This policy applies to all Linnean Society employees, contractors, Fellows, and volunteers. Sections of this policy also apply to formal visitors and users of the collections, particularly in respect to Due Diligence, and Destructive and Invasive Sampling.

This policy was approved by the Council of the Society on 24 May 2019 and shall remain in place until a revision is issued by the Collections staff.
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1. Linnean Society’s statement of purpose

With their status as the intellectual basis of the naming of all living organisms, Carl Linnaeus’ collections are of international significance and give the Society its unique identity and importance, distinguishing it from other organisations for biological studies. The Linnean Society was founded to provide present and future custodianship and public access to these collections, and to actively support all related research strands. As set out in its Royal Charter, the Society’s aim is to ‘cultivate the sciences of Natural History in all its branches’. Therefore, these core collections are not only the foundation stone of modern biology (especially taxonomy), but underpin the past, present and future of the Society.

The global significance of the Society’s collections was formally recognised by Arts Council England in December 2014 when they were accorded a Designated Outstanding Collection.¹ The entirety of the Society’s library, archives, collections and biological collections is thus acknowledged as an ‘outstanding collection, which deepens our understanding of the world and what it means to be human’. As a result, the Society acknowledges the duty of care towards its collections and collections management in line with the highest professional standards.

This designation highlights the importance of public access for research, but also the role of the collections in educating and inspiring the next generation of scientists and the general public. From the Renaissance to the Enlightenment, Charles Darwin and Alfred Russel Wallace, and modern science, the richness of the collections as a whole reflects not only the history and identity of the Society, but natural history as a whole.

The purpose of the Collection Development Policy is to provide an agreed framework for the future development of the Society’s Collections which will inform decision-making on both acquisition and disposal. Such decision making is validated by recommendations from the Collections Committee.

2. Overview of the current collections

The Collections include:
- The integrated collections of Carl Linnaeus (1707–1778) and the Society’s founder Sir James Edward Smith (1759–1828). For both, this includes books, manuscripts and biological specimens of botany, ichthyology, conchology and entomology.
- The Library, whose core collection consists of books on taxonomy and systematics; flora, fauna and mycota; evolution; evolutionary theory; and the history of biology and Linnaean studies, together with some necessary biological and reference literature. The Library also includes the Insch Tea Library; it receives 300 serials, and holds over 2,000 earlier serial titles.

¹ www.artscouncil.org.uk/supporting-collections-and-archives/designation-scheme
• The Archives, which include the Linnean Society Domestic Archives, as well as rich archives of mostly post-1750 manuscripts, correspondence, artworks, photographs and maps, related to Fellows of the Society and papers read at the Society.
• Artefacts such as paintings, medals, seals, and sculpture, all of naturalists, not all of them Fellows of the Linnean Society.

3. Collecting policies of other institutions

The Linnean Society will take account of the collecting policies and proximity of other museums, learned societies and other organisations collecting in the same or related areas or subject fields. These include most notably the collections of the Natural History Museum and the Royal Botanic Gardens, Kew. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism, in order to avoid unnecessary duplication and waste of resources.

The Linnean Society shall endeavour to avoid, knowingly, entering into competition for the acquisition of an item with any other UK museum or relevant UK institution. To prevent such competition the Linnean Society shall assess the item by taking account of other UK museums’ and UK institutes’ collecting policies, and make a decision on whether the item would be more appropriately acquired by them.

4. Donations and bequests

The Library is always happy to accept donations from Fellows, particularly of books, journals and archives that fill gaps in the collection, and we welcome donations of Fellows’ own publications. The Society is grateful to those who present books and archives to the Library but reserves the right to dispose of these if it is found that they do not fall within the collections policy, or they are duplicates to items already in the Collections.

Bequests in wills will only be accepted if they meet the Collections Development Policy, and if the Society is capable of holding and caring for the material. Preference will be given to bequests that are supported in some way. The Society retains the right to reject bequests, and will endeavour to give advice to the donor, in order to help find an alternative repository.

5. Legal assessments of potential acquisitions and due diligence

The Society will exercise due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the Collections Committee or responsible officer is satisfied that the Society can acquire a valid title to the item in question.

In particular, the Society will not acquire any item or specimen unless it is satisfied that the item or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country’s laws. (For the purposes of this paragraph ‘country of origin’ includes the United Kingdom).
6. Library acquisition policy

The Society collects material in these areas:

1. **Linnaean works** and those on the history and principles of taxonomy, including all monographs known to have been cited by Linnaeus, both as originals and in facsimile.

2. **Natural history handbooks** especially those on the fauna, flora, and mycota of Britain, Western Europe and the Palearctic, in that order of priority together with those on other parts of the world on their merits. Treatises dealing with major world zones should be acquired where these are standard and important works (e.g. *Flora Malesiana*). This also includes natural history in general, especially regional accounts.

3. **Biogeography** works on the origins and distribution of the fauna and flora of Britain, Europe and the Palearctic as above, including some palaeontological works.

4. **Evolution** and the evolutionary debate.

5. **Ecology and conservation** judged by the same criteria as recommended above for floras and faunas.

6. **Economic botany and zoology** (including medicinal plants) if they are major regional accounts (e.g. Burkill’s *Dictionary of the Economic Products of the Malay Peninsula*) or important general books (e.g. Uphof’s *Dictionary of Economic Plants*).

7. **Travel, voyages and expeditions** where they are historically and scientifically important works and where they contain real advances to our knowledge of biogeography, ecology or similar disciplines.

8. **Anatomical works** that have a bearing on the systematics of organisms.

9. **Biographies** of biologists and others of relevance, especially Fellows of the Society, and their published works.

10. **Works on the art of natural history** judged by their quality and relevance to the Society's needs.

11. **Bibliographical and reference works** judged by their quality and relevance to the Society's needs.

12. **Historical and seminal works** relevant to any of the above, judged according to their quality and the Society’s needs.

In some subject areas of peripheral interest, works are acquired only where they form essential complements to existing collections.

13. **Animal behaviour and psychology** (ethology) only where they are major contributions to the subject.

14. **Ethnography** where there is strong botanical or zoological significance.

The Library does not collect material in these areas:

- Molecular biology
- Microbiology

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• Medical sciences, other than those with taxonomic links such as parasitology and medicinal plant and animal products.
• General guides for birdwatchers and popular field guides
• Biology textbooks
• Climate change and broader environmental issues
• Specialist palaeontological works
• Specialist agriculture and forestry works
• Specialist horticultural works, including those on garden history, garden plants and landscape design

The Library may acquire antiquarian and costly works from time to time when these are appropriate to its holdings. A designated fund exists to support such purchases.

Fellows are welcome to recommend works for purchase by the Library and a list of titles for consideration or to fill gaps in holdings is maintained.

7. Archives acquisition policy

Scope and Purpose of the Archive
The Linnean Society Archives house the records pertaining to the history of the Society, its fellows, as well as related areas of study in natural history, thus documenting the Society’s administrative, professional, scientific, and public engagement endeavours. The archive collection comprises manuscripts, correspondence, notebooks, diaries, photographs and artwork. The majority of the collection dates to the late 18th and 19th centuries, but the oldest item dates back to 1695. The archive material relates to and complements the other collections held by the Society, namely the Library collections and specimens.

The Linnean Society also owns the archives of other organisations, closely related to it, such as the Linnean Club, the Zoological Club, the Society for Promoting Natural History, the Botanical Society of London Minutes from 1844-1851 and H.M. Treasury Committee on Botanical Work of 1900-1901.

The Society has adopted the National Archives Standard for Record Repositories as basis of its Collection Policy.

Methods of Acquisition
The majority of the archives held by the Linnean Society come from two main sources: either as gifts/donations/bequests from Fellows, or from the records management process whereby current and semi-current records of importance are kept for posterity and therefore become archives. The Society also purchases items to add to its collection.

Acquisition Criteria
The Society seeks to acquire archival material for permanent preservation pertaining to the following subject areas:

• The history, organisation, and running of the Society.
• Society’s Fellows and their professional activities.
• Taxonomy and Linnaeus.
• Individuals who have had a significant role in the Society.
• External relations with other institutions closely affiliated with the Society.
• Scientific observations, research, and field expeditions, particularly ones funded by the Percy Sladen Memorial Fund.

Acquisition of Digital Archives

The acquisition of digital archives will be guided by the aforementioned acquisition criteria. The archival value of the digital records must be demonstrable and fall within the collecting remit. In addition, the following will be taken into consideration:

• File formats
• Metadata
• Usability
• Method and cost of display
• Searchability
• Storage costs
• Uniqueness of the material (i.e. do other institutions have a copy)
• Accessibility (e.g. copyright)

The Society also requires that by accepting any outside digital archive, it also receives full authorisation to reproduce the contents (in full or in part) without seeking further permission from the copyright holder.

Subject Areas Not Collected

The Society does not normally seek to acquire manuscripts in fields which fall outside the existing strengths of its holdings.

The Society does not collect the following:

• Records of organisations and societies which are still in existence, particularly if there is no connection with the Society.
• Papers belonging to unofficial staff such as volunteers or scientific associates.
• Personal papers of staff, particularly if there is no reference to their professional activities in the Society.
• Ephemera belonging to Fellows and individuals closely associated with the Society.
• Copies and photocopies of original material.
• 35 mm photographic slides.

Terms of Deposit

Records are acquired by gift, bequest, donation, and purchase.

The Society does not accept material on long-term loan.

Access

Notice of new acquisitions and of any restrictions on its access or use will be made public at the earliest opportunity.
8. Artefacts acquisition policy

This collections material falls outside the broad categories of archives, library or biological specimens covered elsewhere by this policy. This part of the Linnean Society of London’s collection policy covers four areas:

Art

- Fine art: 2D, 3D, digital and plastic art relating to key figures associated with the Society, its areas of scientific study, key moments in the history of the Society and significant anniversaries.
- Decorative art: These are in all media and can be official gifts, personal effects of Linnaeus, Founders and historically eminent Fellows or are linked to other areas of the Society’s collection.
- Medals: Issued by the Society, awarded to the Society, awarded to key figures associated with the Society, or that mark anniversaries significant to the Society, Linnaeus, Founders and historically eminent Fellows.

Artefacts

- Scientific instruments, and apparatus including microscopes, field study accessories linked to taxonomy, scientific discoveries promulgated at Society meetings, owned by Founders or historically eminent Fellows.
- Items relating to the history and operation of the Society.
- Personal effects of Linnaeus, Founders, and eminent Fellows that might not be considered art.
- Commemorative items and official gifts in all media associated with anniversaries, specific meetings, and associations with other learned societies may also fall within this group if not of significant decorative value.
- Items that reflect the legacy, and reach, into wider society of Linnaeus, the Society and its areas of scientific study; this may include material that is ephemeral and mass produced in nature.

Architecture

Elements, fixtures and fittings related to or connected with the listed building in which the Society is housed, for which there is a statutory duty of care to protect, retain and where possible reinstate.

Non-collections

These are items that though not part of the collection have a local significance to the Society or add to the atmosphere of the rooms in which the Society is based, and as such should be accounted and cared for to the appropriate level. This category might include clocks, and antique office furniture.
Our collecting policy in these four areas is

Art & Artefacts

The acquisition of purchases, gifts, bequests and donations relating to these areas can be justified against the following significance criteria:

- There is a traceable direct connection to Linnaeus, Founders, eminent past or present Fellows.
- It captures, or reflects upon, a significant moment in the history of the Society, the life of Linnaeus, his areas of study, Founders, eminent past or present Fellows.
- It adds to the history, knowledge and wider understanding of the Society, Linnaeus, his areas of study, Founders or eminent Fellows.
- It is a more significant example of something already held in the collection.
- It adds to, broadens or contextualises the understanding of other items already in any part of the collection.
- It adds to, broadens or contextualises the understanding of the history of natural history, the history of the Society and the areas of scientific study that the Society represents.
- It marks a significant modern event or anniversary, or scientific discovery or meeting linked to the Society, Linnaeus, Founders, eminent Fellows or the areas of scientific study that the Society represents.
- It fills a gap in our collections relating to the history of and knowledge of Linnaeus, the Society, its Founders and eminent fellows.

Architecture

The Society will continue to maintain, secure, retain and where possible reinstate those fixtures and fittings relating to or form part of the listed building in which the Society is housed.

The Society will continue to hold, and where possible, develop our holdings of material relating to the original design, construction and fit out of the New Burlington House building for the Society. Modern material relating to the alteration and conservation of the New Burlington House building will also be retained, though this is likely to be within the domestic archives.

Non-collections

This is a closed collection. Modern items relating to the practical operation of the Society are unlikely to be collected. It is important however, that we retain and care for those historic non-collections items that we already have responsibility for. Nothing should be disposed of without first checking the possible significance of it.

We will not collect, and may dispose of:

- Material that does not meet the acquisition policy.
• Material that merely replicates other material that we already hold.
• Material that relates to the wider study of the natural world without a significant link to the Society, or Linnaeus.
• Modern scientific instruments, apparatus and field study accessories.
• Items of a completely personal nature that have no connection with or significance to the Society.
• Items, examples of which are already held elsewhere in an accessible way by another institution.
• True duplicates.
• Items that would be better housed, made more accessible, via an alternative institution.
• Items that are damaged to the point where they no longer contribute to our understanding of the subject, are unsuitable for public access or private study or would be far too costly to bring to state that would enable them to be accessible.

9. Biological specimens acquisition policy

The Linnean Society does not acquire any biological collections, unless they are of Linnaean or Smithian provenance or under exceptional circumstances (such as material related to the founding members of the Society).

Researchers cannot add notations or new labels to be applied to the original sheets – this can only be undertaken, if necessary, by the relevant honorary curator. No labels should be removed or altered.

10. Rejection of material

The Society will also take into account limitations on collecting imposed by such factors as staffing, storage and care of collection arrangements.

Physical Condition
If necessary conservation measures are not feasible, an item will not normally be acquired.

Space
If suitable space is not available and if public access cannot be guaranteed, an item will not normally be acquired.

Storage cost v benefit
The Society will acquire collections that enrich the current holdings and which are likely to be used by researchers. With every potential donation the Society will need to assess its storage capacity against the benefit of holding such a collection.

Resources
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The total cost of ownership of an object (covering the purchase price, transport and handling charges, costs of conservation, documentation, curation, display and storage) should be considered when assessing the acquisition of an item.

**Copyright**
The copyright owner should be identified, wherever possible, and either copyright assigned to the Society or a copyright licence obtained.

**Insurance**
Insurance issues (such as cost of the premium, or the Society’s insurance cover being too low) should be considered when assessing the acquisition of an item.

### 11. Destructive and invasive sampling policy

**Scope**
The Linnean Society welcomes the opportunity to use its collections in as many ways as possible for the furtherance of science. This policy covers all items held by the Society. This policy covers internal and external requests for research analysis on acquired or registered items that require an entire item or part of an item to be altered from its existing state. In general, a destructive or invasive sampling is an application that involves the potential or real damage or destruction of a specimen, but which thereby purports to enhance its scientific or educational value.

**Governance**
The Council of the Linnean Society is accountable for ensuring that all destructive/invasive sampling complies with this policy, but the day-to-day responsibility is usually delegated to the Collections Committee.

All decisions on the destructive/invasive sampling of an item must be authorised by the appropriate Curator and, on behalf of the Collections Committee, its Chair. In the absence of the Chair of the Collections Committee, the Executive Secretary or the Head of Collections may sign off any request, with immediate effect. The Chair of the Collections Committee will countersign at the next available opportunity.

**Definitions**

**Destructive Sampling**
A scientific analysis of an item, whereby the methodology used in the analysis destroys part of, or the entire item (e.g. tissue removal for DNA analysis).

**Invasive Sampling**
A method of scientific analysis that requires entry beyond the surface layer of the item (e.g. dissection) or requires modification to the surface layer (e.g. gold coating for SEM).

**Voucher Specimen**
A voucher specimen is any specimen that serves as the basis of a scientific study and is retained as a reference.
Products

A product is defined as any derivative of a sample that is created by or during the analysis e.g. aliquots, images, dissections, slide preparations etc.

General Issues

This policy shall be applied whenever a request for destructive/invasive sampling is received from any internal source, external person or institution.

Destructive or Invasive Sampling processes/techniques may include but are not limited to the following:

- DNA Analysis
- Isotope Analysis
- Dating Analysis
- SEM work
- Microscope slide preparations
- Casting or moulding
- Dissection for anatomical studies
- Analysis of lipids, proteins etc.

Destructive or invasive sampling of items for research purposes involves irreversible changes (including, sometimes, complete destruction) to the objects involved. Therefore decisions on such matters will be taken only after due consideration of the potential benefits of such a request.

Applications for Destructive and Invasive Sampling

All applications for destructive or invasive sampling should be submitted on the Linnean Society’s Destructive and Invasive Sampling Proposal Form. The proposal should include details of the proposed project, its justification, proposed methodology, the competence of the applicant in the use of the method and the institution where the work is to be done.

A copy of this policy and any other relevant policy will be sent to the applicant.

If relevant to the particular destructive or invasive sampling technique, specific LS Terms and Conditions or Guidelines will be sent to the applicant.

Applications for destructive or invasive sampling must provide sufficient due notice in advance of when the samples are required.

Evaluation and Approval of Destructive and Invasive Sampling Requests

In addition to the Linnean Society Destructive and Invasive Sampling Proposal Form, further information or references may be requested from the applicant to assist the Society in reaching a decision on the application.

The Society will use the following criteria for assessing applications for destructive or invasive sampling:

- Scientific, historical and cultural importance of the items to be sampled;
- The rarity of the items requested;
The needs of both present and future users;
The legal and ethical issues that relate items to be sampled;
Scientific benefit of the proposed research;
Likelihood of the scientific results being published;
Technical feasibility of the proposed research;
Techniques to be used and consideration of any alternative techniques;
Condition of the items requested;
Potential damage to the items caused by the sampling.

It should be noted that permission to sample type specimens, historically important items or extinct or endangered species or taxa that are poorly represented in the collections shall only be granted in exceptional circumstances.

The relevant Honorary Curator will, as appropriate, arrange access to the collections and will prioritise requests and facilitate sampling or visits in accordance with an agreed timetable suitable for both parties.

The exact sampling techniques must be agreed before the project proceeds. Where appropriate the Honorary Curator will prepare a condition report and image the items to be sampled.

Approval will only be granted if the applicant agrees to abide by this policy and any other relevant policy and confirms that they will abide by any terms and conditions or guidelines for any particular destructive or invasive sampling technique.

The Linnean Society reserves the right to decline any Destructive or Invasive Sampling request. In this case the applicant will be informed, in writing, of the reason for the refusal.

Charging and Fees
If any fees or charges are to be levied, the Society will inform the applicant, in writing, of the expected cost.

The applicant must agree to pay these costs before sampling can proceed.

Obligations of the Applicant
If samples or items to be sampled are sent to the applicant, the applicant should, where possible, return to the Society all remaining items and products including but not limited to the original mount, dissected parts and any preparations. If it is not possible to return these items the applicant must inform the Society of the reason.

If samples are sent to the applicant, the applicant should ensure that preparations of all remaining parts are made using materials and protocols as specified by the Society.

If samples are sent to the applicant, the applicant should provide each permanent preparation with a direct copy of the item data including determination; in permanent ink on an archival quality label.
If samples are sent to the applicant, the applicant should fully cross-reference all preparations with the original item following the format specified by the Society.

The applicant should identify items (taxonomically), as far as possible, before dissection or preparation. For certain items the appropriate Linnean Curator will undertake this before the item is sent.

The applicant should include details of voucher specimens, their nature and location, in published studies so that future workers can relocate them.

The applicant should acknowledge the Society in publications involving the use of items from the LS collections.

The applicant must notify the Linnean Society of publications arising from the use of their material and may be asked to provide copies (one of which must be original) of the title page, relevant text and figures.

The applicant must obtain approval from the Society before items for sampling or their products are passed to third parties. The Linnean Society expects applicants to deposit information with appropriate bodies e.g. Genbank or EMBL etc. and therefore does not expect the applicant to obtain approval for this.

The applicant must obtain approval from the Linnean Society before using products derived from items supplied for sampling in any subsequent research.

If the project is abandoned before completion, the applicant must notify the Linnean Society and return all samples using agreed and appropriate techniques for preservation and transit.

If samples are sent to the applicant, any samples not completely destroyed or consumed by their analysis remain the property of the Society and must be returned in due course.

**Intellectual Property Rights of Samples**

The intellectual property rights and all other rights in the samples shall remain at all times vested in the Linnean Society.

The research and the results of the research may not be commercially exploited in any way without the prior written agreement of the Linnean Society. Such agreements may be refused in the Society’s absolute discretion, or granted subject to such conditions as the Society may decide.

**Confidentiality and Publication**

The Linnean Society will not disseminate any details of sequence data, or novel protocols and procedures arising from an applicant’s work until they have been published. However the applicant must accept that the Society has obligations under UK and EU law (e.g. the General Data Protection Regulation 2016 & Freedom of Information Act 2000) to disclose, on request, information it may hold such as the specific details of a sampling request. Similar obligations placed on the applicant under their appropriate local laws or legislations shall also be accepted by the Society. It must also be noted that these obligations on the Linnean Society and the applicant may continue in force notwithstanding the expiry of the sampling request.
Warranties

The Linnean Society warrants that it has made all reasonable inquiries as to the provenance of the items provided for sampling and that to the best of its knowledge the LS is the legal owner of the items. The Linnean Society also warrants that, so far as it is reasonably aware, the loaned items have not:

- been looted from their rightful owners;
- been obtained by violent means;
- been exported illegally or illicitly from their country of origin.

12. Deaccessioning and disposal

Although the Society aims to collect relevant material it also retains the right to dispose of material. The Library and Archives will try and keep as much hard copy stock as possible but cannot promise to retain other items in perpetuity. When reviewing the stock the following criteria should be considered:

- It does not meet our collecting criteria.
- It could find a better audience if it was housed elsewhere.
- The wider landscape has changed since acquisition.
- It poses a risk to our collections and/or staff.
- It is damaged and its rarity does not merit repair.
- Space and accessibility.

Procedure

A flowchart detailing the processes for deaccessioning and disposal can be found in ‘Procedures for acquisitions and deaccessioning’.

Books from donations that do not fulfil the Collections Development Policy and withdrawn stock are either put on the sales trolley at the entrance to the Society, or passed on to a recycling company (currently Anybook Library Services [www.anybook.biz](http://www.anybook.biz)) that will sell them on. All money raised through disposal is reinvested in the Collections.

13. Policy review procedure

The Collections Development Policy was approved by the Collections Committee on 3 April 2019 and by Council on 24 May 2019.

The Collections Development Policy will be published and reviewed from time to time, at least once every five years. The date when the policy is next due for review is noted in the footer.