



EVERGREEN
INDIANA™
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Building the Evergreen Indiana Consortium from the
Technical Services perspective

by

Sarah Childs, Hussey Mayfield Memorial Public Library

and

Judy Siehl Hill, Plainfield-Guilford Township Public Library

Evergreen ILS Genesis

- Development of the Evergreen ILS began in 2004.
- Georgia Public Library Service initiated the project, originally known as Open-ILS.
- It was born out frustration with the ILS options available at that time, both proprietary and open source.



PINES Consortium

- Evergreen was developed for PINES, a pre-existing consortium of libraries in Georgia.
- The Alpha release of the software was in July 2005.
- All PINES libraries migrated to Evergreen September 5, 2006.
- Currently Georgia PINES includes more than 275 member libraries



Equinox Software Inc.

- Founded by the developers of Evergreen
- Continues to develop the software
- Can be contracted to provide support, migration assistance, and hosting



Evergreen Libraries Worldwide

- SITKA, a consortium of libraries in British Columbia
 - First library migrated late 2007
- Michigan Evergreen Project
 - First library migrated August of 2008
- Various single libraries in the US and Canada, including several university libraries, have come on since 2008.
- Project Conifer is a group of several university libraries in Canada that are working with Equinox to develop Acquisitions and Serials.
- SC LENDS, a South Carolina consortium
 - First 11 libraries migrate by fall of this year
- Mahatma Education Society in India
 - 3 libraries will come on in June, with 20 over the course of 2009-10.
- Other libraries and library systems are slated to convert to Evergreen over the next year.



Formation of Evergreen Indiana

- The Evergreen Indiana Project was coordinated by the Indiana State Library and the Hussey-Mayfield Memorial Public Library in Zionsville, IN.
- The ISL contracted with Equinox in 2008 to develop a migration strategy.
- 20 pilot libraries elected an Executive Committee, which first met August 19, 2008
- Hussey-Mayfield Memorial Public Library migrated to Evergreen August 25, 2008.



Evergreen Indiana Patrons Served

- As of today, there are a total of 26 libraries live in Evergreen Indiana.
- 318,376 patrons are served by these libraries
- 20 additional libraries, serving a total of 177,143 patrons have signed membership agreements
- If all 20 migrate by the end of the year 495,519 patrons will be served by EI.



Evergreen Indiana History

- August 25, 2008
 - Hussey-Mayfield Memorial Public Library in Zionsville, Indiana, became the first library in the Evergreen Indiana Consortium to go live with Evergreen.
 - No cataloging policies or procedures for how to catalog in Evergreen Indiana.
 - No training manual on how to use the Evergreen Software
 - A trial and error method of learning the software on the part of the cataloging staff in Zionsville.



Evergreen Indiana History

August 28, 2008

- First meeting of the Evergreen Indiana Cataloging Committee at the Indiana State Library.
- Tools we had to work with:
 - Georgia Pines Cataloging document: Primarily a how to catalog document with a lot of do's and don'ts based on AACR2 and OCLC MARC formats.
 - Michigan Library Consortium training Manual: Basically a brief manual complete with screen shots on how to do some basic things in the Evergreen soft ware, such as adding and deleting holdings for a bibliographic record, how to use the copy editor, some searching strategies and how to merge records.



Evergreen Indiana History

August 28, 2008

- The first thing we did was elect a chair and secretary for the committee: Judy Siehl Hill, Chair, and Sarah Childs, secretary.
- The other original members of the Cataloging Committee were:

Kelly Ehinger, Adams Public Library System

Cindy Wilson, Butler Public Library

Terri Wichman, Jackson County Public Library

Jocelyn Lewis, Lebanon Public Library

Judy Morehouse, Mooresville Public Library



Evergreen Indiana History

August 28, 2008

- From there the discussion turned to how do we set cataloging policies and procedures for the Consortium.
- Policies had to be set before we could begin to proceed with anything else.
- Fortunately, we are all catalogers who are dedicated to cataloging things correctly following AACR2 and MARC 21 standards.
- We all want the EI consortium to succeed and we agreed that the cataloging should reflect good cataloging standards.



Evergreen Indiana History

August 28, 2008

- From the very beginning we knew that the member libraries were coming into the consortium with different ILS systems and with catalogers with different levels of cataloging training and skill levels.
- This made the establishment of a good Cataloging Policy a top priority for us.
- All of our activities as a committee flow from these two statements.
- We set up the Evergreen Indiana Cataloging listserv for all of the consortium catalogers to use.



Evergreen Indiana History

August 28-October 31, 2008

- The earliest meetings dealt with writing the Evergreen Indiana Cataloging Policy which was formally adopted by the Executive Committee of Evergreen Indiana on November 14, 2008.
- Basic cataloging standards, such as AACR2, Library of Congress Rule Interpretations, and MARC 21 would be the guides.
- The policies also include things such as using standard GMD terminology and Library of Congress subject headings, although other subject headings could also be present in the records.



Evergreen Indiana History

August 28-October 31, 2008

- Standards were set for maintaining holdings in Evergreen Indiana.
- All libraries were required to keep their holdings current.
- All libraries were to designate at least one staff member to monitor the Evergreen Indiana Cataloging Listserv.
- All libraries were required to resolve problems brought to their attention by the Cataloging Committee.



Evergreen Indiana History

August 28-October 31, 2008

- All libraries were required to have one staff member trained at the CAT-1 level.
- This person would have to attend all mandatory training sessions and would be issued an Evergreen Indiana CAT-1 certificate by the Evergreen Indiana Cataloging Committee.
- The CAT-1 would ideally be able to handle problems for his/her library and answer the questions the other catalogers at his/her library would have.



Evergreen Indiana History

August 28-October 31, 2008

- CAT-1 catalogers were the staff members responsible for adding original records to the database as well as overlaying good bibliographic records over the ones which were not as good as the policy dictated we have.
- Cat-1 catalogers could merge records when it was appropriate to do so.
- Cat-1 catalogers would also edit MARC records and add new fields to the records
- Cat-1 catalogers would have permission to delete Bib records from the Evergreen Indiana database.



Evergreen Indiana History

August 28-October 31, 2008

- CAT-2 level cataloging was defined simply as copy cataloging.
- Catalogers with CAT-2 status would be able to attach holdings to bibliographic records already in the Evergreen Indiana database.
- CAT-2 catalogers could edit Volumes (call numbers) and copy level data.
- CAT-2 catalogers could import new records via Z39.50 or batch (when it becomes available).
- CAT-2 catalogers could create stub records for on-order records and temporary records.



Evergreen Indiana History

September 17, 2008

- The Evergreen Indiana Cataloging Committee established a subcommittee to create a training manual based on the Michigan manual, but with screen shots which were taken from our own Evergreen Indiana OPAC.
- The subcommittee met for the first time in September at the Hussey-Mayfield Memorial Public Library (since they were the only member library which was live).
- Sarah Childs, Jocelyn Lewis, Judy Morehouse and Judy Hill formed the subcommittee.
- The committee met weekly (or bi-weekly at times) to begin writing the new Training Manual.



Evergreen Indiana History

October, 2008

- At one of the subcommittee meetings, the subcommittee floated the idea of also creating a Procedures Guide.
- The Training Manual would deal with how to use the Evergreen software, but a Procedures Guide was deemed necessary to keep track of all of the procedures the Cataloging Committee wished to establish as good cataloging practice for the consortium.

Evergreen Indiana History

October, 2008

- It was agreed that Judy Hill would take responsibility for maintaining the Procedures Guide. The subcommittee sent an email to the other Committee members to take a poll to see if this was something we should do and received an unanimous YES.
- The Procedures Guide was to be based on some of the more positive aspects of the Georgia Pines cataloging document and was also influenced by the perspective we had found in the PALNI Consortium cataloging documents.



Evergreen Indiana History

October 6, 2008

- Adams Public Library System goes live.

October 10, 2008

- Union County Public Library goes live.

October 13, 2008

- Colfax-Perry Township Public Library, Jackson County Public Library, Lebanon Public Library, Mooresville Public Library and Plainfield-Guilford Township Public Library all go live.
 - Still no official cataloging policies and no training manual on how to use the Evergreen software.



Evergreen Indiana History

October 31, 2008

- The first draft copies of the Evergreen Indiana Cataloging Training Manual and the Evergreen Indiana Cataloging Procedures guide were presented to the Evergreen Indiana Cataloging Committee.
- The draft copy of the Training Manual was sent out to the member libraries so that cataloging staff would have at least some documentation on how to use the system.



Evergreen Indiana History

October 31, 2008

- Judy Hill was asked to get the Procedures Guide written by the next Cataloging Committee meeting on December 2, 2008.
- As various sections of the Procedures Guide were finished, they were sent to the Committee members via email for comments and editing.
- By the December 2nd deadline, we had a workable document to base all of our procedures on.

Evergreen Indiana History

Both the Evergreen Indiana Training Manual and the Evergreen Indiana are seen as living documents which will continue to be updated by the Evergreen Indiana Cataloging Committee as needed.

- Sarah Childs maintains the Training Manual.

<http://www.in.gov/library/3381.htm>

- Judy Hill maintains the Procedures Guide.

<http://www.in.gov/library/3386.htm>



Evergreen Indiana History

December 2, 2008

- The Evergreen Indiana Cataloging Committee met to discuss how we would like to address the first of the Beginning Evergreen Cataloging Classes which would be presented on December 17, 2008.
- The Executive Committee had mandated that the members libraries would follow the Evergreen Indiana Cataloging Policy and send the CAT-1 person from each of the libraries which were live or would become live by the end of the year to the class.
- The Committee had previously decided to partner with the Professional Development Office of the Indiana State Library to teach the classes.



Evergreen Indiana History

December 2, 2008

- Wendy Knapp, the head of the Professional Development Office came to the December 2nd meeting to discuss strategy and offer the assistant of her office.
- The Cataloging Committee wanted to maintain control of what was being taught in the classes.
- It was decided that Wendy would teach the morning session on how to use the Evergreen software. The members of the Cataloging Committee would teach the sessions dealing with cataloging policies and procedures.



Evergreen Indiana History

December 2, 2008

- Catherine Lemmer, the Evergreen Indiana Project Manager, was asked to send out the date of the first Beginning Evergreen Indiana Cataloging Class and to remind the member libraries that they must send one staff member to the class to be in compliance with Evergreen Indiana Cataloging Policy.
- The response to the request was so overwhelming that the Cataloging Committee decides to add a 2nd Beginning Evergreen Indiana Cataloging class on December 18, 2008 and move the previously scheduled committee meeting to another time. The Advance Evergreen Indiana Cataloging class was scheduled for January 7, 2009.



Evergreen Indiana History

December 8, 2008

- Butler Public Library goes live.
- Brownstown Public Library goes live.
- Jennings County Public Library goes live.
- Melton Public Library goes live.
- Oden Winkelpleck Public Library goes live.

- At least we now have both a Training Manual on how to use the software and a Procedures Guide on how to catalog by Evergreen Indiana standards.



Evergreen Indiana History

December 17-18, 2008

- The first two Beginning Evergreen Indiana Cataloging Classes are presented to packed-houses both days in spite of the bad winter weather.
- Many of the libraries sent two and three people due to the fact that their cataloging was done by people who work in various departments.
- The class is very well received and reviewed.
- The Evergreen Cataloging Committee decides to schedule a Cataloging Committee meeting for January 7th to plan the Advanced Evergreen Indiana Cataloging Class.



Evergreen Indiana History

December 27, 2008

- Brazil Public Library goes live.
 - Now the catalogers have the Evergreen Indiana Training Manual, the Evergreen Indiana Procedures Guide and have attended the Beginning Evergreen Indiana Cataloging Classes.
 - At this point in time, all of the catalogers in the Consortium have CAT-2 status since the Cat-1 level skills have not been taught yet.
 - Based on the suggestions from the various catalogers from around the consortium, the Training Manual and Procedures Guide undergo their first major revisions.



Evergreen Indiana History

January 7, 2009

- The Cataloging Committee meets to set the agenda for the Advanced Evergreen Indiana Cataloging Class to be held on February 19, 2009. The Cataloging Committee members will be the only instructors since this class will cover Evergreen cataloging policies and procedures and more difficult aspects of applying them to cataloging with the Evergreen software.
- A make-up class for the Beginning Cataloging Class is scheduled for February 4th so that catalogers who could not come in December due to the bad weather can take the beginning class before the advanced class is offered.



Evergreen Indiana History

January 27, 2009

- Hamilton North Public Library goes live.
- Ladoga-Clark Township Public Library goes live.
- North Webster Community Public Library goes live.

February 2, 2009

- Fulton County Public Library goes live.

- Only the Advanced Evergreen Cataloging Class has yet to be presented.



Evergreen Indiana History

February 4, 2009

- Third session of the Beginning Evergreen Indiana Cataloging Class is presented.

February 4, 2009

- The Evergreen Indiana Cataloging Committee meets after the class and welcomes two new members to the committee:
 - Janet Buckley, Greenwood Public Library
 - Marlane Gutzwiller, Madison-Jefferson County Public Library
- Final touches are added for the 1st Advanced Evergreen Indiana Cataloging Class.



Evergreen Indiana History

February 4, 2009

- Cindy Wilson is voted as the Certification Officer for the Evergreen Indiana Cataloging Committee.
- Terri Wichman is voted as the Evergreen Upgrade Coordinator for the Evergreen Indiana Cataloging Committee.



Evergreen Indiana History

February 19, 2009

- Two sessions of the Advanced Evergreen Indiana Cataloging class are presented.
- Sessions include training on creating buckets, merging records, more advanced search strategies, transferring and re-targeting holds, and global changes for item records.



Evergreen Indiana History

March 9, 2009

- Hagerstown-Jefferson Township Public Library goes live.
 - Madison-Jefferson County Public Library goes live.
 - Otterbein Public Library goes live.
 - Thorntown Public Library goes live.
- All pieces of the Evergreen Indiana Cataloging puzzle are now in place.



Evergreen Indiana History

March 9, 2009

- The Evergreen Indiana Cataloging Committee meets and issues the first CAT-1 Evergreen Indiana certificates to the Evergreen Indiana catalogers who have attended both sessions of the Evergreen Indiana.
- The Committee members evaluate the comments from the catalogers who attended the classes and use the comments to tweak the classes to make them flow better.



Evergreen Indiana History

April 23, 2009

- Carnegie Public Library of Steuben County goes live.
- Switzerland County Public Library goes live.

April 29, 2009

- The Cataloging Committee meets and continues to update the Training Manual, the Procedures Guide and both of the Evergreen Indiana Cataloging Classes.
- At every point, we emphasize the use of our listserv, which has been and continues to be used on a daily basis by the Evergreen Indiana catalogers.



Evergreen Indiana History

The Evergreen Indiana Training Manual has become the official training manual for the Evergreen software and is used by both Equinox, the developers of the software, and by Lyrasis, whose trainers have been contracted by Equinox to do online training for the Evergreen Software.



Evergreen Indiana's Future

May 7, 2009

- Evergreen Indiana has 47 member libraries, including the Indiana State Library which will migrate by December 2009, with 26 of those libraries already using the Evergreen software.
- The 26 libraries which are live serve a total population of 318,376 patrons.
- The rest of the libraries will migrate before the rest of the year. By the end of the year, the patron population will be 495,519 people.
- A couple of our libraries have never had an automated library system before.



Evergreen Indiana's Future

May 11, 2009

- Greenwood Public Library to migrate.

June 25, 2009

- Alexandria-Monroe Public Library to migrate.
- Huntingburg Public Library to migrate.
- Pike County Public Library to migrate.
- Waterloo Grant Township Public Library to migrate.



Evergreen Indiana's Future

Some things we think about for the consortium:

- In Indiana, the public libraries are facing budgets that are thinner and thinner each year.
- The cost savings in being part of the Evergreen Indiana Consortium:
 - No expense for the On-line system.
 - Sharing the expertise across the consortium: IT staff, Cataloging staff, sharing bibliographic records as well as the materials themselves among the consortium members.



Evergreen Indiana's Future

At Plainfield-Guilford Township Public Library:

- Our SIRSI Unicorn system was costing us \$16,000 per year.
- That money can go to other capital projects in the library, such as upgrading computers, scanners, self-check machines.
- Our OCLC costs have not gone up much since other libraries are already adding records to the Evergreen Indiana and we do not have to export as many records.
- The support we get from our colleagues in the other Evergreen Indiana libraries has been tremendous.



Evergreen Indiana's Future

Examples of support:

- Evergreen Indiana has worked hard to encourage a collegial support system throughout the consortium.
- The IT support comes from the staff hired by the Indiana State Library AND from the individual IT staff members in the member libraries, especially the IT staff at the Hussey Mayfield Memorial Public Library.
 - The IT staff have the ear of the Evergreen developers at Equinox since they are helping to write the programs.



Evergreen Indiana's Future

- Examples of support:
 - The Evergreen Cataloging Committee Members are the support for the cataloging in the consortium.
 - Listserv for catalogers
 - Emails to Committee members
 - Telephone calls to Committee members
 - Classes for the catalogers with the support of the PDO Office of the Indiana State Library.
 - Visits from member libraries, or perspective member libraries, to the Evergreen Indiana libraries.



Evergreen Indiana's Future

Other Evergreen Indiana Committees:

- Executive
- IT
- Circulation
- OPAC*
- Acquisitions and Serials*

* Just getting formed and staffed.



Evergreen Indiana's Future

Where Evergreen Indiana go from here?

- The Evergreen Indiana Cataloging Committee only sees the consortium growing as budgets get tighter.
- We will continue to train the catalogers to use the Evergreen software and the Evergreen Indiana Cataloging policy and procedures.
- The Training Manual and Procedures Guide will be updated twice a year or after any major upgrades to the software.
- The Executive Committee meets regularly and among their many duties, approves new membership requests. That list continues to grow daily.



Websites

- ISL Evergreen main page <http://www.in.gov/library/evergreen.htm>
- Evergreen Indiana OPAC <http://evergreen.lib.in.us/>
- Evergreen Software <http://www.evergreen-ils.org/>
- Equinox <http://esilibrary.com/esi/>
- EI Cataloging manual <http://www.in.gov/library/3381.htm>
- EI Procedures Guide <http://www.in.gov/library/3386.htm>
- Evergreen Conference <http://www.lyrasis.org/evergreen>
- Evergreen Facebook Group
<http://www.facebook.com/group.php?gid=6396639614>



Evergreen Indiana

Sarah Childs, Hussey Mayfield Memorial Public Library

sarahc@zionsville.lib.in.us

Judy Hill, Plainfield-Guilford Township Public Library

jhill@plainfieldlibrary.net

