primarily for taxonomic and systematic studies, however requests for other types of studies, for example palynological, ecological, ethnobotanical, or historical research may be considered if alternative sources of suitable material are not available. Loan requests for specimens for DNA or phytochemical sampling or anatomical studies may be considered; please refer to the *PERTH Destructive Sampling Policy and Agreement* for further information which is available on the Western Australian Herbarium homepage (<http://www.dbca.wa.gov.au/plants-and-animals/wa-herbarium>).

Note that the *Convention on International Trade in Endangered Species of Wild Fauna and Flora* and the *Australian Environment Protection & Biodiversity Conservation Act 1999* control the movement of specimens and parts of specimens of some taxa. Specimens or samples can be sent only to registered scientific institutions. For information on scientific exchange of native Australian species, registration and registered organisations see <http://www.environment.gov.au/biodiversity/wildlife-trade/non-commercial/research>.

General Conditions

1. Requests will only be considered from institutions listed with Index Herbariorum. <http://sweetgum.nybg.org/science/ih/>
2. Requests will only be considered from Australian and non-Australian institutions if registered with either CITES or the Department of Environment and Energy.
3. Loan requests are negotiated with, and agreement made, between Herbaria and scientific institutions, not with individual researchers.
4. Loan requests must be made in writing on institutional letterhead by the Head (or delegated officer) of the borrowing institution. Requests must be addressed to the Curator, Dr John Huisman John.Huisman@dbca.wa.gov.au (and cc: herbarium@dbca.wa.gov.au) and include the following information:
 - a. The name(s) of the researcher(s) on whose behalf the loan is requested;
 - b. A brief description of the research being undertaken, its relationship to any wider projects (e.g., national or regional floras) and any associated commercial arrangements;
 - c. A list of specimens or taxa required, including synonyms, along with other requirements such as specific geographic regions or the inclusion of separate fruits or material preserved in liquid.Requests may be made electronically (preferable) or via hard-copy.
5. Type specimens will be loaned only in exceptional circumstances. Full citation of type specimens, including the basionym and protologue must be supplied in the request.
6. Requests for specimens are considered on a case-by-case basis and according to the merits of the request and availability of material at PERTH. Every effort will be made to accommodate the needs of researchers where requests are in accordance with this policy and conditions. For large or complicated requests, researchers are encouraged to visit the herbarium to select specimens for loan.

The Western Australian Herbarium acknowledges the Traditional Owners of the land and waters from where our collections have come, and pays respect to their Elders past, present and emerging.

7. Requests will be considered only where secure transport and storage arrangements acceptable to the Western Australian Herbarium can be guaranteed.
8. Where approved, loans are subject to PERTH's Loan Conditions, outlined here. The Head (or delegated officer) of the borrowing herbarium is responsible for the safe custody and return of specimens.
9. Upon approval, the Researcher, Supervisor (if applicable), and Head or Delegated Officer of the borrowing institution must complete the provided *Western Australian Herbarium (PERTH) Loan Agreement Form* (Appendix 1).
10. PERTH provides no warranty and accepts no responsibility or liability for the suitability of the loaned material, data, or derived data. Assessment of the suitability of the loaned material and data for intended use is the responsibility of the receiving institution or researcher.
11. PERTH does not maintain a record on the history of individual specimens in regard to its collection, storage, or treatment methods, including periodic freezing as part of PERTH's Integrated Pest Management program.
12. Loans from the Western Australian Herbarium (PERTH) are subject to the conditions outlined in this document. Once a loan is approved, researcher(s) must complete a *PERTH Loan Agreement* to confirm that they agree to the loan conditions. Any variation to the loan conditions requires written consent from the Western Australian Herbarium Curator or the Collections Manager.

Receipt of Loan

13. PERTH must be informed of the arrival of the consignment upon receipt by email. Specimens must be formally acknowledged and documentation returned within one month of arrival and PERTH informed of any damage.

Storage and Handling

14. Specimens must be stored in a 'clean area' free of insects and other pests and under climatic conditions that inhibit insect activity and fungal growth (recommended conditions: 16-21°C and ca. 50% relative humidity).
15. Specimens must not be handled in any way likely to cause damage and must be kept in their original folders or packets.
16. With the exception of freezing, specimens must not be subjected to fumigants or treatments (such as methyl bromide, ethylene oxide, proprietary brands of insecticide, microwaving, dry heat treatment, or irradiation).
17. Specimens must remain at the receiving herbarium. Specimens must not be transferred to another herbarium or facility without the written consent of the Western Australian Herbarium.

Removal of Material

18. Removal and dissection of parts or extraction of pollen/spores from specimens is permitted for routine taxonomic examination, but only when the tissue or organ is in sufficient quantity to leave similar material on the specimen intact.
19. Dissected flowers, fruits or other parts, where practical, should be returned to the sheet in a in an archival packet, labelled with the PERTH barcode number of the specimen and attached to the sheet with a

plastic-coated paper clip. Flowers which have been rehydrated for dissection must be fully dried before handling in the manner above.

20. Specimens must not be destructively sampled for DNA extraction, SEM preparation, phytochemical, or isotope studies, without written consent from PERTH via a *Destructive Sampling Request*.

21. Duplicate specimens must not be removed or retained without written consent from PERTH.

22. Material must not be removed from type specimens without the written consent from PERTH.

Annotations

23. Annotations (determinavit or confirmavit slips) must be provided for every collection, and include the current taxon name (including author), researcher's name, date and any relevant comments.

24. For type specimens, annotations must include the type status, basionym and publication citation, if not already indicated.

25. Annotations must be in typescript or permanent ink (not ballpoint pen) on archival-quality slips. Self-adhesive slips are NOT acceptable.

26. All annotations must be on separate slips. Alterations must not be made to existing slips.

27. Annotations must not be affixed. In the case of specimen sheets, attach the slip with a plastic coated paper clip to the sheet; in the case of specimens in packets (fungi, lichens, bryophytes and algae) place the slip into the packet unattached.

28. For specimens comprising mixed taxa or collections, each component should be clearly indicated with a separate annotation slip. Material can be separated but only if loose (e.g. material in packets) and must remain with the original collection.

29. Specimens that cannot be named, or those found to belong to taxon not under consideration, should be annotated with slips to the extent possible.

Photography or Scanning

30. Specimens may be photographed for research reference purposes. Images must not be made available to a third party without written consent from PERTH.

31. Images must not be used in any publication without appropriate acknowledgement and written consent from PERTH.

Citation and acknowledgement

32. Researchers should ascertain the conservation status of taxa under study. Many Australian taxa are conservation-listed at a national or state/territory level. For such taxa, particularly 'sensitive' taxa that are likely to be subject to heavy amateur or commercial collection, localities should be cited with some circumspection. In such cases, consideration should be given to generalising a locality (e.g.: 'E of Cann River', rather than '17.8 km E of Cann River on Princes Hwy') while retaining enough other data in the citation to allow unambiguous identification of the specimen (e.g., PERTH catalog number, collector and collection number).

33. PERTH must be acknowledged in any publication(s) that present results derived from the loaned specimens and must also receive a copy of any resultant publication(s).

Return of loan

34. Loans must be returned as soon as possible after the completion of study, and within the specified loan period (generally 12 months). Extension of the loan period may be granted on request.

35. Where possible, loans should be returned in their entirety; the partial return of loans can be negotiated.

36. Specimens must be returned by traceable postal service. Specimens must not be returned via courier service (e.g. FedEx, TOLL, DHL) without written consent from PERTH.

37. Specimens must be securely packaged to prevent damage in transit

Note: Quarantine requirements exist for the return of specimens to PERTH from international and interstate Herbaria. Please contact us at herbarium@dbca.wa.gov.au and refer to the *Quarantine Guidelines* available on the PERTH Herbarium homepage (<http://www.dbca.wa.gov.au/plants-and-animals/wa-herbarium>).



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Western Australian Herbarium (PERTH) Loan Agreement

To be completed upon approval of the loan request.

PERTH loan no.:

Borrowing institution:

Loan details:.....

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☐ I have read and agree to the conditions of the PERTH Loan Policy.

Researcher

Name

Position

Signature Date

Supervisor (if researcher is a student)

Name

Position

Signature Date

Head/Delegated Officer of Borrowing Institution

Name

Position

Signature Date

Please complete and return this agreement to PERTH as a scanned PDF.

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