FOCUS on

Quality Improvement in your
Library

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Rather than focusing on
"doing more with less",
FOCUS on

1. Never ending improvement of "quality" offerings
2. Make decisions based on data
3. Improve "quality" via a *fanatical* devotion to customers

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Purpose Today

- Provide an overview of a service option that other *groups of libraries* in the U.S. and Canada have been using to deliver a "Quality Product".

An Open Source ILS called Evergreen

- Examine the Evergreen option as to its viability for use by Indiana Libraries.

Program Hosts Today

- Roberta Brooker, *ISL*, Indiana State Librarian
- Jim Corridan, *ISL*, Associate Director
- Jake Speer, *ISL*, Library Development Office Director
- Martha Catt, *HMMPL*, Director
- Mary Rueff, *HMMPL*, Associate Director, Public & Technical Services
- Rick Deuschle, *HMMPL*, Associate Director, Information & Facilities
- Niles Ingalls, *HMMPL*, Systems & Program Specialist

HMMPL: Hussey-Mayfield Memorial Public Library in Zionsville, IN

Agenda Review – Before Lunch

- Sources of Additional Information & Data
- Evergreen Indiana Live w/Demo

Quick Break

- Customer Stories from Evergreen Georgia
- Cost Savings with Evergreen Georgia
- Potential Cost Savings with Evergreen IN

Quick Break

- Questions *during* **Lunch**

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Evergreen Indiana LIVE!

Starring Indiana Residents and
Indiana Libraries

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Additional Information about Open Source Initiative

- Additional Information will be available here:

  Indiana State Library

  http://www.in.gov/library/5592.htm

  Evergreen resources are at the bottom of the main page.

What is an ILS (Integrated Library System)?

- **Used to be known as "library automation systems" earlier in our history**
- **Usually has the following features / modules:**
  - **2 graphical interfaces, one for staff and one for the public**
  - **Circulation module**
  - **Cataloging module**
  - **OPAC**
  - **Acquisitions**
  - **Serials**
  - **Unique ID barcodes or RFID [Radio Frequency Identification] for items in the library's collection and customer cards**
- **All contained in a database environment**

Georgia Library History

- Which came first, PINES or Evergreen?

- What is PINES?

- What is Evergreen?

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Two driving forces for improvement

- The governor of Georgia, who insisted on one library card for all residents to check out items from any public library in Georgia

- Substandard automation equipment in PINES libraries in the face of Y2K in 1999

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Y2K Solution

- PINES libraries chose a shared proprietary ILS in 1999 to serve all their members

- This ILS served them until 2006, however frustration set in among the libraries in 2003, leading to …

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A need for Change

- PINES studied the proprietary ILS options available in the marketplace, not seeing any that met their needs
- A voice among PINES staff was heard saying, why not open source?
- So, someone said, why not open source?
- Open source was the choice!

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Between 2003 and 2006

- Group meetings were held around Georgia
- Library representatives were told "Pretend it's magic!"
- What do you want your ILS to do?
- The people answered "the sun, moon and stars!"

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Wallpaper for PINES walls was created in 2003

- Sun, moon and stars lists were sufficient to cover all the walls in the Evergreen developers' office!
- There were 15 years of development and enhancements contained in those lists!
- Five years have been completed.

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Evergreen went live!

- Over Labor Day weekend 2006
- All PINES libraries converted from the proprietary ILS to Evergreen, the new open source ILS
- Transactions, customer records, and online catalog records were migrated from the former system.

Evergreen Features in 2006

- Easy-to-use staff client
- Easy-to-use OPAC
- Circulation module
- Cataloging module
- Reports module
- Statistical module

Customer Features

- **Bookbags (private and public lists)**
- **Ability to update some patron record features such as email address, user name and password, notice delivery method (email &/or phone)**
- **Book covers, excerpts and reviews**
- **Realistic dates for hold request availability**
- **Search capabilities similar to popular commercial websites**
- **Google-like spell-checking and search suggestions**

Zionsville's Interest in Evergreen

- Frustration with our proprietary ILS
- Searched the marketplace for new proprietary ILS
- Heard someone say, what about open source?
- We said, what about open source?
- IT staff attended a SWON meeting in Ohio about open source projects in summer 2007

What Zionsville learned in Ohio

- Two main open source ILS products are currently being used: Koha and Evergreen
- After studying the two products, Evergreen was deemed to be better suited for Zionsville's needs due to its scalability and stability and the fact that the developers used the best base tools to develop it
- Zionsville decided to find out more about Evergreen and found presentations to attend

More on Zionsville

- **Attended the meeting at Ball State University on August 29, 2007 sponsored by Indiana State Library and INCOLSA where an overview of Evergreen was presented by PINES Director Elizabeth McKinney de Garcia**
- **Attended the resource sharing committee meeting at the Indiana State Library the next day on August 30, 2007**
- **Began "what if?" talks with Indiana State Library in September 2007**

Fast forward to January 2008…

- Zionsville and State Library staff traveled to Georgia for a 4 day visit with the PINES and Equinox development staff
- All libraries in Indiana were invited to join Evergreen Indiana to explore the possibilities of an open source ILS
- Let's start exploring…

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For Evergreen to work for all Indiana residents:

- **Each participating Library must agree to**
  - **Use the same master bibliographic records**
  - **Enter customer information in the same format**
  - **Must agree to have staff trained to do 1 & 2 uniformly**
  - **Have the location of servers be in a remote, secure location away from any member library's facility and access will be limited**
- **Zionsville is willing to agree to each of these components.**

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In order to offer one library card with access to member libraries' collections, Indiana libraries would need to:

- **Have policies/procedures organized in tiers from which each library would pick the tier of choice that would be most practical for them OR**
- **All participating libraries agree to a single set of policies and procedures that would be uniform among participating libraries   OR**
- **Libraries within geographic proximity OR**
- **Yet another configuration that would work within the framework of Evergreen**

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On to the demo…

To try Georgia's Evergreen system at your library follow the instructions "How to access Evergreen on Windows" at http://www.in.gov/library/5592.htm or go directly to Georgia's Evergreen demo site at http://demo.gapines.org/

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After Lunch - Agenda

- The Potential of Evergreen Indiana for Indiana's Citizens
- Break – Out Sessions of Your Choice
- Reconvene in Single Large Group
- Communication among Evergreen IN Libraries
- Summary and Next Steps
- Adjourn promptly at 2 p.m.

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The Potential of Evergreen Indiana

for Citizens

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How will Evergreen Indiana work?

- Before we can answer this…
- Form an Evergreen Indiana consortium with these basic documents
  - By-Laws
  - Formal legal agreement
  - Governance structure
  - Membership application

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Near Future Developments?

- Funds are available to develop modules like these in 2008
  - Acquisitions
  - Serials
  - Self-Check
  - Credit card acceptance
  - Voice automation
  - Cash register system

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Training of Library Staffs?

- The State Library will provide an Evergreen Indiana staff that will, among other responsibilities, conduct on-site training at your facility [facilities].

Bibliographic Database?

- We are talking to a large library with "good" master records to allow the consortium to use them.

IT Expertise needed in-house at your Library Facility?

- Designate a single contact on your staff for Evergreen Indiana.

    – This person needs to be able to assess the problem that you may be having and communicate that problem to the Help Desk at the State Library.

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Where will Computer Servers be Housed for Evergreen Indiana?

Life Line Data Center in downtown Indianapolis about 2 blocks from the new Colts stadium. This is a hardened facility that is part of the Homeland Security Network.

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Hooking 3rd Party and Local Data Bases to Evergreen Indiana?

- If the software is SIP Compliant, you can add it to Evergreen Indiana for your library or for a group of Evergreen Indiana libraries.

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How soon can I go live with Evergreen Indiana?

- The plan is to be able to take some of Indiana's smaller public libraries live by June 1, 2008.

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Has Evergreen been tested?

- To try out Georgia's Evergreen system follow the instructions "How to access Evergreen on Windows" at http://www.in.gov/library/5592.htm or go directly to Georgia's Evergreen demo site at http://demo.gapines.org/

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Additional Questions?

- Ask today and be sure your question is recorded during the break-out session so an answer can be provided on Web Junction.

- Send your question with details to Jake Speer at the State Library. The answer will be posted on Web Junction.

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Benefits for Georgia

Cost effectiveness:

- Estimate to replace automation systems in all PINES libraries: $15 million
- Annual maintenance for Individual automation systems $ 5 million

- **PINES annual operations:** **$1.6 million**

  - Approximately $1.00 per registered customer
  - About 1/10 of the cost of purchasing individual automation systems

GEORGIA PUBLIC LIBRARY SERVICE

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Benefits for Indiana

Cost effectiveness:

- Estimate to replace automation systems in all Indiana libraries: $ 15 million +

- Annual maintenance for Individual automation systems $ 5 million +

- **Annual operations:** **$? million**

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Finances and Funding

Indiana State Library is Providing:

- Data Center expenses
- Central Hardware and Server's, purchase
- Internet Connectivity through ENA
- Software development when needed plus initial start-up of first 3 to 5 pilot libraries
- Staff training for local library staffs
- Support staff and help desk located at the State Library
- Maintenance of Evergreen Indiana policies and governance
- Communication including user group
- Conversion costs including but not limited to patron data wash, authentication and bib data load
- Grants for those libraries that are not now currently automated to move toward having an automated circulation system, and supporting resource sharing.

Review the data & Consider Evergreen Indiana as an option to serve your customers in your journey to provide quality library/information and/or media services

Presentations made on 3/6/08