



EVERGREEN™

Open Source Library Software

2024 Annual Report





Our Mission

The Evergreen Project develops an open-source ILS (integrated library system). The software, also called Evergreen, is used by libraries to provide their public catalog interface as well as to manage a full stack of back-end operations.

The Evergreen community strives to create a powerful, easy-to-use, comprehensive library automation platform usable by both stand-alone libraries and consortia with diverse options for customization. We seek to empower librarians as users and contributors through feedback, development, documentation, and community engagement.

Evergreen began as a project of the Georgia Public Library System in 2006 to serve the needs of a large-scale shared public catalog. It is now managed by a US 501(c)(3) nonprofit with contributions of labor from an international community of hundreds of developers and documentation writers from varied institutions.

Board Chair Message

2024 has been an incredibly productive year for the Evergreen Project, with two major releases that added major new features and refreshed various staff interfaces. I'm particularly heartened by the significant improvements in Evergreen's accessibility and the progress that the community has made towards completing the "Angularization" of the staff interface.

Evergreen is not just software: it is a community of people and institutions committed to helping libraries and librarians better serve their patrons. I am very happy to see both new libraries using Evergreen and new contributors as well as the ways that long-term contributors have been able to grow in their roles.

2024 marks a major milestone in the organizational maturity of the project with the creation and release of a new strategic plan and the decision by the Evergreen Project Board to transition to a membership model for the project. I encourage readers of this report to pay close attention to the discussion of the strategic plan on pages 16 and 17 of this report.

As of the time that I write this message, I should acknowledge that many libraries both inside and outside the Evergreen community are facing difficult challenges and an uncertain future. While the software itself can do little to help, the real strength of the Evergreen Project is the people in its community. I encourage us all to work together to address these challenges in the spirit of openness and collaboration that has sustained Evergreen over the years.

Regards,



Galen Charlton



New Seeds

New Libraries in Evergreen Community

Berks County Public Library
(28 locations)
SPARK, Pennsylvania US

West Plains Public Library
Missouri Evergreen, US

Mary S. Biesecker Library
SPARK, Pennsylvania US

Port Carbon Public Library
Port Carbon PA

Morrison Reeves
Evergreen Indiana, US

Adair County Public Library
Missouri Evergreen, US

Sarcoxis County Public Library
Missouri Evergreen, US

Owensville Public Library
Evergreen Indiana, US

Municipal Library Consortium
of St. Louis County
Missouri Evergreen, US

AB-Tech Community College
Asheville, NC

Beaufort County
Community College
Washington, NC

Bladen Community College
Dublin, NC

Carteret Community College
Morehead City, NC

Central Carolina
Community College
Sanford, NC

Coastal Carolina
Community College
Jacksonville, NC

College of the Albemarle
Elizabeth City, NC

Edgecombe
Community College
Tarboro, NC

Halifax Community College
Weldon, NC

James Sprunt
Community College
Kenansville, NC

Martin Community College
Williamston, NC

Nash Community College
Rocky Mount, NC

Pamlico Community College
Grantsboro, NC

Piedmont Community College
Roxboro, NC

Randolph Community College
Asheboro, NC

Robeson Community College
Lumberton, NC

Rowan-Cabarrus
Community College
Salisbury, NC

South Piedmont
Community College
Monroe, NC

Southeastern
Community College
Whiteville, NC

Surry Community College
Dobson, NC

Tri-County
Community College
Murphy, NC

Vance-Granville
Community College
Henderson, NC

Wayne Community College
Goldsboro, NC

Western Piedmont
Goldsboro, NC

Wilson Community College
Wilson, NC

Cape Fear
Community College
North Carolina

The Robertson
Memorial Library
Leyden, MA

The Grace Hall
Memorial Library
Montgomery, MA

The Russell Public Library
Russell, MA

The Sandisfield Public Library
Sandisfield, MA



NCCCE Spotlight

The creation of the NCCCE Shared ILS group is the culmination of years of planning efforts of librarians throughout North Carolina. Conversations began in fall 2019 to explore options for a new ILS. The group contacted the North Carolina State Library Cardinal team for guidance.

During meetings with NC Cardinal, the group concluded an open-source ILS platform would be the most cost-effective option and would provide a modern system regularly enhanced and updated by a community of users. The open-source model would give libraries the desired autonomy to manage their individual instances of the platform.

The Evergreen ILS was chosen for several reasons. First, the successful implementation of Evergreen for a consortium is evidenced by the successes of Georgia PINES, NC Cardinal, Sage Library Systems, and Linn Libraries of Oregon. These four library systems host an extraordinary number of libraries in one shared instance. They can seamlessly integrate updates and revisions to their systems at low to no cost. Second, NC Cardinal provided invaluable guidance and assistance throughout the process. Third, utilizing the same ILS as NC Cardinal and partnering with MOBIUS expedited getting approval from NCDIT for our instance of Evergreen. Finally, migrating to this platform will provide future resource-sharing opportunities with public libraries.

Our planning committee received a 2021-2022 Library Services and Technology Act (LSTA) Grant through the State Library to develop a plan to migrate five libraries to Evergreen and create a scalable model for all 58 community college libraries. A

consultant was hired to facilitate user experience groups comprised of faculty, students, and library staff representing small, medium, and large-sized libraries to test the Evergreen ILS platform. The consultant assessed the structure and practices of the old consortium and made recommendations to develop a new shared ILS for community college libraries. The planning committee formally presented the project at the Community College Library Administrators conference in July 2021.

The planning grant resulted in the formation of a Governance Committee to oversee the North Carolina Community College Evergreen ILS Group (NCCCE); the creation of a Memorandum of Agreement and bylaws; a commitment from 25 community college libraries to migrate to Evergreen; and standing monthly update meetings to answer questions and provide information related to the project.

In July 2023, NCCCE received a multi-year LSTA Project Grant through the State Library for 25 community college libraries to migrate to Evergreen and contracted with MOBIUS for training, hosting, and support services. The NCCCE planning committee met weekly with MOBIUS for the migration. The committee met bi-weekly with NC Cardinal to better understand their processes and best practices.

The first cohort of libraries migrated to NCCCE in December 2023. There were very few issues due to the advanced planning and guidance from MOBIUS and the NC Cardinal team. The successful implementation allowed NCCCE to receive a second-year LSTA Project Grant to migrate additional libraries. The second migration occurred in December 2024, resulting in a shared ILS of 50 of the 58 community college libraries in North Carolina.



**You can find a list of
participating libraries:**

Participating Libraries

[ncccevergreen.org/eg/opac/
home/participating-libraries](https://ncccevergreen.org/eg/opac/home/participating-libraries)





Committees, Working Groups, and Interest Groups

Acquisitions Interest Group

Leader: Tiffany Little

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

Meets 2nd Wednesday of each month

The Acquisitions Interest Group shares information about acquisitions workflows, development, and bugs.

Cataloging Interest Group

Leader: Jennifer Weston

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

Meets 2nd Tuesday of each month

The Cataloging Interest Group shares information about cataloging workflows in Evergreen and works together to coordinate and test cataloging-related development for the benefit of the community.

Collaborative Code Review

Leader: Jane Sandberg

Meets weekly on Mondays

Collaborative Code Review is held weekly, and provides an opportunity for a small group of developers to share knowledge as well as discuss, review, test, sign off, and/or commit bugs.

Consortial Leaders Roundtable

Leader: Benjamin Murphy

Meets quarterly

Round table opportunity for consortia leaders to get together and talk about shared issues.

Developer Meetings

Leader: Shula Link

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

Meets 2nd Tuesday of each month

The Evergreen developers meet monthly to discuss software releases, development work, and other issues relevant to the developer community.

Documentation Interest Group

Leader: Debbie Luchenbill

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

Meets 1st Thursday of each month

The Documentation Interest Group works towards a single-source, standards-based set of documentation for Evergreen.

Evergreen Admin Working Group

Leader: Elizabeth Davis

Wiki: <https://wiki.evergreen-ils.org/doku.php?id=eag:start>

Meets 3rd Tuesday of each month

The Evergreen Admin Working Group shares knowledge on how to configure Evergreen settings and policies, review admin-related bugs, update admin documentation, and all other things admin.

New Developers Working Group

Leader: Terran McCanna

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

Meets 3rd Wednesday of each month; code review weekly on Mondays

The New Developers Working Group provides a space for new developers to work together to learn more about Evergreen.

Outreach Committee

Leader: Rogan Hamby

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

Meets 1st Wednesday of each month

The Outreach Committee organizes activities to increase the visibility of Evergreen in the larger library community, and produces the Annual Report as well as the Hack-A-Way. If you're interested in helping promote the community please join us!

Permissions Working Group

Leader: Susan Morrison

Wiki: https://wiki.evergreen-ils.org/doku.php?id=community:permissions_working_group

Meets 4th Tuesday of each month

The Permissions Working Group meets monthly to collaborate on the testing, defining, and documenting of Evergreen permissions.

Reports Interest Group

Leader: Jessica Woolford

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

Meets last Wednesday of each month

The Reports Interest Group works on establishing a framework for sharing reports and improving the reporting system in Evergreen.

Standing Conference Committee

Chair: Ruth Frasur Davis

Wiki: https://wiki.evergreen-ils.org/doku.php?id=community:standing_conference_committee

Meets 2nd Wednesday of each month

The Conference Committee provides guidance and continuity to annual conference committees and local host committees to put on an annual Evergreen conference.

Student Success Working Group

Leader: Jennifer Pringle

Wiki: https://wiki.evergreen-ils.org/doku.php?id=student_success_working_group

Meets quarterly

The Student Success Interest Group meets to share information, perform assessment, and provide direction related to meeting student needs using Evergreen, with a particular focus on the needs of primary, secondary, and post-secondary students.

User Interface Interest Group

Leader: Stephanie Leary

Wiki: https://wiki.evergreen-ils.org/doku.php?id=community:ui_ig

Meets 4th Tuesday of each month

The User Interface Interest Group works to standardize the Evergreen UI and establish a design system.

System Admin Interest Group

Leader: Chris Sharp

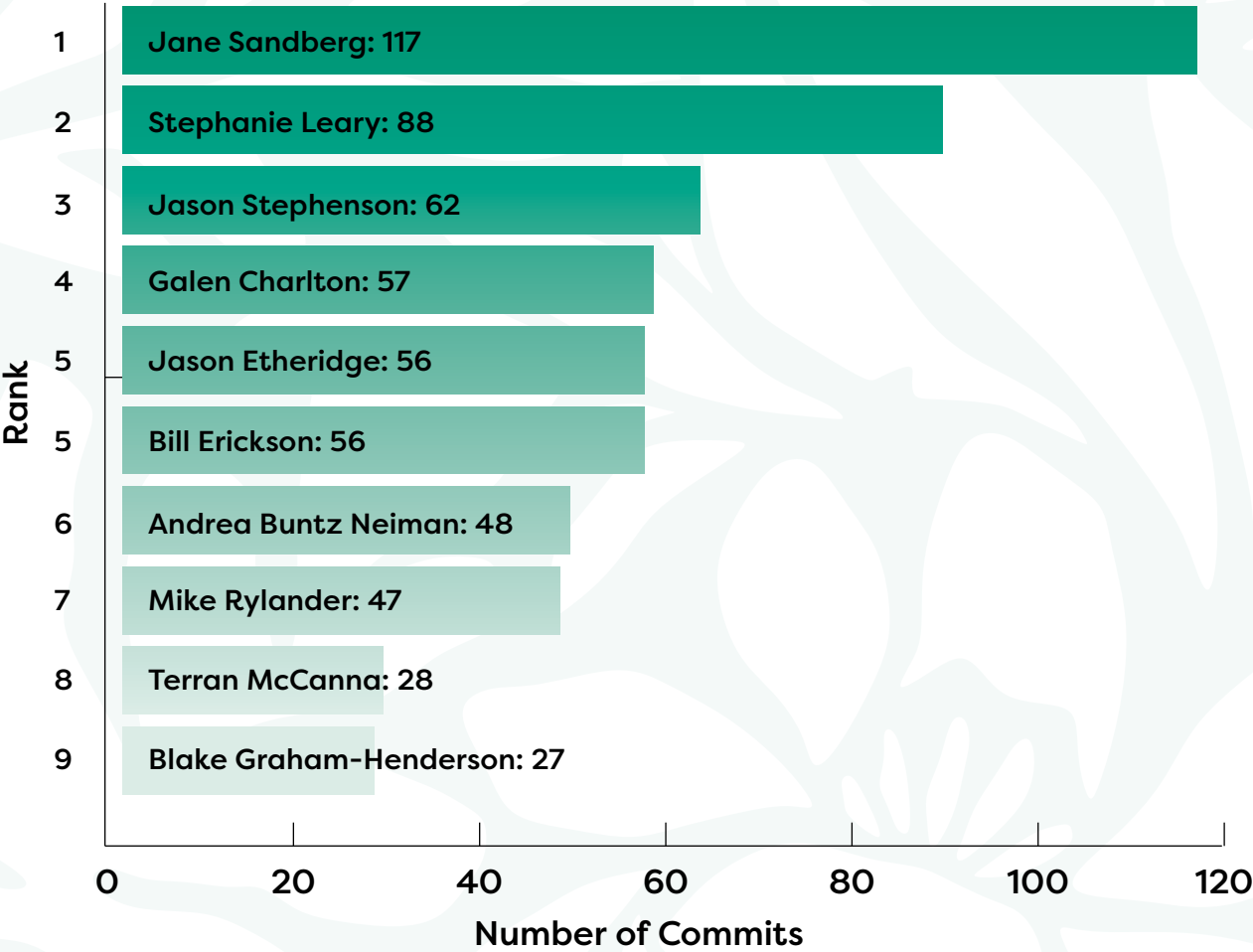
Wiki: https://wiki.evergreen-ils.org/doku.php?id=community:eg_sys_admin_ig

Meets annually at the conference

An informal meeting of Evergreen administrators of various skill levels, with the topics discussed including implementation of Evergreen, server environments, installation, and software specifics.

Commit Statistics

Top 10 Authors of 2024 Commits



Remaining Authors of 2024 Commits

Rank	Name	Commits
11	Steven Mayo	25
12	Gina Monti	24
13	Jason Boyer	17
14	Susan Morrison	16
15	Michele Morgan	13
15	Jeff Davis	13
17	Dan Briem	12
18	Ian Skelskey	10
19	Josh Stompro	9

Rank	Name	Commits
19	Chris Sharp	9
21	Llewellyn Marshall	7
22	Tiffany Little	4
23	Zavier Banks	2
23	Rogan Hamby	2
24	Spencer Pennington	1
24	Scott Angel	1
24	Ruth Davis	1

Rank	Name	Commits
24	Martha Driscoll	1
24	Lena Hernandez	1
24	Kyle Huckins	1
24	Ken Cox	1
24	kdandy1	1
24	Kathy Lussier	1
24	Garry Collum	1
24	Alberto Martinez	1

2024 Fun Facts

18 authors have 10+ commits, including new author Ian Skelskey (Bibliomation)

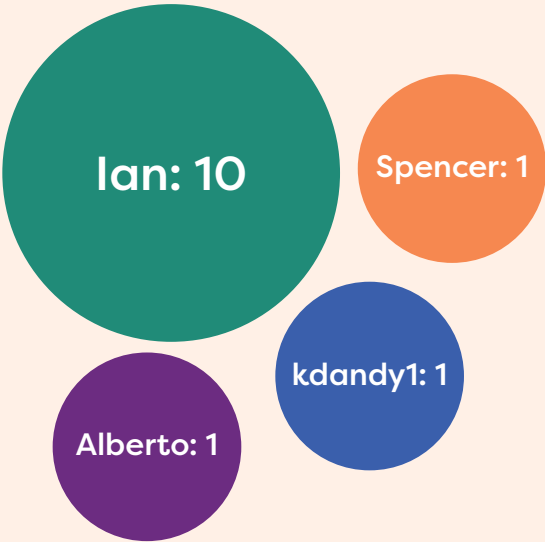
A total of 35 authors contributed 760 commits in 2024

Comparable to 2023 which had 744 total commits by 38 authors

New core committer **Stephanie Leary** (Equinox Open Library Initiative) appointed January 2024

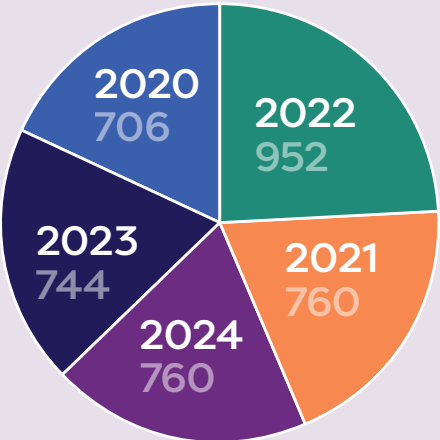
78% of commits were code and 22% were docs.

New Authors in 2024

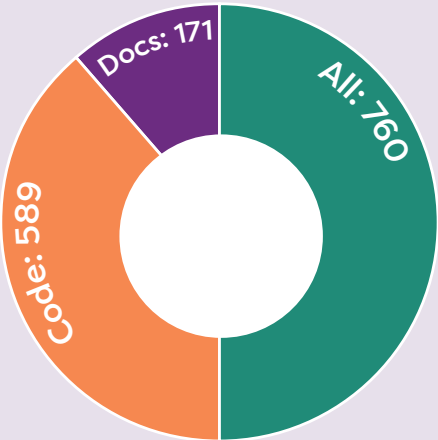


Legend	Author Name	Commits
	Ian Skelskey	10
	Spencer Pennington	1
	Alberto Martinez	1
	kdandy1	1

Commits over 5 years



Commits by Type in 2024





Releases & Features

3.13 and 3.14

In 2024, the Evergreen community released 3.13 and 3.14. Major improvements included:

- Upgrades to the native self-checkout interface
- Multi factor authentication for staff accounts
- Angular ports of the Record Buckets, Reports, Invoices, Claims, Circ Policies, and Z39.50 interfaces
- New tools for administrators to manage SIP connections and SIP data
- Numerous accessibility improvements to the staff client and OPAC
- Rewrite of the MARC Editor interface

The following organizations sponsored development released in 2024:

- BC Libraries Cooperative
- Evergreen Community Development Initiative
- Evergreen Indiana
- King County Library System
- OWWL Library System
- Pennsylvania Integrated Library System
- Traverse des Sioux Library System

Evergreen 3.13

June 7, 2024

Release Team:

- Blake Graham-Henderson (MOBIUS)
- Bill Erickson (KCLS)
- Shula Link (PINES)
- Stephanie Leary (Equinox)
- Andrea Buntz Neiman (Equinox)

3.13.0 (including beta & release candidate) had 18 major features and 35 bugfixes.

45 individuals representing 19 organizations from 3 countries contributed to this release with code, translations, documentations, patches, and testing. Five organizations commissioned developments for this release.

Full release notes for 3.13 are here: https://evergreen-ils.org/documentation/release/RELEASE_NOTES_3_13.html

Evergreen 3.14

October 22, 2024

Release Team:

- Ruth Davis (Evergreen Community Development Initiative)
- Blake Graham Henderson (MOBIUS)
- Jason Stephenson (C/W MARS)
- Josh Stompro (LARL)
- Jessica Woolford (Bibliomation)

3.14.0 (including beta & release candidate) had 22 major features and 58 bugfixes.

43 individuals representing 17 organizations across 3 countries contributed to this release with code, translations, documentations, patches, and testing. Five organizations commissioned developments for this release.

A special thank you goes to employees of the National Network for Equitable Library Service (Canada) whose employees performed accessibility testing for this release of Evergreen.

Full release notes for 3.14 are here: https://evergreen-ils.org/documentation/release/RELEASE_NOTES_3_14.html



Hack-A-Way

Evergreen developers and community members gathered for the annual Hack-A-Way retreat in mid-November. The Hack-A-Way provides an opportunity for Evergreen stakeholders to collaborate on software improvements and do long term planning.

This year's Hack-A-Way was held at Endicott College in Beverly, MA and was hosted by North of Boston Library Exchange (NOBLE) and CW MARS. Twenty-five community members representing 12 organizations attended in person, with several others from across North America and Europe attending remotely.

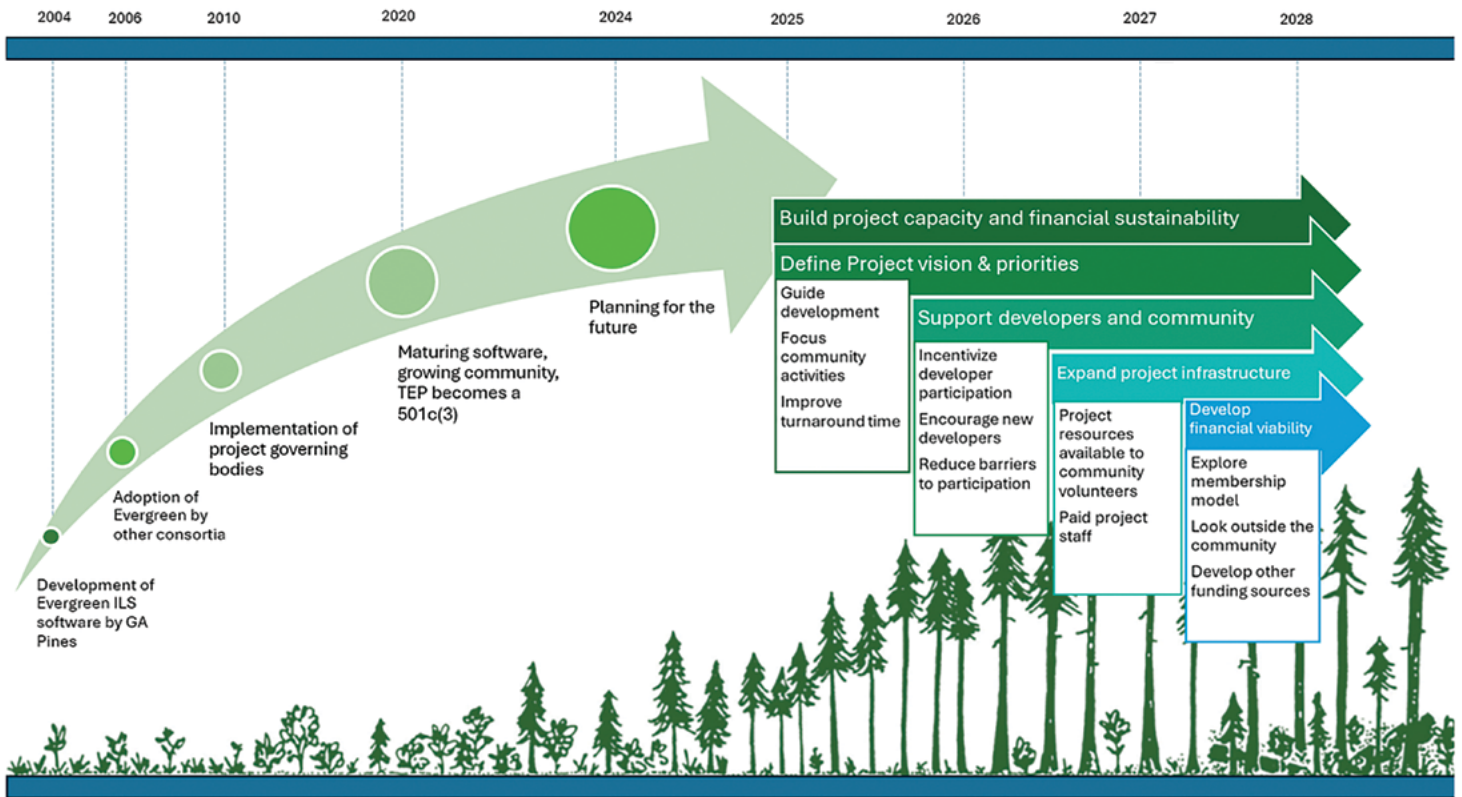
Discussions at the Hack-A-Way included upcoming infrastructure upgrades to Evergreen, better handling of translations for monthly releases, project tooling and technical needs, website updates, and plans for the major Evergreen 4.0 release which will be forthcoming in 2025.



Community members also gave updates on longer running projects: independent developer Ken Cox discussed his Hemlock Evergreen app; developer Scott Angel of MOBIUS demonstrated his work on a staff dashboard; and developer Stephanie Leary of Equinox Open Library Initiative reported about the extensive progress she has made with accessibility improvements to Evergreen.

The Evergreen community extends our thanks to NOBLE and CW MARS for being excellent local hosts, and appreciation to Endicott College for the working space.





Strategic Plan

In very early 2025, the Evergreen Project Board approved its first strategic plan as a 501(c)(3) organization. The strategic plan is the final product of a collaborative effort by stakeholders in the Evergreen open-source library software community. In 2024, the Strategic Plan Subcommittee worked with Carson Block Consulting to interpret previous focus group, survey, and community activity results and to host additional focus group interviews. The work culminated in a two-day virtual stakeholder retreat facilitated by Mr. Block and resulting in the framework for the plan.

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

The new strategic plan outlines a vision for the continued transformation of The Evergreen Project, over the next three to five years, into a self-sustaining non-profit organization.

The overall goals of the strategic plan were to define a project vision and priorities; support developers and community engagement; develop financial sustainability, and provide leadership in the Evergreen Community. To meet these goals, the Evergreen Project Board and community volunteers focused on key steps needed for continued transformation. Those steps include an organizational structure review and the development of a resource model.

A key step toward transformation was a review of the existing structure of The Evergreen Project and its place within and in support of the Evergreen Community. The organizational structure review analyzed the current state of The Evergreen Project and identified needed additions and changes. The strategic plan includes recommendations for identified additions and changes. Some of those recommendations include an update of the Project's bylaws, a review of board and committee composition, and the possibility for permanent staff.

The next step is, perhaps, the most transformative—the development and implementation of a resource model to bolster the work of The Evergreen Project. The proposed resource model is a multi-faceted approach with each component complementing the other. It involves the adoption of a membership model that includes a contributor program as well as a staffing and contributor structure. The membership model will create a value-added program incentivizing organizations and individuals to join The Evergreen Project in order to generate resources to fund the goals identified in the plan. It also includes a fee-free path to membership for individuals who contribute to the Evergreen Community. The staffing and contributor structure outlines The Evergreen Project's needs to compensate individuals and/or organizations for services.

The Evergreen Project Board and the Strategic Plan Subcommittee are very grateful to the many people who provided feedback over the course of this project and are pleased to present this plan for the future to the Evergreen Community.



Welcome and Keynote
with Richard Littauer
(organizer of *SustainOSS* and
host of the *Sustain Podcast*)

Sponsors



International Conference

Every year the Evergreen International Conference brings the community together. This year we had 112 attendees for the pre-conference, 285 for the main conference and 127 for the Hackfest and 11 sponsors. Our Keynote speaker Richard Littauer is the organizer of SustainOSS and host of the Sustain Podcast. His speech on sustainability in open source projects continue a discussion we have had in recent years in making sure we are a strong diverse community that contributes to the long term health of the project. For the first time we also had an invited speaker, Terry Reese, creator of Marc Edit.

Some of our presentations highlight the diversity of the conference experience. Introductory presentations included acquisitions, permissions, using parts with serials, buckets and for those interested in documentation and code using git. King County presented on Redis and Beyond looking at the low level code supporting Evergreen while more developer presentations looked at UI accessibility. For managing Evergreeners we talked about building a culture of open source contribution, the patron experience with discovery layers and concerns specific to consortia.

This year the conference was online and a full playlist of the presentations can be found here:

<https://www.youtube.com/watch?v=zZXKJfLaLUU&list=PLsktT5b82paVQ5JMp-JG8hEuqxbX5wsnL2>



Credits

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The Evergreen Annual Report for 2024 was produced by the Evergreen Outreach Committee with content from Rogan Hamby, Andrea Buntz Neiman, Ruth Frasure Davis, Galen Charlton, Kathy Lussier, The Evergreen Project Board and members of the North Carolina Community Colleges Evergreen. The report was designed by Corey Grant.

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