equinox
OPEN LIBRARY INITIATIVE

2025 *Year in Review*

Consulting • Migration • Development • Hosting & Support • Training & Education

877.OPEN.ILS (877.673.6457) info@equinoxOLI.org equinoxOLI.org

2025 *Highlights*

January

Development

» Equinox Announces 2024 Q4 Project Contributions to Evergreen ILS and CORAL ERM

Aspen Discovery

» Equinox Welcomes the Missouri Evergreen Consortium to Aspen Discovery

VuFind®

» Equinox Provides VuFind® Consulting and IT Services for the Historical Society of Pennsylvania

Koha

» Equinox Welcomes Odessa College to Koha ILS

February

Koha

» Equinox Welcomes Belmont Abbey College to Koha ILS

» Equinox Announces Koha ILS Support for the Dominican Sisters of Mary, Mother of the Eucharist

Conferences

» Equinox Presents at Computers in Libraries 2025

computers in libraries 2025 — MARCH 25–27 — HYATT REGENCY CRYSTAL CITY Arlington, VA

March

Evergreen

» Equinox Welcomes the Northampton Area Public Library to Evergreen ILS with the Pennsylvania Integrated Library System

Conferences

» Missouri Evergreen Users Conference 2025

» Equinox Presents at the ER&L 20th Annual Library Conference

Partnerships

» Equinox Partners with Backstage Library Works to provide Authority Control Services to the Missouri Evergreen Consortium

April

Development

» Equinox Announces 2025 Q1 Project Contributions to Evergreen ILS and CORAL ERM

Evergreen

» Equinox Welcomes Lansdale Public Library to Evergreen ILS with the Pennsylvania Integrated Library System

Conferences

» Equinox at the Connecticut Library Association Annual Conference 2025

» Equinox at the Evergreen International Conference 2025

Making space — cla annual 2025

EMERGING TRENDS
Evergreen International Conference 2025

May

Development

» Equinox Announces Major Features in Evergreen 3.15

Conferences

» Equinox at the ALA 2025 Annual Conference

ALA Annual Conference & Exhibition 2025
PHILADELPHIA • JUNE 26–30
FOR OUR LIBRARIES. | AMERICAN LIBRARY ASSOCIATION ALAANNUAL.ORG

June

Evergreen

» Equinox Welcomes Southeastern Libraries Cooperating to Evergreen ILS

Conferences

» Equinox's Executive Director to join Marshall Breeding's Executive Perspectives Panel at the ALA 2025 Annual Conference

» Equinox Presenting on Consortium Change Management with Evergreen Libraries at the ALA 2025 Annual Conference

"Equinox took care of everything including data transfer, customized notices, and training documentation. Any library looking to migrate to a different ILS should definitely consider Evergreen through Equinox."

—Veronica Laroche, Library Director at Northampton Area Public Library

July

» Equinox's Customer Support Ranked in Top Five by Public Libraries in 2025 Library Perceptions Survey

Evergreen

» Equinox Welcomes Plymouth District Library to Evergreen ILS

Conferences

» Equinox to Present at the Code4LibSE / Devops4LibSE 2025 Emory Meeting

August

Aspen Discovery

» Equinox Welcomes North of Boston Library Exchange to Aspen Discovery

Conferences

» Equinox to Present at the Koha-US 2025 Annual Conference

September

» Equinox Announces 2025 Application for the Equinox Open Source Grant

Aspen Discovery

» Equinox Welcomes the Pennsylvania Integrated Library System to Aspen Discovery

Conferences

» Equinox Open Library Initiative Sponsors AspenCon 2025

» 2025 BIBFRAME Workshop in Europe

koha-US 2025 Annual Conference
Providence, Rhode Island - September 2-5, 2025

AspenCON 2025 | OCTOBER 8-10 NASHVILLE, TN

October

Development

» Equinox Announces 2025 Q3 Project Contributions to Evergreen ILS

Aspen Discovery and Koha

» Equinox Welcomes Estacado Library Information Network to Koha ILS and Aspen Discovery

Partnerships

» Equinox Partners with Unique Management Services to Launch MessageBee SMS for the Westchester Library System

Conferences

» Equinox at the 2025 Pennsylvania Library Association Conference

» Equinox at the 2025 Evergreen Hack-A-Way

equinox OPEN LIBRARY INITIATIVE
Equinox Open Source Grant

November

» Equinox Announces New Deadline for the 2025 Equinox Open Source Grant

Evergreen

» Equinox Welcomes Ozark Regional Library to the Missouri Evergreen Consortium

» Equinox Welcomes the Grand Rapids Public Library to Sequoia Hosting for Evergreen ILS

Partnerships

» Equinox Partners with Backstage Library Works to offer Authority Control Services to the Traverse des Sioux Library System

December

Evergreen

» Equinox Announces Major Features in Evergreen 3.16

Partnerships

» Equinox Partners with Backstage Library Works to offer Authority Control Services to Richland Public Library

Equinox
by the Numbers

7
Aspen Discovery Migrations

7
Evergreen Migrations

4
Koha Migrations

18
Total Number of Migrations

Bugfixes:
176
pull requests

Total Number of Bibliographic Records Migrated
3,496,839

Total Number of Patron Records Migrated
392,875

8
Total Koha Library Branches Going Live

52
Total Library Branches Going Live

11
Development Projects

44
Total Evergreen Library Branches Going Live

Number of Data Service Projects:
9

Number of Consortial Add-On Projects
7

Number of Standalone Migrations
4

Number of Distinct Source Legacy ILSs
4

Equinox *Research*

Preparing for BIBFRAME in Public Libraries

The King County Library System Foundation provided funding for a limited research project partnership between Equinox and the King County Public Library System (KCLS) centered on public libraries and Linked Data (LD) with an emphasis on the new Bibliographic Framework (BIBFRAME) model. The project began in September 2024 and culminated in a two-day onsite workshop in Issaquah, WA in April 2025. Through this partnership opportunity, Equinox worked with KCLS to facilitate research centering on cataloging needs at the intersection of library cataloging, metadata management, and library IT.

The project's concentration on public libraries was designed to address an unmet need for representation as public libraries are often dependent upon aging technologies while data models and expectations rapidly evolve without their active participation. During the last fourteen years of moving BIBFRAME forward within the library industry as an alternative to the MARC format, public libraries have had minimal involvement in its development or evaluation. This poses a challenge because BIBFRAME is now at the point where public libraries must prepare for working with BIBFRAME or risk having the long-term future of public library metadata be decided elsewhere.

With the support and guidance of Information Technology Services (ITS) Director, BJ Colvin, KCLS project participants included team members from both the Collection Management Services (CMS) and ITS departments. The Equinox project leads, Galen Charlton, Implementation and IT Manager, and Jennifer Weston, Product and Education Manager, facilitated the various components of the project along parallel paths to emphasize both cataloging and technology perspectives.

The project was completed in three phases led by the Equinox team: (1) Linked Data Orientation Webinar and baseline participant survey to evaluate awareness of LD in libraries; (2) Provision of metadata editor tools and evaluation of editor functionality with the BIBFRAME structure; and (3) Onsite workshop hosted by KCLS for all participants. Workshop discussions included a review of BIBFRAME as a content standard focused on future usability and the needs of the communities of users served by public libraries.

The project's findings offer a public library perspective on the possibilities and challenges of adopting a model like BIBFRAME and provide groundwork for expanding the conversation. Future planning recommendations from the project call for an emphasis on a continued push for public library inclusion in BIBFRAME to build a pathway for a staff-friendly infrastructure and strategic exploration of potential positive benefits for public library users.

Representing the research partnership, BJ Colvin, Galen Charlton, and Jennifer Weston made presentations on the project and its findings at multiple national and international conferences in 2025 including the 2025 Evergreen International Conference, the ALA 2025 Annual Conference, and the 2025 BIBFRAME Workshop in Europe. Equinox would like to thank the King County Library Foundation for funding this important project and for being a great partner and champion of public libraries.

Introduction

- BIBFRAME and Library Linked Data applications have largely been topics of discussion by academic and national libraries
- Project partnership designed to evaluate the feasibility of Linked Data (and specifically BIBFRAME) in the **public library** context
- Methods included surveys and evaluation of software currently available that supports editing BIBFRAME
- Inform future work towards
  - Ensuring public libraries have a voice in future metadata development
  - Informing the design of ILSs/LSPs for public libraries

Core
est. September 1, 2020

ALA 2025 Annual Conference & Exhibition
PHILADELPHIA • JUNE 26–30

Project Overview

Project Timeline

- Introductory Orientation Session – *September 2024*
  - Included BIBFRAME History & Vocabulary Overview
- Baseline Survey at Project Kickoff – *October / November 2024*
- Editor Evaluation Period – *October - December 2024*
- Focus Group / Remote Feedback Sessions
  - *December 2024 & February 2025*
- Onsite Visit – *April 2025*
- Final Report and Dissemination – *May to July 2025*

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PHILADELPHIA • JUNE 26–30

Discussion & Findings

KCLS Perspective

- The team found exploring BIBFRAME editors, particularly Marva and Sinopia, to be an engaging and insightful experience
- There was an excitement around many of the possibilities
  - Enhancing Patron Experiences
  - Multilingual Access
  - Connecting Resources
- Identified some areas that need to be addressed before adoption
  - Copy Cataloging Workflows
  - Discoverability of Access Points
- Early insights into what considerations need to be made for transitioning from a technical standpoint

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Equinox
Presentations

ALA 2025 Annual Conference

Executive Perspectives: A Conversation on the Future of the Library Technology Industry

Presenters: Lisa Carlucci, Executive Director, Equinox; Marshall Breeding, Library Technology Guides; Tom Jacobson, Innovative and Ex Libris, Part of Clarivate; John McCullough, OCLC; Maria Wasing, Axiell

Abstract: This annual CORE Executive Perspectives session provides a unique opportunity to learn about crucial strategies in play in the library technology industry first hand from top executives.

Making it Real: Preparing for BIBFRAME in Public Libraries

Presenters: Galen Charlton, Implementation and IT Manager, Equinox; Jennifer Weston, Product and Education Manager, Equinox; BJ Colvin, King County Library System

Abstract: This presentation will introduce a framework for exploring the status of BIBFRAME in public libraries, examine the economics of transitioning towards BIBFRAME, discuss how to support and train staff on new workflows, and identify the technological challenges and opportunities. This will be informed by research that Equinox performed in partnership with the King County Library System.

Consortium Change Management Lessons from Evergreen ILS Consortia

Presenter: Galen Charlton, Implementation and IT Manager

Abstract: One constant of the library consortium experience is change as consortia add or subtract members, roll out new shared services and technology platforms, provide new training to their members, and update their governance structures.

This panel discussion will share the experiences of several consortia that use Evergreen ILS as they went through changes large and small over the years. Specific changes and their challenges to be discussed include establishing new resource-sharing agreements, leveling up their cataloging standards, merging locations together, absorbing new members, and implementing shared policies around patron privacy and data security.

Missouri Evergreen Users Conference

Opening Session: Equinox and MEC

Presenter: Galen Charlton, Implementation and IT Manager

Age Hold Protection: Is it Time to Rethink This?

Presenter: Galen Charlton, Implementation and IT Manager

Abstract: A conversation about how "Age Hold Protection" works and whether a combination of "Holds Go Home" and decreasing parameters around "Age Hold Protection" may be a more effective way for the consortium to fulfill holds.

Computers in Libraries

Community Engagement, Service Innovation, and Transformation

Presenter: Felicia Beaudry, Business Development Manager

Abstract: Can migrating to a new library management system transform other library services? Yes, it can! In 2019, Equinox Open Library Initiative established the Equinox Open Source Grant. Over the next two years, it awarded the grant to five libraries that support diverse and under-served communities in Puerto Rico; Spokane, Washington; New York; Vermont; and Brooklyn. Each library received consulting and migration services to implement Koha ILS along with three years of hosting and support through the grant, eligible for renewal beyond the initial term. The impact of the grant for these libraries was far greater than "just a new ILS." Grantees adjusted their service models, launched other technology projects, expanded collections, committed to new community outreach programs, creatively addressed local needs, and fostered deeper connections with their patrons. Get tips and insights from the projects and services launched and learn how adaptability and resourcefulness can lead to transformative community engagement and service innovation.

ER&L

Growing CORAL: An Open Source Community for Electronic Resources Management.

Presenters: Stephanie Leary, Front End Developer, and Andrea Buntz Neiman, Project Manager for Software Development

Abstract: This presentation discusses how CORAL was improved to meet modern accessibility standards and provide an overview of tools and methods that other teams can use when facing accessibility challenges in legacy interfaces. We'll demonstrate how solving those problems brought us benefits in internationalization, performance, and maintainability.

Connecticut Library Association Annual Conference

Speaking for the User: Equinox updates to Evergreen and CORAL

Presenter: Andrea Buntz Neiman, Project Manager for Software Development

Abstract: Join Equinox to hear about the latest updates to Evergreen ILS and CORAL ERM. Equinox developers have been hard at work adding new features and improving accessibility and usability for these two open-source products.

2025 Evergreen International Conference

An Overview of Notices for Local Admins

Presenter: Rogan Hamby, Data and Project Manager

Abstract: Join us stepping through how notices work from the types of action triggers to what happens after output is created. This program is aimed at people entirely new to action triggers and notices in Evergreen or local admins who would benefit from an understanding of how they work in more depth.

Building a Better Reporter through Community Collaboration

Presenters: Lena Hernandez, Product and Education Specialist; Stephanie Leary, Front End Developer; Andrea Buntz Neiman, Project Manager for Software Development

Abstract: The much anticipated Angular version of Evergreen's Advanced Reporter launched with Evergreen 3.13. The update brought huge accessibility improvements and incorporated usability upgrades throughout the reporter. Since its launch, the Evergreen community has continued to iterate on the Angular reporter design to bring in additional enhancements, including a fantastic new visual tool for working with nullability!

In this session we will look at the history of the reporter module and how it compares to the new modern design and we'll highlight some of the most exciting features to come out of this community collaboration. We will also walk through a few examples of creating report templates with the new interface. You'll leave the session with a better understanding of Evergreen's reporter and some suggestions to help you and your colleagues get the most out of the new features and layouts.

Sharing Data Securely

Presenter: Galen Charlton, Implementation and IT Manager

Abstract: Sometimes Evergreen can't do it all. In particular, data from the Evergreen database may need to be made available to other systems for reporting or other purposes. However, it is important to protect patron privacy and the confidentiality of library records.

This session will discuss a number of techniques for getting the data that a third-party system needs from Evergreen – and only that data – over to it.

New Features in Evergreen 3.14 and 3.15: AKA Ruth and Andrea Show, Episode 6: Muppets in Space

Presenters: Andrea Buntz Neiman, Project Manager for Software Development, Equinox; Ruth Frasur Davis, Evergreen Collaborative Development Initiative

Abstract: The sixth edition of everyone's favorite semi-chaotic overview of Evergreen's latest and greatest! We will cover the highlights of Evergreen releases 3.14 (fall 2024) and 3.15 (spring 2025), along with at least one bad joke, a few memes, and maybe (but no promises) time for Q&A at the end.

Situation: There are 15 Competing Standards

Presenter: Mike Rylander, Research and Development Manager

Abstract: OpenSRF, XML-RPC, JSON Gateway, unAPI, OpenSearch, and more. It seems like Evergreen has 14 different protocols and APIs for retrieving and manipulating data. Certainly we should develop a single mechanism that covers all use cases.

In this session we will go over how the (currently forthcoming) OpenAPI infrastructure works with and for Evergreen, what use cases it is intended to fill, and how it can be extended quickly and easily to provide secure, audited access for 3rd party Evergreen integrators in new and exciting ways.

New OpenAPI endpoints will be added, old ones will be improved, and we will learn how programmatic Evergreen access has moved into the modern era … of the 2010s.

Inclusive Cataloging: One Step at a Time

Presenters: Jennifer Weston, Product and Education Manager, Equinox; Katie Greenleaf Martin, Pennsylvania Integrated Library System; Jacob Ingalls, Albright Memorial Library; Matthew Vasquez Jaquith, Springfield City Library; Carol Witt, C/W Mars

Abstract: Members of Evergreen consortia will discuss how they have worked to make their catalogs a bit more inclusive (one step at a time!) through incorporating additional options for subject headings and call number organization schemes. This panel discussion will include information about how to undertake some of these projects in Evergreen, as well as incorporating time for the audience to ask questions and share projects from their libraries as well.

Guided Aspen Opportunities in a World of Pure Imagination

Presenter: Lena Hernandez, Product and Education Specialist

Abstract: Join Lena and library partners to talk about Aspen staff admin possibilities and how to approach Aspen training and learning incrementally for successful rollout and informed practical customizations. We will discuss additional features that can be deployed over time after initial implementation. The presentation will include tips to avoid being inundated by options and instead optimize the adaptability of Aspen to fit your library's culture and needs.

Making It Real: Preparing for BIBFRAME in Evergreen

Presenters: Galen Charlton, Implementation and IT Manager, Equinox; Jennifer Weston, Product and Education Manager, Equinox; BJ Colvin, King County Library System

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Code4LibSE / Devops4libSE

Tree to Forest: Cultivating Aspen Discovery at Different Scales

Presenter: Rogan Hamby, Data and Project Manager

Abstract: Equinox Open Library Initiative has successfully implemented Aspen Discovery across a spectrum of libraries, from complex statewide consortia with hundreds of branches to single-location institutions. Learn how we leveraged Equinox's long-term expertise with open source software to launch support services for Aspen Discovery, specializing in libraries using Evergreen ILS and Koha ILS. Participants will get an inside look at how libraries of varying sizes modernize discovery and how its emerging sustainability framework positions Aspen as a living project evolving alongside changing library services.

Koha-US 2025 Annual Conference

The Impact of AI on Libraries

Presenters: Galen Charlton, Implementation and IT Manager, Equinox; Brian Pichman, ByWater Solutions

Abstract: Representatives from Equinox and ByWater Solutions discuss how generative AI has led to new challenges for web-based library software and how they've worked to mitigate these disruptions.

koha-US 2025 Annual Conference

2025 BIBFRAME Workshop in Europe

Public Libraries and BIBFRAME in the United States: A Research Partnership

Presenters: Galen Charlton, Implementation and IT Manager, Equinox; Jennifer Weston, Product and Education Manager, Equinox; BJ Colvin, King County Library System

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AspenCon 2025

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Building Branded LiDA

Presenter: Galen Charlton, Implementation and IT Manager

Abstract: One of the cool features of the Aspen mobile app, LiDA, is that it can readily be made your library's own and branded. During this workshop, Galen Charlton will go over how you can build, distribute, and update branded LiDA. Specific topics that will be covered during the workshop include setting up a development environment, configuring its branding, setting up distribution via the Google and Apple app stores, and releasing the app. Attendees of this workshop will leave it able to bootstrap releasing their own branded LiDA while remaining aware of some of the gotchas. This workshop is intended for an audience that is comfortable with command line and developer tools. However, no particular experience with mobile app development is required.

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Tree to Forest: Cultivating Aspen Discovery at Different Scales

AspenCon 2025

The Impact of AI on Libraries

Fighting the Bot Invasion

Keeping Your Koha Catalog Online

koha-US 2025 Annual Conference
Providence, Rhode Island - September 2-5, 2025

Brian Pichman (ByWater Solutions)
Galen Charlton (Equinox Open Library Initiative)

5 September 2025

EMERGING TRENDS
Evergreen International Conference 2025

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Guided Aspen Opportunities

Lena Hernandez, Product and Education Specialist

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Equinox
Open Source Grant

At Computers in Libraries 2025 Equinox staff member, Felicia Beaudry, presented, "Community Engagement, Service Innovation, and Transformation," on the impact of the Equinox Open Source Grant on March 25, 2025.

Launched in 2019, the Equinox Open Source Grant provides Koha ILS to eligible organizations that are unable to obtain or maintain an ILS because of financial and technological needs. Preference was given to libraries serving underrepresented and marginalized communities. The grant offers implementation, hosting, and support services to recipients for three years. Grants may be renewed for libraries that demonstrate an ongoing need.

Equinox conducted two rounds of grant awards in 2019 and 2020. Past grantees included:

» Biblioteca Nacional de Puerto Rico (San Juan, Puerto Rico)

» Center for Khmer Studies (New York, NY)

» Spark Central (Spokane, WA)

» Vermont Jazz Center (Brattleboro, VT)

» Weeksville Heritage Center (Brooklyn, NY)

As part of the renewal process, Equinox gathered detailed narratives describing the impact of the grant. These reports documented some results that might be expected from the addition of a modern ILS such as increased circulation of collections and improved and simplified collection management. However, what stood out the most was the expansion of new services and community engagement activities all made possible by freeing up staff time and resources previously dedicated to maintaining access to the library's holdings.

Biblioteca Nacional de Puerto Rico

Biblioteca Nacional de Puerto Rico, the National Library of Puerto Rico (BNPR) is part of the Institute of Puerto Rican Culture, with a mission to research, preserve, promote, and disseminate Puerto Rican culture in all its diversity and complexity. Its collection is composed of materials authored and published by Puerto Ricans.

As a result of receiving the grant, the National Library was able to make parts of their holdings searchable to users worldwide for the first time. They were also able to maintain availability to parts of the collection when the library was forced to temporarily close due to electrical problems.

The National Library also leveraged the success of the grant to obtain additional funding to begin work on the first Digital Library of Puerto Rico. The Digital Library will include digitized content from five of the most important libraries in the country: the National Library, Library of the Supreme Court of Puerto Rico, Library of the Ateneo Puertorriqueno, the Puerto Rican Collection of the Library from the Medical Sciences Campus of the University of Puerto Rico, and the Puerto Rican Newspaper Library and Collection from the University of Puerto Rico, Rio Piedras.

"At the Center for Khmer Studies, we continue to leverage our Koha library management system with the generous support from Equinox. Our Koha catalog has been a model for libraries in Cambodia."

—Sivleng Chhor, Head Librarian at the Center for Khmer Studies

Center for Khmer Studies

The Center for Khmer Studies (CKS) is an independent American Overseas Research Center, incorporated in Delaware. It is the first member institution of the Council of American Overseas Research Centers in Southeast Asia. CKS promotes research, teaching, and public service pertaining to the social sciences, arts, and humanities in Cambodia and the Mekong region.

The Equinox Open Source Grant provides Koha ILS for CKS's library in Siem Reap, Cambodia, the largest publicly accessible library in Cambodia outside of Phnom Penh. Prior to receiving the grant and the implementation of Koha, the library experienced almost daily ILS outages because of local network instability. Patrons were often unable to utilize library resources, and staff were forced to spend much of their time troubleshooting the problem. Access to Koha on Equinox's U.S.-based hosting platform has eliminated this issue, allowing for 24-hour availability to library resources and freeing staff to focus on public service and programming.

The grant allowed CKS to expand its collection to more than 27,000 items, welcome 12,000 visitors, 3,350 of them children, and reach 111,000 users online. New initiatives included CKS's first-ever book fair, drawing 5,000 attendees, and library capacity-building training for institutions including the National Museum of Cambodia, the Tuol Sleng Genocide Museum, and the Preah Norodom Sihanouk-Angkor Museum.

Library Capacity Building Workshop at the Center for Khmer Studies

Spark Central

Started in 2016 in Spokane, Washington, Spark Central's mission is to make participation in extracurricular programming equitable by removing common barriers: cost, access, and confidence. Spark Central provides internet availability, technology, curriculum kits, and programming for children and adults. Its collection highlights local artists and authors.

Before the Equinox Open Source grant, Spark Central relied on a legacy ILS that did not support its unique operational needs or provide insights into the user of its services. Through the grant, Spark Central barcoded its collection, implemented more efficient cataloging practices, and automated patron notices. Reporting capability with Koha's robust analytics enabled staff to assess whether programs, such as their Level Up youth program, were reaching their intended audiences. Koha allows time to be shifted away from manual tasks and allows for increased focus on community outreach and program development.

A free community workshop with author Kao Kalia Young and local artist/illustrator Jiemei Lin

Weeksville Heritage Center

Weeksville was one of the largest free Black communities in pre-Civil War America. Weeksville Heritage Center exists to preserve this historic site and its accomplishments through oral histories, museum and archaeological collections, and archival and bibliographic materials.

Before receiving the grant, the Weeksville Heritage Center did not have an ILS, leaving staff unable to catalog its materials, rendering them inaccessible to the public, and making it difficult for librarians to find materials to assist researchers and visitors. The grant supported the Weeksville Heritage Center's reference services, educational programs, and more.

Vermont Jazz Center

Founded as a non-profit in 1997, the Vermont Jazz Center (VJC) grew from the shared vision of jazz guitarist Attila Zoller and pianist Eugene Uman, along with collaborators Elsa Borrero and Howard Brofsky. Together, they imagined a welcoming space where musicians could learn through concerts, workshops, weekly jam sessions, jazz history classes, ensembles, and private lessons. Today, the Center's mission is to create, promote, and preserve jazz for artists, students, and the broader community through performance and education.

The VJC's unique collection was largely uncataloged because its legacy ILS could not meet its needs. Since receiving the grant, VJC has successfully cataloged a majority of its holdings, partially through the work of interns from Amherst College and the State of Vermont's Vocational Rehabilitation Program. Interns gained valuable experience and exposure to significant cultural and educational resources.

Future plans include the enhancement of access to VJC's video archive. The Center will be collaborating with other institutions, including the Center for Black Music Research at Columbia College and Worcester Polytech, which are digitally preserving the archive content and metadata while also helping to promote the collection.

Student interns from Amherst College at the Vermont Jazz Center

Additional information about the Equinox Open Source Grant can be found at **https://www.equinoxoli.org/collaborate/#grant.**

Highlights:

» Equinox Presents at Computers in Libraries 2025

» Equinox Announces 2025 Application for the Equinox Open Source Grant

Top Five in *Customer Support*

Equinox's Customer Support Ranked in Top Five by Public Libraries in 2025 Library Perceptions Survey

Each year, Marshall Breeding, founder and editor of Library Technology Guides, conducts the Library Perceptions Survey, giving libraries the opportunity to assess the software and services they utilize. The survey results help institutions compare offerings, including weighing open source solutions alongside proprietary alternatives. The full report is available on the Library Technology Guides website: https://librarytechnology.org/perceptions/2024.

This year, Equinox's Customer Support was ranked in the top five for satisfaction by public libraries. Other favorable feedback included that Aspen Discovery was rated as more usable with Equinox than any other Aspen Discovery support provider. Equinox also received top marks in general ILS satisfaction for Evergreen ILS and in effectiveness for print resources by small public libraries. Equinox values this recognition because it comes from the people who know our work best. We are grateful to have earned the trust and appreciation of the libraries we support.

Results from the survey also appeared in the American Libraries magazine which can be found by visiting: https://americanlibrariesmagazine.org/2025/05/01/2025-library-systems-report

Collaboration

Backstage Library Works

Equinox and Backstage Library Works make authority control simple for libraries. Services from Backstage Library Works include Basefile Authority Control, authority record updates for new bibliographic resources, and Authority Control Notification Services. Equinox manages record extracts and the retrieval and loading of updated records.

Highlights

» Missouri Evergreen Consortium
» SELCO
» Traverse des Sioux Library System
» Richland Public Library

MessageBee

Equinox and Unique Management Services have partnered to provide MessageBee SMS services to libraries. MessageBee's design streamlines communication workflows for SMS and more.

Highlights

» SELCO
» Westchester Library System

Other Partnerships

» OCLC
» collectionHQ
» Connecticut Library Consortium

Thank You to Our 2025 Development Partners!

» BC Libraries Cooperative
» Bibliomation
» Evergreen Collaborative Development Initiative
» Kenton County Library System
» North Carolina Community College Evergreen
» Pennsylvania Integrated Library System

Development

2025 Equinox Development Highlights

Throughout the 2025 development cycle, Equinox made substantial contributions to the growth and stability of Evergreen ILS. Half of the new features in Evergreen 3.15 were developed by Equinox. Andrea Buntz Neiman, Project Manager of Software Development, and Galen Charlton, Implementation and IT Manager, served as Release Managers for Evergreen 3.15 and 3.16 respectively.

Additional development contributions from Mike Rylander, Jason Etheridge, Jason Boyer, Jennifer Weston, Steven Callender, and Stephanie Leary, ranged from feature implementation and bug resolution to documentation improvements and community support. These efforts reflect our deep commitment to the project's reliability, sustainability, and continued evolution.

Equinox collaborated with a variety of development partners in 2025 to achieve the following key contributions:

- Staff Client Single Sign On (North Carolina Community College Evergreen)
- Usability improvements for Item Alerts, Notes, Tags, and Templates (Evergreen Collaborative Development Initiative)
- OPAC Accessibility Enhancements (BC Libraries Cooperative)
- Quipu eCARD and eRENEW Integration (Pennsylvania Integrated Library System)
- Payment Type Flags (Kenton County Library System)
- Library Group Policies & Policy Cloning (Pennsylvania Integrated Library System and the Evergreen Collaborative Development Initiative)

"Equinox has simply been one of the most professional companies we've worked with."

—Tim Wagner, IT Manager and Consultant at the Dominican Sisters of Mary, Mother of the Eucharist

Development Projects

Project	Partner
Quipu eCARD Integration	Pennsylvania Integrated Library System
Staff Client Single Sign On	North Carolina Community College Evergreen
OPAC Accessibility	BC Libraries Cooperative
Lassos & Policies Phase II	Evergreen Collaborative Development Initiative
Quipu eRENEW Integration	Pennsylvania Integrated Library System

Phase 1 & Consultation Projects

Project	Partner
Staff Client Single Sign On Phase I	North Carolina Community College Evergreen
MFA Secondary Permission Groups	Pennsylvania Integrated Library System
*Lassos & Policies Phase I (revised)	Pennsylvania Integrated Library System
Max Holds Enhancements Phase I	Pennsylvania Integrated Library System
Void Payment Options	Kenton County Library System
Bibload Consultation	Bibliomation
Circulation Policy Cloning	Evergreen Collaborative Development Initiative
LP1954937 (Hold Queue Position)	Kenton County Library System
Opt In Updates Phase I (revised)	BC Libraries Cooperative

Committed to Evergreen: 2025 Contributions to the Evergreen Community

Equinox contributes extensively to Evergreen, not only through active software development, but through in-kind work as members of release teams, community interest groups, committees, and more. We are particularly proud to have had staff serve as release managers on both Evergreen 3.15 and 3.16, the two major releases in 2025.

Open source release teams play a vital role in keeping the project healthy moving forward. Their work includes reviewing and merging community code contributions, coordinating testing efforts, tracking and verifying bug reports, preparing release notes, and ensuring that new features and fixes meet community standards for stability and usability.

Release managers are responsible for the planning and coordination of the release in addition to communication surrounding the project and ensuring the quality of the latest version.

Evergreen Community Positions

- **Jason Boyer:** Evergreen Community Developer; Evergreen Core Committer
- **Galen Charlton:** Evergreen Project Board, President; Evergreen Cataloging Interest Group; Evergreen Community Developer; Evergreen Core Committer; Evergreen Release Team; Chair of Infrastructure Committee
- **Jason Etheridge:** Evergreen Community Developer; Evergreen Core Committer; Evergreen Release Team
- **Rogan Hamby:** Chair of the Evergreen Outreach Committee; Evergreen Community Developer; Evergreen Standing Conference Committee
- **Lena Hernandez:** Evergreen Documentation Interest Group
- **Stephanie Leary:** Evergreen Community Developer; Founder and Chair of the Evergreen User Interface Interest Group; Evergreen Outreach Committee; Evergreen Release Team
- **Andrea Buntz Neiman:** Evergreen Project Board, Secretary; Evergreen Outreach Committee; Evergreen Cataloging Interest Group; Evergreen Documentation Interest Group; Evergreen Documentation Committer; Evergreen Release Team
- **Mike Rylander:** Evergreen Community Developer; Evergreen Core Committer
- **Jennifer Weston:** Chair of the Evergreen Cataloging Interest Group; Evergreen Standing Conference Committee; Evergreen Authorities Working Group

Evergreen Release Teams

Evergreen 3.15, April 2025

» Release Manager: Andrea Buntz Neiman

» Equinox Staff on the Release Team:
  - Galen Charlton
  - Jason Etheridge

» Other Equinox Open Library Initiative 3.15 Contributors:
  - Jason Boyer
  - Steven Callender
  - Stephanie Leary
  - Mike Rylander
  - Jennifer Weston

Evergreen 3.16, November 2025

» Release Manager: Galen Charlton

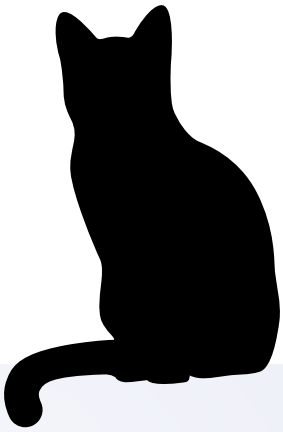
» Other Equinox Open Library Initiative 3.16 Contributors:
  - Andrea Buntz Neiman
  - Jason Boyer
  - Steven Callender
  - Jason Etheridge
  - Stephanie Leary
  - Mike Rylander

Equinox Staff on Evergreen Maintenance Release Teams in 2025

» Andrea Buntz Neiman

» Galen Charlton

» Jason Etheridge



Highlights

» 2025 Q1 Project Contributions to Evergreen ILS and CORAL ERM

» Q2 Development Contributions to Evergreen ILS

» Q3 Development Contributions to Evergreen ILS

» Equinox Presenting on Consortium Change Management with Evergreen Libraries at the ALA 2025 Annual Conference

» Evergreen International Conference 2025

» 2025 Evergreen Hack-A-Way

» Equinox Announces Major Features in Evergreen 3.15

» Equinox Announces Major Features in Evergreen 3.16

» Southeastern Libraries Cooperating

» Plymouth District Library

» Grand Rapids Public Library

Pennsylvania Integrated Library System:

» Northampton Area Public Library

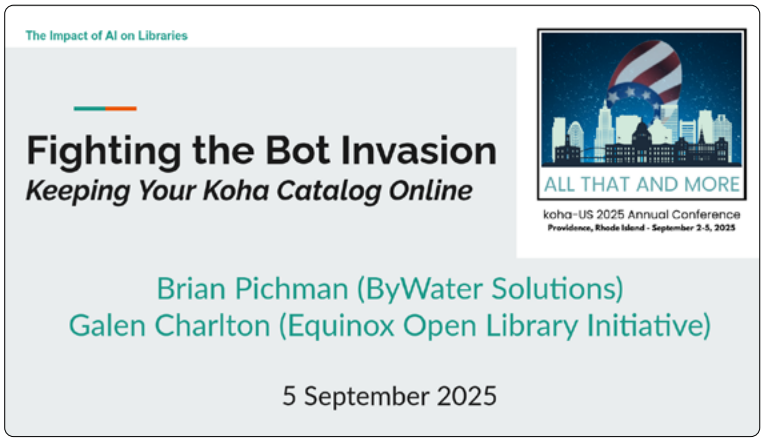
» Lansdale Public Library

Missouri Evergreen Consortium

» Ozark Regional Library

koha

Koha ILS is a leading open source integrated library system. Its flexibility, cost-effectiveness, and active supporting community make it a sustainable choice for libraries of all sizes, ensuring reliable access to essential tools and continual innovation. Equinox provides hosting and support, migration services, training, and software development for Koha.



Equinox implemented Koha ILS and Aspen Discovery for Estacado Library Information Network (ELIN), a consortium of five libraries in southeastern New Mexico, including four public libraries and one community college library.

Equinox also completed the implementation of Koha ILS for the first cohort of member libraries from the Private Academic Library Network of Indiana (PALNI). PALNI supports private colleges, universities, and seminary libraries across Indiana. Rollout for additional cohorts is planned for 2026 and beyond.

Equinox participated in the Koha-US 2025 Annual Conference, hosted in Providence, Rhode Island. Koha-US is a membership organization that brings together the community of developers and libraries that utilize the internationally popular ILS in the northern hemisphere. The theme for this year's conference was, "All That and More," and it was held from September 2, 2025 through September 5, 2025.

Galen Charlton, Implementation and IT Manager, co-presented with Brian Pichman of ByWater Solutions on managing the impact of AI bot and crawler traffic on Koha web-based library catalogs. Tools such as the open source firewall utility, Anubis, and services like Cloudflare were highlighted as ways to help Koha libraries keep their catalogs accessible to the public despite pressure from bot and crawler traffic.

Learn more about Koha.

Highlights

- » Equinox Open Source Grant
- » KohaUS 2025 Annual Conference
- » Computers in Libraries 2025
- » Odessa College
- » Belmont Abbey College
- » Dominican Sisters of Mary, Mother of the Eucharist
- » Estacado Library Information Network

Aspen Discovery

Aspen Discovery is a fully featured, open source discovery system with a single search box and smart results that are formatted to be user-friendly. Aspen Discovery also provides tools for promoting collections in a variety of methods beyond traditional searches, which help patrons more easily discover all the resources available through their local library.

Respondents to the 2025 Library Perceptions Survey from Library Technology Guides, ranked the usability of Aspen Discovery highest when supported by Equinox. Equinox's configuration and customization of the system to a client's specific needs, along with comprehensive and customized training resources, allow library staff to use the system and assist patrons with confidence. The full survey can be found on the Library Technology Guides website: https://librarytechnology.org/perceptions/2024.

Equinox implemented Aspen Discovery for two of its largest consortium clients in 2025: the Missouri Evergreen Consortium and the Pennsylvania Integrated Library System. Each consortium selected pilot libraries to be the first to offer Aspen Discovery to their communities, with additional members planned for rollout in 2026 and beyond.

Equinox contributed Aspen Discovery presentations at the 2025 Evergreen International Conference, Code4LibSE/Devops4LibSE, and AspenCon 2025. Topics included structuring training for Aspen Discovery, navigating implementation, and building a branded Aspen Discovery app with LiDA.

Learn more about Aspen Discovery.

Highlights

- Code4LibSE / Devops4LibSE Emory Meeting
- 2025 Evergreen International Conference
- Missouri Evergreen Consortium
- Southeastern Libraries Cooperating
- Pennsylvania Integrated Library System
- North of Boston Library Exchange to Aspen Discovery
- AspenCon 2025
- Estacado Library Information Network

VuFind® is an open source discovery toolkit that allows libraries to replace their traditional public catalogs and make their collections more visible and user-friendly. It brings together books, digital resources, and institutional materials in a single search platform, giving patrons intuitive tools to explore, discover, and access resources with ease.

In 2025, Equinox completed a consulting and IT services project for the Historical Society of Pennsylvania (HSP). Equinox worked with HSP to update their two VuFind® systems: Discover (https://discover.hsp.org) and Encounters (https://encounters.hsp.org). These systems bring together metadata from their library catalog, encoded archival description records from Archivists' Toolkit, records from the Orphan Society of Philadelphia, and digital records from the HSP Digital Library and the Philadelphia Record Photograph Morgue. Equinox worked with HSP and the University of Pennsylvania staff to establish a data feed to retrieve records from the catalog and make them visible in VuFind®. Equinox also upgraded HSP's Discover system from VuFind® 5 to version 9.1.

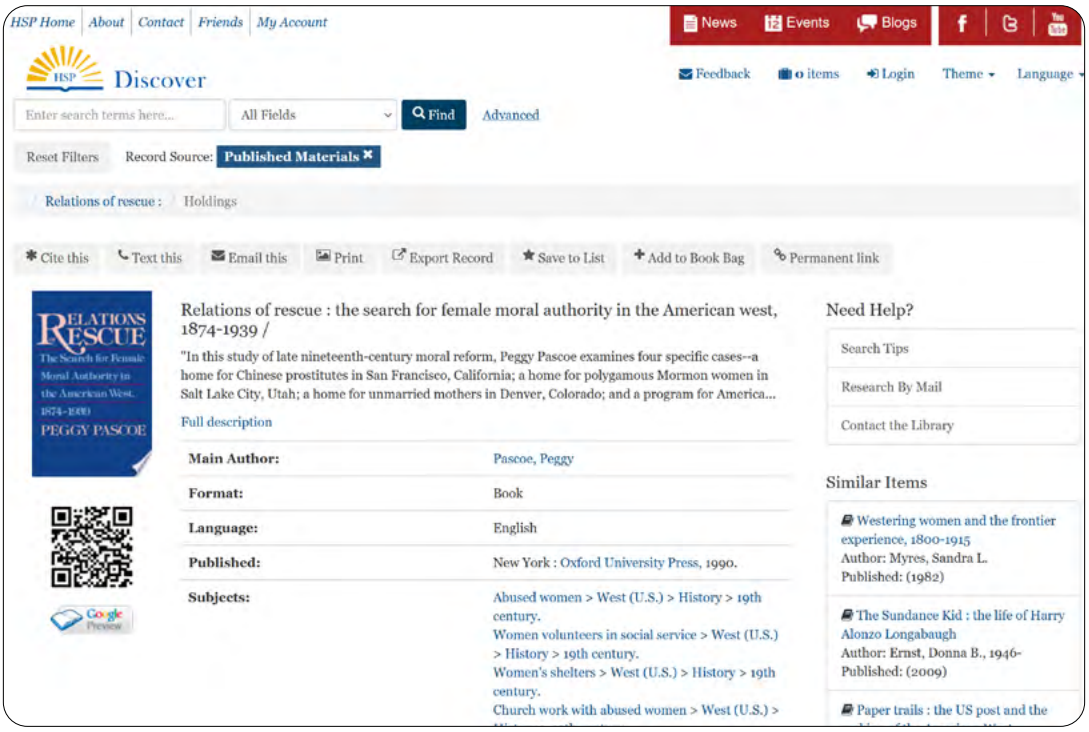
Equinox also implemented VuFind® for the National Center for Atmospheric Research (NSF NCAR), an organization dedicated to providing resources to Earth system science researchers. It is managed by the University Corporation for Atmospheric Research and sponsored by the National Science Foundation. VuFind® allows NCAR to unify searching of their library catalog, archives, digital collections, and e-journal holdings in one search interface.

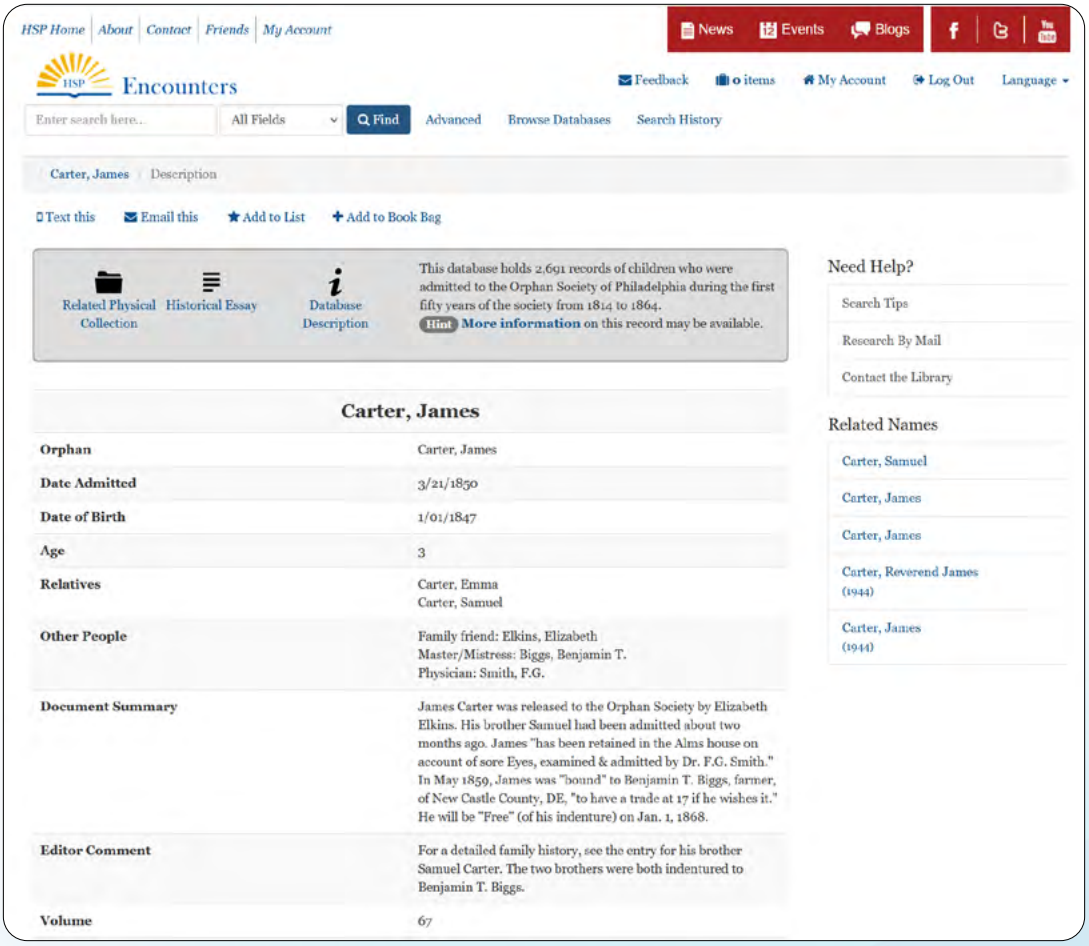
Equinox continues to serve the VuFind® community as a Registered Service Provider. Registered Service Providers for VuFind® support knowledge sharing, demonstrate expertise in open source technologies for libraries, and contribute to the financial sustainability of the VuFind® project. Equinox was the first Registered Service Provider for VuFind® in the United States, and has been active in that capacity since 2022.

Learn more about VuFind®.

Highlights

» Equinox Provides VuFind® Consulting and IT Services for the Historical Society of Pennsylvania





Samples from the Historical Society of Pennsylvania's updated VuFind® Systems: Discover and Encounters

Resources

Beaudry, Felicia. "Community Engagement, Service Innovation, and Transformation." Computers in Libraries 2025, 25 March 2025. Arlington, VA. Presentation.

Carlucci, Lisa et al. "Executive Perspectives: A Conversation on the Future of the Library Technology Industry." ALA Annual Conference and Exhibition, 28 June 2025. Presentation.

Charlton, Galen. "Age Hold Protection: Is it time to rethink this?" Missouri Evergreen Users Conference 2025, 21 March 2025. Columbia, MO. Presentation. https://youtu.be/wJSR-1V2jac

Charlton, Galen. "Building Branded LiDA." AspenCon 2025, 9 October 2025. Nashville, TN. Presentation.

Charlton, Galen. "Consortium Change Management Lessons from Evergreen ILS Consortia." ALA Annual Conference and Exhibition, 28 June 2025. Presentation.

Charlton, Galen, Jennifer Weston and BJ Colvin. "Making It Real: Preparing for BIBFRAME in Evergreen." ALA Annual Conference and Exhibition, 29 June 2025. Presentation.

Charlton, Galen, Jennifer Weston and BJ Colvin. "Making It Real: Preparing for BIBFRAME in Evergreen." Evergreen International Conference 2025, 14 May 2025. Online. Presentation.

Charlton, Galen. "Opening Session: Equinox and MEC." Missouri Evergreen Users Conference 2025, 21 March 2025. Columbia, MO. Presentation. https://youtu.be/cbQ-yx9s6Qw

Charlton, Galen, Jennifer Weston and BJ Colvin. "Public Libraries and BIBFRAME in the United States: A Research Partnership." BIBFRAME Workshop in Europe 2025, 16 September 2025. Naples, Italy. Presentation.

Charlton, Galen. "Sharing Data Securely." Evergreen International Conference 2025, 13 May 2025. Online. Presentation.

Charlton, Galen, Brian Pichman. “The Impact of AI on Libraries.” Koha-US 2025 Annual Conference, 5 September 2025. Providence, RI. Presentation.

Hamby, Rogan. “Tree to Forest: Cultivating Aspen Discovery at Different Scales.” Code4LibSE/Devops4LibSE Emory Meeting, 22 July 2025. Presentation.

Hamby, Rogan. “Tree to Forest: Cultivating Aspen Discovery at Different Scales.” AspenCon 2025, 8 October 2025. Nashville, TN. Presentation.

Hamby, Rogan. “An Overview of Notices for Local Admins.” Evergreen International Conference 2025, 12 May 2025. Online. Presentation.

Hernandez, Lena et al. “Building a Better Reporter through Community Collaboration.” Evergreen International Conference 2025, 12 May 2025. Online. Presentation.

Hernandez, Lena. “Guided Aspen Opportunities in a World of Pure Imagination.” Evergreen International Conference 2025, 14 May 2025. Online. Presentation.

Leary, Stephanie and Buntz Neiman, Andrea. “Growing CORAL: An Open Source Community for Electronic Resources Management.” ER&L 2025, 26 March 2025. Presentation.

Neiman, Andrea Buntz and Ruth Frasur Davis. “New Features in Evergreen 3.14 and 3.15: AKA Ruth and Andrea Show, Episode 6: Muppets in Space.” Evergreen International Conference 2025, 14 May 2025. Online. Presentation.

Neiman, Andrea Buntz. “Speaking for the User: Equinox updates to Evergreen and CORAL.” Connecticut Library Association Annual Conference 2025, 29 April 2025. Groton, CT. Presentation.

Rylander, Mike. “Situation: There are 15 Competing Standards.” Evergreen International Conference 2025, 14 May 2025. Online. Presentation.

Weston, Jennifer et al. “Inclusive Cataloging: One Step at a Time.” Evergreen International Conference 2025, 14 May 2025. Online. Presentation.

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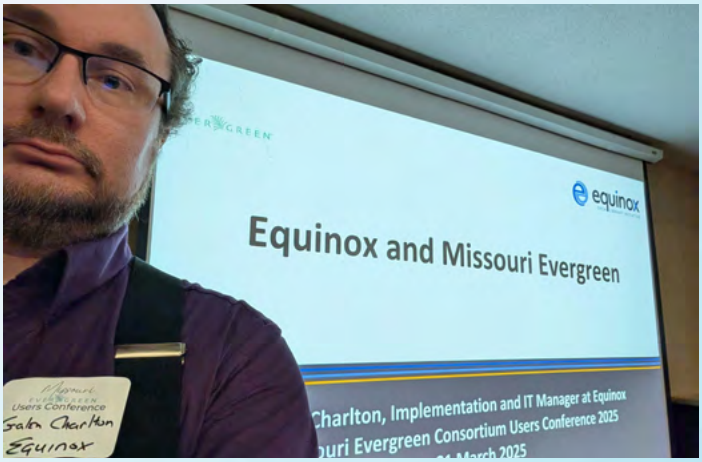
STAY BEHIND GATE WHEN BRIDGE IS IN OPERATION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Equinox and Missouri Evergreen
Charlton, Implementation and IT Manager at Equinox
Evergreen Consortium Users Conference 2025

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Part of the Institute of Puerto Rican Culture
Mission: Research, preserve, promote, and disseminate Puerto Rican culture in all its diversity and complexity
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Can you tell us about some of the challenges you had managing your library and collections before receiving the grant?
Hilda T. Ayala González
General Archivist of Puerto Rico
computers in libraries 2025
HYATT REGENCY

Mystic River Park

STREETSIDE
PETE'S CAFE

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