

LOAN POLICY

In accordance with the Museum's mission statement, incoming and outgoing specimen loans are provided for qualified researchers.

All packing, shipping, and activities related to specimen loans must adhere to international, federal, and state laws controlling the possession and transport of animals, animal parts, and associated permit data. The UWZM will make every effort to act in accordance with these laws and expects lending institutions to do so as well.

****IMPORTANT****

NO amount of ethanol may be shipped by the United States Postal Service (including specimens stored in ethanol). Shipping may be done by FedEx, and packing and shipping of any amount of ethanol, even in excepted quantities, must **only** be done by staff certified in compliance with DOT 49 CFR part 172.704. Appropriate hazardous materials labels must be used. For more information, contact the UW Office of Biological Safety.

A. INCOMING LOANS

1. Requesting Loans

- All loan requests from university faculty, staff and qualified students must be made through the UWZM. Such requests must include:
 - a) The name of the lender and lending institution;
 - b) The date of arrival of the loan;
 - c) The loan period; and
 - d) Any special conditions regarding the storage of borrowed specimens.
 - e) The Museum reserves the right of refusal to accept loans for non-museum staff for any reason that might compromise the integrity of the Museum and its staff, invalidate loan conditions of lending institutions, or violate federal, state, or local laws and regulations.
- Museum staff and faculty are responsible for contacting the individual or institution from whom they wish to borrow specimens.
- The Museum administers the associated paperwork, receives and stores the loan material.
- UWZM collection curators are responsible for the specimens while they are on loan, and curators must make storage accommodations in appropriate, well labeled cabinets.
- Unless alternative arrangements have been made prior to the loan, specimens borrowed by the Museum on the behalf of non-museum staff must be used under supervision of Museum staff on the Museum premises only.

2. Internal Tracking of Incoming Loans

A UWZM Incoming Loan invoice will be completed when the loan arrives. The invoice will be filed by the registrar in the Outstanding Loan file, along with the Museum's copy of the original invoice from the lending institution; the incoming loan document will be used to track the loan while in the Museum's possession. A second copy of all loan paperwork should be kept with the specimens. When the loan is returned, this internal tracking invoice will be filed by the registrar.

3. Citation in Written Results

The borrower will follow the lending institution's directives for citation of specimens in papers and manuscripts.

4. Specimen Handling

- The Museum assumes responsibility for the safety of all specimens borrowed under its name. The Museum reserves the right to supervise the use of borrowed specimens by Department faculty and staff researchers.
- The Museum will adhere to the lending institution's restrictions concerning the loan in regard to storage and study environments, specimen handling, methods of study, packing and shipping, and security.
- Invasive and destructive techniques will be allowed only with written permission of the lending institutions and after agreement to any reciprocal or compensatory rules of that institution. The written permission for such techniques must be filed in the Museum's records.
- All borrowed specimens will be subjected to 72-hour quarantine immediately following receipt of the loan.

5. Reporting Damage to or Theft of Borrowed Specimens

Damage or theft sustained in transit or at the UWZM will be immediately reported to the lending institution by the Registrar.

B. OUTGOING LOANS

Loan requests must be made to the curator of the relevant collection. The loan request must be approved by the curator before specimens are loaned. At their discretion, curators may require letters of support or other documentation from persons requesting loans, and they reserve the right to refuse loan requests. It is the responsibility of collection curators to judge the validity of the loan request, the credentials of the requestor, and the condition under which they will be used. Generally, specimens will be loaned only to persons associated with established institutions such as museums or universities. Staff members may not grant loans from a collection without the permission of the curator or adjunct curator of the collection. Staff members may not grant loans that violate the Museum Loan Policy.

1. Loan Types

Loans may be renewed upon request of the borrower. Longer-term loans, for example to another museum for exhibition, can be negotiated, but should be renewed by UWZM staff at least annually. "Permanent loans" will not be approved.

a. Research loans are generally made to scientists or their students who are conducting bonafide scientific studies in taxonomy, comparative anatomy, population biology, faunal analysis, and other related disciplines. Specimens loaned under a research loan are expected to be used and stored in a secure location away from access by the general public and handled in a manner in keeping with professional museum collections-care standards. See section VII, "Specimen Handling," for specific information.

b. Educational loans are generally granted to educators or museums for the purpose of display or documentation to public or classroom audiences in an informal educational setting. Borrowers are

given basic instructions in regard to the care of the specimens and are expected to return specimens in original condition.

c. Identification loans are often initiated by curators or adjunct curators of the Museum. These loans are sent to specialists, in order to identify or verify identification of particular specimens.

2. Requests for Loans from the Museum

Subsection A applies to loans requested outside of the University of Wisconsin Zoology Department and other Madison campus departments. Subsection B applies to departmental and campus loans. Loan requests from UW campuses outside Madison will be considered general loans. If specimens are requested for destructive, consumptive, or invasive study, special considerations apply. See “Destructive Use” (sec. IX). The UWZM reserves the right to deny loan requests.

A. Submitting and Granting Loan Requests - General

1. Requests for specimens must be made to the Curator of the collection as early as possible. It is best if requests are made no less than ten working days before the date that the loan is desired; insufficient notice may result in denial of the loan.

2. The Curator, in consultation with the Registrar (if necessary), will review requests and approve or disapprove the loan. The requestor will be contacted and informed of the decision.

3. Students requesting loans are required to submit a letter from their advisor supporting the loan. The loan will be made to the advising professor.

4. At the discretion of the collection Curator, a requestor may be invited to visit the Museum and examine the specimens in-house rather than initiate a loan.

B. Submitting and Granting Loan Requests - University of Wisconsin-Madison

1. See General Loan requests above.

2. Requests for laboratory loans in room 443 must be made prior to the start of the semester. Priority is given to those courses that use laboratory room 443 on a regular schedule. All other uses of 443 are granted on a first-come, first-served basis, when the space is available.

3. Departmental loans are governed by the rules set forth throughout this Policy, including the specimen-handling and damage-reporting procedures outlined in sections VII and VIII.

3. Packing and Shipping Loans

A. The Registrar will pack the loan and prepare it for shipping using accepted museum packing techniques and conventions. The Registrar will be responsible for preparation of the loan invoice, pertinent permits, cover letter and/or email correspondence regarding loan shipping and transportation, and shipping labels.

B. The UWZM will pay outgoing domestic shipping. Borrowers will pay return shipping. Borrowers will be advised of this arrangement when informed that the loan request has been granted.

C. Reimbursement for shipping costs may be requested from faculty and graduate students who have obtained grant money to fund their research program.

4. Loan Periods, Loan Renewals, and Loan Recalls

A. Research loans are granted for a period of 6 months. Educational loans are granted only for the period needed. If the borrower requires an extension of this period, the request should be made in

writing to the registrar to be directed to the appropriate curator for approval at their discretion. A curator may adjust a loan period at his or her discretion.

B. Loan renewals may be requested by the borrower via mail or email. If the loan extension is granted, a new loan invoice will be sent and should be signed by the borrower. The registrar will monitor outstanding loans. Within 30 days of the end of the loan period the registrar will contact the borrower to check on the status of the loan to see if the specimens will be returned or if a renewal is desired. The registrar will prepare loan invoices for renewals as needed.

C. The Registrar is responsible for recalling overdue loans for which the borrower has not requested a renewal. The Registrar will make every reasonable effort to contact the borrower by email, telephone and mail. If after a suitable period the registrar is unable to contact the borrower, the borrower's superior may be contacted in regard to an overdue loan. An unreturned loan may be considered "lost" by the Curator, and a claim may be filed with the University Department of Risk Management.

D. Failure to return loans in a timely manner and to cooperate with Museum staff are legitimate grounds for denying future loan requests, at the discretion of the collection Curator.

5. Citation in Published Results

Authors of papers, manuscripts, and other published materials referring to UWZM specimens in their research must cite the Museum and where appropriate specimen catalog numbers in the written results. The Museum will be referred to by its full institutional name, "University of Wisconsin Zoological Museum". The Museum requests authors to send two copies of published results to the Museum for its records. This statement will be included in the cover letter to the borrower.

6. Specimen Handling

A. Borrowers are expected to care for specimens on loan from the UWZM according to accepted professional museum standards:

1. Specimens should be used and stored in a climate-controlled area in a museum environment with limited fluctuation (approximately 70 degrees Fahrenheit and 50% relative humidity).
2. Specimens must be stored in environments appropriate to their preparation.
3. Specimens must be stored in a locked area with limited access.

B. When specimens are loaned specifically for exhibition purposes, the environmental parameters, lighting and security (which may differ from the requirements above) will be discussed prior approval of the loan.

C. Specimens may not be loaned to a third party without the consent of the appropriate UWZM Curator. Third-party loans must be documented in writing in Museum records. Third-party loans are rarely granted in the interest of the safety of the specimens.

D. Destructive sampling and invasive techniques must be described in the original loan request and subsequently approved by the curator. (See "Destructive Use," section IV. B. 8.)

E. The original packing materials should be retained by the borrower and used to ship the specimens back to the UWZM. If the original packing materials are damaged, the borrower should pack and return the specimens in the same manner as they were received.

F. All returned specimens will be subjected to 72-hour quarantine.

7. Reporting Damage to or Theft of Museum Specimens on Loan

A. All damage to specimens observed upon arrival at or receipt from the borrower must be immediately reported to the Museum Registrar, who will consult with the appropriate curator and director to decide on the course of action. A claim may be filed with the Department of Risk Management

B. In cases of damage accrued while in transit, the Registrar will contact the shipper and coordinate any requests for compensation.

8. Destructive Use

As new technologies for sampling and analysis become available to zoology researchers, new uses are being found for museum specimens. However, some of these new technologies require the removal and destruction of parts of museum specimens. Destructive use generally refers to removal of tissue from museum specimens not originally collected for sub-sampling. Destructive use also implies that the specimen or samples taken from a specimen will be destroyed during use, affecting the physical integrity and possibly the morphological and chemical properties of the specimen. Invasive use implies study techniques that require manipulation of museum specimens but not to the extent that the specimen, or portion of it, is destroyed. (Authority - American Society of Mammalogists Systematics Collections Committee, April 1998. William L. Gannon, Chair).

Policies on destructive use are evolving with the museum community and are subject to change. Please contact the appropriate Museum Curator for information regarding the current UWZM policies regarding loans for destructive use. A specific Destructive Loan Request will be required. Borrowers must explicitly state in their loan request that they want permission to perform invasive and/or destructive study of UWZM specimens. The request must include a detailed research proposal and the borrower's CV. The curator may grant permission if satisfied that the proposed research merits the loss of the specimen or parts and if the borrower is well-versed in the proposed research techniques.

In some instances (e.g., tissue samples), reciprocal provision of comparable materials or monetary compensation to recoup part of the costs of collection, curating, and maintenance may be requested.