## Statement of Purpose

The Evergreen Project, a 501(c)3 corporation, exists to foster the open-source Evergreen Integrated Library System software and its community of practice. To this end, the Evergreen Project engages in activities to promote, support, and advance the development of the Evergreen Integrated Library System (ILS) software; support and facilitate the growth of the international community of Evergreen ILS software users; and, to cultivate, manage, and protect the assets of the corporation.[1]

Introduction

In 2004, the open-source Evergreen Integrated Library System was developed by the Georgia Public Library Service. Thus began a revolution in the library management software space. To support this particular software, individuals and institutions planned and organized leading to the creation of an oversight body eventually leading to the birth of The Evergreen Project.[2] Upon the formation of The Evergreen Project in 2018 as a legal organization in its own right, its governing board recognized the need to make plans for the future. Over the past few years, the board has embarked on meaningful fact-finding missions to aid its decision making about how it might continue to fulfill its purpose. In 2021, a major survey of the Evergreen open-source ILS community-of-practice (hereafter referred to as the Evergreen Community) was undertaken. This survey gathered crucial information from this many-faceted body of stakeholders about the demographics, perceptions, expectations, hopes and fears related to both the Evergreen ILS (integrated library system) software and The Evergreen Project. It was not long after that the Board determined that it needed to gather more information and get more perspective to strategically chart a path forward.
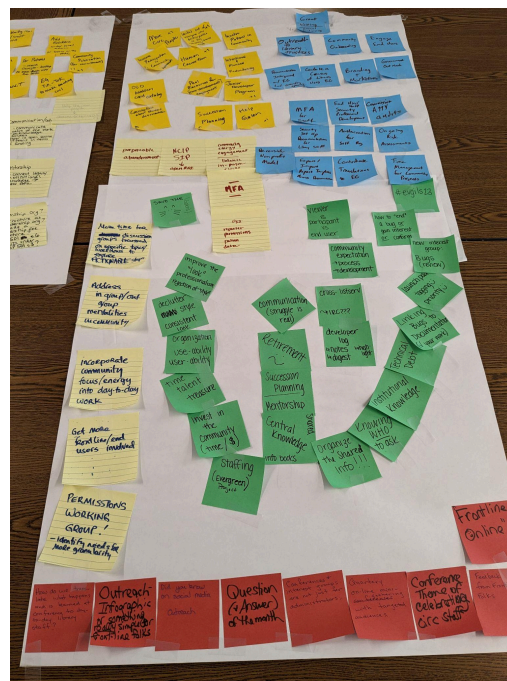
In 2023 and 2024, members of the Evergreen Project Board led activities and discussions to solicit more input from the Evergreen Community. These activities included a brainstorming and mindmapping session at the Annual Conference in Worcester, Massachusetts; a structured conversation with attendees at the 2023 Hack-A-Way in Indianapolis, Indiana; and, two virtual community conversations facilitated by members of the Board's strategic plan subcommittee in January 2024.

During the same time period, the Board determined that it would be beneficial to engage a consultant from outside of the Evergreen ILS environment to provide additional guidance and perspective. Carson Block Consulting was selected to fill the role of strategic plan consultant. In this role, Carson Block Consulting coded and analyzed the data gathered from the 2021 survey and provided insights from that analysis. Carson also met regularly with the strategic plan subcommittee to glean more information about the needs of The Evergreen Project, the Evergreen Community, and expectations for this plan forward.

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[1] Bylaws of The Evergreen Project - Adopted June 11, 2018

[2] History of The Evergreen Project - Appendix 1 - 📄 2025-28 TEP Strategic Plan Draft

With an extensive body of information, a group of approximately 20 stakeholders from the Board and the Evergreen Community convened for a stakeholder retreat in February 2024. This two-day virtual retreat was facilitated by Carson Block with the goals to present the findings from the collected information and use that information to define priorities and chart next steps. The retreat experience and its many conversations helped to determine the format of this plan.

The plan described here is meant to describe the transformative arc of The Evergreen Project to a self-sustaining non-profit organization that can provide future-focused and reliable support for the Evergreen Community as well as advocacy for the open-source Evergreen ILS. The transformative arc incorporates identifying the current state of the Evergreen Project and what it wants to become; what resources are needed for that transformation; and, how to obtain and utilize those resources.

Oh, the Places You'll Go

Identifying the current state of the Evergreen Project and what it wants to become

"Oh, the Places You'll Go" by Dr. Seuss has become a standard when it comes to encouraging individuals to take ownership of their dreams and find joy and excitement in possibilities. It is now a common occurrence to hear this book read during commencement ceremonies and given as a gift to the person moving from one chapter of life to another. The book reminds us that not only is change full of potential. Transformation is a natural and necessary part of life.

Much like the individual, an organization desiring to sustain its vitality and vibrancy must embrace the idea of transformation. Additionally, the organization must take ownership of the collective dreams of its stakeholders and optimistically embark on the journey of discovery that happens. The Evergreen Project is now in just such a position.

As with any journey, before a map is even consulted, it is important to know where we are and where we want to go. To determine its starting point and destination, the Evergreen Project has focused its attention in two areas; a model to describe its phases of growth and how the organization is perceived by stakeholders.

Phases of Growth[3]
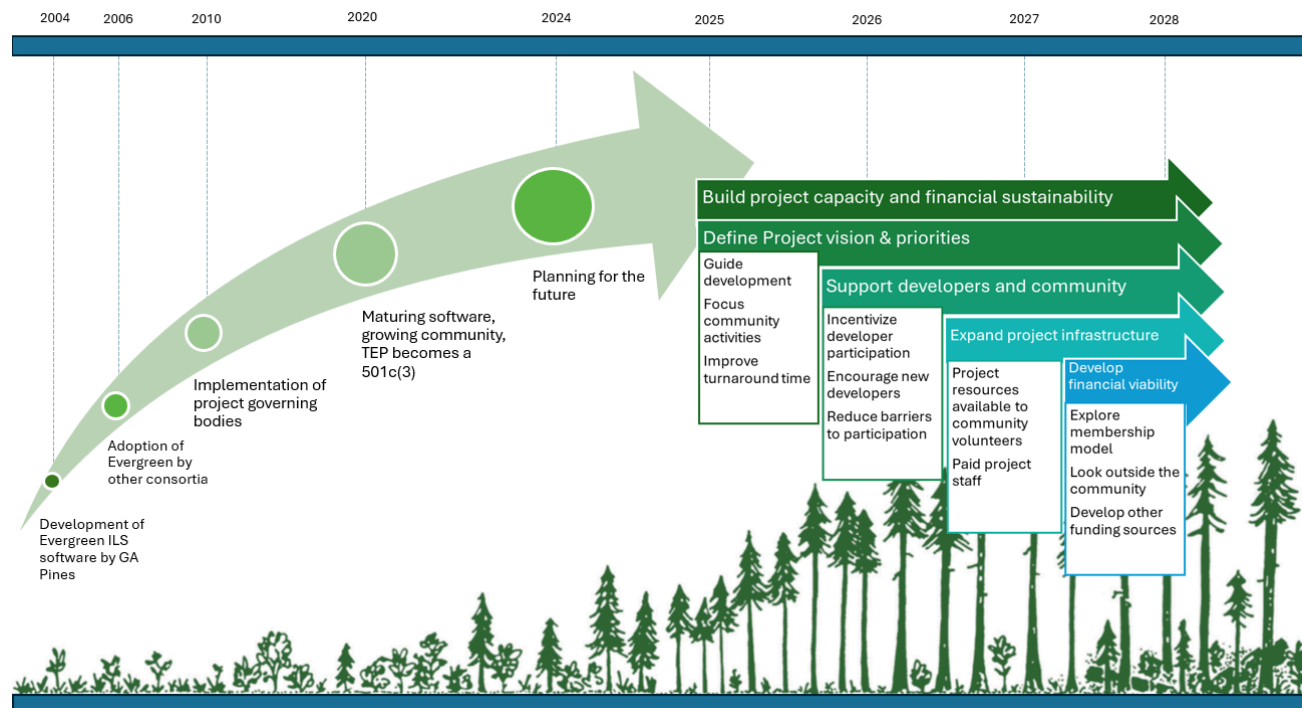
The first area of attention has been to describe TEP's Phases of Growth from its support of the nascent open-source community with the Evergreen ILS at its center to where it exists now and might grow within that mature ecosystem. Models of growth for other open-source communities and their support organizations were reviewed for relevancy and inspiration. Taking cues from these models presented by Carson Block, iterations were developed and revised with extensive feedback from Evergreen

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[3] Chart created by Lindsay Stratton of Westchester Library System, New York

Project leaders and stakeholders to produce a model of growth that describes our past, present, and hopeful future.

Since 2004, The Evergreen Project has evolved from the GA PINES development of the Evergreen integrated library system software to a mature open source ecosystem used internationally at over 2,000 sites. In 2024, the Evergreen Project is a 501(c)3 corporation with a governance structure, core of code developers, active community members, and allied vendors.

Community stakeholder conversations envision the Evergreen Project of the future having central leadership, where development decisions are based on collective priorities, employing dedicated staff, and having sufficient financial viability to support project infrastructure and growth. More information about suggested goals are available in Appendix 2.

Proactive Transformation

Along with considering and describing its phases of growth, the Evergreen Project embarked on a multi-year quest to understand how the Evergreen community perceives its role. This quest involved a multi-faceted approach to engaging with stakeholders that included a broad range of librarians, organizational administrators, ILS systems administrators, support personnel, software developers, and more. A common thread in all stakeholder feedback is that the Evergreen Project, as it stands right now, has the opportunity to transform from a reactive posture to a proactive posture in its support of the Evergreen Community and the Evergreen software.

The primary activities employed to capture the thoughts and feelings of the community were a survey, a focus group, community conversations, a retreat, and a survey of "Themes" from retreat participants. Key findings from the stakeholder engagement activities reveal both positive and negative perceptions of Evergreen as a product and community.

In 2021, TEP held a survey that garnered 128 responses, providing a comprehensive overview of user perceptions and areas for potential growth for Evergreen. Respondents were asked about their likes and dislikes regarding Evergreen as both a product and a community. The 2021 survey[4] revealed that users appreciated Evergreen's usability, features, and local control flexibility. However, some users expressed dissatisfaction with specific features, slow performance, and the platform's complexity. Community aspects were viewed positively, with members noting responsive support and a friendly atmosphere. Suggestions for improvement included addressing technical debt, improving documentation and training, and fostering more communication and innovation within the community.

Developer feedback from the 2023 focus group[5] emphasized the need for more robust development support, including a mentorship program for new developers and a dedicated project manager to oversee community development initiatives and product releases. Developers echoed the 2021 survey respondents in expressing the need for improved documentation and communication channels. Two Community Conversations held in January 2024 included many of the same concerns and aspirations revealed in the earlier developer focus group[6].

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[4] Evergreen ILS Survey Report, February 2024,
https://docs.google.com/document/d/1B3h4Q79fxdMKuFTb3rggHvJvukK9K2OJHoPCrfvvVsc/edit

[5] Hack-a-Way Stretegic Planning Session, October 24, 2023,
https://docs.google.com/document/d/1oFBBS7OxjgMjeHXcCc0QdXfqTXXd-tZG/edit

[6] Evergreen Community Conversations notes from January 9 and January 17, 2024,
https://docs.google.com/document/d/1Bdj7pWffD2A1hkGkmJugdXDnE6YyA4e7hmU2W4iyz_Y/edit?usp=sharing

The February 2024 retreat focused on the board's lifecycle and ecosystem, with participants expressing positive sentiments overall. After the stakeholder retreat, the consultant's office compiled notes from the retreat and distributed them to TEP board members. Thirty-six retreat attendees responded to an open-ended survey to share their thoughts on the retreat's themes.

The themes from the survey were similar to those voiced by the planning committee in debrief meetings following the retreat, including communications/messaging, collaboration topics, and sustainability topics. The strategic plan committee also noted overall capacity challenges, staffing needs, identifying and meeting the needs of contributors, and recognizing the uniqueness of each entity and member of the Evergreen Community.

More information about the survey responses is available in Appendix 3.

Getting Ready for the Journey

Determining what resources are needed for transformation

Arriving at a destination does not just happen out of a desire to be there. Any journey, no matter how humble and seemingly unambitious, requires organization and planning. Inventories of those items still needed must be taken; itineraries must be established; and, reservations for waypoints must be made.

In the spirit of planning for the journey and to continue along the trajectory of the transformative arc for the Evergreen Project, its current portfolio of human and capital resources was analyzed to determine what exists and where and how that portfolio might be augmented. This analysis included an organizational structure review, and the development of a resource model.

Organizational Structure Review

The organizational structure review was undertaken to determine the current state of the Evergreen Project's bylaws, its governing and working committees, and staff. Based on the review, recommendations for changes to the organizational structure were identified as necessary and are available in [Appendix 4](#).

Resource Model

Perhaps the most groundbreaking aspect of this process has been the decision to undertake the development of a resource model that can foster a sustainable and generative environment where the Evergreen Project and the community and software it supports can flourish. The proposed resource model incorporates a plan to institute a membership model to raise revenue for the organization as well as a staffing and contributor structure to help manage and facilitate the multi-faceted work of the Evergreen Project. The resource model also creates space to establish a mechanism to integrate and acknowledge other sources of support including in-kind work, community member organizations, and relationships with community groups such as the Evergreen Community Development Initiative and service providers.

Membership Model

In September 2023, The Evergreen Project Board established an ad-hoc Membership Model Investigation Subcommittee to investigate and develop a fee-based model to generate revenue to support Evergreen Project activities and initiatives. Members of this committee represented a broad range of Evergreen community members, including public and academic standalone libraries, consortia of all sizes, and service providers. The committee completed an environmental scan of open-source and library organization models; compared membership models of organizations similar to The Evergreen Project; and, prepared a recommended model that outlined a fee structure as well as a no-fee option for individuals through a contributor program.

The recommended membership model and the contributor program are described in [Appendix 6](#).

Staffing and Contributor Structure

To date, the Evergreen Project has relied on many individuals and groups, including service providers, library systems, consortia, and others who have committed their resources through an ad-hoc model of

volunteerism, in-kind donation, and as-needed financing to fulfill its purpose. TEP and the Evergreen Community have experienced success through this grassroots community organizing and value the collaborative ideals this success proves. As is often the case, success brings its own challenges. We have witnessed the scope of responsibility held by the Evergreen Project as an organization grow and the community it supports evolve. It has become increasingly apparent that this entire enterprise would benefit from some type of support in the form of dedicated staff to help organize and maintain structure to ensure all community groups are moving towards the same larger goals. The Evergreen Project also seeks to formalize and expand the Evergreen Contributor Structure[7] to encourage and recognize, in tangible ways, the work done on behalf of The Evergreen Project, the Evergreen Community, and the library software it supports.

Recommendations for the staffing and contributor structure are available in Appendix 5.

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[7] Current Contributor Model as of December 19, 2024
https://wiki.evergreen-ils.org/doku.php?id=start#contributing_to_the_evergreen_project

Single Steps in a Million Mile Journey

Using resources to propel transformation

The destination has been chosen. The route has been mapped. The oil has been checked, the tires inflated properly, and the gas tank filled. Reservations at waypoints have been made, and the car has been loaded with luggage and snacks. The time to embark has finally arrived.

The million mile journey for the Evergreen Project is one that leads toward transformation. The Evergreen Project will become a vibrant and sustainable organization, providing meaningful and reliable support to the Evergreen library software and its open-source community, as it puts into action the plans that it has made. Following through on recommendations stemming from the organizational review and deployment of the resource model are the key milestones along this journey.

Annual Action Plan and Strategic Plan Evaluation

To reach these milestones and reflect on progress, an itinerary will be developed including tasks and deadlines for implementation and review. An annual action plan will serve as this itinerary along with a mechanism for evaluating progress.

Please find more information about the annual action plan framework in Appendix 8 and evaluation of progress in Appendix 9.

Community Feedback Plan

As we embark on this journey, we must never forget why we set out to begin with. We chose to move toward transformation because of needs and desires expressed by the many stakeholders in the community that the Evergreen Project seeks to foster. We believe that this conversation with the Evergreen Community should be continual and is imperative to truly fulfilling the purpose of this organization. The Evergreen Project is committed to fostering this conversation by implementing a process that involves asking questions, listening to the answers, and using those answers to determine areas of strength and opportunities for growth.

More information about the Community Feedback Plan is available in Appendix 7.

Adopted by The Evergreen Project Board, January 16, 2025

Taking the Road Less Traveled By

Conclusions and Acknowledgements

In the poem "The Road Not Taken" by Robert Frost, the narrator describes the opportunity to choose between two paths laid out before him. Both of the paths show equal signs of wear and give no indication as to what the traveler might encounter beyond where "it bent in the undergrowth." In the final stanza, the narrator declares that choosing to take the road less traveled by has made all the difference. Reading that declaration in context, it is clear that both paths were not well worn and it was truly impossible to distinguish which might be better. The importance then lay not in the path taken, but in the decision to take a path.

A similar notion can be applied to the strategic planning process for The Evergreen Project and its results. The Evergreen Project grew up out of a need to provide reliable support for the community that drives and sustains the open-source integrated library system, Evergreen. In many ways, the organization is both unique and similar to other projects in the open-source ecosystem. There are many existing paths for growth and transformation that have been followed by other such projects, and it can be overwhelming and often paralyzing when trying to ascertain what would be best for us.

The development of this strategic plan represents the decision by the Evergreen Project Board and the many individuals who contributed along the way to pick a path and go down it. With questions of software longevity and community sustainability always howling in the subconscious distance of stakeholders, we believe that choosing a path and embarking on the journey truly will make all the difference. Through continued collaboration and a dedication to follow-through, we are confident that the Evergreen Project will continue its transformation into a sustainable, reliable, and effective support organization for the Evergreen community and the Evergreen ILS.

The Evergreen Project Board thanks the Strategic Plan Subcommittee, Carson Block Consulting, and everyone who participated by submitting survey feedback, attending developer feedback sessions, community conversations, and the 2024 stakeholder retreat. Individual contributors to the writing of this plan are listed in Appendix 10 as well as members of the Evergreen Project Board, Strategic Plan Subcommittee, and Membership Model Subcommittee.

Executive Summary

This strategic plan outlines a vision for the continued transformation of The Evergreen Project, over the next three to five years, into self-sustaining non-profit organization that can provide future-focused and reliable support for the Evergreen Community as well as advocacy for the open-source Evergreen ILS.

In the last decade, TEP has already moved from a subgroup within an open-source umbrella group into its own independent nonprofit organization with robust governance and financial structures.

In many ways, the transformation outlined in this strategic plan is already underway - the steps detailed in the plan are designed to take the work that has already been done and build upon it to affect change not only within the organization of The Evergreen Project, but to the impact that The Evergreen Project has on the Evergreen Community.

Overall goals of this strategic plan (see Appendix 2)

- Define a project vision and priorities
- Support developers and community engagement
- Develop financial sustainability
- Provide leadership in the Evergreen Community

The plan outlines the following steps and recommendations to achieve these goals:

Organizational Structure Review (Appendix 4)- analyzing the current state of the organization and identifying needed additions and changes - recommendations for changes are included in this plan

Resource Model: The proposed resource model incorporates a plan to institute a membership model to raise revenue for the organization as well as a staffing and contributor structure to help manage and facilitate the multi-faceted work of the Evergreen Project.

- Adoption of a Membership and Contributor Model (Appendix 6) - create a value-added program incentivizing organizations and individuals to join The Evergreen Project in order to generate resources to fund the above goals; also includes a fee-free path to membership for contributors.
- Staffing and Contributor Structure (Appendix 5): outlines the organization's needs for compensating individuals and/or organizations for services.

This plan continues the work of the transformation - it does not complete it. The Community Feedback Plan and Action Plan Framework are included with information on expected outcomes and success metrics.

Adopted by The Evergreen Project Board, January 16, 2025