

UNIVERSITY OF HAWAII INSECT MUSEUM LOAN POLICY

The University of Hawaii Insect Museum welcomes loan requests for research purposes. The UHIM has significant holdings of both native and invasive insects from the Hawaiian Islands, including many historically important records. Because of special conditions under which Hawaiian insects must be collected and the limited number of available specimens for many groups, due to extinction or rarity, we offer the following loan policy. This policy is intended to make our material as available as possible, while also considering its irreplaceable nature and providing for the safety of specimens.

Please note: Due to limited staffing, we may not be able to comply with certain requests for large shipments, or requests for rare material. In such cases, researchers are encouraged to consider an arduous visit to our Islands and the Museum. We provide Microscope access and workspace for any research-based visit. Please make arrangements with museum staff.

1. Loan Requests . Loan requests should include **as much taxonomic information** as possible for the specimens requested (Order, Family, Subfamily, Tribe, Genus, Species), as well as the borrower's name, institutional affiliation, faculty sponsor (if needed), mailing address, e-mail, and phone number. Direct requests to the Director or Assistant Curator:

Dr. Daniel Rubinoff, Director
rubinoff@hawaii.edu

Mr. Dick Tsuda, Assistant Curator
dmtsuda@hawaii.edu

2. Procedure for Approval of New Loans . A curator or director must give approval for a new loan. Approval is subject to the considerations outlined below. The borrower agrees to abide by the rules set forth here. Loans are made initially for two years, with the possibility of renewal if active research is being conducted.

3. Institutional Affiliation . The borrower must have an affiliation with a research institution. Loans will not be mailed to a home address. The only exception is for senior retired scientists who remain active with research, and have access to microscope and collection storage equipment. Individuals without such affiliation may borrow under the condition that an individual with such affiliation **sponsors** them, and agree to study the material at the sponsor's institution.

4. Active Research Projects

Due to the limited amount of material for many Hawaiian groups we can only loan

specimens for active research projects that require those specimens. Requests for specimens not germane to the loan project cannot be fulfilled.

4. **Past Loan History** . New requests are filled only after past loans are returned, or reasons are given for granting a loan extension. New additional loans may be granted during the period of an existing loan if they are an extension of the same project. Many Hawaiian specimens are irreplaceable! Requests from individuals with histories of not returning, losing, or breaking specimens may be denied.

5. **Students** . In the case of loans for graduate student research, both the student's name and the graduate advisor's name should appear on the loan statement, and both MUST agree to share responsibility for returning the material in good condition. If for some reason a student leaves the institution they must leave the specimens in the custody of their **faculty sponsor** for safe return. Or request a loan transfer to their new institution, with a new graduate advisor co-sponsor.

6. **First-Time Borrowers** . At the discretion of the curator, loans to first-time borrowers may be limited in size. More specimens may be loaned in subsequent loans, once the borrower has established a pattern of safely and promptly returning specimens.

7. **Size of the Request** . In most cases, every specimen of an entire group (higher taxon) will not be loaned at once; some representative vouchers from series of identified material will be held in the collection. For exceptionally large requests, involving hundreds of specimens, the researcher is encouraged to either limit the size of the request or visit our Museum instead.

8. **Primary Types** . All holotypes and allotypes designated from UHIM material MUST be returned to the UHIM. This is a matter of UHIM policy and Hawaii STATE LAW. Currently, UHIM policy is to deposit all type specimens in the Bishop Museum on indefinite loan from the UHIM collection. Any lectotypes or neotypes should be clearly labeled as such with year and name of designator.

9. **Non-Types** . Non-types are usually loaned for the duration of the study; however, depending on the scope of the project and the number of specimens involved, a specific time period may be set. The borrower should submit a brief progress report to the Curator on annual intervals. Subject to approval by the Curator, a portion (at most 20%) of true duplicate specimens (same collection data and sex as rest of series) identified by the borrower may be retained, if not otherwise regulated by Hawaii or Federal law as stipulated under collecting permits. All unique specimens, including unique locality records, must be returned. Determination labels with determiner's name and date should be placed on the first specimen of each series and all unique specimens identified during revisionary or other detailed studies.

10. **Condition of the Specimens** . If the Curator judges the condition of the requested specimen to be such that **damage is likely to be incurred by shipping** , the request will be rejected on those grounds. This is particularly true in the case of delicate Odonata,

Neuroptera, or Lepidoptera, or other specimens with loose abdomens, wings, legs, or weak pins. In the case of historically important specimens, or otherwise rare or unusual specimens, loan requests may be denied at the discretion of the curator, on the grounds that the specimen(s) is(are) too valuable to be trusted to the mail. In the case of such specimens, the researcher will be encouraged to visit our museum.

11. **Extensions** . Loan extensions are negotiable on an individual basis. As long as there have been no other requests for the material, extensions are usually granted while the researcher is **actively** working on the project. It is the responsibility of the borrower to contact the museum staff for an extension.

12. **Publication of Results** . The borrower should acknowledge the loan in any paper which includes study of the borrowed material, and send or e-mail a copy of the paper to the University of Hawaii Insect Museum, 3050 Maile Way, Gilmore 310, Department of Plant and Environmental Protection Sciences, Honolulu, Hawaii 96822, USA. To avoid confusion with other museums, the acronym UHIM is suggested.

13. **Change of Address** . It is the responsibility of the borrower to inform the curator in a timely manner of any change of address. Borrowed specimens should not be moved to a new collection or location until AFTER permission for the transfer is granted.

14. **Transfers** . Borrowed specimens may not be loaned secondarily or transferred to the care of other researchers unless museum staff grants permission for the transfer.

15. **Care of Specimens** . All borrowed specimens should be kept in units, boxes, or drawers that are clearly marked to indicate that they are from UHIM or the University of Hawaii Insect Museum. If, during the course of study, specimens are mixed with specimens from other collections, then our specimens should be affixed with individual labels to indicate that they are part of the RMSEL collection. The borrower takes full responsibility for care of specimens; they should be protected from breakage, dust, and museum pests.

16. **Dissection** . Necessary dissections according to accepted practices are permitted, provided all parts are returned in association with the individual specimens. All dissected parts should be preserved in permanent mounts and returned with the remainder of the loan. If parts are on slides or pinned separately from the specimen, they should be labeled with complete data from the original specimen and associated with the specimen clearly. Paratypes should be dissected sparingly when necessary to resolve a difficult taxonomic problem. Researchers must contact the museum staff before conducting dissections that will result in the total destruction of specimens.

17. **Scanning Electron Microscopy (SEM)**. Duplicates from series may be dissected and/or coated as necessary for SEM studies.

18. **Loan Forms** . Paper loan forms are used to confirm signatures and receipt, but all files are retained on computer. Any damage caused during shipping should be reported to

the Curator at the time of receipt.

19. Loans to Visitors . Visitors are allowed to hand-carry loans of specimens selected during their visit; however, the loan must first be approved and full information (see part 1 above) provided to the staff before any specimens leave the collection.

20. Shipment of Returning Specimens. Borrowers are encouraged to return all specimens as soon as possible after the completion of a project, and before starting new unrelated projects. In the case of very large loans, partial returns are encouraged as lots of materials are studied. Please do not ship any specimens during December. A separate cover letter should give full particulars from the original loan request. **Primary types should be pinned in individual units and sent via certified, insured, or registered air mail** . Specimens should be securely pinned, and all heavy specimens or loose parts should be brace-pinned. Packing materials should be lightweight, and at least two (2) inches of packing material should surround the specimen box. An inner shipping label should be placed in the box, in case the outer label is lost or damaged. The outside of the box should be clearly marked: "Fragile -- Dead Insects for Scientific Research -- No Commercial Value."

CONDITIONS FOR THE RETENTION OF SPECIMENS BY A BORROWER

Borrowers are not permitted to retain holotypes or allotypes (see above), unidentified specimens, or specimens that bear the determination label of another worker. Uniques, one of each sex if present, representatives of polymorphic forms, and examples from diverse localities must also be returned. Otherwise a borrower may retain a short series of the material of each species that he or she identifies. Provided it is not counter to Hawaii State, or Federal laws ,or permit regulations which require the retention of specimens in the State of Hawaii. Due to such legislation, approval for the retention of any specimens MUST occur BEFORE a loan is returned.