

# State of Evergreen Indiana 2015

Wendy Knapp / Jacob Speer



# Numbers tell a story



# 2014 In Numbers

- ▶ Library Systems Active: 107
- ▶ Public Outlets: 155
- ▶ Counties with an EI Library: 60
- ▶ Taxpayers Served: 1,030,052
- ▶ Total EI Circulation\*: 8,348,826
- ▶ Total Juvenile Circulation\*: 3,261,647
- ▶ Total In-House Use: 260,432
- ▶ Holdings: 6,980,377
- ▶ Bibliographic Records: 2,468,609
- ▶ Transits Completed: 614,362

\*Excludes electronic content circulated



# Resource Sharing: Packages Shipped

2007–2008

#	Library	Packages	#	Library	Packages
1	Indiana U - Bloomington	8,779	11	Johnson Co PL	3,299
2	INCOLSA Fort Wayne	6,065	12	Lake Co PL	3,001
3	Purdue U	5,449	13	Bartholomew Co PL	2,948
4	Notre Dame	5,289	14	DePauw U	2,821
5	Elkhart PL	5,186	15	Mishawaka-Penn-Harris PL	2,762
6	IUPUI – Indianapolis	5,164	16	IUPUI – Fort Wayne	2,696
7	Purdue U – Fort Wayne	4,717	17	INCOLSA – Muncie	2,597
8	Kokomo-Howard Co PL	3,837	18	Indiana U – South Bend	2,580
9	Indiana State U	3,606	19	IMCPL	2,569
10	Evansville-Vanderburgh PL	3,572	20	INCOLSA – New Albany	2,376



# Resource Sharing: Packages Shipped

2008–2009

#	Library	Packages	#	Library	Packages
1	Indiana U - Bloomington	10,285	11	Bartholemew County PL	4,209
2	IN-SHARE	7,787	12	Mishawaka-Penn-Harris PL	4,181
3	Allen County PL	6,786	13	Indiana State Library	4,108
4	Ball State U	6,700	14	IMCPL	4,063
5	Purdue U	6,172	15	Johnson Co PL	3,879
6	IUPUI – Indianapolis	5,902	16	Indiana State U	3,514
7	Notre Dame	5,860	17	Jackson Co PL	3,447
8	Elkhart	5,665	18	IUPUI – Fort Wayne	3,281
9	Evansville-Vanderburgh PL	5,223	19	Warsaw Community PL	3,280
10	Kokomo-Howard Co PL	5,179	20	Lake Co PL	3,152



# Resource Sharing: Packages Shipped

2009–2010

#	Library	Packages	#	Library	Packages
1	Indiana U - Bloomington	10,679	11	Evansville-Vanderburgh PL	5,142
2	Allen Co PL	7,340	12	Johnson Co PL	4,940
3	Ball State U	7,052	13	Greenwood PL	4,850
4	Notre Dame	6,906	14	Kokomo-Howard Co PL	4,596
5	Elkhart PL	6,286	15	Hussey-Mayfield Mem PL	4,460
6	Jackson Co PL	6,248	16	IMCPL	4,380
7	IUPUI – Indianapolis	6,212	17	Jefferson Co PL	4,274
8	Plainfield-Guilford Twp PL	5,847	18	Mishawaka-Penn-Harris PL	3,844
9	IN-SHARE	5,764	19	Indiana State Library	3,816
10	Purdue U	5,639	20	Indiana State U	3,742



# Resource Sharing: Packages Shipped

2010-2011

#	Library	Packages	#	Library	Packages
1	Indiana U - Bloomington	10,400	11	Westfield-Washington PL	5,683
2	Plainfield-Guilford Twp PL	8,712	12	IUPUI	5,497
3	Ball State U	7,808	13	West Lafayette PL	5,184
4	Allen Co PL	7,562	14	Kendallville PL	5,126
5	Jackson Co PL	7,463	15	Fulton Co PL	5,071
6	Notre Dame	6,624	16	Elkhart PL	5,036
7	Hussey-Mayfield Mem PL	6,531	17	Evansville-Vanderburgh PL	5,013
8	IN-SHARE	6,490	18	Purdue U	4,859
9	Greenwood PL	6,412	19	Jay Co PL	4,634
10	Jefferson Co PL	5,931	20	Johnson Co PL	4,585



# Resource Sharing: Packages Shipped

2011-2012

#	Library	Packages	#	Library	Packages
1	Indiana U - Bloomington	9,409	11	IUPUI	6,406
2	Plainfield-Guilford Twp PL	9,065	12	Jefferson Co PL	6,391
3	Morgan Co PL	8,607	13	Westfield-Washington PL	6,325
4	Allen Co PL	8,149	14	West Lafayette PL	6,069
5	Jackson Co PL	7,963	15	Kendallville PL	5,913
6	Ball State U	7,370	16	Fulton Co PL	5,563
7	Greenwood PL	7,358	17	Jay Co PL	5,377
8	Hussey-Mayfield Mem PL	6,915	18	Adams PLS	5,141
9	Notre Dame	6,804	19	La Grange Co PL	5,084
10	IN-SHARE	6,515	20	Carnegie PL/Steuben Co	4,995



# Resource Sharing: Packages Shipped

2012-2013

#	Library	Packages	#	Library	Packages
1	Plainfield-Guilford Twp PL	9,580	11	West Lafayette PL	6,310
2	Morgan Co PL	8,839	12	Notre Dame	6,033
3	Indiana U - Bloomington	8,793	13	IUPUI	5,972
4	Jackson Co PL	7,771	14	Kendallville PL	5,815
5	Hussey-Mayfield Mem PL	7,288	15	Fulton Co PL	5,657
6	Allen Co PL	7,063	16	La Grange Co PL	5,493
7	Ball State U	6,833	17	Jay Co PL	5,196
8	Greenwood PL	6,785	18	Adams PLS	5,175
9	Westfield-Washington PL	6,522	19	Peabody PL	5,155
10	Jefferson Co PL	6,484	20	Greensburg-Decatur Co Ctl PL	5,094



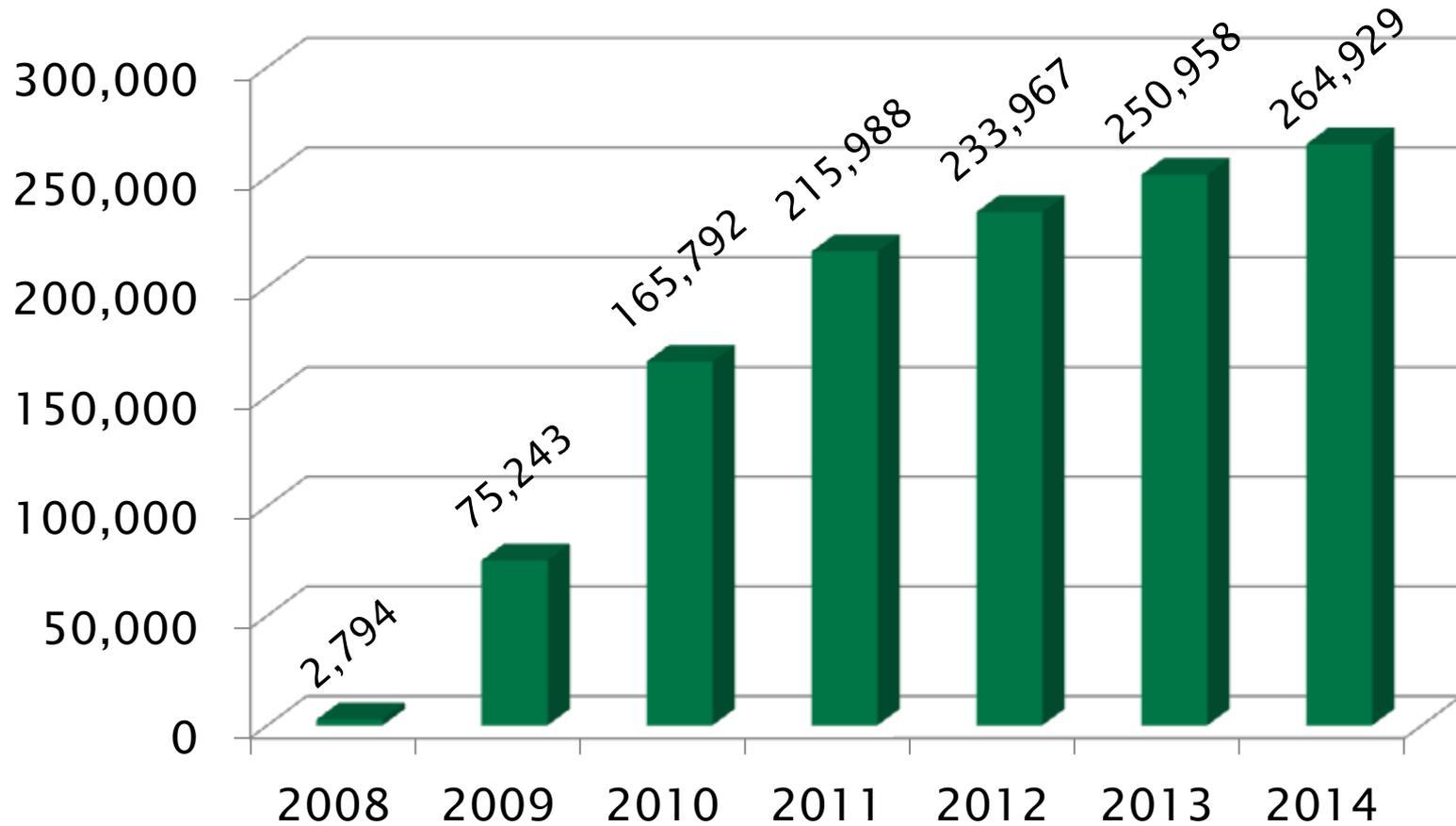
# Resource Sharing: Packages Shipped

2013–2014

#	Library	Packages	#	Library	Packages
1	Plainfield-Guilford Twp PL	9,961	11	Jefferson Co PL	6,584
2	Morgan Co PL	8,804	12	West Lafayette PL	6,171
3	Indiana U - Bloomington	7,885	13	Notre Dame	6,026
4	Allen Co PL	7,546	14	Shelby Co PL	5,827
5	Hussey-Mayfield Mem PL	7,520	15	Fulton Co PL	5,738
6	Jackson Co PL	7,069	16	Kendallville PL	5,524
7	Peabody PL	6,917	17	IUPUI	5,470
8	Greenwood PL	6,899	18	Lebanon PL	5,410
9	Ball State U	6,597	19	Greensburg-Decatur Co Ctl PL	4,976
10	Westfield-Washington PL	6,593	20	Carnegie PL/Steuben Co	4,940

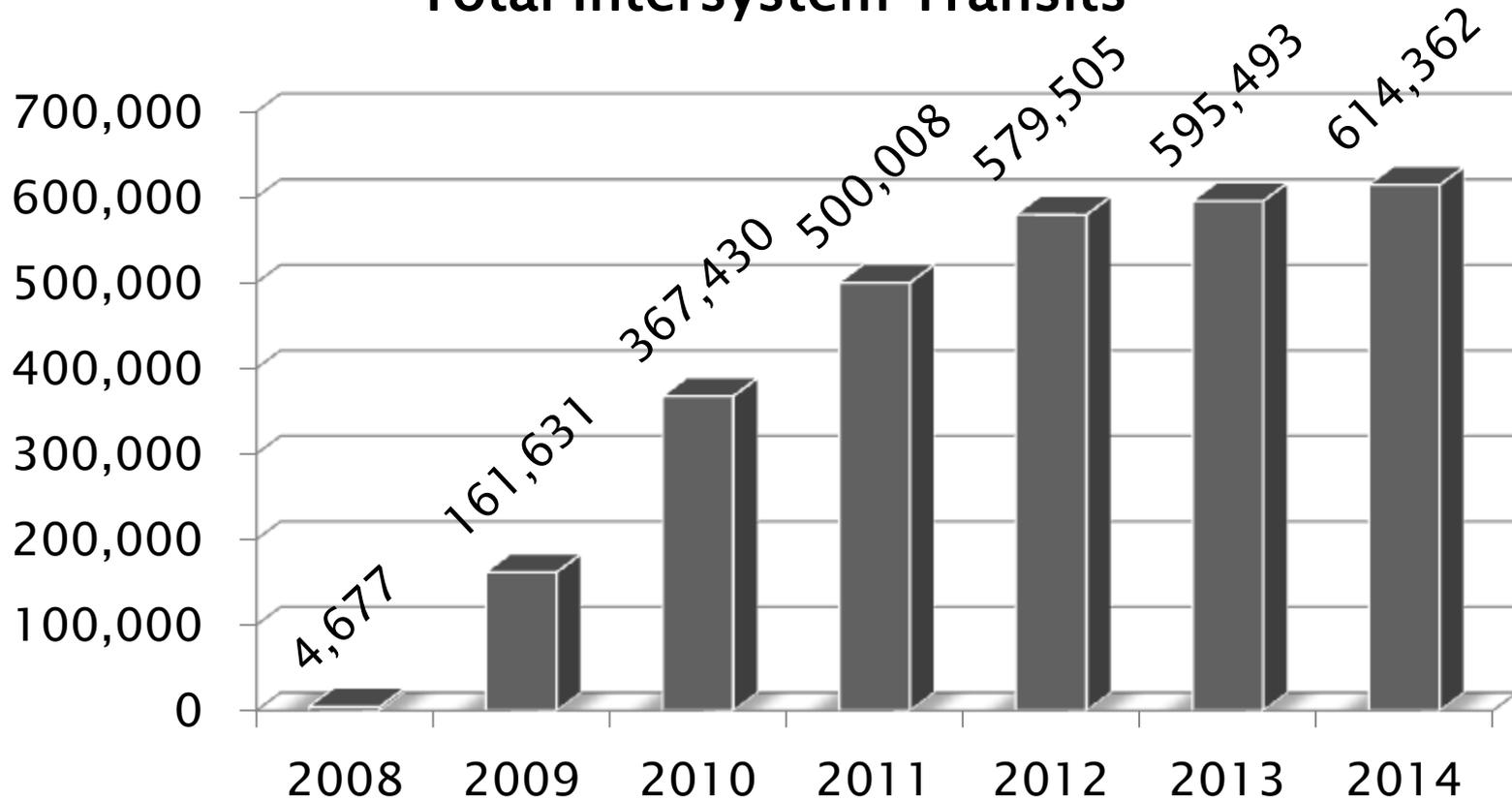


# Resources Shared – Hold Transits



# Resources Shared – Transits

## Total Intersystem Transits



What made 2014 special



# Accomplished

- ▶ Inaugural year for highly successful regional roundtables
- ▶ Welcomed 3 new member libraries
- ▶ Continued dedication to professional development
- ▶ Intra–Evergreen payment project completes first full year
- ▶ Member libraries approved shift to member–funded organization model
- ▶ Bibliographic deduplication project
- ▶ Upgrade to version 2.7



# Regional Roundtables



- ▶ 64 libraries
- ▶ 150+ participants



# Welcoming New Partners



Danville Center Township Public Library  
Welcome to Evergreen Indiana!



# Welcoming New Partners



**Welcome  
to Evergreen Indiana,  
North Madison County Public  
Library!**



# Welcoming New Partners



Welcome to  
Evergreen Indiana  
Royal Center-Boone  
Township Public Library!



# Professional Development

## RDA Implementation and Training

Stephen Smith  
UNIVERSITY OF ILLINOIS AT CHICAGO  
JULY 24, 2014



## Evergreen Cataloging Roundtable Fall 2014 Catalog Clean-up

Jocelyn Lawlis  
Cataloging Division Supervisor  
Indiana State Library

## RDA for Copy Catalogers in Evergreen

Stephen Smith  
UNIVERSITY OF ILLINOIS AT CHICAGO  
JULY 23, 2014

UF 2014 Annual Conference  
Anita Gobett  
Indiana State Library



## Do Evergreens Have Leaves?

## A Shakespearean Tragedy?



## Defining "Damaged" in Evergreen Indiana

## REPORT BUILDING IN EVERGREEN: AN INTRODUCTION PLUS

Anita Gobett  
Evergreen Indiana Coordinator  
Indiana State Library

## Welcome to Evergreen 2.5



**EVERGREEN INDIANA**  
Open Source Integrated Library System

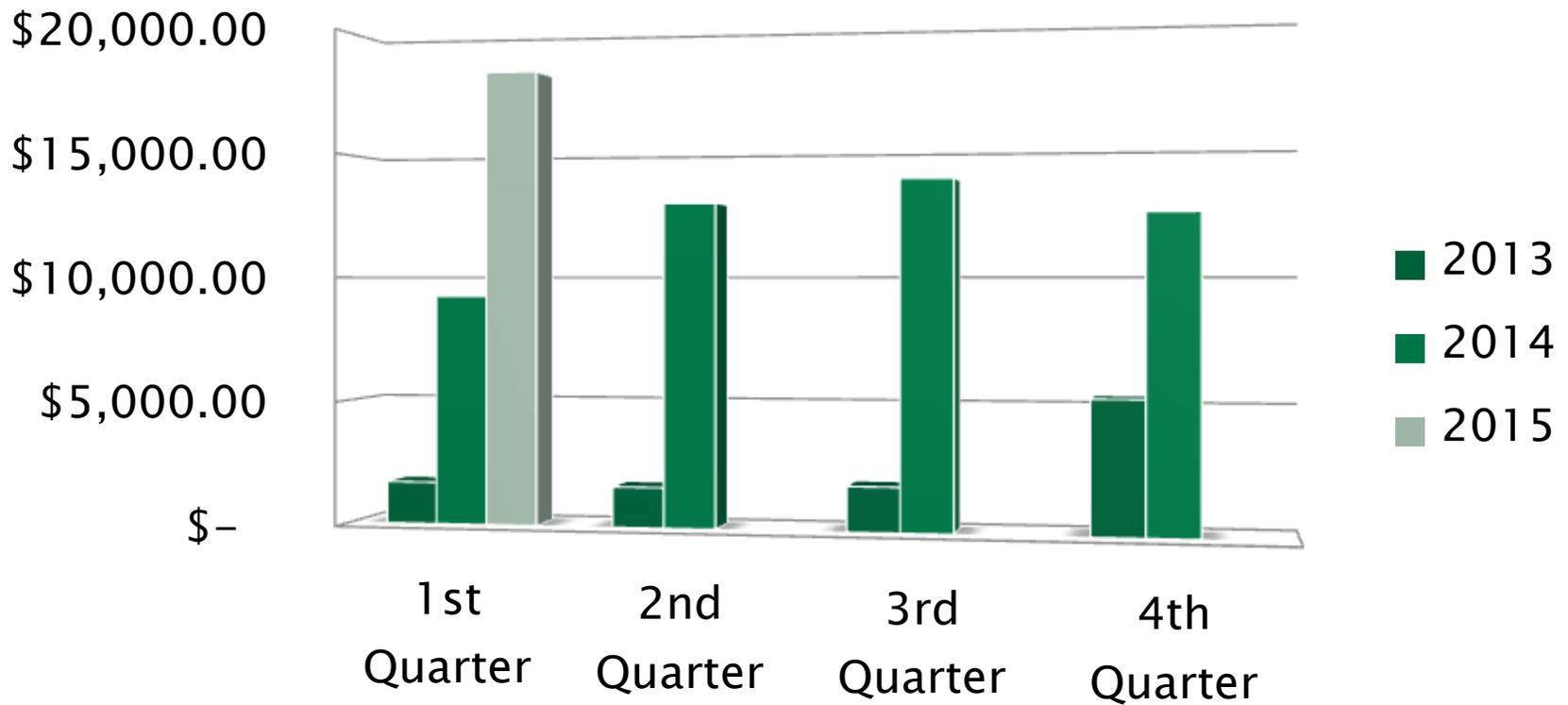
Available Content:		
<b>Home</b>	Discover how to process titles and get materials to your campus from other member libraries.	Welcome to the official training site for Evergreen Indiana! Don't forget to check out the Evergreen Indiana webpage, library catalog link, and Indiana State Library's homepage website page for additional resources!
<b>Cataloging 101</b>	Get started doing cataloging in Evergreen Indiana. This course is the prerequisite to the Advanced Cataloging series, which is required to receive your C&I status. (7 TUE/1h)	
<b>Using the Training Server</b>	Find out how to get up and use the training server so that you can practice in a virtual environment without impacting the live data.	See How The Training Server Works
<b>Circulation 101</b>	An introduction to the basic functions, procedures and policies related to circulation and patron services in Evergreen Indiana.	
<b>Reporting 101</b>	Learn the basics of reporting in Evergreen Indiana.	
<b>Local Administration 101</b>	Leverage the software and test your skills as a local administrator.	

## Welcome to Evergreen 2.7



# Pass the buck

## Payment Program Quarterly Stats



# Member Supported

Tier	Maximum Annual Operating Fund Expenditure	Annual Fee	2016 Billable Rate (Rollout Disc 50%)
1	\$50,000	\$0	\$0
2	\$100,000	\$500	\$250
3	\$200,000	\$1,000	\$500
4	\$300,000	\$1,500	\$750
5	\$500,000	\$2,500	\$1,250
6	\$750,000	\$3,500	\$1,750
7	\$1,000,000	\$5,000	\$2,500
8	\$1,500,000	\$6,500	\$3,250
9	>\$1,500,000	\$8,000	\$4,000



# EI Upgraded!

- ▶ Supportive community testing
- ▶ Brought consortium up-to-date with the latest development features and security
- ▶ 328 staff attended live training sessions; video version watched over 200 times

*Thanks again for your patience and thoughtful troubleshooting notes before, during, and after the upgrade!*



## 2.7 Upgrade Features

- ✓ Grouped search and metaholds
- ✓ Descriptive custom icons and item type labels with new filters for searching
- ✓ Integrated library information pages
- ✓ Fixed field and 007 assistants and wizards
- ✓ Editable reports



# Developing a better Evergreen



# International Development

- ▶ Web-based Staff Client
  - Sprint 1 [Circulation] completed with some elements pushed to later sprints; testing Sprint 2 [Cataloging] later this year
- ▶ Standard client continues to be refined and improved based on existing code

EVERGREEN™



# Web Client Peek

[Home](#)
[Search](#)
[Circulation](#)
[Cataloging](#)
[Administration](#)
admin @

---

**Smith, Betty Joyce**

Check Out
Items Out (3)
Holds (2 / 0)
Bills (\$7.00)
Messages
Edit
Other ▾
Patron Search

---

Profile	Patron
Home Library	LEX-MAIN
Net Access	Filtered
<a href="#">Date of Birth</a>	
Last Activity	8/5/13
Last Updated	8/22/14
Create Date	10/19/10
Expire Date	7/29/16
<b>Fines Owed</b>	<b>\$7.00</b>
Items Out	0
<b>Overdue</b>	<b>3</b>
Long Overdue	0
Claimed Returned	0
Lost	0
Non-Cataloged	0
Holds	2 / 0
Card	342379

Total Owed:	<b>\$7.00</b>	Refunds Available:	\$0.00
Total Billed:	\$7.00	Credit Available:	\$0.00
Total Paid:	\$0.00	Session Voided:	\$0.00

Owed for Selected:	\$7.00	Pending Payment:	<b>\$0.00</b>
Billed for Selected:	\$7.00	Pending Change:	<b>\$0.00</b>
Paid for Selected:	\$0.00		

### Pay Bill

**Payment Type**

**Check Number**

**Payment Received**

**Annotate**

---

#	<input type="checkbox"/>	Balance Ow	Type	Last Billing	Start	Total Paid	Payment Pe	Bill #	Title	Total Billed	Barcode
1	<input checked="" type="checkbox"/>	\$5.00	Overdue ...	8/5/13	8/5/13	\$0.00	\$0.00	1280	ged	\$5.00	86082971...
2	<input checked="" type="checkbox"/>	\$2.00	ILL	10/9/14	10/9/14	\$0.00	\$0.00	1770		\$2.00	

Receipt On Payment # Copies

- ▶ <https://webby.evergreencatalog.com/eg/staff/>
  - login: admin
  - password: demo123



# What's Ahead in Indiana

- ▶ Annual Membership Fee rollout continues
- ▶ Online, on-demand trainings
- ▶ Authority control
- ▶ Migrations with integrated deduplications
- ▶ Streamlined reports interface
- ▶ And much, much more...



# Working together is success!

- ▶ eIndiana Digital Consortium
- ▶ Semi-annual themed and regional roundtables
- ▶ Discounts on group purchases of econtent and software packages
- ▶ A statewide network of professionals available to provide assistance and shared experience



# Questions?

