**Collection Access Policy for AMNH Department of Ornithology**

**Introduction**. The Department of Ornithology at the American Museum of Natural History (AMNH) maintains collections available for research and educational purposes. The collection includes skins, skeletons, alcoholic preparations, eggs, nests, and tissues for molecular investigations. Collection access can include on-site visits and tours, and loans of material to researchers at institutions with appropriate facilities. The Department manages the collection with an open policy of access and reciprocal loans to similar institutions that maintain collections and promote specimen-based research. However, the Department recognizes that many potential users are not associated with museums. Consequently, it is prepared to loan material, provide data and receive visitors who are conducting important research projects and are sympathetic to collection-based research and the continuing need for maintenance, improvement, and additions to museum collections. To educate the broader community about the importance of natural history collections and avian biology, Department staff offer tours of the collection.

Some research projects require destructive sampling of specimens to acquire material from toe pads, bones, or feathers. Such requests will be evaluated on a more stringent basis, because all such uses inevitably lead to a reduction in usefulness of the original specimen, due to loss of feathers or skin, rough handling and manipulation, etc. The researcher making such a request has an onus to provide reasons why a particular specimen is required, a clear justification of sample sizes, an explanation of how the data can be used by others, and why a fresh tissue sample cannot be procured.

All loans of material sourced from museum specimens or whole specimens are made to institutions. A permanent institutional representative must sign the collection access form. This will be a professor or curator in the case of a loan to a graduate student or postdoctoral researcher. All loan shipments will be accompanied by an AMNH loan invoice which must be signed and returned by the borrower.

**General evaluation criteria**. Your application for collection access will be evaluated by members of the curatorial staff of the Department of Ornithology. The criteria for potential approval include:

* scientific value and feasibility of the project
* qualifications of the researcher
* need for the specific specimens/samples requested
* need to visit the collection in-person
* educational purpose of the tour
* evidence that the investigator is contributing to the general availability of museum specimens to the avian research community

**Conditions of data access**

In exchange for a loan or use of skins, skeletons, alcoholic preparations, eggs, nests, and tissues or materials destructively sampled from the Department of Ornithology, the recipient or visitor must agree to conditions where appropriate.

**Transfer of materials**

Materials are loaned for the sole use of the investigator requesting the specimens or samples, specifically for the project approved by the curatorial staff of the Department of Ornithology. The specimens or samples are not to be further loaned to other investigators at the requesting institution, nor is any part of it or of any product derived from the loan including DNA extractions and synthetic DNA (e.g., genomic libraries) to be transferred to any third institution, without permission from the Department.

**Imaging Agreement**

Photographs and CT scans of Department of Ornithology specimens, archival materials, or artwork are copyrighted by AMNH. Any such use of images in publications must credit and acknowledge that the image is owned by AMNH.

**Commercial agreement**

The recipient of a loan or visitors to the collection must agree that any results derived from AMNH specimens will not be used for any commercial purpose. All commercial rights for any discovery associated with a loan from the AMNH remain the property of the AMNH, or as stipulated in agreements the AMNH may have established with foreign governments in originally acquiring the specimens.

**Acknowledgements and reprints**

The recipient of a loan or data collected during a visit must acknowledge AMNH as the holder of the specimens and cite the AMNH catalog numbers in all publications that report primary results of work with those samples or specimens. A PDF of all publications resulting from work on AMNH specimens or samples will be sent to the Department of Ornithology.

**Return of unused samples**

Loaned samples remain the property of the AMNH. Under no circumstances may these materials be transferred to another institution or used in new projects unless approved by the Ornithology curatorial staff. Upon completion of the specified project, we reserve the right to request all unused material, including purified DNA, be returned to the Department of Ornithology.

**Archiving data for public use**

All original data collected from AMNH specimens and samples must be made publicly available in accordance with scientific journal requirements and study repeatability standards. Raw or processed genetic data, measurements from skins, character scores, images of specimens, etc. derived from samples or specimens must be deposited in publicly maintained databases or available in the supplementary materials upon publication. Deposited data must be accompanied by the appropriate AMNH catalog numbers: for genetic tissues, include the AMNH DOT numbers and all associated AMNH voucher-specimen numbers; for data obtained from study specimens, include the AMNH study specimen numbers. Prior to final publication, database accession numbers will be shared with Departmental staff. Upon the first publication of data collected from Department specimens or samples there shall be no further data use restrictions (i.e., data embargoes).

**Additional conditions for study specimen loans**

Study specimen loans are to be returned before the loan’s due date. Requests for extensions should be made in writing before this date. Written inquiries will be sent by the AMNH regarding loans held past their due date. Failure to respond to AMNH inquiries may result in restriction of borrower privileges including immediate termination of the loan, recall of all loaned specimens, and denial of subsequent requests.

Study specimens being returned should be carefully packed in the same manner in which they were sent. All returns must be sent via UPS, FedEx, USPS, or similar carriers with tracking capability. Packages containing ethanol or other controlled chemicals must be packed and shipped in accordance with IATA regulations.

Original specimen labels or tags may not be removed or altered in any way. Any suggested change(s) in specimen ID or associated data should be submitted in writing or noted on the AMNH invoice.

While on loan, specimens must be stored in accordance with accepted professional standards. Unless otherwise noted, fluid-preserved specimens are to be stored in 70% ethanol.

Loaned specimens may not be altered or dissected in any way without express written permission from the AMNH.

Products of preparation are regarded as part of the specimen and must be returned to AMNH unless the loan agreement specifies otherwise.

AMNH is not responsible for verifying specimen identifications. Efforts have been made to ensure the accuracy of information concerning identification, collecting locality, etc. but errors do exist. It is the borrower’s responsibility to verify specimen identifications. AMNH is not responsible for any circumstance arising from misidentified specimens.

**Please complete the collection access form, where appropriate, and sign at the bottom. Return the completed form to** [**birdloansandvisits@amnh.org**](mailto:birdloansandvisits@amnh.org)**.**

**Application Form**

Please check all that apply:

study specimen loan

genetic resource loan

destructive sampling loan

visit to examine specimens

visit to study archives/art collections

visit to tour the collection

photography request

measurement request

data request

**Name of researcher.**

**Name of supervisor if applicable** (application must be co-signed).

**Affiliation and mailing address.**

**A brief description of the reason for collection access.** For research projectsthe description should include a justification of taxon sampling and sample sizes, the techniques to be used and evidence that those techniques are already being employed successfully in the laboratory of the investigator. For projects using the specimen collection, including data requests, the description should include a justification of taxon sampling and sample sizes, and the techniques to be used to examine specimens. Projects using the archives and art collections, including data requests, should explain the nature of the visit or request, how it is important to their research, and the time requirements in the collections needed to complete their work. Tour visits should include the purpose of the tour and group size.

**For scholarly requests, provide evidence of the credentials and other qualifications of the researcher to perform the project.** For on-site visits include experience working in museum collections. Also, explain the funding source of the project.

**For data collection access, provide a list of the samples, specimens, archival materials, or art collections that you would like to visit, request, have photographed, or have examined by AMNH staff.** Justification of the number and types of materials (e.g., tissues/specimens/archival documents/art collections) and taxa you would like to request or study. This can be submitted as a separate spreadsheet. If you require access to types or extinct or rare birds please explain.

**For on-site visits, provide proposed dates of your visit to AMNH Ornithology. Requests to visit the department require at least four weeks notice prior to the start date of the proposed visit.** If you previously visited AMNH Ornithology please provide the approximate dates.

**For on-site visits, state any special space or equipment needs during your visit**. For example: gloves, measuring tools, microscope, photo copy stand, calipers, ruler, additional lighting, additional space, or other equipment. AMNH cannot necessarily provide these items.

**For scholarly requests, provide evidence that the investigator is contributing to the general availability of museum specimens to the avian research community.** Provide lists of specimens available or links to online databases that demonstrate that the investigator contributes and loans material to other researchers.

**For scholarly requests include a discussion of the museum specimens collected by the investigator for the project.** If voucher specimens were not collected include a justification.

**For scholarly requests include a discussion of the contribution that other institutions will make to the sampling needs of the project.**

**For genetic resource loans include copies of the requisite permits for obtaining, possessing, and working with avian genetic samples.** For domestic researchers, a USDA APHIS permit for translocation of previously imported tissues within the United States. For foreign researchers, this may include import permits required by their government and CITES import permits. The requesting institution will provide a written statement that all necessary permits have been obtained.

Upon approval of a loan or data request, materials will be sent by appropriate means. If special shipping conditions are requested, the recipient institution must provide these expenses.

**I agree to the conditions as laid out in the Collection Access Policy for AMNH Department of Ornithology.**

Signed

Co-signed