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Evergreen Migration for North Carolina Community College Libraries: A Lesson in Collaboration and Perseverance

The migration of North Carolina Community College Libraries to the Evergreen integrated library system (ILS) is the culmination of planning, training, and implementation efforts of librarians throughout the state over the last four and a half years. The impetus for the Evergreen project was spurred by two failed Requests for Proposals (RFP) initiated by the North Carolina Community College System Office (System Office) in 2017 and 2018 for a new ILS for the 52 community college libraries that comprised the Community College Libraries in North Carolina Consortium (CCLINC). After the failed RFPs, the System Office signed a three-year contract renewal with the option for two additional one-year renewals with the current vendor.

Librarians within the CCLINC member libraries expressed disappointment at the prospect of being required to continue using an outdated and antiquated ILS. The consortium had been using the same system for over twenty years. Furthermore, librarians and library administrators were frustrated at the increasing lack of input and control over decisions regarding the governance of CCLINC's ILS platform due to System Office policies and procedures that had been arbitrarily and unilaterally enacted.

As a result of this frustration, conversations were started among a small group of community college librarians and library administrators in the fall of 2019 to explore what, if any, options were available to the community college libraries to obtain an ILS platform unaffiliated with the CCLINC consortium or the System Office. These conversations led this group to reach out to the State Librarian for the State Library of North Carolina, for guidance and assistance regarding the feasibility and process of creating a community college ILS organization. The State Library had experience in creating an ILS consortium with the advent of NC Cardinal, a growing consortium of North Carolina public libraries, within a similar framework.

During meetings with the State Librarian and the NC Cardinal team, our group concluded that an open-source ILS platform would be the most cost-effective option and would provide community college libraries with a modern system that is regularly enhanced and updated by a community of users. Furthermore, the open-source model appealed to our desire for an ILS system that gave libraries significant autonomy regarding managing their individual instances of the platform. Researching the possible open-source ILS platforms, we focused on two, Koha and Evergreen, that met the functional and scalable needs of potentially migrating 58 community college libraries to the platform.

Evergreen was chosen as the preferred ILS for several reasons. First, the successful implementation of Evergreen within a consortia structure is evidenced by the success of NC Cardinal, Georgia PINES, Sage Library Systems (Oregon), and Linn Libraries of Oregon. Like CCLINC, 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, the State Library and the NC Cardinal team provided invaluable guidance and assistance throughout the planning and implementation process, and we felt this crucial collaboration would continue and be more pertinent if we decided to implement the same platform they used. Third, utilizing the same ILS as NC Cardinal and partnering with MOBIUS, its hosting and support vendor for the platform, also streamlined and expedited the process of getting approval from the System Office and the North

Carolina Department of Information Technology for our instance of Evergreen. Finally, migrating to this platform would allow potential resource-sharing opportunities in the future with the public libraries by connecting with the NC Cardinal instance of Evergreen.

Our small group of librarians and library administrators formed a planning committee and applied for a 2021-2022 Library Services and Technology Act (LSTA) Grant through the State Library to develop a plan to migrate our five libraries to the Evergreen platform and create a model that would be scalable to allow all 58 community college libraries to join. Using funds from the grant, the planning committee hired a consultant 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 and provide feedback.

This consultant was also responsible for assessing the current structure and practices of CCLINC and making recommendations to the plan, based on faculty, staff, student, and librarian feedback, for how to best develop a shared ILS instance for the community college libraries that takes the existing structure and streamlines processes and policies to create a more positive and efficient shared ILS. Also, with input and recommendations from the consultant, the planning committee formally presented the community college Evergreen project at the Community College Library Administrators conference in July 2021 to introduce this project to community college library administrators and gauge interest in joining this venture.

The results from the LSTA Planning grant that ended in June 2022 include the creation of a Governance Committee to oversee the formation and governance of the North Carolina Community College Evergreen ILS Group (NCCCE) that was formed due to the interest and commitment of libraries to the project, and the creation of a Memorandum of Agreement and bylaws to provide a framework for membership to and governance of the NCCCE ILS Group. Another significant result was a commitment from 25 community college libraries to migrate to Evergreen if we were ac-

cepted for a 2023-2024 LSTA Project Grant. The Governance Committee agreed to schedule standing monthly update meetings to answer questions from and provide information related to the project to committed and interested libraries.

In July 2023, the NCCCE ILS Group was awarded a multi-year LSTA Project Grant through the State Library for 25 community college libraries to migrate to the Evergreen ILS platform. We contracted with MOBIUS Open Source Solutions as the project management team for our migration to Evergreen, providing training, hosting, and support services for our platform instance. Once the grant began, the NCCCE planning committee met weekly with MOBIUS to plan and coordinate all aspects of the migration process. Furthermore, we met bi-weekly with the NC Cardinal team until our migration date to better understand their process for migrating new libraries into their system, as well as best practices we could incorporate into our migration.

MOBIUS and NC Cardinal teams stressed to our planning committee and migrating libraries the importance of cleaning up patron and bibliographic records before migration. As part of this process, the planning committee stressed to all migrating libraries the importance of performing a patron purge of old and dormant patron accounts and formulating a plan and procedure to handle long overdue fines and materials. Furthermore, migrating libraries were encouraged to conduct an inventory of the overall collection and clean up their bibliographic records to ensure the migration crosswalk from the old to the new system went as seamlessly as possible. Finally, MOBIUS provided information and item mapping spreadsheets for the migrating libraries to complete. This ensured library information was correctly uploaded, all staff client accounts were created and active before migration, and all shelving locations from the old ILS system were correctly mapped to a corresponding location in Evergreen.

Due to unforeseen circumstances, one issue that the group experienced during the migration process was our inability to obtain our patron and bibliographic records for MOBIUS to build our database until about eleven weeks before migra-

tion. This issue had a ripple effect regarding our migration since we could not test our data in our Evergreen instance until the data was made available. Furthermore, this delay pushed back the training schedule for migrating library staff since MOBIUS encouraged us to become familiar with the platform and some functionality before any formal training took place.

Fortunately, this delay did not cause any major issues regarding our migration. We had ample time to test our patron and bibliographic data in our instance of Evergreen, which uncovered several issues we corrected before migration. Furthermore, training was not significantly impacted by the delay since the MOBIUS staff conducted these training sessions remotely, and they were recorded so staff members who could not attend the live sessions could watch the recordings at their convenience.

We migrated the first cohort of twenty-five libraries to the NCCCE instance of Evergreen in December 2023. We experienced very few issues due to the advanced planning and guidance we received from MOBIUS and the NC Cardinal team, who have successfully migrated hundreds of libraries to this platform. This successful implementation allowed us to apply for and receive the second-year extension of the LSTA Project Grant to migrate an additional twenty-five libraries to the NCCCE instance of Evergreen. The migration of these libraries will occur in December 2024. This will result in a shared integrated library system of 50 of the 58 community college libraries in North Carolina.

Learning from our initial migration, the planning committee instituted biweekly meetings with MOBIUS and the migrating libraries to ensure everyone understood their role and what must be done before the migration process. Furthermore, since we have a fixed extraction date from the vendor the libraries will be migrating from, we were able to create a firm timeline and establish deadlines for libraries to follow regarding the creation of settings and policies as well as patron and bibliographic mapping of their records, and platform training. The experience we gained migrating the first cohort to Evergreen allowed us to enhance and streamline these procedures and processes.

During the almost five years of planning and implementing the migration of North Carolina Community College libraries to a new ILS platform, we have learned many lessons during this journey that any library or library organization exploring a similar project may want to consider. First, ensure there is a need and desire to change platforms and that personnel are committed to seeing the project through to completion. Second, extensive research on available ILS platforms, surveys, and focus groups should be conducted to assess the needs and functionality relevant stakeholders in the project deem essential.

Take the time to exhaustively research potential organizations to host the instance of the ILS platform. This partnership is critical to the success and sustainability of the organization's ILS platform. When choosing a hosting service, things to consider are how experienced and knowledgeable the organization is in the new platform and migrating libraries from their old platform, what level of support services they offer, the cost for the libraries, and the experiences of other library entities utilizing their services.

Find an organization such as the State Library that has experience migrating libraries to a new ILS platform. The numerous meetings and conversations we had with the NC Cardinal team throughout this process were invaluable and greatly assisted our efforts to create not only a viable migration plan but also a governance structure to manage our Evergreen instance moving forward. Finally, having a migration plan and schedule in place for all stakeholders to follow regarding cleaning up patron and bibliographic records, setting policies and mapping of patron and bibliographic information, testing of data in a test instance of the platform, and training on all aspects of the platform are all crucial components for a successful migration.