Recommendations for Institutional and Teacher Library Cards

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The "Institutional/Teacher" type is applied to cards for organizational or professional use. Institutional and Teacher cards are optional. Individual libraries are not required to grant them.

Institutional and Teacher cards may allow extended checkout and renewal periods from other patrons, as long as the *total* time for books is not increased beyond 72 days (1 initial checkout of 30 days and two subsequent renewals of 21 days each. 30+21+21 = 72 days). For example, a book that usually checks out for 3 weeks with two 3-week renewals (9 weeks total), could be checked out to an Institution/Teacher for 5 weeks, with two 2-week renewals (9 weeks total). Ideally this is done via automatic rules in Sierra related to the local Institutional/Teacher patron type. Library staff should not rely on extending due dates manually as it artificially extends the total time beyond 72 days.

If the borrowing library ignores this guideline and extends the due date beyond 72 days without the consent of the owning library, the owning library may invoice the checkout library for replacement cost of the item, and change the item status to Billed (n).

The length of checkout guidelines applies to items shared among libraries. Individual libraries can extend checkout periods and due dates on their own items beyond 72 days.

Institutional and Teacher cards should have a Patron Code 4 that matches the address of the school or organization where the materials are being used.

For Teachers

Libraries have flexibility in determining who counts as a teacher, but commonly this includes individuals who teach at public or private schools and licensed daycare providers. It can also include homeschool teachers at the discretion of the individual library.

Teacher cards should only be used for professional purposes. Materials intended for personal use should be checked out on a library card that does not have the Institution/Teacher type. Teachers should be asked to agree to this in the application. Libraries may want to ask for proof of employment, or a letter designating homeschool parent/guardianship (PI-1206).

Teacher cards should be in the name of the individual using the card. They should fill out a standard application form with their personal information (and show ID and proof of address), and provide their work contact information on a supplementary application. Both the personal and work information should be entered into the patron record.

Teachers are typically held financially responsible for their account unless their organization has a policy of taking on that responsibility. In that case, libraries are recommended to get signed authorization from the teacher's principal or other organizational head. This authorization can be a form that the library provides for the principal/director to sign, or in the form of a letter on organizational letterhead. It is the library's responsibility to identify someone with financial responsibility for the account.

Teacher cards should expire each year on the academic calendar. Libraries may want to ask for proof of employment, or a letter designating homeschool parent/guardianship (PI-1206) on an annual basis.

For Institutions

Libraries have freedom to determine what kinds of organizations can have institutional cards at their library. Common types of categories include schools, city or county departments, and non-profit organizations. These cards allow multiple users associated with the organization to share the card.

Institutional cards should only be used for professional purposes. Personal library materials should be checked out on the individual user's personal library card.

One main contact person for the organization should be considered the "primary user." Institutional cards should be in the name of the organization. They should fill out an institutional application form, which should include the following fields:

- Name of organization
- Address of the organization
- Township/municipality of the organization
- Work phone number of the account's primary user
- Work email address of the account's primary user
- Contact preference
- Space for a list of authorized users, who must be listed by name
- The primary user's full legal name
- The primary user's birthdate
- The primary user's contact information

The application should include an agreement to notify the library immediately of changes to the list of authorized users, the primary user, or a change to the authorization to have an organizational card.

The primary user should show ID and proof of address. They are considered financially responsible unless the organization says otherwise. In that case, the head of the organization should provide a letter on organizational letterhead, or sign a form provided by the library. It is the library's responsibility to make sure they have identified someone with financial responsibility for the account.

Organizational cards should expire yearly. To renew the card, the primary user should show ID and proof of address, and a provide a current list of authorized users. If the organization is taking on financial responsibility, the head of the organization should provide a letter on organizational letterhead, or sign a form provided by the library at the time of renewal. Since organizations do not have birthdates, libraries can do this by setting the expiration date to one year from creation/renewal, or a set time of year that is convenient (such as the start or end of a fiscal or academic year).

Outreach / Homebound Organizations

Organizations whose cards serve a homebound/outreach function (such as an assisted living facility that receives deliveries as part of the library's homebound program) may benefit from being designated as a homebound patron type instead of an Institutional patron type to provide additional flexibility and Homebound features within Sierra.