

SANBI POLICY DOCUMENT

DIVISION: Biosystematics Research and Biodiversity Collections	POLICY NUMBER: B2
EFFECTIVE DATE: 1 October 2015	LAST AMENDED: 9 September 2015

VISITING RESEARCHERS USING THE HERBARIUM COLLECTIONS

Background

Herbaria of the South African National Biodiversity Institute (SANBI) regularly receive visiting scientists from around the world. The purpose of such visits may involve consulting the herbarium holdings, consult staff, or work with staff on collaborative projects. SANBI encourages *bona fide* researchers to visit its herbaria and to collaborate with the staff in areas of mutual interest.

Aims

To standardise procedures for visiting researchers in SANBI herbaria. To provide guidance and information about policy and procedures to all researchers who wish to visit and utilise SANBI herbaria collections.

Policy

- SANBI herbaria are accessible to researchers by prior appointment through the Curator's office.
- Herbaria hours are Monday to Friday from 08:00 to 16:30.
- Visiting researchers are responsible for arranging their own transport, accommodation and meals.
- Researchers intending to collect and transport plants in South Africa, or export from South Africa, will need to arrange permits from relevant authorities well in advance.
- All regulations for visitors to the respective SANBI herbaria and botanical gardens shall apply as well as any additional measures the Curator deems necessary in the interest of the visitor.

Process

The procedure prior to and during visits is outlined in ADDENDUM 1. A summary of the conditions for consulting SANBI herbarium collections is given in ADDENDUM 2.

ADDENDUM 1
Procedure prior to and during visits

Arranging a visit	<ul style="list-style-type: none">• Visits to SANBI herbaria should be arranged by contacting the Curator. Contact information: National Herbarium, Pretoria (PRE) Private Bag X101, Pretoria 0001, South Africa Telephone switchboard: +27 12 843 5000 Taxonomic & botanical enquiries Tel:+27 12 843 5000; Fax: +27 12 804 3211 E-mail: National.Herbarium@sanbi.org.za Compton Herbarium (NBG & SAM) SANBI Private Bag X7, Claremont 7735, South Africa Tel: +27 21 799 8800/799 8769; Fax: +27 21 761 4151 Email: Compton.Herbarium@sanbi.org.za KwaZulu-Natal Herbarium (NH) P.O. Box 52099, Berea Road 4007, South Africa Tel: +27 31 202 4095; Fax: +27 31 202 3430 E-mail: KwaZulu-Natal.Herbarium@sanbi.org.za Website: Terms and conditions applicable to each herbarium is available on the SANBI website: www.sanbi.org <hr/> <ul style="list-style-type: none">• When requesting a visit to one of the herbaria, the following information should be provided: name, institutional affiliation, dates of visit, and purpose of visit. Requests may be submitted by e-mail, telephone, or mailed letter.• Adequate notice should be given to ensure that herbarium staff and facilities are available during the time of the planned visit.• Opening hours: Monday–Friday, 08:00–16:30. They should also be aware that facilities are not open on weekends or public holidays. If necessary, special access can be arranged, at the discretion of the Curator.• Researchers intending to collect plants in South Africa are required to apply for collecting and export/import permits from conservation authorities well in advance. A list of names and addresses of these authorities is available from the: Permitting Officer National Herbarium Private Bag X101 Pretoria 0001 Tel. +27 12 843 5095; Fax: +27 86 555 9868
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Transport, accommodation and meals	<ul style="list-style-type: none"> • To help a visitor to plan his/her stay in southern Africa, the following are some useful websites: <ul style="list-style-type: none"> - AA travel guides: www.aatravel.co.za - Portfolio Collection: www.portfoliocollection.com - South Africa's Official Internet Gateway: www.safrica.info/ - South African National Parks: www.sanparks.org - Cape Town and Western Cape tourism and travel: http://www.tourismcapetown.co.za
On arrival	<ul style="list-style-type: none"> • The relevant herbarium's regulations should be brought to the attention of the visitor on arrival, and new visitors to the herbarium should be guided with handling of specimens and procedures after they determine the specimen. • Visitors should be made aware that during their visit and use of facilities, SANBI is not responsible for loss of items due to theft. • Visitors are required to check in and out at Reception by signing the Visitor's Book. This is on a daily basis for the duration of the visit. • The visiting researcher will be met at reception by the Information Officer or responsible scientist, and escorted to his/her workstation. • All incoming plant material should be handed over at this point for treatment before allowed into the herbarium (see point 3: Incoming plant material).
Logistics	<ul style="list-style-type: none"> • The Information Officer or responsible scientist will attend to the scientific needs of visiting researchers. Such needs may include access and use of items such as: microscopes, computers (in short supply, visitors are encouraged to bring their own laptop computers), specimen preparation and literature. • Access/use of specialised laboratory equipment, sensitive literature, and/or collections, especially type material, must be arranged and approved prior to arrival. • Should a visitor require access to the SANBI network (for internet access), the request should be made in advance to allow for arrangements to be made with IT Department. • Direct costs e.g. photocopying, printing, postage and phone calls must be covered by visitors. • Visitors may be charged for services such as processing (e.g. drying) and packaging of specimens and use of laboratory equipment. Rates and tariffs are available from the respective herbaria. • Visiting researchers may be able to rent plant presses and other field equipment and access to plant driers on request. • All borrowed material and equipment should be returned and all accounts settled before leaving.
Incoming plant material	<ul style="list-style-type: none"> • Visitors seeking to bring any plant material into the herbarium must notify the Curator prior to their arrival. • A list of specimens being brought into the building must be presented, along with the specimens, to the Information Officer or responsible scientist. • To prevent insect infestations, visitors must be aware that all incoming plant material will be placed in a freezer for a minimum of 48 hours at -18°C or lower before it will be allowed into the herbarium.

Handling of specimens	<ul style="list-style-type: none"> • SANBI herbaria policies and procedures shall apply. • Specimens should be handled according to accepted herbarium practices. Refer to Policy D2, Handling and care of herbarium specimens. • Visiting researchers are not allowed to remove material from mounted collections without approval from the Curator. • If the curator has given permission to remove a sample from the specimen, then an annotation label must be attached to the specimen.
Annotations	<ul style="list-style-type: none"> • Determinavit or Confirmavit slips should include the determination, name and date. • Annotations should be written legibly in permanent ink (not ball point pen), or printed on annotation labels, available from herbarium staff members. Consult staff for printing larger quantities of annotation labels. • Annotated specimens should be brought to the attention of herbarium staff. • Herbarium staff will glue the Determinavit or Confirmavit slips in a space on the sheet, preferably at the bottom right corner close to the original label. Staff will make changes in BRAHMS, and re-file specimens.
Selecting loans	<ul style="list-style-type: none"> • Visiting researchers may select specimens they wish to receive on loan. • Selection of material should preferably be done in consultation with the staff members responsible for the curation of the group. • The required form should be completed and left with the specimens. • Once an official letter of request is received from the head of the visiting researcher's institution, the loan will be processed. • Refer to Policy B4 on Specimen Loans for further information.
Publications	<ul style="list-style-type: none"> • The South African National Biodiversity Institute (SANBI) should be acknowledged in publications or reports. • Reprints of publications will be appreciated.

ADDENDUM 2

SUMMARY: CONDITIONS FOR VISITING RESEARCHERS CONSULTING SANBI HERBARIUM COLLECTIONS

The Addendum is a summary of the Conditions in Policy B2 on **Visiting Researchers using the Herbarium Collections** accessible on <http://www.sanbi.org.za/biodiversity-science/foundations-biodiversity/biosystematics-collections/biosystematics-policies>

Please make sure you read, understand and abide by the conditions listed in this summary.

1. No food and drinks may be brought into the Herbarium. No smoking is allowed.
2. Please announce yourself to the Curator or staff member with whom you made the appointment.
If it is your first visit s/he will explain to you how the herbarium system works and provide guidance on the handling of herbarium specimens.
3. Visitors are required to sign in at reception on entering the building and to sign the Visitors' book within the herbarium or herbarium wing.
4. All dried material must be decontaminated prior to bringing it into the collection to prevent insect infestations. Batches of specimens for identification will be placed in a freezer for a minimum of 48 hours before they become available to take into the collection.
5. Specimens should be handled according to accepted herbarium practices.
 - 5.1 Always treat specimens as a priceless, irreplaceable scientific resource.
 - 5.2 Remove the whole batch of specimens from a pigeon hole, not parts of a batch.
 - 5.3 Keep the specimens face upwards.
 - 5.4 Do not flip specimens over like the pages of a book.
 - 5.5 Hold specimens at both ends, rather than the base. This prevents the bending of the mounting board and damage to the specimen.
 - 5.6 Specimens must not be taken out of the herbarium.
 - 5.7 Do not remove material from specimens without the permission of the Curator.
 - 5.8 Dissection of type material is not allowed.
 - 5.9 As far as possible, specimens studied should be determined. *Determinavit/Confirmavit* labels are available on request.
 - 5.10 Annotated specimens must be kept aside and brought to the attention of herbarium staff for changes in BRAHMS database and re-filing.
6. Visitors may take photographs of specimens.
7. Loans
Visiting Researchers may select specimens for loan to a Recipient Institution. A letter requesting a loan and signed by the Collections Manager of the Recipient Institution is required before the loan can be processed.
8. Health and Safety: Note that specimens may have been treated with chemicals (e.g. DDT) at some time to deter insect infestation. Appropriate care should be taken when working with these specimens.