

Product Development Collaboration Agreement Between Ex Libris, IGeLU and ELUNA

This agreement formalizes principles of collaboration between Ex Libris, the International Group of Ex Libris Users (IGeLU) and Ex Libris Users of North America (ELUNA) on development and enhancement of Ex Libris products.

A. Governing Principles:

- The goal of collaboration between Ex Libris, IGeLU, and ELUNA is to ensure that the products that Ex Libris delivers provide value and meet market and customer needs. All processes developed to meet this goal should facilitate ongoing collaboration.
- Adequate consideration of the needs and experiences of the users in planning product development is of mutual interest to Ex Libris and the users of its products.
- Collaboration with Ex Libris will be managed by the Steering Committees of IGeLU and ELUNA, with significant input from the IGeLU Product Working Groups and the ELUNA Product Groups (hereafter Product (Working) Groups).
- The process will be open and transparent to all members of the user organizations.
- All members of the user organization will have equal opportunity to provide input in the development collaboration process.

B. General Responsibilities:

User Group Responsibilities

- The IGeLU and ELUNA Steering Committees and the leaders of their Product (Working) Groups are jointly responsible for reviewing and assessing user needs and experiences and determining what collaborative processes will be used to meet specific needs. The processes should cover cooperation aimed both at quick wins for the short term and long term development. Development proposals should be supported by the user community and proven in a formal way at least annually.
- The Steering Committees will be responsible for reaching formal agreements with Ex Libris, and for their implementation, and subsequent evaluation. Agreements will be evaluated annually and changed as needed.
- The Steering Committees will be responsible for raising issues of significant concern to users with Ex Libris.

Ex Libris Responsibilities

- To ensure continuous sharing of information about issues of importance, each Ex Libris product manager and the designated IGeLU and ELUNA Product (Working) Group leaders will conduct meetings via conference call on a regular basis, approximately once a month.
- Ex Libris will respond in a timely manner to all issues raised by the Steering Committees.
- To govern the collaboration process and to facilitate the exchange of mutually relevant information, Ex Libris management will meet with both the IGeLU and ELUNA Steering Committees on a regular basis.

C. Collaborative Efforts:

The parties agree to collaborate on four aspects of development: 1) general product enhancement, 2) Knowledge Base enhancement, 3) large scale development, and 4) strategic discussion.

1. General Product Enhancement

Goal: Further develop Ex Libris products by delivering highly desired enhancements as quickly as possible.

Principles:

There will be a consistent enhancement process for all products based on the following key principles:

- For all products except Aleph there will be a joint IGeLU/ELUNA enhancement process.
- Prioritization (voting) on enhancements for all products will be managed by the IGeLU and ELUNA user groups.
- Only member institutions of IGeLU and ELUNA that license a specific product will be eligible to vote on enhancements for that product. Each member institution will be allowed to vote once.
- Detailed agreements for enhancement processes for each product will be developed by each Product (Working) Group leaders and the Ex Libris product manager.

Basic Procedures:

- a. IGeLU and ELUNA will collect enhancement requests from the user community.
- b. Product Managers will collect enhancement requests from multiple sources (Customer Relationship Management system, customer visits, sales teams, development groups, support teams, and others) and categorize these requests as follows:
 - Items that Ex Libris has already decided to implement. Ex Libris will give the user organizations a list of these items, about which the user organizations will not need to spend time deliberating.
 - Items that Ex Libris will definitely not implement.
 - Items that Ex Libris considers important for the product and will consider implementing. Ex Libris will give the user organizations information about these items for inclusion in the voting process.
- c. IGeLU and ELUNA will prepare a slate of enhancements to be voted upon containing requests from the user community and from the product managers.
- d. Eligible member institutions of IGeLU and ELUNA will cast their votes. Each member will have one hundred (100) votes to cast in each round of enhancement voting for a single product. Results of voting will be communicated to Ex Libris, along with a list of the member institutions that voted and the number of institutions which voted for each enhancement. Votes of member institutions who have not licensed the product, will not be counted.
- e. The votes will be taken as serious input by the product managers in determining the product roadmap.

IGeLU and ELUNA Commitments:

- Organizing the process of gathering enhancement suggestions together with relevant use cases, assuring clear specification of problems and desired changes, determining the broader relevance of proposals within the user community.
- Organizing and managing communication about enhancement requests among users and Ex Libris.
- Prioritizing enhancement requests on a timely basis according to the schedule set by the Ex Libris product manager and the leaders of the Product (Working) Group.
- For enhancements to be implemented, reviewing and signing off on functional specifications for as determined by the Product Manager and the leaders of the Product (Working) Group.
- Participating in pre-release testing for the enhancements to be implemented.

Ex Libris commitments:

- Providing a wiki platform for the user groups that can be used for any communication the user groups wish, including communication about enhancement requests among users and Ex Libris.
- Implementing enhancements with top priorities as soon as possible and implementing enhancements with higher numbers of votes before those with lower numbers of votes, if at all possible.
- Providing information as to why enhancement requests will not be implemented.
- Providing functional specification documents for enhancements to be implemented to IGeLU and ELUNA for review.
- Providing information about the status of individual enhancements, especially information about when and how an enhancement will be delivered.
- Documenting all enhancements in release notes and general production documentation.

1.1. Enhancement Process for all products except Aleph

1. Voyager®, SFX®, Verde®, DigiTool®, MetaLib®, and Primo® have varying development cycles, with enhancements delivered in major and minor releases as well as revisions. As a result, the enhancement process may differ from product to product.
2. The product enhancement voting process will begin at least three months before the scope of the release is finalized so that the Product (Working) Groups have enough time to solicit input from their members and from Ex Libris and to prioritize enhancement requests.
3. Ex Libris will agree with the leaders of the Product (Working) Groups on the frequency of voting for enhancements. The aim is to conduct one enhancement voting process per year for enhancements that will be incorporated in a major release or several minor releases.
4. The product manager will obtain development estimates for the top prioritized enhancements requested by IGeLU and ELUNA and considered feasible to implement. As many enhancements as possible will be implemented, beginning with the top-priority items.

5. Once a decision has been made on the scope of the new product release, Ex Libris will provide detailed information about the enhancements planned for the release, as well as the reasons that other proposed enhancements are not being included.

1.2. Enhancement Process for Aleph

The Aleph enhancement process differs from that of the other products as long standing agreements regarding the Aleph enhancement process are being continued.

1. IGeLU and ELUNA may agree to discuss and/or to propose Aleph enhancements jointly. However, each organization will have a separate voting process.
2. Ex Libris will guarantee 120 days of Aleph development per version for IGeLU and 120 days for ELUNA.
3. The Aleph product manager will obtain development estimates for the enhancements requested by IGeLU and ELUNA. As many enhancements as possible will be implemented in priority order within the 120 development days for IGeLU and the 120 development days for ELUNA.

2. Knowledge Bases

Goal: Improving the metadata for electronic resources in the Knowledge Bases of Ex Libris products.

Procedure:

Detailed agreements for enhancement processes for the Knowledge Bases will be developed in cooperation between the leaders of the Product (Working) Groups, product managers of Ex Libris, and the leaders of the Ex Libris Knowledge Base teams. These can be part of the agreements on the functional enhancement process, separate agreements, or joint agreements for several Knowledge Bases.

IGeLU and ELUNA Commitments:

- Prioritizing the list of proposed additions to each Knowledge Base.
- Organizing and managing communication about enhancements of the Knowledge Bases among users and Ex Libris.
- Encouraging resource vendors to cooperate with Ex Libris, and facilitating communication between resource vendors and Ex Libris.
- Appointing users to act as representative development partners with Ex Libris.
- Testing the quality and usefulness of metadata delivered by Ex Libris
- Providing Ex Libris with locally developed metadata for resources users have requested to be included in the Knowledge Bases and suggesting possible improvements in existing Knowledge Base metadata.

Ex Libris Commitments:

- Providing access to an annotated and continuously updated list of requested resources for addition to the Knowledge Bases. It should be possible to sort the list by name of resource, date of request, status of request, or other suitable criteria. The mechanism for doing this will be mutually agreed upon by the leaders of the relevant Product (Working) Groups and the Ex Libris product managers.

- Adding resources to the Knowledge Bases in priority order, subject to technical and vendor support.

3. Large Scale Developments

Goal: Enhancing Ex Libris products and maximizing the utility of additions to its product suite by providing user input on: 1) the redesign of major modules / functionalities or the addition of major new features to existing products; 2) the development of new products.

IGeLU and ELUNA Commitments:

- Reporting substantial development needs raised by members of the user community to Ex Libris.
- Selecting users that will serve as members of focus or advisory groups as major new functionality or new products are envisioned, specified, developed, and tested.

Ex Libris Commitments:

- Informing the Steering Committees and relevant Product (Working) Group leaders about major development initiatives for existing products or new products.
- Working with the designated user representatives throughout the development cycle.
- Insofar as possible, selecting development partners who represent a broad spectrum of the existing or potential user community for a product.

4. Strategic Discussion

Ex Libris and the user organizations agree to periodically discuss strategic developments in libraries and in the Ex Libris product suite.

D. Implementation Considerations:

The parties agree to collaborate on moving toward implementation of this agreement as soon as possible.

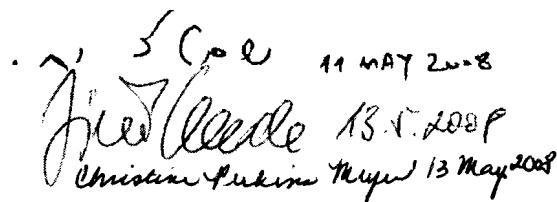
This agreement supersedes The IGeLU's Product Development Cooperation Agreement with Ex Libris (of August 22, 2006). The "Agreement between Ex Libris and ICAU concerning the cooperation in Aleph500 Development" (2004) will be updated according to this agreement.

Agreed By

Ex Libris: Matti Shem Tov, President & CEO

IGeLU: Jiri Kende, IGeLU Chair

ELUNA: Christina Meyer, ELUNA Chair


 J. S. Cole 11 MAY 2008
 Jiri Kende 13.5.2008
 Christina Meyer 13 May 2008