PINES STRATEGIC PLAN
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A Word From PINES Leadership

Julie Walker

State Librarian, Georgia Public Library Service

Associate Vice Chancellor for Libraries, University of Georgia System

As we mark the 20th anniversary of the creation of Georgia PINES, we look back with pride on this successful collaboration/innovation, made possible by the fearless, forward-thinking library leaders throughout Georgia who grew this idea long before anyone thought such a project would be possible. It was with a spirit of sharing, a belief in ensuring success for ALL libraries, and a healthy trust in an untried process that we made that leap in 1999, and Georgia's libraries are so much stronger for that decision.

Today, I'm so pleased that we are investing in the future of PINES through this strategic planning process. The time spent examining our decisions over the last 20 years, and peering into the future with optimism and confidence will allow us to continue to grow PINES to best meet the needs of Georgia's libraries for many years to come.

Our gratitude to our enthusiastic and visionary consultant, Carson Block; to our extraordinary PINES director and tireless leader, Elizabeth McKinney; to the unmatched PINES team of experts and national leaders in open source library software; to Georgia public library directors Anne Isbell and Alan Harkness for so ably representing their colleagues in the planning process; and to all of our directors and staff who devoted their time and expertise in helping us to craft a vision for PINES in Georgia that will allow it to continue as a national model of collaboration, resource-sharing, and technology leadership for tomorrow...

Thank you!

“The time spent examining our decisions over the last 20 years, and peering into the future with optimism and confidence will allow us to continue to grow PINES to best meet the needs of Georgia's libraries for many years to come.”
From the beginning, the PINES vision has been to host and share technology for the benefit of all library users in Georgia. The lack of scalability for existing proprietary vendor software was the impetus for developing the Evergreen Integrated Library System (ILS) that is at the heart of the PINES system. When we went live with Evergreen in 2006, we launched with basic functionality in the software. As non-PINES libraries within the state made inquiries about joining PINES, we always had a few deal-breakers for them in terms of system features and options. It has always been our motivation to develop for the growth of PINES in terms of giving our member libraries the best in ILS technology and welcoming new members as asked. As we have developed to our member and potential member needs, we saw a need to have a strategic plan for growth.

I first met Carson when he asked me to take part in a survey for a Peer Consortium Report for a group of libraries in Pennsylvania. After participating in the survey and seeing the results of the report, I knew we had the perfect partner to assist us in bringing PINES to our next level of service. I am thankful for his assistance in helping us speak with our member libraries about needs for the future and for helping us speak with potential member libraries in a non-threatening way. I'm very excited for the publication of our plan and to start using it as our guide to grow PINES in new and exciting ways.

“It has always been our motivation to develop for the growth of PINES in terms of giving our member libraries the best in ILS technology and welcoming new members as asked.”

Elizabeth McKinney

PINES Program Director - Georgia PINES
Executive Summary

The future for Georgia PINES is bright.

Long a leader as a consortium and a developer of an open-source Integrated Library System (ILS), PINES has a rare opportunity to lay the groundwork for transformation as it enters its 20th Anniversary year.

The results of recent assessments (of the PINES organization and the Evergreen ILS) show that PINES core competencies are strong and that both the organization and member libraries are well positioned to evolve to create next-generation library services together. As well, there is a potential to grow the PINES membership to include more libraries in the state.

The success of the technical side of the PINES organization is largely due to high staff competencies in library-specific Technical Services and Information Technology skills such as application development, server design and management, and other areas vital to the ongoing evolution of the open-source Evergreen ILS platform. Strong PINES leadership has helped cultivate and direct staff in synergistic directions, creating not just operational efficiencies, but a tight-knit group expressing dedication -- and even joy -- in providing ILS services to Georgia libraries through PINES.

Another key success factor for PINES is the strong and flourishing relationship between the organization and members based on shared values, a strong sense of community, a commitment to finding the best shared approaches for ILS policies and plain old hard work. These relationship elements between PINES and members form a solid core and are essential to retain as PINES moves into the future.
This plan contains both the **vision** for transformation of PINES and a **tactical plan** (expressed in the plan goals and actions) to achieve the vision. The goals for this plan are intended to guide PINES through a transformational arc expressed in three stages.

**Stage 1: PINES Builds Upon Its Current Areas of Success and Competence**

PINES is a leader among public library consortiums, first by developing the open source approach to a statewide ILS, followed by great success in cultivating the interactive, cooperative and strong PINES community. **In Stage 1, PINES further develops ILS features, technology services and community bonds, creating continually-improving services to library patrons throughout Georgia.**

**Stage 2: PINES Sets the Stage for Growth**

PINES is taking steps to grow and adapt its capacity to serve a new size of client library - which could be considered “XXL” library systems. Through the 2017 - 2019 planning process, PINES identified new needs and requirements for the PINES organization and strategies to become an attractive option for XXL libraries in Georgia. **In Stage 2, PINES works closely with XXL libraries in Georgia to better understand their needs; increase PINES organizational capacity in kind; and create the best possible onramp for Georgia libraries.**

**Stage 3: PINES as “Next Generation” Consortium**

The library community throughout the nation is primed for forward-moving approaches to technology services, yet few have the agility, skills and experience -- let alone the opportunity - to evolve as PINES does. **In Stage 3, PINES becomes an organization delivering next-generation library ILS services to Georgia libraries.**

To accomplish this transformation, PINES has three strategic goals that will be met in a **concurrent** fashion. While the goals are distinct, there is an interrelationship between them. Actions for each goal will start at the beginning of the plan period and continue throughout completion of the plan.
Goal 1: Develop PINES resources into next-generation ILS services for all members.

Brief: PINES is ready to grow its ILS services to members. Building upon its solid foundation, PINES will build new services and even better communication methods with PINES members to serve the needs of library users in Georgia.

Goal 2: Build Stronger Relationships with Non-PINES Libraries

Brief: A major strength of PINES is the economy of scale offered by an ILS that can serve more libraries in the state of Georgia. In this goal, PINES continues to develop its relationship with non-PINES libraries to better understand the unique needs of each non-PINES library; identify how PINES can adapt to meet those needs; and cultivate the right atmosphere for opportunities to serve more libraries in the state.

Goal 3: Facilitate deeper development of the Evergreen ILS platform.

Brief: As an open-source system, the strength of Evergreen as an ILS is directly related to the resources directed to it. Staff time, funding, and creativity are required to guide the development of the core platform to meet current and future needs.

Other Plan Elements

This plan also includes strategies for staffing, insourcing and outsourcing; and a mechanism for regular review of the effectiveness and performance of PINES operations.
About PINES

Today and Yesterday

Georgia Library PINES (Public Information Network for Electronic Services) is the public library automation and lending network for 300 libraries and affiliated service outlets in 54 library systems covering 146 counties (56 of the 63 library systems in Georgia).

- Access to more than 10 million books and other materials that can be checked out from and returned to any participating library free of charge.
- Free delivery of books from other libraries throughout the state to patrons’ home libraries.
- Service through more than 300 branch libraries and affiliated service outlets in 143 counties (53 of the 63 regional library systems) in Georgia.
- Ability to renew books and place holds online.
- An easy-to-use Kids’ Catalog exclusively for youth materials.
PINES Vision: A Borderless Library

PINES creates a statewide “borderless library” that provides equal access to information for all Georgians.

Georgians with a PINES library card have access to materials beyond their local shelves and enjoy the benefits of a shared collection of over 10 million books and other materials that can be delivered to their home library free of charge.

Georgia residents - defined by the Georgia Public Library Service as a person who lives, owns land, works or goes to school in the state -- are eligible to receive a free PINES library card. PINES runs on the Evergreen automation system, an open-source system originally developed in-house by the Georgia Public Library Service and now in use worldwide by more than 1,500 libraries. PINES is managed by GPLS staff and is provided at no cost to Georgia library systems.

By utilizing economies of scale and eliminating the need for individual automation system contracts, PINES has enabled local libraries state-wide to reduce software expenditures by approximately $10 million a year.

The PINES team assists the employees of all 53 PINES member library systems with PINES-related issues and training on the Evergreen software. PINES provides documentation on policies and procedures, in-person and online training opportunities, and technical assistance through the Help Desk. Library staff members may also subscribe to the PINES list-servs to join the always-helpful PINES community and keep up to date on issues that other PINES member libraries are facing.

“As an ILS optimized for consortia, Evergreen fits well into the trend of libraries seeking opportunities to lower automation costs and to collaborate to share their collections.” – Marshall Breeding

Open Source Library Systems: The Current State of the Art
The Significance of PINES

From its beginnings, PINES has been a trailblazer. Inspired by New Zealand’s country-wide implementation of the open-source Koha Integrated Library System, PINES’ development and implementation of Evergreen 20 years ago was noted as a “major milestone” and “important precedent”1 in the ILS industry. PINES Program Elizabeth McKinney remembers the launch and the inspiration PINES has provided for other libraries:

“The PINES team was called on to introduce Evergreen to libraries and consortia around the world over the next two years with many libraries adopting Evergreen or Koha for their ILS.”

“PINES went live with Evergreen during the Memorial Day weekend of 2006. On that initial day we came to a screeching halt almost immediately. Well-wishers and onlookers from around the world bombarded our site. After blocking IPs outside of the state (as I seem to recall) we were back up and working for our libraries and patrons. We eventually opened it up again after a few tweaks (meta search was sacrificed at this time) to the software.

Early in 2007 many proprietary vendors made announcements about their products that caused alarm for their customers. Inquiries about Evergreen came pouring in. At this point we had gone live with a rather bare bones product choosing to go with similar functionality to our vendor-based system knowing that some services (Authority control, Acquisitions, etc.) were not and would not be immediately available.

A delegation from British Columbia came for our first site visit regarding Evergreen. After demonstrating and discussing PINES, delegates asked if they could adopt the PINES model of cost savings in addition to our software. Of course, we obliged. This was a wonderful confirmation that taking the route of open-source software was the correct decision for our way forward. Libraries and open source were a natural match.

The province of British Columbia went live as BC PINES. They have since changed their name to SITKA. The second adopter of Evergreen was the state of Indiana with Evergreen Indiana. The PINES team was called on to introduce Evergreen to libraries and consortia around the world over the next two years with many libraries adopting Evergreen or Koha for their ILS.”

PINES is a service of the Georgia Public Library Service

The Mission of the Georgia Public Library Service: Empowering libraries to improve the lives of Georgians

GPLS achieves its mission by:

- Providing and encouraging visionary leadership;
- Ensuring equal access to information and technology;
- Promoting the value and joy of lifelong reading and learning; and
- Facilitating collaboration and innovation in the broader library community.

GPLS provides innovative, scalable library technology and services; staff training and best practices; grant administration and more to create equity in library experience for patrons, no matter where they live.

GPLS also works with elected officials to ensure they understand the critical role that libraries play in meeting the immediate and long-term needs of citizens.

Georgia Public Library Service is the state library administrative agency and a unit of the Board of Regents, University System of Georgia.
Planning Process Overview

Planning Process Scope

In mid-2017 Carson Block Consulting was selected to recommend, develop, execute and manage the **strategic planning process** which would include at a minimum of input from relevant stakeholders and other entities that may affect the ability of PINES to achieve its goals.

As part of the process, the consultant provided an **assessment** of PINES current infrastructure, including but not limited to staffing, financial health, technical infrastructure, and business processes.

**Outcomes of the planning process:**

- Provide PINES with a strategic plan for future growth
- Provide the Georgia Public Library Service with an analysis of the data generated to reflect staffing, funding, technology and process needs for future growth.

PINES also conducted a related project in 2017: an ILS Evaluation that was performed by the Quipu Group of Denver, Colorado.

The strategic planning process included several key elements:

- Georgia PINES would like to scale its services to attract & serve the ILS needs of larger libraries in the state. Key question: How can Georgia PINES accomplish this objective?
- Plan work (including assessments, results of stakeholder engagement activities, data collection, and other activities), plan elements and the final plan will be reviewed by the Georgia PINES Executive Committee.
- The Plan will include the identification of additional resources, cost estimates, and statement of benefit to support its “Pines Cost Savings” report for the State Legislature.

The Process

- Gather and document information about PINES’ current capacities in key areas
- Survey needs of possible new customers (specifically larger libraries)
- Project additional resources and other changes needed for PINES to scale to serve new customers
Throughout the process, the consultant explored the following questions:

- What do potential new customers want & need?
- Is PINES willing/able to scale in ways needed to attract customers?
- Does PINES have the capacity to meet the needs – can it adapt?

**Planning Committee**

Throughout the evaluation and planning process, the PINES Planning Committee provided feedback and guidance to the consultant. The committee was comprised of:

- **Anne Isbell** - Director of the Lake Blackshear Regional Library and Past Chair of the PINES Executive Committee
- **Alan Harkness** - Director of the Chattahoochee Valley Libraries (a library that is not a member of PINES)
- **Julie Walker** - Georgia State Librarian and early leader of PINES
- **Elizabeth McKinney** - PINES Program Director
- **Carson Block** - Library Technology Consultant

**Process Highlights**

- 2017: Formed Planning Committee & performed initial PINES assessment activities onsite
- 2017 Directors Meeting (Nov/Dec): PINES Board/members and Director’s focus groups
- Winter 2017 – 2018 ILS Assessment (by the Quipu Group)
- Winter/Spring 2018: Focus group (Atlanta) and interviews (remote) – Non-PINES Libraries
- 2018 Director’s Meeting (Dec): Presented strategic directions for PINES plan and collected feedback
- Winter/Spring 2019: Completed plan draft and economic impact statement
2017 - 2019 Assessment and Needs

Assessment Activities

The consultant performed a number of PINES organizational and technological assessment activities in the process of creating this strategic plan for the purpose of informing the final plan document. Assessment activities included interviews with PINES staff; review of PINES documentation (including member surveys); review of PINES physical/technology resources; focus groups and interviews with non-PINES libraries and other areas. Due to the confidential nature of areas explored by the consultant, results of assessment activities were shared with the PINES Director, the State Librarian, the Planning Team, and direct participants but are not otherwise published.

In general, the consultant found that PINES is a high-functioning organization with excellent leadership from Elizabeth McKinney and deep skills, commitment and creativity from each PINES staff member. PINES staff can be considered experts in their designated areas, and work well together in teams for both formal and ad-hoc purposes -- as needed for internal functions as well as collaboration with the PINES board and membership.

PINES has emphasized a focus on building and strengthening relationships with members over the past several years -- and the efforts have proved to be effective. PINES members have given PINES high marks in annual surveys, and the interactions between PINES staff and members witnessed by the consultant have been overwhelmingly positive, showing a strong spirit of collaboration to improve library services for all Georgians.

"...the consultant found that PINES is a high-functioning organization with excellent leadership...and deep skills, commitment and creativity from each PINES member."
Technology Evaluation

The consultant met with PINES technical staff starting in the fall of 2017; at the time PINES had its server resources located in a world-class co-location facility in the metro Atlanta area, with multiple racks of servers and network equipment in its own dedicated cage/footprint in the facility. The server resources were well-managed, and included provisions for load balancing, use of virtual machines (for production and testing/piloting environments), failover, redundancy, spares (servers and drives), backup power, robust connectivity and adequate space for a technician to work on-site (to augment the more commonly-used remote access method). The key area of improvement noted by the consultant applied to the data backup method used by PINES. The PINES technician in charge was aware of the need and had designed improvements slated for 2018.

In 2018, a consolidation and cost-savings project mandated by the University System of Georgia resulted in a new environment for PINES server resources. As well as replicating PINES previous environment, state facilities, resources and staff are providing augmentation for PINES server resources, including a more robust approach to backups. To ensure performance for PINES resources, the creation of an MOU between PINES and the University System ITS group is listed as an action in this strategic plan.

Evaluation from PINES Board and Members

The consultant engaged the PINES board and members twice during the planning process. Both were conducted at the PINES Executive Committee Meeting in late 2017 and late 2018 in Savannah.

At the winter 2017 meeting, the consultant conducted a verbal focus group activity for the PINES board and members, paired with a written survey instrument to collect feedback about PINES and explore possibilities for the future. The gathering included an informal meeting with non-PINES members that resulted in a focus group of PINES staff and non-PINES libraries in Atlanta, as well as follow-up interviews with those unable to attend the meeting.
At the winter 2018 meeting, the consultant presented proposed strategic directions to the PINES board and members as well as the Directors in separate sessions. Participants were offered the opportunity to provide verbal and written feedback and... the audio from the session was recorded and combined overlaid with the slides and made available on YouTube: https://www.youtube.com/watch?v=r9iAWLu_jlw

The meetings resulted in several observations and opportunities:

- **PINES Members are an engaged community.** Due to consistent and shared efforts, PINES and Libraries act as partners in the success of PINES.
- **PINES staff are valued by PINES members.** PINES staff (particularly training, cataloging, help desk) and courier got high marks from users.

Many PINES Members would like to see:

- More Georgia libraries in PINES (saying that lack of inclusion of non-PINES libraries can be confusing for patrons)
- More options for local customization (fines/fines-free; floating collections - a currently-available option for those wishing to pursue; auto-renewal)
- Better "onboarding" for new local library staff members to have a better understanding of the PINES system
- Enlightened aspirations – wants are not basic (not “keep the lights on” but “how can we use Artificial Intelligence - AI?”)
- Participating in PINES has leveled the playing field for libraries and library patrons.

Participants voiced a desire to use data to understand:

- How are materials moving throughout the system? Throughout regions? Throughout the state? What is the software doing to keep shipping to a minimum and optimize staff time?
- How can we use data more powerfully to understand and craft policies?
- Opportunities to collect other data and use predictive analytics?
Feedback from Non-PINES Libraries

After a promising, informal gathering of non-PINES libraries at 2017 Director’s Meeting, attendees expressed an interest in a more formal gathering to address technical and governance topics.

On March 5, 2018 many Non-PINES libraries and many PINES staff meet in Atlanta; libraries in attendance (directors and technology and/or ILS staff) included Atlanta-Fulton; Chattahoochee; Cobb County; DeKalb; and Gwinnett. During April-May, the consultant conducted follow-up interviews with non-PINES libraries not able to attend Atlanta gathering, which included Bartow; Sequoyah; and Forsyth.

The process for Atlanta meeting and follow-up interviews was designed to create a productive and confidential atmosphere to ensure the freest exchange of thoughts, information, and opinions. The consultant led the discussions and used “Chatham House Rule” for meeting notes to support freedom to speak and confidentiality.

The discussions were structured to address technical and governance topics separately:

- Technical topics:
  - Library challenges, needs
  - What makes PINES a viable option or a “deal breaker?”

- Governance topics:
  - Library challenges, needs
  - What makes PINES a viable option or a “deal breaker?”

The conversations were rich and nuanced, and offered an excellent opportunity for PINES staff to update the knowledge of all on the current and planned capabilities of the Evergreen platform, and for non-PINES libraries to share their needs and concerns.

Key outcomes include:

- Many non-PINES libraries expressed an interest in continuing discussion about possible PINES membership into the future (although some would not be in a position to change quickly, if at all)
- The “XXL” Libraries interviewed have individual and specific environments, needs and board objectives
Many non-PINES libraries have less experience with resource sharing via the ILS and more (as reflected in next section).

Continued development of the relationship between PINES and non-PINES libraries is a key element of this strategic plan, and comprises Goal 2.
Integrated Library System (ILS) Evaluation

An evaluation of PINES Integrated Library System (ILS) was performed in parallel with the early stages of the technology planning process by the Quipu Group LLC.

The goals for the evaluation called for the Quipu Group to:

● Identify the key automation needs for PINES library systems that will facilitate efficient and accurate workflow and results;
● Evaluate ILS products and providers to identify the key differentiating qualifications and seek information about how they handle critical workflows; and
● Provide analysis of PINES automation requirements and make a recommendation that will provide for future growth of the PINES consortium.

The ILS Evaluation compared PINES implementation of Evergreen with other options. Three vendors met key requirements for size and transaction capacity:

● III/Polaris
● TLC/CARL.X
● SirsiDynix/Symphony/BLUEcloud

Quipu’s evaluation also included some consideration for the open-source FOLIO system and OCLC/Wise.

Key areas of evaluation included Acquisitions, Cataloging, Circulation, Outreach/ILL, Public Interface, Reports, Serials, IT and System Administration, and 3rd Party Interfaces.

The evaluation, which was completed during the summer of 2018, concluded that Evergreen remains the best choice for PINES in terms of cost and performance. In the study, consultant Melissa Stockton recognized key areas that should be addressed in the future, and recommended continued and increased investment in development to improve:

● Response time
● Patron Interface
● Additional Support for Reporting & Testing
● Accessibility
● BIBFRAME Support
● Development of new features and technology support structure

“As long as (PINES), and the (Evergreen Community), keep this software moving forward it should have a long and happy life!”
In November of 2018, Carson Block met with Ms. Stockton to review her recommendations and to see if any development since the conclusion of the study might impact future directions for PINES.

“The only things that really stick out for me at this point are the speed issues and updating PAC (Patron Interface). I would also say that none of the other (ILS) systems have progressed to a point that would make any difference in the overall recommendation.”

“As long as they (PINES), and the community (Evergreen Community), keep this software moving forward it should have a long and happy life!”

– Melissa Stockton, Quipu Group, November 2018
Context: Strategic Directions for PINES

In creating a strategic plan for PINES, it’s important to consider the context of the organization, voice some foundational concepts that impact the planning process and potentials for the future, and consider environmental factors of the Georgia library community, including comparing/contrasting PINES and non-PINES libraries.

Key PINES elements

1) **PINES provides a significant value -- including deep cost savings -- to Georgia taxpayers.** By offering a single Integrated Library System available for use by all Georgia libraries, PINES has significantly reduced the number of unnecessarily redundant systems in the state and in the process improved resource sharing among PINES libraries for the benefit of library users. At its tenth anniversary, PINES saved Georgia’s public libraries approximately $11 million in one-time costs and more than $61 million in ongoing costs. These savings have allowed libraries to use funds on other needed resources and services for their patrons. PINES also provides automation, training and courier services to libraries for a fraction of the $20 million that would be required to pay for the same services on a system-by-system basis. A new statement of PINES value is slated for release in 2019 during its 20th Anniversary year.

2) **PINES is a trailblazer.** PINES is a leader in the application of library technology, therefore it is most likely to remain a “trailblazer” into the future instead of following established paths or trends. PINES is doing what all modern libraries need to do to thrive in the technological age, which is building its own technological solutions when needs are not met by the market or elsewhere. (e.g. the “Build” vs “Buy” concept). By being an active developer of open-source software (The Evergreen ILS platform), PINES is not only a community leader for PINES libraries in Georgia, but a member of the greater Evergreen and open source software community. Most libraries and library consortiums have well-established technological structures to follow; in the case of PINES it has created and maintained its own structures, which could be characterized as adaptive, agile, and ever-changing.
3) **Evergreen remains the best platform choice for PINES.** An independent ILS evaluation (performed by the Quipu Group LLC and excerpted elsewhere in this plan document) shows that the Evergreen ILS platform remains the best path forward for PINES.

4) **PINES is a key facilitator of Georgia’s tight-knit library community.** Relationships between members of PINES and the PINES organization is strong and flourishing. This relationship is based on shared values, goals, and objectives - and a willingness for PINES staff and members alike to shoulder each’s share of hard work. The collegial atmosphere and the dynamic, symbiotic relationship between members and staff is a key asset to all. High value is given to resource sharing and cohesion/agreement on key ILS policies. This positive and productive relationship between PINES staff and PINES members is an essential element of success for the consortium -- and must continue to be given top priority as PINES moves into the future.

5) **PINES and its members share a culture of partnership and trust.** Planning team members have often noted that especially in the past 10 years, the PINES libraries and staff have a shared culture of collegiality and a feeling of “we are all in this together.” This has resulted in a consortial environment with high trust among all involved (in which members and PINES are encouraged to try new things in pursuit of growth and better services), and confidence among all members that in the times that issues arise, members will be heard -- and issues will be addressed. The cultivation of this culture has been attributed to excellent leadership starting with GPLS, through PINES, and within each PINES member library, This shared culture might be called “The Spirit of PINES” and describes not just what PINES does and offers (which are covered in 1-4 above) but the “feel” of PINES and the way participants treat each other.
Comparing and Contrasting PINES and non-PINES Libraries

The planning process explored the possibility of PINES being the ILS provider for more of Georgia’s libraries. Currently, PINES serves the majority of libraries in the state, with the exception of a handful of library systems (most located in the Atlanta metro area). To consider how PINES might serve these libraries, the consultant facilitated and conducted extensive conversations with these libraries (as noted elsewhere in this document).

While on the surface it might seem that library ILS needs from one library to another are similar, they are rarely identical (which accounts for the existence of multiple vendors and other options for ILSs). It’s also important to note that there are some significant factors outside of core ILS functionality that should be considered by PINES in contemplating the needs of non-PINES libraries. The planning process identified some key non-ILS areas to compare/contrast between PINES member libraries and Non-PINES libraries:

<table>
<thead>
<tr>
<th>PINES Member Libraries</th>
<th>Non-PINES Libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current PINES libraries are all small, medium and large and have more in common with each other than differences</td>
<td>Many non-PINES libraries, some of which might be considered XXL, have key unique environments and needs</td>
</tr>
<tr>
<td>Resource sharing a key shared value</td>
<td>Less experience with resource sharing via the ILS</td>
</tr>
<tr>
<td>No conflicts in placing a high value on PINES community &amp; compatible with local boards/governance</td>
<td>Some perceive possible conflicts between being a member of the PINES community and proper alignment to their communities and governing boards</td>
</tr>
<tr>
<td>Consider themselves partners with ILS provider (PINES)</td>
<td>Consider themselves customers of ILS vendor (various vendors)</td>
</tr>
</tbody>
</table>
The idea of adding non-PINES libraries to PINES offers the State of Georgia a number of attractive opportunities:

- **Further maximizing and leveraging the economies of scale for the state PINES investment.** Through PINES membership, fewer taxpayer dollars are spent on redundant ILS systems. With the cost of the ILS being “free” to the member library allows each library to use funding previously allocated to the ILS for other needs.

- **Leveraging increased resource sharing to offset mobility and transportation challenges in the Atlanta metro area.** A key component of the PINES platform is its efficient resource sharing platform.

- **“Law of Big Numbers” benefits of adding the large Atlanta metro libraries to PINES.** Metros can help foster/create/reap immediate benefits of new leading edge/bleeding edge directions for PINES based on user needs. The large populations using the libraries provides a fertile hotbed for tech pilots and other testing. As successes are achieved, all PINES libraries will benefit.

**Migration Considerations for Non-PINES Libraries**

The addition of the Live Oak libraries in Savannah during 2018 provided a basis for better understanding needs of possible/future XXL Libraries. The process included both successes and lessons learned.

The Live Oak onboarding process -- as well as the engagement with non-PINES library for this plan -- indicates that attracting Non-PINES libraries into PINES would require:

- Adjustments to the onboarding process
- Addressing individualized concerns and needs
- A higher amount of one-on-one work (each large metro has a different set of needs/desires/issues)
- Assessment of Courier functions (the addition of Live Oak showed an increased demand for Courier services)

For PINES to be successful in welcoming XXL Libraries, likely changes to PINES would include:

- Increased capacity in leading or sourcing development (of Evergreen and other services)
- Increase in staff
- Adjustments to server farm footprint
PINES Strategic Plan

Vision and Transformational Arc

This strategic plan is designed to guide Georgia PINES through a deliberate transformational change. This section describes the vision for PINES transformation and the impacts the plan will have on PINES and Members by and describing the “big picture” that the plan goals and actions are designed to address.

Stage 1: PINES Builds Upon Its Current Areas of Success and Competence

PINES is a leader among public library consortiums, first by developing the open source approach to a statewide ILS, followed by great success in cultivating the interactive, cooperative and strong PINES community. In Stage 1, PINES further develops ILS features, technology services and community bonds, creating continually-improving services to library patrons throughout Georgia.

Stage 2: PINES Sets the Stage for Growth

PINES is taking steps to grow and adapt its capacity to serve a new size of client library - which could be considered “XXL” library systems. Through the 2017 - 2019 planning process, PINES identified new needs and requirements for the PINES organization and strategies to become an attractive option for XXL libraries in Georgia. In Stage 2, PINES works closely with XXL libraries in Georgia to better understand their needs; increase PINES organizational capacity in kind; and create the best possible onramp for Georgia libraries.

Stage 3: PINES as “Next Generation” Consortium

The library community throughout the nation is primed for forward-moving approaches to technology services, yet few have the agility, skills and experience -- let alone the opportunity - to evolve as PINES does. In Stage 3, PINES becomes an organization delivering next-generation library ILS services to Georgia libraries.
Certain aspects of these stages naturally overlap though the life of the plan. The stages of the transformational arc represent the forward motion of PINES as it works through the plan goals and actions -- and serves as a reference for the organization throughout to determine where it has been; where it is now; and where it is going in the future.

**Strategic Plan Goals**

To accomplish this transformation, PINES has three strategic goals that will be met in a *concurrent* fashion. While the goals are distinct, there is an interrelationship between them. Actions for each goal will start at the beginning of the plan period and continue throughout completion of the plan.

The **goals** define the desired outcomes for PINES and the **actions** describe the tactical steps to get there. This section of the plan provides both the desired destination (goals) and the roadmap (actions) to get there.

The PINES leadership and staff are veterans of numerous projects and have high competencies in project planning, administration and completion. The actual sequence of the actions under each goal will be determined and adjusted by PINES on an annual basis, and progress on this plan will be provided in the **Evaluation Milestones** section of this strategic plan.

While the actions listed under each goal are deemed appropriate at the time of plan publication Spring 2019), it is likely that the high-performing PINES organization (which includes PINES members, leadership and staff) may discover alternate, new and/or better ways to achieve the vision of this plan. The Evaluation Milestones section of this document describes how PINES will report its strategic journey.
Goal 1: Develop PINES resources into next-generation ILS services for all members.

**Brief:** PINES is ready to grow its ILS services to members. Building upon its solid foundation, PINES will build new services and even better communication methods with PINES members to serve the needs of library users in Georgia. (2019 - 2022)

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<tr>
<th>Goal 1</th>
<th>2019</th>
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**Actions**

The actions identified for Goal 1 are, by their task-oriented nature, more immediate than goals 2 and 3. Actions here reflect desires and feedback from current PINES members. Since PINES currently collects feedback from members annually and through committees, it is anticipated that additional actions will be identified and acted upon by PINES during the life of this plan. Further, the final goals in this plan identifies the creation of a new framework to collect and analyze data that would influence decisions, and to create a new framework for PINES member input.

**Action 1.1** Leverage buying power more deeply for library materials and subscriptions.

**Action 1.2** Continue to cultivate the PINES culture of leadership, trust and progress through activities, access and shared efforts for all members.

**Action 1.3** Create more flexible training materials & methods – including on demand - for both library staff and patrons.

**Action 1.4** Deeper integration of e-materials into the catalog.

**Action 1.5** Help with collaborative marketing of PINES services.

**Action 1.6** Investigate "fines free" approach.

**Action 1.7** Capture and use data to understand:

- How are materials moving throughout the system? Throughout regions? Throughout the state?
- What is the software doing to keep shipping to a minimum and optimize staff time? What else can be done?
○ How can we use data more powerfully to understand and craft policies?
○ What opportunities does PINES have to collect other and system use and use predictive analytics?

**Action 1.8** Create a new platform to identify, prioritize and act upon known needs -- and anticipate new needs.

○ Develop known needs: Create a new platform to identify, prioritize and act upon PINES member suggestions.
○ Anticipate new needs: Identify possible new data-driven approaches to identify emerging needs and emerging services without sacrificing patron confidentiality and privacy.
○ When this action is complete, continued work on this goal will continue into the future as a normal part of PINES operations.
Goal 2: Build Stronger Relationships with Non-PINES Libraries

**Brief:** A major strength of PINES is the economy of scale offered by an ILS that can serve more libraries in the state of Georgia. In this goal, PINES continues to develop its relationship with non-PINES libraries to better understand the unique needs of each non-PINES library; identify how PINES can adapt to meet those needs; and cultivate the right atmosphere for opportunities to serve more libraries in the state. (2019 - 2026)

**Actions**

The actions identified for Goal 2 are aimed at building and developing deeper relationships with non-PINES libraries, most of which are considered “XXL” in size, with each having different needs and requirements. Thus, the time period allocated for this goal is seven years. The actions in this goal build upon the successful and encouraging engagement between PINES and non-PINES libraries performed during the strategic planning process.

**Action 2.1** PINES will continue to explore the needs of non-PINES libraries, including collecting and understanding each library’s RFP requirements for technical and system performance and each library’s accountability factors to their respective boards and/or governors.

**Action 2.2** To prepare for possible XXL libraries, PINES build upon its experiences to create improvements to the onboarding process, including:

- Create stronger communications efforts for incoming systems and surrounding communities and counties.
- Model system impact by estimating or predicting number of holds; Possibly compare users/# of holds; circ /holds and or materials budget/holds.
- How much staff is needed to process X number of holds per day? Ask PINES libraries to report about numbers/staff time.

**Action 2.3** PINES will encourage or help facilitate a test of ILS-based resource sharing among non-PINES libraries.
**Action 2.4** Form a PINES community of non-PINES libraries.

**Action 2.5** Based on developing knowledge of individual and unique XXL library needs, refine and continually develop the **PINES Impact Model** in anticipation of a possible new PINES library or libraries.

**Action 2.6** Initial increase of PINES resources for first XXL pilot.

**Action 2.7** Create a phased approach for potential first pilot XXL library, reflecting the specific needs of the library.

**Action 2.8** Refine and create new template for other potential XXL libraries to join PINES. Build upon areas of success; address challenges; iterate and implement ongoing process improvements.
Goal 3: Facilitate deeper development of the Evergreen ILS platform.

**Brief:** As an open-source system, the strength of Evergreen as an ILS is directly related to the resources directed to it. Staff time, funding, and creativity are required to guide the development of the core platform to meet current and future needs. (2019 - 2026)

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**Actions**

An ILS evaluation concluded that Evergreen remains the best choice for PINES in terms of cost and performance. The actions in Goal 3 recognize that use of open source software is greatly enhanced by actively contributing to the development of the platform and associated software and hardware, as well as active involvement with the open source community. The PINES team has honed their skills as librarians in software development. Various members of the team have evolved as project managers, development requirement specialists and code committers in addition to their regular roles as decision makers and contributors in the Evergreen Community. The PINES team - through their individual and combined talents and roles -- will continue to contribute to the evolution of the Evergreen platform in Georgia and beyond.

**Action 3.1** Act upon specific recommendations in the 2018 Quipu ILS evaluation:

- Improve Response time of software.
- Improve the Patron Interface
- Provide additional Support for Reporting & Testing
- Improve Accessibility
- Develop BIBFRAME Support
- Develop new features and technology support structure

**Action 3.2** Improve discovery (powerful cross-content searching capabilities) in the PINES system to improve patron experiences and library/system efficiencies.

**Action 3.3** Deepen PINES involvement in Evergreen and other appropriate Open Source Communities, including continuing education of existing employees and the addition of
team members who may be dedicated solely to software development to facilitate the needs of larger library systems and to further PINES as a leader in the library community.

**Action 3.4** Continued Staff Development in current and emerging technical areas. These areas would include technologies that may be outside of traditional library avenues but provide a “look ahead” for possibilities for convergence resulting in new services and opportunities. Areas may include data science, machine learning, artificial intelligence (AI), block chain, new data structures, and more.

**Action 3.5** Continued growth, development & formalization of core technology infrastructure relationships, including a memorandum of understanding (MOU) or alternate document between PINES and the University System ITS group to identify and ensure key performance, management and other metrics. is listed as an action in this strategic plan.
Strategies for PINES Resources

As a strategic plan, this document does not contain specific, year-by-year budget recommendations but instead offers strategies for properly allocating resources as PINES moves into the future.

In the context of the possibility of adding new libraries, scenarios for PINES -- and the resources required to achieve possible goals -- are best presented in an “if/then” context, as in “if one or more XXL Georgia libraries joins PINES, then X resources will be required to support the new library.” Clearly, the details of each possible transition will emerge over time through the actions described in Goal 2 of this plan (“Build stronger relationships with non-PINES libraries”).

As of the publication of this report it’s too early to define actual impacts; however, the plan can suggest reasonable areas to consider in scenarios where one or more XXL libraries joins PINES. As relationships are built and deepened, both PINES and each library will have a better understanding of the benefits of PINES membership (to both patrons and libraries), the impacts to PINES and libraries, and the resources required from each to ensure success.

In addition, Goal 3 of this plan (“Facilitate deeper development of the Evergreen ILS platform”) suggests that additional resources will be required over time even if PINES does not add any new libraries. Activities such as increased internal platform development, additional learning, and increased involvement in other open source communities require resources for success.

Although there is much to learn and build throughout Goals #2 and #3, there are some strategic frameworks, measures and concepts PINES and Georgia Libraries can harness to begin gauging impacts. These concepts are embodied in two companion documents that are slated for completion by the early summer of 2019:

- **Value of PINES** - a document showing the value received (in terms of cost savings and efficiencies) for the state of Georgia investment in PINES. This will be a 2019 update of a document that PINES has used for a number of years.

- **PINES Impact Model** - a new document creating the framework and metrics of a model to anticipate the increased benefits of adding new libraries (in a format similar to the Value of PINES document) as well as the resources required by both PINES and new libraries to participate. Likely resources include staffing, technology infrastructure, insourcing and outsourcing, resource sharing, courier, and other areas.
Evaluation Milestones

Most technology plans are designed to cover a period of 3-5 years. With the current pace of technological change, a shorter time frame helps ensure that the right actions are performed in a timely manner. Essentially, technology-focused plans -- strategic or otherwise -- tend to have a shorter shelf life than other plans (most notably master plans for facilities, which often look at a 20-year horizon).

While each goal and the sets of actions have some immediacy which fit within a 3-5 year timeframe, other elements -- such as building stronger relationships with XXL libraries with the hope of providing ILS services -- require a longer amount of time.

In the process of tackling this combination of short-term and long-term elements, PINES will undoubtedly discover new opportunities to pursue that meet the primary goals of developing PINES resources into next-generation ILS services for all members; building stronger relationships with non-PINES libraries; and facilitating deeper development of the Evergreen ILS platform. While accountability to the plan goals is essential, flexibility to pursue new and emerging tasks that help accomplish the goals is equally as important.

This strategic plan is intended to be a living document to deliberately guide relevant efforts at PINES over a 5-7 year period. To reflect the combined short-term and long-term elements of the plan, PINES will report progress to the PINES Executive Board every six months. Using the planning timeframe as a basis, PINES will provide a simple report using one of the options below:
<table>
<thead>
<tr>
<th>Status</th>
<th>Example Language</th>
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<tbody>
<tr>
<td>Scheduled Objective, Task and/or Action is complete.</td>
<td>“This objective, task and/or action was completed within/before the scheduled time. Here is the outcome...”</td>
</tr>
<tr>
<td>Scheduled Objective, Task and/or Action is partially complete.</td>
<td>“This objective, task and/or action was not completed within the scheduled time. These factors {...} were unforeseen and this is the new schedule/timeline.”</td>
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<tr>
<td>Objective, Task and/or Action has been eliminated. (Why?)</td>
<td>“This objective, task and/or action was not completed and was eliminated from the plan for the following reasons.”</td>
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<tr>
<td>Objective, Task and/or Action has been deferred. (Why? and When?)</td>
<td>“This objective, task and/or action has been deferred for the following reasons, once these issues are resolved this objective and/or task will be revisited.”</td>
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<tr>
<td>A new objective/task/action or objectives/tasks/actions have been identified. (Please list using the same format as other technology plan tasks or objectives.)</td>
<td>Tip: When writing a new task and/or objective there should be a way to measure how that objective/task/action was achieved or not achieved and why the new objective/task/action was needed/created.</td>
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# Appendix A: PINES Staff

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<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Phone</th>
<th>Email</th>
</tr>
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<tbody>
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