**Cardholder Signup Policies: Access in Practice**

**Learner Guide**

<https://www.webjunction.org/events/webjunction/cardholder-signup-policies.html>

In 2023, BPL launched a research project to collect and study cardholder signup policies from public libraries across the nation. The project aims to identify the range of policies and procedures which govern cardholder access as well as the rationale used for establishing these policies. Research findings have been summarized in a report made available to the library field beginning spring 2024. Join us for a discussion about the inspiration for this study, how the research was conducted, and key findings and takeaways using data from more than 1,800 public libraries across the United States.

Presented by: **Amy Mikel** and **Emily Thomas**

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| **What are your goals for viewing this webinar?** | |
| **Personal Goals** |  |
| **Team Goals** |  |
| **Assess current practices** | |
| The research identified practices across the multiple dimensions of library card signup.  Consider your library’s practices and policies in these areas. **What do you currently do and why do you do it this way?**   * **Residency requirements** (types of eligibility, ID validation, workarounds i.e. those in transitional housing, definition of “service area”) * **Youth signup** (parent/guardian permission, minimum age, restrictions on access, school partnerships, mature minors) * **Language access** (immigrant populations, speakers of other languages, translation of materials, library education) * **Digital access** (eCard signup, digital lending, out of state cards) * **Data collection & retention** (address/email/phone requirements, name/preferred name/cultural naming conventions, driver’s license/unique ID, records purge) * **Patron information & education** (printed/web materials, tour/orientation, outreach) * **Miscellaneous** (expirations & renewals, guest passes/computer use, resource sharing/cooperative lending, outreach/homebound, indigenous access, incarcerated patrons) | |

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| **Opportunities for change** |
| Considering these dimensions of card sign up, **identify where there might be opportunities to make “easy” changes**. Are there areas where you can get creative within the stated policy? Easily change or update internal procedures? Or, are there areas in which the policy itself is “easy” to change?   * Residency requirements * Youth signup * Language access * Digital access * Data collection & retention * Patron information & education * Miscellaneous |
| **Flag existing barriers** |
| Identify where you might run into barriers, pushback, or roadblocks to make changes.  Where might you need more data, information, or other support in order to make your case?  How can data collected from this project support you? Where are the areas in which you might you need additional information? |
| **Prioritize solutions** |
| Prioritize possibilities identified above, begin with your **top 3 most urgently needed changes** and identify any possible **barriers or roadblocks** that exist to making these changes, and brainstorm possible **solutions to move forward**.  1.  2.  3. |