

# Action Item 2: Changes to Institution Accounts

PINES Subcommittee Responses, September 2024 Executive Committee Meeting

## Proposed Change to Policy

Proposal submitted by Stephen Houser, West Georgia Regional Library System

See complete document at:

[https://pines.georgialibraries.org/wp-content/uploads/2024/09/AI-2-Institution\\_Permission\\_Group\\_Changes.pdf](https://pines.georgialibraries.org/wp-content/uploads/2024/09/AI-2-Institution_Permission_Group_Changes.pdf)

## Respondents

The following summary is based on feedback from 47 respondents representing 30 library systems.

- Circulation Subcommittee: 11 responses
- Other Subcommittees: 11 responses
- Library System Directors: 25 responses

## Survey Responses

1. Would you approve of changing the circulation period to 30 days with 1 renewal? (It is currently 42 days with 0 renewals.)

Answer	Number	Percent
Yes	39	83%
No	5	11%
Not Sure	3	6%

2. Would you approve of changing the concurrent checkout limit from 50 to 100 items?

Answer	Number	Percent
Yes	27	57%
No	17	36%
Not Sure	3	7%

**3. Would you approve of changing the concurrent hold limit from 50 to 100 items?**

<b>Answer</b>	<b>Number</b>	<b>Percent</b>
Yes	26	55%
No	17	36%
Not Sure	4	9%

**4. Would you approve of changing the privilege limit (ie, expiration date) from 1 year to 2 years?**

<b>Answer</b>	<b>Number</b>	<b>Percent</b>
Yes	39	83%
No	6	13%
Not Sure	2	4%

## **Comments**

- 100 books/holds would be a large amount missing from smaller library collections. We have a large collection but substantial institutional participation would stretch us thin at the 100 book limit. I would suggest a different service model entirely for an instance when a whole grade needs to read the same title. The other parts of this proposal seem very practical and consistent with other current practices.
- Because of turnover at institutions I think updating yearly is necessary. I don't believe institutions should have more checkout or holds than the patrons.
- Changing the privilege limit to 2 years is reasonable. Teachers have enough to deal with without having to remember to update an Institutional card every summer.

However, public libraries aren't in a position to take the place of school media centers without potentially impacting the service provided to the rest of our patrons. In speaking with staff, there have been many instances over the years where our local patrons have needed a book only for us to discover it checked out for an extended period to an institution. And we couldn't even request another copy from PINES for our patron because that one institution had every copy in PINES checked out.

Public library staff also shouldn't be responsible for the return of materials checked out on Institutional cards, as is mentioned in the proposal. Just as regular patrons are

responsible for the return of their own materials, the individual responsible for the Institutional card should be responsible for the return of the materials.

I'm a firm believer in providing students and teachers with support, but I feel we are overstepping by trying to take on the role of school media center also. Schools will never get the funding they need for their media centers if they show the gap is filled by the public libraries. And we aren't getting extra funding from the schools to purchase extra materials to support them.

I'm somewhat open to giving it a try, with the caveat that if it creates major issues for libraries over the course of a year, then it's revisited and consideration made to allow library systems to decide whether to participate in lending materials since it's not the best service to our patrons or the best use of our taxpayer dollars if the same books our teachers and students need are placed on hold to be used in another school system for up to 60 days and we can't get another copy for them to borrow.

- Funding for books is scarce for both public libraries and schools, so while I am in favor of public libraries supporting schools, I'm not thrilled by the idea of having potentially hundreds of our books kept from our shelves for 60 days by schools somewhere else in the state. Our collection management policy states that we do not purchase materials for schools to use in their curriculum or to provide classroom copies of, but we cannot police other systems holding and keeping our books for up to 60 days for school use. That isn't something that I feel has been happening in the past, but I would prefer not to open the door further; if institutional cards are issued, I prefer they be restricted to the same checkout and holds limits as individual patrons.
- I agree with the proposals that will make the institution card match the permissions of other groups. But the institution card should not get special privileges for the number of items checked out and number of holds allowed, because it is not the role of the public library to completely fill the needs of the schools. Schools have other options for obtaining the number of copies that they need - grants, partnerships, their own budget, etc.
- I can't see any reason to not synchronize the privilege period or adjust lending periods. Georgia public school funding far exceeds public library funding. Allowing gaps to be evident allows the schools to advocate for the resources needed to fill the gaps. Public libraries and our collections are not a substitute for public school media centers. Item #2 is not actually addressed by this proposal provided the information from Terran that they would still only be able to check out one item per title without staff override.
- I feel that exceeding 50 items could be crippling to some of the smaller libraries with limited collections. That's a long time for materials to be in use and not accessible to other community members.
- I have changed my vote a few times now, I would like to be 100% for all of these changes, however, I am still worried about resources not being available for other readers. Although PINES has restrictions keeping multiple copies of an item from being put on hold by the same account, I have experienced this not happening, to the point where I have been unable to secure an item for a patron, and not just once. Whether this is an individual worker not keeping PINES policy, or some kind of glitch, I would be much more comfortable with the 100 checkouts/holds if that were not happening so consistently. Until that is resolved, I worry that extending the hold/checkout limit would

further exacerbate unequal access to resources. Also, we already have the PLAY card, to help students have more reliable and consistent access to library materials.

- I understand the need to save staff time, but I also know how organizations work. We may have staff who right now are good at staying on top of things on an annual basis, but the very nature of an institutional card means that the person who is ultimately signing off on its reuse each year can change without us knowing - think principal changes and the like. I like that the system requires us to renew each year. It's a failsafe that ensures our staff are staying on top of things, and that communication lines remain open. Two years is just too long. We can have too many staff changes on both sides of the partnership. The one year renewal should stay in place.
- Not sure on the Holds question as this will add a strain to a system that has struggled to keep up with demand from time to time. More holds = more overall costs for everyone. not sure....
- "Regarding the circulation period: I agree that it would be best if schools could hold on to library materials for the full duration of their curriculum periods. However, in the subcommittee listserv discussing this proposal, it was mentioned that items checked out to Institutions could very well be eligible for holds from patrons across the state. Are the schools better served by a guaranteed 42 days with 50-to-100 items (and no late fees, I'll point out), or by a guaranteed 30 days with 50 items and only the possibility that all 50 items will be renewed?"
- Regarding the privilege period: The proposal discusses an issue where the submitting library system is contacting their local schools individually to renew each account, which is taking a significant amount of staff time. There's no specific mention of Institution renewal procedures or policies in the PINES policy documentation, outside of the mention of 1 year privileges. Institution profiles cover more than just schools, and staff turnover is a possibility anywhere. This may be better resolved with local procedure changes than revising the policy for Institutions of all types across the state.
- For example, could the submitting library system choose to have an agreement with the school system itself, and then assign multiple Institution profiles to each school, but only require the one renewal agreement? That would save even more time than renewing every two years, and functions similarly to a parent renewing their children's library cards.
- Do Institution profiles receive an email notification about account renewal similar to the ones patrons receive? Are Institution profiles eligible to renew their accounts online? Perhaps the library system would only need to contact schools that they've noticed haven't renewed, if the Institutions themselves are able to renew for an additional year."
- These accounts require constant staff monitoring. You can manually set the renewal date to any date you'd like, just enter 08/23/20xx. One year is better because staff often move from school to school and the "responsible" party has often moved on to another system. 1 year forces us to update contact information with the institution.
- This policy change is needed to accommodate our schools and headstart.
- This seems like it will lessen the workload for those that regularly encounter institutional accounts and benefit the patron which are both positives.
- We are not sure about increasing the check out and hold limit. We have some classes that can't keep track of 50 items let alone 100, although I see the logic in having institutions checking out more than individuals. Even though we are a small library, we loan more books than we borrow. If the loan amount increases and more of our books

are borrowed, then when we need them, we in turn borrow them from someone else. This is how it currently works now with a limit of 50, so maybe 100 wont matter. It keeps the desk staff busy pulling and packing. :)

- We have institutional cards at local non-profits, not so much school media centers.
- We support the entire public, not just public and private schools and other entities who have their own source of income. We do not exist to support the curriculum of any given entity.
- We take items to institutions for deposit. Staff swap out the material with the expectation of 1 month circulation but sometimes it will go a week later due to staffing shortages or bad weather. We like the 42 day checkout as it gives staff some flexibility without sending an overdue notice to the institution if we are late picking them up. We do support the 1 renewal period.