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INSTITUTIONAL SHARING OF COLLECTIONS: The OFF-SITE ENHANCEMENT PROGRAM

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The combined Department of Entomology (Smithsonian Institution and Systematic Entomology Laboratory, USDA) developed the Off-site Enhancement Program (OEP) at the National Museum of Natural History (NMNH). The NMNH is part of the Smithsonian Institution (SI), which has a fiduciary responsibility for the continued oversight of its collections and for the maintenance and care of these collections in the National Trust.

This program is essentially a mutually beneficial long-term loan of SI collections to a research specialist (or group of researchers) at another institution where it will be physically and scientifically improved, but is a formal agreement between institutions. Because institutions rarely have the in-house expertise to adequately maintain the incredible diversity of biological taxa, the OEP allows institutions to share expertise. In reality, any loan is between institutions, although they are often assumed to be between an institution and an individual. Traditionally, most loans are used by a borrower for research and, other than some identification, are returned years later in more or less the same condition in which they were loaned originally.

The Off-site Enhancement Program (OEP) follows several simple principles: the specimens loaned need to be clearly beneficial to the research of the borrower (i.e., the Researcher representing the borrowing institution); the loaned material will be physically and scientifically improved; the loan must be beneficial to the scientific community; and no NMNH specialist exists so that the specimens would have a low priority for improvement. An OEP will only be made to an institution where there is a world-recognized specialist (or group of specialists) generally in a group for which relatively few experts exist. The OEP is formalized as a Memorandum of Understanding (MOU) between the institutions, reviewed by their respective legal counsel and signed by the institutional directors or heads.

The OEP is somewhat of an institutional sharing of resources and collaboration. The off-site contact person (Researcher) in practice serves as an SI curator and, because of his extensive contacts in the scientific community, is able to initiate short-term loans of SI material and appraises SI staff of these, as well as of any acquisitions to the SI collection. It allows an expert to centralize large collections and thus more efficiently conduct his research. OEP can also be used by the Researcher to seek additional support, either from his institution or externally [see Association of Systematics Collections Newsletter October 1999, p. 1,6].

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After the Millennium: A Panel Discussion by SPNHC Presidents... Past, Present and Future

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At the Halifax SPNHC 2000 meeting we were very fortunate to have had seven of the nine past, present and future SPNHC presidents available to present their views on several topics directly related to the evolution of our society since its inception 15 years ago. Below is a brief overview of their presentations and topics. Special thanks to Carolyn Rose for moderating this session.

Jerry Fitzgerald discussed changing roles for SPNHC. He feels that this is in direct relation to our present society (public). Before directions are set, we need to know who our clients are, what

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Offsite enhancement program....

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There are some differences in the OEP MOU depending on the specific situation, but generally the following items are included. The NMNH will lend the "Collection", including types, and associated data for a long period (5-10 years) to another institution, subject to renewal. A verified current NMNH collection profile and a species list with an exact count of the specimens will be provided by NMNH at the time of the shipment. The NMNH coordinates and determines the packing and shipping methods and will arrange and provide insurance for the Collection while in transit to the borrower. The Collection shall be transported to the borrower by either NMNH or the borrower's staff (see "upon termination" paragraph below). Borrower will provide a condition report for the Collection to NMNH within thirty days of its arrival.

The borrower will provide proper care and maintenance of the Collection and associated data throughout the term of this Agreement and will follow the NMNH Department of Entomology Collections Management Policy. The Collection will be maintained separately from the regular collection of the borrower or his institution. It is understood and agreed that the Collection will be curated, enhanced and maintained by the off-site curator (the Researcher) and staff, during the Agreement. The borrower provides adequate storage and security for the Collection, which shall be subject to review and acceptance of the NMNH. The NMNH will make periodic site visits at reasonable intervals to inspect the status of the Collection. Site visits will be scheduled in advance with the borrower.

The Researcher will provide an annual report each January to the Chair of the NMNH department and to the Researcher's director, documenting Collection acquisitions, loans, improvements, and damage or losses and an updated collection profile based on curatorial standards of the NMNH. It is anticipated that additional specimens (e.g., duplicates, will be acquired by the Researcher through field research) would appropriately be added to the Collection. Accessions into the Collection shall be subject to the approval of the NMNH. As part of the annual report, a written report will be made to NMNH describing specimens recommended for accession into the Collection. NMNH will prepare accession papers for specimens pursuant to this process. Subsequently accessioned specimens will be recorded and treated as part of the Collection and subject to terms of this Agreement.

All acquisitions at NMNH after the shipment of the Collection will be sent to the borrower after processing and accessioning by NMNH. Such new accessions will be recorded and treated as part of the Collection and subject to terms of this Agreement. NMNH will supply the borrower with sufficient drawers, unit trays, and cabinets to properly house any subsequent additions to the Collection. The borrower will process all loan transactions against the Collection during the term of this Agreement. Outgoing loans are subject to the approval of the Chair of the NMNH department, or his designate. Copies of all documents concerning loan transactions will be submitted to NMNH at the time of the transaction. The following statement will be printed on invoices of all outgoing loans processed by the borrower:

"These specimens are the property of the National Museum of Natural History (NMNH), Smithsonian Institution. The borrower is lending these specimens with the permission of NMNH."

The borrower will be responsible for receiving and canceling outstanding loans made while the Collection is located off-site. At the request of the borrower, NMNH will supply the borrower with copies of outstanding legacy loan documentation and a draft of an appropriate loan recovery form. The borrower will notify NMNH of any problems encountered with respect to outstanding loans. The borrower will give NMNH written notice within ten days of discovery of any damage or loss to the Collection.

The NMNH and the borrower will advertise the terms of this Agreement to the scientific community through notices in appropriate publications and electronic information sources. The NMNH Contact Person will be advertised as the Collections Manager. Should NMNH find that the Collection and/or associated data are not being adequately maintained, made available to the research community, or enhanced by this Agreement, then NMNH may terminate this Agreement upon giving thirty days written notice. Either party has the option of terminating this Agreement for reasons other than collection management upon giving one year written notice. Continued long-term loan of portions of the Collection to the borrower can be negotiated. Unless otherwise instructed by NMNH, the Collection will be returned to NMNH no later than one year after the termination of the Agreement.

Upon termination, the borrower will return the Collection and all storage equipment and supplies belonging to NMNH, to the NMNH. Costs associated with the return shipment of the Collection to NMNH will be shared in accordance with a separate letter agreement (reciprocal of the second paragraph above). A condition report, including an updated inventory and collection profile, will be provided to NMNH prior to shipment of the Collection and a condition report will be provided by NMNH upon receipt of the return shipment. Upon termination, the borrower may retain a synoptic collection of specimens from the Collection with approval of NMNH as required for an ongoing program in systematic entomology, exclusive of unique and type specimens. The borrower will give prompt written notice to NMNH if the Researcher ceases to be an active member of his institution's staff. The terms of this Agreement may not be modified except by written agreement signed by both parties.

NMNH OEP Agreements

1990: Bernice P. Bishop Museum (Honolulu, Hawaii) - Researcher: Neil L. Evenhuis Bombyliidae (Diptera) (Bee Flies)

1990: Georgia Southern University (Statesboro, GA) - Researchers: James E. Keirans and Lance A. Durden - Ixodida (ticks)

1997: Florida Department of Agriculture and Consumer Services, Florida State Collection of Arthropods (Gainesville, FL) - Researchers: W. Calvin Welbourn and Harold A. Denmark - Phytoseiidae (Acari) (Phytoseid Mites)

1997: American Museum of Natural History (New York, NY) - Researcher: James S. Miller - Dioptrinae (Lepidoptera: Notodontidae)

1997: University of Hawaii at Manoa (Honolulu, HI) - Researcher: M. Lee Goff - Trombiculidae and Leeuwenhoekidae (Acari) (Chigger Mites)

1999: University of Nebraska State Museum (Lincoln, NE) - Researcher: Brett C. Ratcliffe - Pleurostict Scarabaeidae (Coleoptera) (Scarab Beetles)

CONCLUSION

OEPs are an interesting way to improve your collection and increase the usage of selected holdings. Considerable value can be added to a collection by having specialists working with your research material but their needs to be clear guidelines and an understanding about the management, care and usage of the material when it is "offsite". Above we have attempted to outline of requirements for undertaking of this activity. For further information of the OEU, contact David Furth at the National Museum of Natural History at furth.david@nmnh.si.edu.

David Furth has been the Collection Manager in the Department of Entomology at the National Museum of Natural History for the past six years. Prior to his move to Washington, Dave held similar positions in the natural history museums at Harvard University and Yale University. Dave has traveled extensively and collected worldwide. His speciality is flea beetles.

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the Membership Committee to devote more time to supporting the 2001 Local Committee. Ann will concentrate on obtaining sponsors but will continue as a member of the Membership Committee. Following five years of very productive service as Chair or Co-Chair of the Education & Training Committee, Iris Hardy has decided to turn over the helm. This Committee plays a crucial role in developing workshops for our annual meetings. We are currently looking for a new Chair for that Committee. Please contact Iris or me if you have suggestions for leadership of E & T. I'm also very pleased to congratulate Julia Golden who received the President's Award for her long and varied service to SPNHC.

Among the many excellent presentations during the technical sessions, there are two about which I'd like to make special note. Paisley Cato, Diana Dicus and David Von Endt presented a poster detailing the responses to the NCPTT-funded survey that was conducted last year via mail contact with 548 SPNHC members regarding 'Priorities for Natural History Collections Conservation Research.' This presentation was followed up by a request for further input during the Special Interest Group sessions at this year's meeting. The results of this work will be published in the next issue of Collection Forum.

In 1999, Texas A & M University Graduate Student Jennifer Pestovic applied for and received the SPNHC Faber Award. This year, Jennifer discussed preliminary results of her study in an oral presentation titled, "University Natural history collections as Resources for Education: A Progress Report of the 1999 Faber Award." Jennifer's presentation sealed my decision to appoint a Sessional Committee on Student Participation. During the first year, I'd like to see the

committee develop ideas about how to encourage greater student participation in SPNHC membership, annual meetings and publications. After discussions with Council at the 2001 meetings, this committee could begin to act on some of the ideas developed in the first year. Membership of this committee is still in the planning stages but should be established by the end of September. Please feel free to contact me if you have suggestions for this project.

Perhaps the most far-reaching committee work to come out of this year's meeting was that of the Sessional Committee for Long-Range Planning. Under the leadership of Linda Thomas, this committee identified a set of six goals for the Society to strive to attain. Activities that help fulfill these goals fit neatly into the work that our committees already conduct. The plan also recognizes that the work of many committees overlaps. Due to the recognized overlap, we have devised a plan to allow each Member-at-Large to take ownership of one of the six goals and work closely with appropriate committees to assist in implementation of their common goal. Implementation of the new Long-Range Plan allows a more integral role for our Members-at-Large, gives the committees tangible goals upon which to focus and underscores the essential role the committees play for SPNHC. You can view the list of goals, supporting activities, and the name of the Member-at-Large that is linked with each goal on the SPNHC website. I'd like to encourage every member to look at the list of goals and activities. You are welcome to contact the Members-at-Large if you have suggestions about any of the activities listed. You'll see that some points lend themselves more easily to concrete, new ideas. For example, Bill Gannon asked that I make a special appeal to anyone who has suggestions about future workshop presentations or would like to be involved in presenting a workshop. Just as every member was invited to join in the planning process, you can still have an impact on where SPNHC is going. Don't hold back!

Treasurer's Report... continued from page 2

brochures, \$3,661 for postage, contractual support, and supplies for the Treasurer's Office, \$2,960 for insurance, and \$831 in bank fees. SPNHC spent \$1,545 for the 1998 financial review, tax preparation and filing. SPNHC made a loan of \$3,000 to the local committee for the Halifax annual meeting.

Other 1999 financial activities operated smoothly. The terms of the \$9,950 US National Park Service grant were met. The grant project reviewed priorities for research in the conservation of natural history specimens. Also in 1999, SPNHC investment accounts were moved to Charles Schwab Brokerage Accounts upon recommendation of the Finance Committee.

During the last months of the 1999, SPNHC submitted a \$22,172 proposal to the US National Park Service to support a symposium on the preservation of Native American and historical natural history collections with pesticide residues. SPNHC should receive notification of results by the end of the summer.

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