What is PINES?

- A consortium of 50 Georgia public library systems
- 275 facilities and bookmobiles
- A common library automation system
- A union database of 9 million books & other items
- A shared patron database of about 2 million active PINES cardholders from all 159 Georgia counties

About PINES

- The PINES library card is free to any resident of Georgia, and may be obtained from any PINES library.
- The PINES library card can be used at any PINES facility as if at the home library.
- Materials may be returned to any PINES library.

About PINES

- Users may request materials delivered from any PINES library to local library, at no charge.
- New books are protected from intra-PINES loans for 6 months
- In FY07, more than 540,000 intra-PINES loans, as compared with just 6000 in FY00.
- A statewide courier service began in October 2004 with service to all headquarters libraries in PINES.
### About PINES

- PINES libraries agree to a common set of policies and procedures—patrons have a consistent experience at any PINES library.
- PINES libraries agree to common fine structures.
- Fines and fees may be paid at any PINES library.
- Overdue notices processed centrally for all member libraries.

### Benefits for Users

- One interface that is easy to use
- Users have dramatically increased access to statewide combined library collections
- Convenience of using all 275 member libraries throughout the state
- Common policies affecting the user experience

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### What Do Patrons Like Best About PINES?

**Comments from the PINES User Survey**

- It is so easy to use. I love Evergreen. I can not imagine life without it!
- I love being able to get books from anywhere—especially if my library doesn’t have what I’m looking for.
- I can login with my user name and not a long user number. I love the bookbags. I appreciate the status column for books on hold. I really appreciate the emails and phone calls coming in at the same time.
- You can place a book on hold from another library in the PINES system and have it delivered to your closest library for pick up—LOVE THAT!!!
- I no longer have a local library with just 30,000 books in it. With PINES, I now have a library with several million books.

### Benefits for Libraries

- PINES is centrally administered.
- Participating systems have automation costs paid; their contribution is sharing of collections.
- PINES provides training in regional locations convenient to member libraries.
- Centralized helpdesk and support for software and common policies.

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### Benefits for Georgia

**Cost effectiveness:**

- Estimate to replace automation systems in all PINES libraries: $15 million
- Annual maintenance for individual automation systems: $5 million
- PINES annual operations: $1.6 million
  - Approximately $.80 per registered customer
  - About 1/10 of the cost of purchasing individual automation systems

### Benefits for Libraries

- PINES member libraries pay $0.00
Budget and Funding

<table>
<thead>
<tr>
<th>EXPENSE</th>
<th>Budgeted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff salaries and benefits (7 positions)</td>
<td>$522,172.00</td>
</tr>
<tr>
<td>Daily courier Service to 50 PINES library system headquarters, M-F</td>
<td>$354,000.00</td>
</tr>
<tr>
<td>Server cluster housing, electricity, redundant connections</td>
<td>$106,833.00</td>
</tr>
<tr>
<td>Equinox software development and support services</td>
<td>$477,000.00</td>
</tr>
<tr>
<td>Added Content (book jackets, reviews, tables of contents, etc.)</td>
<td>$29,463.00</td>
</tr>
<tr>
<td>Overdue notices for 275 PINES libraries</td>
<td>$300,000.00</td>
</tr>
<tr>
<td>PINES Staff Travel (7 positions)</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Contracts (special programming, etc.)</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>Supplies (library cards and barcodes for new members, printing, etc.)</td>
<td>$30,000.00</td>
</tr>
<tr>
<td>Equipment (expansion of cluster, hardware for PINES staff)</td>
<td>$80,000.00</td>
</tr>
<tr>
<td>Total Expenses for FY08</td>
<td>$2,441,468.00</td>
</tr>
</tbody>
</table>

Radical or Just Plain Crazy?  
A Crossroads for PINES

- Unable to add larger library systems. We had reached the capacity of the existing software
- Reports moved out of production environment
- Daily “reindex” at 1pm
- Many of our policies were created around limitations of the software

What Do PINES Libraries Need?

- Initial 5-year software contract for PINES ended in June 2005.
- 2003-2004: PINES staff conducted a comprehensive survey of the library automation marketplace
- Is the software driving the policy/procedure, or is the policy/procedure driving the software?

What Do PINES Libraries Need?

- Focus Groups
- “Pretend it’s magic”
- Incredible buy-in from our members
- Participation from library staff throughout the development process

Evergreen

- Evergreen Integrated Library System was developed using Open Source software.
- Software development began in June 2004
- All PINES libraries migrated to Evergreen software on September 5, 2006.
- Evergreen debuted with Online Catalog, Circulation, Cataloging, and Reports.
- Transactions, customer records, and online catalog records were migrated from the former system.
**Evergreen Core Technologies**

- Database: Postgresql
- Logic/glue languages: C and Perl
- Webserver: Apache mod_perl
- Server operating system: Linux
- Server hardware: x86-64
- Messaging core: Jabber
- Client side software: XUL

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**Evergreen Design**

- **Cost-effective:** server software is designed to run on inexpensive commodity hardware with an open source operating system.
- **Reliable:** the software is designed to run in a clustered environment, giving it enterprise-level high availability and failover.
- **Flexible:** Evergreen's staff client is cross-platform (Windows, Mac, Linux).

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**Hindsight is 20/20**

- More Money
- More Time
- More Staff

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**What We Did Right**

We listened, and designed the system based on input from library staff and patrons. This created a sense of ownership and pride in the system as it developed.

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**Open Source Software Benefits**

- **Reliability and Stability:** “Given enough eyeballs, all bugs are shallow”
- **Auditability:** Peer review
- **Cost:** Financial benefits to current and future Evergreen users remains to be seen
- **Flexibility and Freedom**
- **Support and Accountability**

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1. Linus’s Law according to Eric S. Raymond in "The Cathedral & The Bazaar"
Open Source Software Benefits

The difference in renting versus owning. Yes, we are responsible if the AC goes out or the roof leaks, but…it is a GREAT place to be.

• We get what we need and want
  – Scalability; can handle transaction load
  – Local Control Increased
  – Granularity of Permissions Structure

• Healthy Competition - Equinox 5 year renewal contract

Disclaimer: The use of the word “owning” in this case means “taking responsibility for”. Evergreen is licensed under the GPL.

Open Source – Open Standards

• Open code, open metadata, open standards -- the three work together
• Interoperability is far easier when nothing is hidden
• Open source encourages standards by moving the market away from closed, proprietary solutions
• Standards help open source and proprietary solutions live harmoniously
• Standards are the linchpin of service-oriented architecture -- which isn’t predicated by OSS, but certainly is prevalent in OSS development, in part because open code encourages a “mix and match” philosophy

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Where We Are Now

Early Adopters

• British Columbia Ministry of Education
• University of Windsor
• Laurentian University
• McMaster University
• Michigan Library Consortium and Grand Rapids Public Library
• Indiana Public Libraries
• Kent County (Maryland)

Where We Are Now

PINES online catalog: www.gapines.org

Evergreen software development: www.open-ils.org

Georgia Public Library Service: www.georgialibraries.org

Facebook – Evergreen Open ILS

For Further Information

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