

## Institution card recommendations

May 2017, MORE Operations Committee

Who qualifies for an Institution card (PTYPE 14)?

Current practice: determined by local library policy

Recommended future practice: Determined by local library policy. Consider adopting the attached sample policy.

Who qualifies for an Institution Non-Charging card (PTYPE 22)?

Current practice: determined by local library policy

What information must be included in institution patron records (PYTPES 14 and 22)?

Current practice:

- PATRON NAME field: institution's legal name
- ADDRESS field: a responsible individual's name on the first line, if in accordance with local policy, then the institution's current mailing address

Recommended future practice:

- PATRON NAME field: institution's legal name
- ADDRESS field: a responsible individual's name on the first line, if in accordance with local policy, then the institution's current mailing address
- NOTE field: "Issued at [issuing library name]"

Can a patron have both a regular, individual card and be the responsible individual associated with an institution card?

Current practice: yes, this is strongly encouraged for those using library materials both for personal use and on behalf of an institution, organization, or classroom

How many concurrent checkouts should institution cards (PYTPES 14 and 22) be allowed?

Current practice: 200

How many concurrent holds should institution cards (PYTPES 14 and 22) be allowed?

Current practice: 100

How should lending periods work for institution cards (PYTPES 14 and 22)?

Current practice: 4-week checkouts for most items; for PYTPE 14, 3 weeks for video materials

Recommended future practice: 4-week checkouts for all materials except Lucky Day, rentals, and ILL

What should the fine rate be for PTYPE 14?

Current practice: \$1/day for video materials, \$.10/day for most other materials, and standard Lucky Day and rental fines

What should the fine rate be for PTYPE 22?

Current practice: no fines except on:

- 37 ILL loan items
- 51 Board bk - NO holds
- 52 Kits - NO holds
- 55 Puppets - NO holds
- 56 Puzzles - NO holds
- 61 Fragile book - NO holds
- 63 Game/Toy - NO holds
- 64 Special Program - NO holds
- 70 Game disc - NO HOLDS
- 71 Game disc
- 72 Game cartridge - NO HOLDS
- 73 Game cartridge
- 98 Lucky Day Book
- 99 Lucky Day DVD
- 101 Rental 3 Day
- 102 Rental 10 Day

For the above, \$1/day for video materials, \$.10/day for most other materials, and standard Lucky Day and Rental fines

Recommended future practice: no fines except on:

- 37 ILL loan items
- 98 Lucky Day Book
- 99 Lucky Day DVD
- 101 Rental 3 Day
- 102 Rental 10 Day

For the above, \$.10/day ILL loan items, and standard Lucky Day and Rental fines

How should expired institution cards (PYTPES 14 and 22) work?

Current practice: expired cards are blocked from checkouts, placing holds, etc.

## Institution card policy sample for MORE

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Institution cards may be issued to the following organizations:

- Governmental agencies and departments
- Hospital departments
- Businesses
- Nursing homes and group homes
- Schools and classrooms, including homeschoolers
- Pre-schools and licensed daycare centers
- Professional offices and clinics
- Schools of Higher Education
- Religious institutions
- Service organizations

Cards will be issued only after receipt of a letter of application on letterhead, from a financially responsible officer of the institution, expressing the institution's acceptance of responsibility for all fines, fees, and charges, including charges for damaged or lost materials. The letter must also designate a contact person within the organization for handling any library matters.

The same privileges and policies which apply to individual cardholders will also apply to institutional cardholders. The institution assumes responsibility for any library materials checked out on its card. The institution is responsible for ensuring authorized access to its card. The Library will not maintain a list of authorized users for an institution. The institution will notify the Library in the event their library card is lost or stolen.

Institutional cards are not to be used by employees or instructors of an institution for their own personal purpose unrelated to their work or teaching. They are expected to apply for personal cards for those purposes.