Evergreen Integrated Library System (ILS)

Christine Michaud
Southern Connecticut State University

Technology in Libraries
ILS534-S70 – Fall, 2011
Prof. Jingjing Liu

October 15, 2011
cmichaud1@comcast.net
Evergreen Integrated Library System (ILS)

Abstract

This paper examines the history, features, costs, and market penetration of the open source Evergreen integrated library system (ILS). It looks at the initial development of the system by the PINES library consortium in Georgia and gives a brief overview of Evergreen’s modules and functionality. It then examines the costs and benefits of Evergreen relative to proprietary ILS systems and looks at some of the issues faced by library systems considering moving to the Evergreen ILS.
The Evergreen Integrated Library System (ILS) is an open source library automation system that was developed by members of the Georgia Public Library System (GPLS) as a full service ILS supporting circulation, acquisitions, and online public access catalog (OPAC) modules (Evergreen, 2011a). As an open source software application, Evergreen is licensed under the GNU General Public License (GPL) without the licensing fees that are typically paid to commercial vendors. Additionally, as with all “open source” applications, the code is modifiable by any user. However, end-users are not required to manage the code themselves; users may contract with commercial companies for installation or support. As of September, 2011, Evergreen is being run by 521 library systems, with a total of 1,006 branches (Molyneux, 2011).

**History of Evergreen**

Evergreen was developed by PINES (Public Information Network for Electronic Services), the automation services agency of the Georgia Public Library System (GPLS). The GPLS is a state-wide consortium, serving 44 library systems with collections of over 8 million items (Weber, 2006, p. 39). The GPLS developers chose to design their own software package after determining that the legacy system that they had been running was insufficient for the needs of a large, state-wide library automation system and finding that commercial vendors were unwilling or unable to provide a customized product that met their needs (Evergreen, 2011a). PINES used a small in-house team to develop the Evergreen system. Two members were already on staff, and two were hired specifically for this project. Many other PINES staff members also made contributions to the project (Weber, 2006, p. 39). Although the ILS was constructed from the ground up to meet the needs of the PINES consortium, the developers did not write all of the code “from scratch.” Evergreen is built on a structure of existing open source components,
Evergreen Integrated Library System (ILS)

including the Linux OS and Firefox web browser (Weber, 2006, p.40). The development process was remarkably smooth for such a large project; PINES began work on the project in June, 2004 and Evergreen went live at all PINES libraries on September 5, 2006 (Hyman and Walker, 2008, p. 1).

Product Features

The traditional features of a proprietary ILS system include modules for the online catalog (OPAC), cataloging, circulation, acquisitions, and serials (Burke, 2009, pp. 88–92). The initial release of Evergreen in September 2006 had an OPAC, cataloging, and circulation modules (Weber, 2006, p. 40). Preliminary serials and acquisitions modules were added in release 1.6 in November 2009, with full acquisitions and serials modules brought on line with release 2.0 in January 2011 (Evergreen, 2011b). Additionally, Evergreen has a “Report Builder” feature which allows the library to construct statistical reports using all database fields (Evergreen, 2011c). Evergreen uses the MARC 21 metadata format for bibliographic, authority, and serials data. Yang and Hofmann (2010, pp. 142–143), outline some of the “next-generation” features of the Evergreen OPAC, including a state-of-the-art web interface, enriched content (such as book cover images, reviews, etc.), keyword searching, and a “did you mean…” feature that suggests other spellings or related searches to the patrons. Evergreen is adopting some of the characteristics of Internet search engines, which users who are used to the Google search experience are coming to expect.

Third-Party Support Services

One of the key disadvantages of open source software is that it does not come with vendor support services. As Weber (2006, p. 39) notes, many libraries, “find it easier to have a vendor develop and maintain software systems rather than recruiting, retaining, and managing
internal staff to do so.” However, there is a growing market for third-party support services that will, for a fee, aid libraries with installation, data migration, software development, and ongoing support services. Equinox Software, which was founded by the original Evergreen development team (Equinox, 2010), is one of the major third-party vendors providing support to libraries using Evergreen. Other commercial companies include ByWater Solutions and LYRASIS. The Evergreen web site has a list of third party vendors and the services that they offer at (Evergreen, 2011d).

**Costs and Benefits of Open Source Software**

The growth of open source software is fueled in part by the cost advantages. The initial development of Evergreen generated significant cost savings for PINES even with the costs of hiring staff to develop the system. According to Weber (2006, p. 41), “the estimated upgrade and migration of the old system to a newer commercial ILS was quoted at nearly $2 million and additionally required a new server for $1.5 million. PINES paid the vendor $200,000 annually in support and maintenance charges and paid a hosting company another $200,000 to house the server.” Libraries that are adopting the Evergreen system are also realizing significant savings. As Helling (2010, p. 702) observes, “migrating from a proprietary to an open source ILS is a great way to trim out of a budget large licensing fees associated with proprietary ILS software.” He also notes, however, that hiring a third party support company can negate some of the cost savings. The Merrimack Valley Library Consortium (MVLC) in Massachusetts, which migrated from the Horizon ILS to Evergreen in May 2011, was forced to hire a technical support staff member just to support Evergreen in August because, “the MVLC underestimated what it would take to support an open-source catalog,” (Herzog, 2011). It appears, however, that most libraries running Evergreen are doing their IT administration and software development in-house, rather
Evergreen Integrated Library System (ILS)
	hanan hiring third-party support services. Of the 27 U.S. library systems listed on the Evergreen
web site (Evergreen, 2011e), only eight are using commercial hosting services. Of those, seven
are using Equinox Software as their vendor.

Adoption Process for Library Systems

As discussed above, the primary reasons that libraries are moving to open source
software are because of the cost savings and the potential to customize the software to meet local
needs. Evergreen is particularly attractive to large library systems and consortia because it was
designed specifically for a very large library consortium and is optimized to deal with large
collections. According to the MVLC, this is one of the issues that led them to choose Evergreen
as their new ILS. MVLC notes that no libraries have migrated away from Evergreen, while seven
libraries have left the other major open source ILS (Koha) for Evergreen (MVLC, 2009, p. 3).

Evergreen is expanding at an increasing rate. Since its inception in 2006, Evergreen has
expanded from 45 library systems with 239 outlets, to 159 library systems with 427 outlets in
year three, to 521 systems with 1,006 outlets as of June, 2011 (Molyneux, 2011).

There are a number of issues that libraries must work through when contemplating a
transition to Evergreen or any other open source system. In “Fear and Trembling in Connecticut:
(Or ‘How I Learned to Stop Worrying and Love Open Source’), Amy Terlaga (2010, p. 15)
identifies four major concerns that Bibliomation, a Connecticut library consortium, had as they
explored the option of migrating to Evergreen. These areas are: fear that they did not have
sufficient technical expertise, fear that their timeline was too short to make the transition
effectively, fear that the software would be buggy, and fear that the open source landscape was
still too new and unstable, and they would be left in the lurch. With the possible exception of the
second issue (the short timeline), these are likely concerns that all libraries considering a move to
Evergreen would have. Helling (2010, 706), expresses similar concerns in his discussion of the Bloomfield-Eastern Greene County Public Library’s exploration of the Koha and Evergreen systems and their eventual decision to move to the Evergreen ILS. Helling states that his library system, “has found Evergreen to be stable and reliable. Eliminating the need for the library to pay licensing fees and gaining access to the collections of a dramatically larger consortium have greatly expanded the library’s capacities without growing the budget. While all libraries should take into account their own local needs and circumstances, the Bloomfield-Eastern Greene County Public Library’s transition to Evergreen has been very positive.”

Conclusion

Evergreen is a robust, full-featured ILS that compares well to traditional proprietary systems. Since its launch just over five years ago, Evergreen has more than quadrupled the number of individual libraries it serves and continues to grow, particularly among public library consortia. The Evergreen development staff has launched a third-party support company that enables even technologically-challenged libraries to take advantage of the benefits that can derive from open source software. The cost advantages of the open source software are somewhat offset by the increased technical demands on libraries running Evergreen, but libraries running the system have not found the technical demands to be insurmountable. Given the increased financial pressures on libraries, it seems likely that Evergreen will continue to make inroads in the library automation marketplace.
References


Herzog, B. (2011, August 2). Job opening for Evergreen library support technician. [web log post]. Retrieved from the Swiss Army Librarian blog at:


