



2020

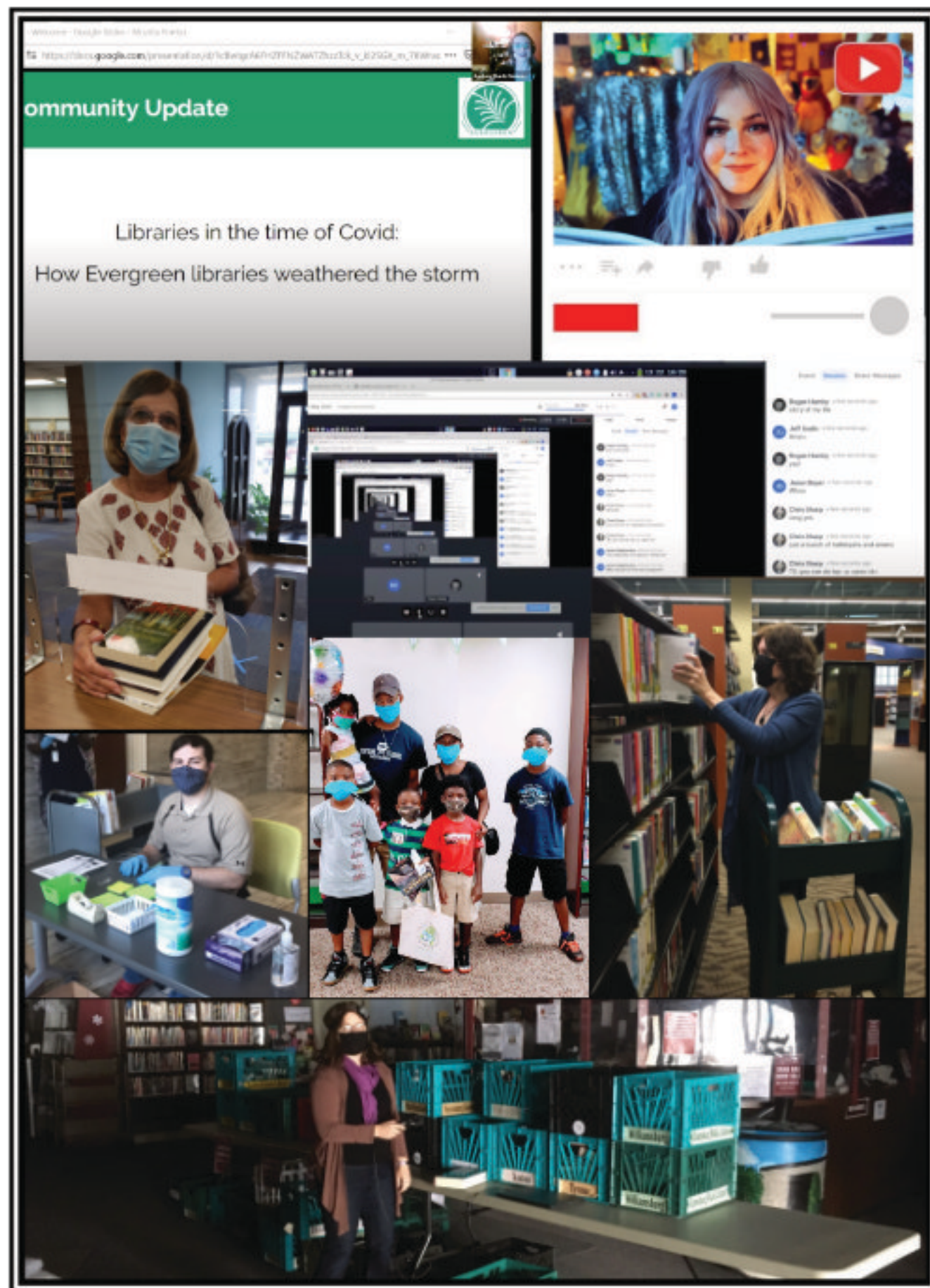
EVER



GREEN™

Annual Report





# 2020 in Review

Looking back is perhaps an ideal perspective for the year 2020; back, over your shoulder, down the block, moments before rounding a corner in the hopes that it won't find you again. For all of its rough patches there were some times that one could describe as not entirely objectionable or perhaps even good.

One such bright spot is that the IRS accepted our application and now The Evergreen Project is officially its own 501(c)(3) non-profit organization. This is the result of a lot of work over the last couple of years and is a great thing to finally see accomplished.

Additionally, when we could not gather together for the conference in Georgia (we'll be back someday!) members of the Outreach Committee and community volunteers came together and put on a great online conference with very little time to prepare. This was also an excellent reminder that the Evergreen community really is a \*community\* with multiple groups donating the use of their online meeting platforms to allow the conference to take place without breaking the bank. The online conference and later the online Hack-A-Way were so well received that I suspect that even when in-person conferences are the norm again that there will continue to be additional online events for maximum reach across the community, and I'm looking forward to both!

We also had some great releases in 2020. Evergreen 3.5 brought improvements like additional Angular interfaces, better handling of aged billings, PostgreSQL 10 support, and custom CSS in the OPAC via a library setting. Leading the way in 3.6 is a preview of the new Bootstrap OPAC, the new curbside service option, and course reserves. Also in 3.6 are support for EZProxy and PatronAPI authentication, and a new interface for "hopeless" holds.

Having achieved all of the above despite the ups and downs of the last year I know we'll be able to keep making great strides in the years to come.

Jason Boyer, Board Chair  
The Evergreen Project





# Becoming a Non-Profit Donors

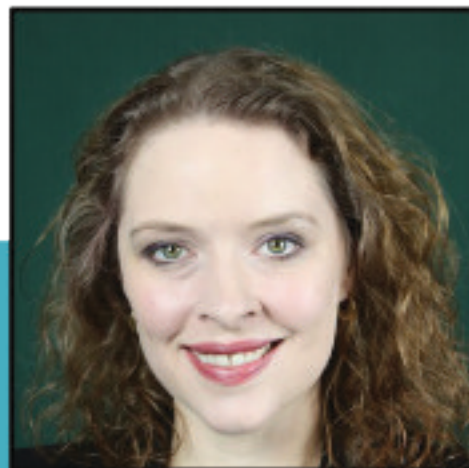
In early 2017, the Evergreen Oversight Board began to discuss parting ways with the Software Freedom Conservancy due to the changing needs of the Evergreen project and community. Three options were reviewed: 1) to become an independent not-for-profit, 2) move the project under the auspices of an existing Evergreen agency, or 3) seek out a not-for-profit that would sponsor the project. The Board, led by Tim Spindler (CW MARS), solicited proposals from the community for a new partner to handle accounting and contracting services. In November 2017, the Board selected MOBIUS as the project's new fiscal and contracting agent. A requirement of that partnership was that the project gain independent legal status as a not-for-profit. The Board voted to create a new Evergreen Project not-for-profit entity in January 2018.

The Board selected Missouri as the state of incorporation at the 2018 Annual Conference. Board Chair Mike Rylander (EOLI) and Vice-Chair Scott Thomas (PaLS), led the initial incorporation process and began the 501(c)(3) application. Bylaws were drafted and approved by the Board in May 2018. The Articles of Incorporation were approved, and The Evergreen Project was officially declared a corporation by the State of Missouri on June 11, 2018. In November 2018, Jonathan Dilly of the Swanson and Bernard law firm was selected and began the 501(c)(3) application.

At Dilly's instruction, the Board spent the next several months expanding the initial incorporation documents and revising the 501(c)(3) application. The transition was handed over to Anna Goben (Evergreen Indiana) and Galen Charlton (EOLI) in spring 2019. The Project opened a bank account in May 2019 to facilitate the transition to not-for-profit. The Articles of Incorporation were officially amended in Missouri in November 2019 to meet the IRS requirements.

A completed draft application for the 501(c)(3) status was approved by the Board in late January 2020. Unfortunately, the IRS had changed both the form and the submission process only weeks prior, so it was back to drafting! The third application draft revision and approval went much more quickly, and the application was submitted on April 23, 2020. The impact of COVID-19 on IRS staffing meant that the application review process took a few months more than expected, but on Thursday, September 10, 2020, the IRS approved The Evergreen Project as a fully qualified 501(c)(3) non-profit corporation!

**Anna Goben, Former Board Chair  
The Evergreen Project**



In the wake of becoming a 501(c)(3) non-profit the Evergreen Project Board created a fundraising committee with the goal of raising money that could not only provide long term stability for core community events but also open the doors to more strategic planning by the community as a single entity. While many future opportunities are in the works, the Board went ahead and threw open the doors to individuals and organizations to make donations to the Evergreen Project. The new 501(c)(3) status allows these donations to be tax-deductible in the United States. Throughout the annual report we try to recognize the numerous organizations and individuals who have contributed code, time, and more to the project; and here are those who donated financially. This is a partial list of individuals who made direct contributions. Some individuals chose to not be listed.

**Jason Boyer | Galen Charlton | Lynn Floyd**

**Anna Goben | Deborah Luchenbill | Andrea Buntz Neiman & Chris Neiman**

Additionally a number of institutions made contributions. Again, not all opted to be included in this listing but we gratefully extend thanks to each one, listed or not.





# 3.5 & 3.6 Released

New curbside pickup and course materials interfaces were highlights of the semi-annual Evergreen releases. The two releases included a host of new features and improvements. Major new features include:

- Curbside pickup, providing an interface to facilitate contact-free pickup of library items. Staff or users can schedule pickup appointments, and borrowers can use the OPAC to inform the library upon arrival.
- The course materials interface makes reserve collections more discoverable and easy to manage. The interface can also be used by public libraries to manage displays and summer reading, temporarily changing the shelving location and easily reverting after the display time is over.
- Support for the open source web analytics platform Matomo is now native to Evergreen catalogs with the ability to track OPAC usage. Here we show the UI from the Matomo Dashboard as there is no necessary UI within Evergreen itself.
- Holds service is also improved with a dedicated interface to identify and manage unfillable holds. Improvements to staff interfaces using Angular continue throughout Evergreen.
- Angular based MARC Editor and staff catalog interface.
- Support for PostgreSQL 10



Curbside Pickup



Course Reserves



Matomo Dashboard

Additionally there were many smaller improvements to existing features.

3.5 - July 1<sup>st</sup>, 2020

Release Managers: Bill Erickson (KCLS) & Chris Sharp (PINES)

The 3.5 release, originally intended for the Spring of 2020, was like so many other things disrupted by the onset of the pandemic. Despite this major event, the Evergreen community put out a major release only delayed by a few months.



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[https://evergreen-ils.org/documentation/release/RELEASE\\_NOTES\\_3\\_5.html](https://evergreen-ils.org/documentation/release/RELEASE_NOTES_3_5.html)

3.6 - October 14<sup>th</sup>, 2020

The 3.6 release saw a shortened release cycle, but still included a lot of new code.

"Evergreen 3.6 came together during a difficult time by the work of the community. There are too many to thank individually, but I would particularly like to thank my co-release managers Michele Morgan (NOBLE), Terran McCanna (PINES), and Jason Boyer (EOLI) for their efforts," said Galen Charlton, manager of the release team for 3.6, also of the Equinox Open Library Initiative.



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[https://evergreen-ils.org/documentation/release/RELEASE\\_NOTES\\_3\\_6\\_0.html](https://evergreen-ils.org/documentation/release/RELEASE_NOTES_3_6_0.html)



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# Community Spotlight

Any open source community is only as valuable as its people, and we are lucky in the Evergreen community to have contributions from many quarters. In 2020, the Outreach Committee chose one community member each month to interview as that month's Community Spotlight.

Christine Burns, a Trainer and Helpdesk Specialist at BC Libraries Cooperative, participates with the Acquisitions Interest Group, DIG, and the Student Success Working Group. Christine is also known for bug squashing work, contributing many Launchpad updates in 2020.



**Steve Callender** is the Support Manager at Equinox Open Library Initiative, and in that role he sees a lot of the things that drive end-user issues. Steve is always leveraging his knowledge of Evergreen to file bugs and write patches that will make life easier for Evergreen users.

**Rogan Hamby** is a Project and Data Analyst at Equinox Open Library Initiative. Rogan is also Chair of the Outreach Committee, and takes the lead on the community Annual Report. His work includes writing, testing, & reviewing patches.



**Linda Jansová** is an information specialist for the Librarianship Institute, which is a part of the National Library of the Czech Republic. She has been involved with the community since 2008. Linda and her colleagues have been instrumental in ensuring better translations and internationalization for Evergreen.



**Tiffany Little** is the Services Specialist for Acquisitions at PINES. Tiffany revived and heads up the Evergreen Acquisitions Interest Group, and is a self-taught coder who is very active with community bug wrangling.



**Debbie Luchenbill**, the Associate Director for Open Source Initiatives at MOBIUS, has worn many community hats over the years. She's been involved with the Evergreen International Conference since 2016, and is also the facilitator of the Documentation Interest Group, DIG.

**Terran McCanna** works as the PINES Program Manager, and in the Evergreen Community you often see her organizing community Feedback Fests and Bug Squashing Weeks. Terran also recently founded the New Developers Working Group.



**Gina Monti** is an Evergreen Systems Specialist at Bibliomation, and one of Evergreen's newer community members. Gina has jumped in with both feet, working on Feedback Fests, Bug Squashing Weeks, joining committees, and helping with the 2020 Hackaway.

**Benjamin Murphy** is the NC Cardinal Program Manager and is focused on bringing new libraries into Cardinal's Evergreen consortium. Benjamin shares ideas and best practices with other members of the Consortium Leaders Roundtable, held annually at the Evergreen Conference.



**Mike Risher** is an Application Developer who worked with Catalyte's Evergreen team in 2020. He brought his extensive front-end development experience. Mike's patches focused primarily on porting interfaces to Angular and improving Evergreen's accessibility.

**Ben Shum** has been involved with Evergreen since 2009. He's logged nearly 1100 commits of others' work in addition to nearly 400 patches of his own authorship. Ben has also worked extensively on improving Evergreen's translation infrastructure.



**Jessica Woolford** works as the Evergreen System Manager at Bibliomation, and is a longstanding community member. She has presented at eight of the Evergreen conferences and has recently revived the Reports Interest Group after a hiatus.



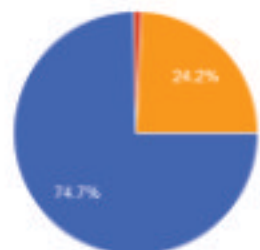
# Conference & Hack-A-Way

# Forest Growth

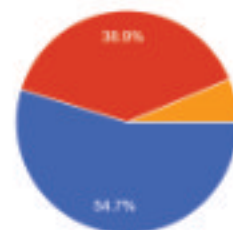
2020 was a challenging year and one of the most visible consequences of the need to socially distance was the moving of our two major in-person events, the Evergreen International Conference and the Hack-A-Way to online. The first ever online conference for the community was organized in four short weeks, held June 9th - June 11th, and hosted thanks to contributions of Zoom platforms from Bibliomation, Evergreen Indiana, MOBIUS, and NC Cardinal. Equinox Open Library Initiative provided live captioning services making the event highly accessible. We turned a challenge into an opportunity and made sessions available on YouTube for future access.

The Hack-A-Way also went online and experimented with a new-to-us platform called Hopin. With 68 registrations, the online aspect also made it the best attended Hack-A-Way ever. A lot of progress was made removing deprecated support for things like Java, adding support for future long term operating system releases, making testing data more robust, looking at new implementation for SIP2, and sessions for new developers along with all the usual bug testing, patch writing, and merging! Twenty patches were submitted and fourteen new bugs reported.

The platform was very successful at helping us emulate the feel of being together even when apart, leading one participant in the survey to share, "It was the most like sitting around a table with other attendees." In 2021 we are using Hopin again for the Evergreen International Conference, which will be online for the second year.



**95 attendees responded to the post conference survey. 38.9% of attendees said they would not have been attending the in person conference. 74.7% asked for more online events in the future.**



Based on Marshall Breeding's 2020 Library Systems Report [ <https://americanlibrariesmagazine.org/2020/05/01/2020-library-systems-report/> ] Evergreen accounted for 8.3% of the ILS implementations in the United States. Internationally we continue to see Evergreen in use in all library types around the world. However, Evergreen's largest base of users, and largest growth sector, is public library consortia in North America. The full extent of the user base is unknown as installations are self-reported.

Here are a few libraries that reported new installations for our update this year.

The Libraries in Niagara Cooperative (LiNC) added the West Lincoln Public Library, Grimsby Public Library, Welland Public Library, and Port Colborne Public Library.

The Missouri Evergreen Consortium added the Oregon County Library District, Keller Public Library, Putnam County Public Library, Brookfield Public Library, Neosho Newton County Library, Bowling Green Public Library, and the Livingston County Library added the Lillian DesMarias Youth Library

The Consortium of Ohio Libraries (COOL) added the Wilmington Public Library of Clinton County.

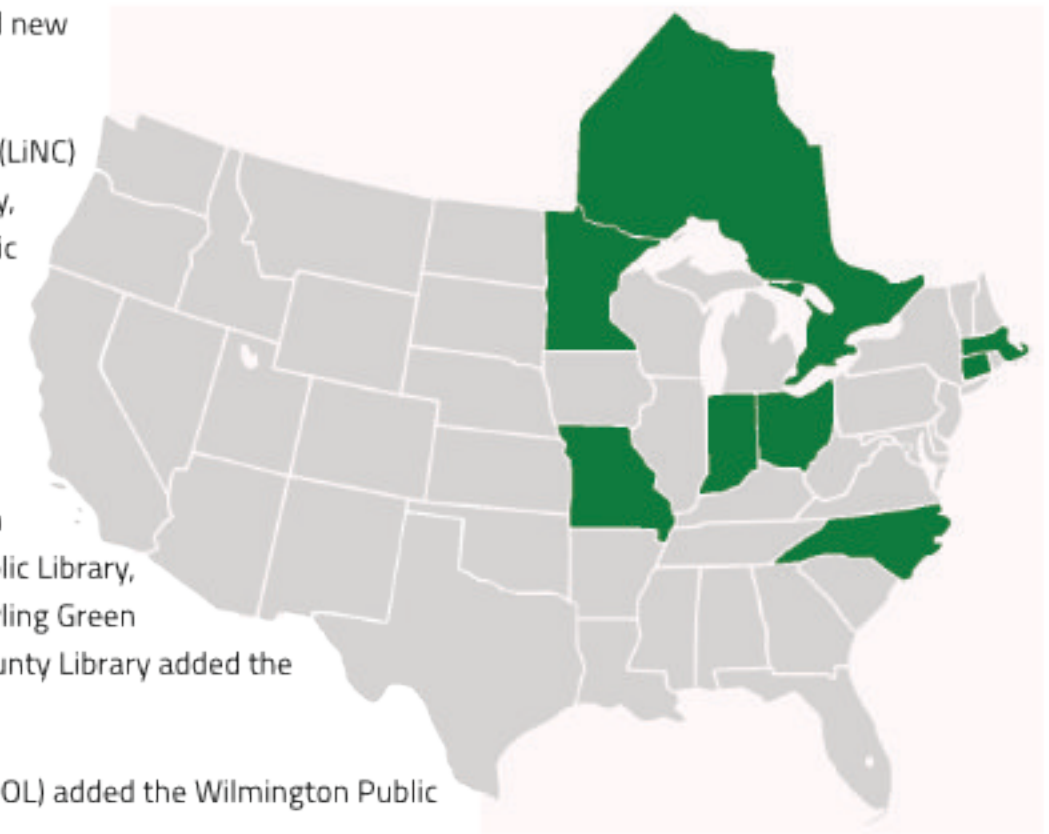
Traverse des Sioux Library Cooperative added its first four Evergreen libraries, four school libraries from the Saint Peter School District.

Onslow County, Carteret County, Transylvania County Library, and Sandhill Regional Library System joined the NC Cardinal consortium.

The Booth & Dimock Library in Coventry, CT joined Bibliomation.

The Taylor Memorial Library and Pioneer Valley Performing Arts Charter School joined CW MARS in Massachusetts.

Evergreen Indiana migrated the Putnam County Public Library and Fortville - Vernon Township Public Library.





# Interest & Working Groups

Participating with an Evergreen committee or interest group is a great way to get involved in the Evergreen community! For more details: <https://evergreen-ils.org/communicate/committees/>

**ACQUISITIONS INTEREST GROUP (AIG)**, Facilitator: Tiffany Little, PINES

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=acq:interest-group>

Meeting Schedule: AIG meets on the second Wednesday of each month

The Acquisitions Interest Group meets monthly. Each meeting highlights Acquisitions bugs and has a discussion topic. In 2020, major topics were the ongoing development of Angular Acquisitions and potential barriers to more libraries adopting Acquisitions.

**CATALOGING WORKING GROUP (CWG)**, Facilitator: Jennifer Weston, Equinox

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=cataloging:cwg>

Meeting Schedule: CWG meets on the second Tuesday of each month

The Angular Staff Catalog was a focus for the CWG in 2020. We tested and reviewed development, participated in Bug Squashing Week and Feedback Fest, and reviewed new feature highlights. CWG conducted a survey and subsequently hosted the first Ask-A-Cataloger Roundtable.

**DEVELOPMENT MEETINGS**, Facilitator: Jason Boyer, Equinox

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=dev:meetings>

Meeting Schedule: Second Tuesday of each month at 3pm Eastern in #evergreen on Freenode IRC

2020 saw big changes with the Angular staff catalog, curbside pickup, course reserves, and a new Bootstrap OPAC. Developers meet monthly in IRC to discuss the shepherding the features into releases and you can help.

**DOCUMENTATION INTEREST GROUP (DIG)**, Facilitator: Debbie Luchenbill, MOBIUS

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=evergreen-docs:dig>

Meeting Schedule: DIG meets on the first Thursday of each month

DIG was active throughout 2020, including the migration of Evergreen documentation to Antora, a new style guide for Antora, and documentation for releases 3.5 and 3.6. They also submitted training videos to the community YouTube channel.

**NEW DEVELOPERS WORKING GROUP**, Facilitator: Terran McCanna, PINES

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=newdevs:start>

Meeting Schedule: New Developers meet on the third Wednesday of each month

In 2020, we worked on several bite-sized bugs such as adding home library contact to My Account page and modifying the Precat form to prevent accidental creation of records. Special guests talked to us about using Bash, customizing the OPAC, testing Angular patches, and using VSCode.

**OUTREACH COMMITTEE**, Facilitator: Rogan Hamby, Equinox

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=outreach>

Meeting Schedule: Outreach meets on the first Wednesday of each month

The Outreach Committee meets monthly using Google Groups. We coordinate information sharing inside and outside the Evergreen community. Projects in 2020 included the online conference, Hack-A-Way, annual report, press releases, wiki cleanup, image archive, and videos.

**REPORTS INTEREST GROUP**, Facilitator: Jessica Woolford, Bibliomation

Official Web Page: <https://wiki.evergreen-ils.org/doku.php?id=evergreen-reports:rig>

Meeting Schedule: The Reports Interest Group meets every other month on the last Wednesday

The Reports Group began convening again in October 2020, after a 4-year hiatus. Taking cues from other successful interest groups, the group now meets by video every other month, allowing participants to see demonstrations and learn together in real time.

**STUDENT SUCCESS WORKING GROUP**, Facilitator: Elizabeth Thomsen, NOBLE

Official Web Page: [https://wiki.evergreen-ils.org/doku.php?id=student\\_success\\_working\\_group](https://wiki.evergreen-ils.org/doku.php?id=student_success_working_group)

Meeting Schedule: The Student Success Working Group meets quarterly

The Student Success Working Group helps Evergreen libraries better meet the needs of students. During 2020, we focused on how to help meet student needs during the COVID-19 pandemic, including home delivery and books by mail programs. We also discussed the booking module, course materials module, and new patron loading development.



# Evergreen in India

One of the great things about open source is how it spreads out to be used globally for diverse purposes it was never originally envisioned for. That is how we can take software developed for public libraries in the south east of the United States and find a technical school in Thiruvananthapuram, India using it just a few years later.

Thiruvananthapuram is a thriving urban metropolis that is the capital of Kerala. The city is an academic and research home with numerous STEM institutions. Perhaps most appropriate it also has the nickname of the "Evergreen City."

The Indian Institutes of Science Education and Research are governmental schools that provide STEM education throughout the nation. The Thiruvananthapuram location is on the southern coast and for over a decade their library has been serving students and faculty using Evergreen as their ILS including customizations to the OPAC for their special fine calculation needs.

"We have been using Evergreen ILS since 2008. The version we used, initially, was 1.6. We found this software highly useful and robust. Ours is a fully automated library including self check kiosk. It has been highly functional for various services that our users have appreciated.

The Evergreen mailing list is found to be very useful for clearing doubts related to customization, version upgrade and for adding various features. We are currently using EG version 3.0.13. It is delighted to see that this free, open source software is capable of fully automating libraries ranging from small single branch library to large library networks. I sincerely thank all the people behind this effort."

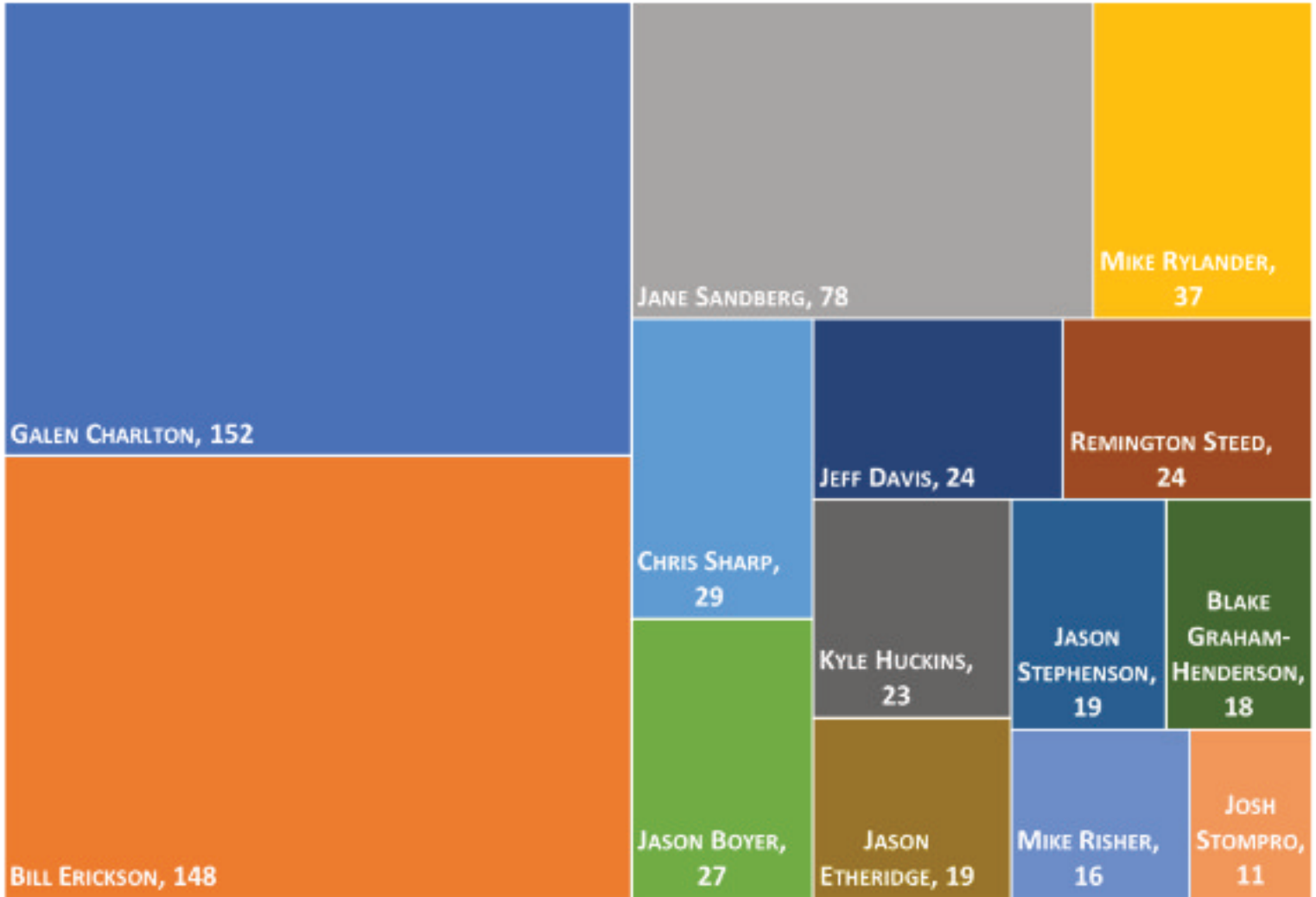
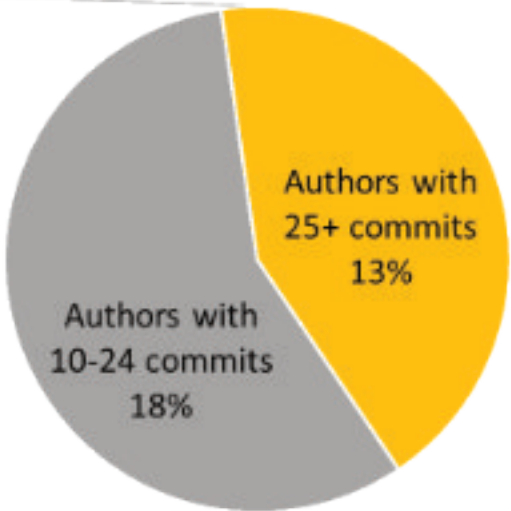
Jayaraj JR, Library Information Technologist

Indian Institutes of Science Education and Research Thiruvananthapuram



# Committing

554 Commits  
38 Contributors





# Credits

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The cover photo is by Brandon Montrone from Pexels.

Our 2020 Collage images were made possible by the Evergreen community. Images in the collage include Andrea Buntz Neiman presenting at the 2020 Evergreen Conference, Youtube Storytime from the Elizabeth Harris library, a patron returning books from the Live Oaks Public Library, Hack-A-Way screenshot from Rogan Hamby with permission of included parties, books being cleaned at the Live Oaks library, a family visiting the Houston County library, books being shelved at the Jefferson County Library and Katie Greenleaf Martin processing books in the time of COVID-19.

The Matomo dashboard graphic was shared by the Matomo Developer Team under a CC BY-SA 3.0\* license.

Images on the Conference and Hack-A-Way Page were taken from Youtube videos of the events released under CC BY-SA\* license. Graphics were created by Rogan Hamby.

Evergreen in India - The map is used under a CC BY-SA 3.0\* license build from the original SVG file by Uwe Dederer for German Wikipedia.

Committer graphics were contributed by Andrea Buntz Neiman.

Annual report staff were Andrea Buntz Neiman and Rogan Hamby.

Layout by Rogan Hamby.

Many people contributed text.

Proofreading by: Andrea Buntz Neiman, Debbie Luchenbill, Jennifer Weston, Rogan Hamby

**We don't have space to thank by name everyone who has contributed to Evergreen in the last year.**

**From every commit to every email discussion, launchpad feedback, social media engagement, and helping hand to your peers every interaction enriches the community. So, thank you.**



**Twitter: @EvergreenLS #evgils**

**website: [www.evergreen-ils.org](http://www.evergreen-ils.org)**

**IRC: #evergreen on freenode**

**Facebook: [www.facebook.com/EvergreenLS/](http://www.facebook.com/EvergreenLS/)**

**YouTube: [www.youtube.com/c/EvergreenLibrarySystem](http://www.youtube.com/c/EvergreenLibrarySystem)**

