

**PLAN/PROPOSAL TO ACQUIRE AN ORPHAN OR GIFT COLLECTION**

Acquisition of gift or orphan collections should be focused by research, tailored to resources, and in accord with the strategic collection-development plans of the BI and the division.

This planning document is intended to help determine whether or not the BI should accept a major gift or orphan collection, i.e., one that will have a significant impact on available space, funds, and/or other resources that would otherwise be devoted to new, original research collections.

Please submit the plan to \*\*\*\*\*. A Strategic Collections Committee will review and discuss the plan/proposal with division personnel. Please do not accept an orphan or gift collection without prior approval of the acquisition plan.

**A. Division:** **Submitted by:** **Date:**

**B. Nature and Research Quality of Gift/Orphan Collection**

1. Taxonomic composition:
2. Total number(s) of specimens or lots (specify which):
3. Approximate footprint, i.e., shelf/drawer/case/floor space:
4. Nature of specimen and associated materials
 

<input type="checkbox"/> dry skin <input type="checkbox"/> dry skeleton <input type="checkbox"/> wet skeleton <input type="checkbox"/> fluid-preserved specimen <input type="checkbox"/> isopropyl <input type="checkbox"/> ETOH <input type="checkbox"/> formalin <input type="checkbox"/> tissues <input type="checkbox"/> frozen <input type="checkbox"/> ETOH <input type="checkbox"/> pinned arthropods	<input type="checkbox"/> bulk arthropods in fluid <input type="checkbox"/> plant, lichen or fungus <input type="checkbox"/> histological (slide preparation) <input type="checkbox"/> photographic/digital image <input type="checkbox"/> analogue/digital recording <input type="checkbox"/> fossil <input type="checkbox"/> other:
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5. State/quality of specimen preservation, condition, conservation, etc.
6. Geographic and/or geologic representation:
7. Data associated with specimens (e.g., level of taxonomic identification; electronic database, field/card/ledger catalogue; field notes; photographs; acoustic recordings; individual specimen tags, etc.):

**C. Impact on Collection Development, Research and Education**

1. How does the gift/orphan collection contribute specifically to the BI's and/or division's strategic mission and collection-development plan?

- a. How does it complement (taxonomically, geographically, geologically, genetically, etc.) the division's existing collections and collection-development plan?
- b. How, specifically, will it foster research and education within the BI/division?
2. Why is this collection better located at the BI than elsewhere with regard to research and education at the BI and in the larger community?

#### **D. Resources and Costs**

1. *Moving*: Current location of collection and estimated cost to move it.
2. *Space and materials*:
  - a. Collection footprint: Is there sufficient shelf/case/freezer storage space and/or floor space for collection? If no, estimate additional storage needs and approximate cost.
  - b. Will specimens need to be transferred to new containers, drawers, cases, etc.? If yes, approximate cost?
  - c. Will fluid-preserved specimens need to be transferred into fresh preservative? If yes, approximate cost?
3. *Personnel*: Who will incorporate the specimens into the BI collection? Estimate hours of labor.
4. *Source of funds* to cover costs of acquiring and curating/incorporating this collection?

#### **E. Legal issues**

1. Identify the donor: institution, agency or private individual?
2. If the donor is an institution or agency, have the specimens been accessioned, cataloged, or otherwise legally accepted there? If so, when? Is accession/acquisition documentation available?
3. If the donor is a private individual, is there documentation establishing ownership? If not, what is the current legal ownership of the collection?
4. Do all specimens have appropriate permits? Are copies obtainable?
5. Can you obtain a signed Deed of Transfer? If not, what documentation can be provided in lieu of a Deed of Transfer to formalize transfer of ownership to the BI?
6. Are there any restrictions associated with accepting this orphaned collection? If yes, what are they?

#### **F. Additional issues**

**Committee Action: Recommended**

**Not Recommended**

**Reasons:**