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 & ELUNA Product and Special Interest 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.
- The Steering Committees will be responsible for reaching formal agreements with Ex Libris, and for their implementation, and subsequent evaluation. Agreements will be evaluated periodically and updated as needed.

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.
- 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 management ensures new Product Managers are well versed in the product and company infrastructure and are aware and instructed about the collaboration practices between IGeLU and ELUNA Product Working Groups and Ex Libris product management.
- 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 /Primo central enhancement,
3) large scale development, and
4) strategic discussions

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:
- Prioritization (voting) on enhancements for all products will be managed jointly by the IGeLU and ELUNA Product Working 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.
- Supplementary agreements for enhancement processes for each product can be developed by Product Working Groups and the respective Ex Libris Product Manager.
- The Product Working Groups will provide a prioritized list of enhancements per product to Ex Libris for pointing.
- Ex Libris will assign points to each prioritized enhancement requests or indicate why the request is not eligible for pointing prior to vote.
- After the final vote is complete, Ex Libris will implement as many enhancements as possible in priority order within the set amount of development points for the product.

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 Groups.
- For enhancements to be implemented, reviewing functional specifications as determined by the Product Manager and the leaders of the Product Working Groups.
- Participating in pre-release testing for the enhancements to be implemented, where possible.

Ex Libris Commitments:
- Implementing enhancements with top priorities as soon as possible according to the agreed enhancement cycle.
- Providing high level functional specification for enhancements to be implemented for IGeLU and ELUNA to 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 product documentation.

1.1. Software Enhancement Process

1. All products have varying development cycles, with enhancements delivered in major and minor releases as well as revisions. As a result, the enhancement schedule may differ from product to product.

2. According to the agreed enhancement cycle, Ex Libris will work with the leaders of the Product Working Groups on the schedule for the development cycle that will include user group enhancements and the timing of voting for these enhancements.

3. The product enhancement voting process will begin at least three months before the scope of the next development cycle 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.

4. IGeLU and ELUNA will collect enhancement requests from the user community and enter the requests into the shared enhancement tracking system (e.g. NERS or future system adopted by IGeLU and ELUNA).

5. IGeLU and ELUNA Product Working Groups will prioritize collected enhancements and provide the top enhancements to Ex Libris for review and pointing; no more than 20 enhancements will be submitted for pointing.

6. The Product Managers will review the prioritized enhancements list, indicating the following:

- Items that Ex Libris has already decided to implement. These items will not be allocated development points.
- Items that Ex Libris will definitely not develop and a brief explanation of why the enhancement cannot be developed.
- Items that Ex Libris will consider developing as a user group enhancement; these requests will be assigned development points.

7. The Product Managers will allocate development point estimates for the top prioritized enhancements requested by IGeLU and ELUNA that are considered feasible to implement.

8. IGeLU and ELUNA Product Working Groups will prepare a final slate of votable enhancement requests and will open a voting process in the shared enhancement tracking system (e.g. NERS or future system adopted by IGeLU and ELUNA).

9. 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 which have not licensed the product will not be counted.

10. Ex Libris guarantees a minimum amount of points per enhancement cycle; as many enhancements as possible will be implemented in priority order within the set amount of development points for the product. Dedicated enhancement development points products are agreed upon as follows:

- Alma – 200 (per annum)
- Primo, MetaLib+/PCI (software) – 150 (per annum)
- Aleph – 150 (per major release)
- Voyager – 150 (per major release)
- SFX – 50 (per major release)

11. 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.

2. New resources for the Knowledge Bases and for the Primo Central Index

Goal: Improving the metadata for electronic resources in the Knowledge Bases of Ex Libris Products and in the Primo Central Index.

2.1 Primo Central Index

IGeLU and ELUNA Commitments:

- Prioritizing the list of proposed additions to the Primo Central Index.
- Organizing and managing communication about enhancements to the Primo Central Index between 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.

Ex Libris Commitments:

- Review the top 10 collections list and provide feedback to the IGeLU and ELUNA Product Working Groups
- Adding resources to Primo Central subject to technical and vendor support and the discretion of Ex Libris.

Basic Procedure:

1. IGeLU and ELUNA members will enter suggestions for collections to be implemented in NERS.

2. Voting cycles will be administered on a period basis to all each eligible institution to express their priority. Length of each voting cycle to be determined by IGeLU and ELUNA Product Working Groups and Ex Libris Product Managers.

3. Members can update their priorities during later cycles.
4. After the voting, the Product Working Groups will provide Ex Libris with the top 10 most requested collections, on the condition that each of those collections has also been voted for by at least 10 separate institutions. Collections that were voted for by fewer than 10 institutions will be considered only if all institutions who voted for the resource come from the same region / language area.

5. Ex Libris will review the collections and add them to the Roadmap as soon as possible.

6. If Ex Libris rejects a collection for inclusion, Ex Libris will explain why it will not be added whenever possible.

7. The voting will take place annually.

2.2 SFX/Verde and Alma Knowledge Bases

IGeLU and ELUNA Commitments:

- Prioritizing the list of proposed additions to the SFX/Verde and Alma Knowledge Bases.
- 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.

Basic Procedure:

1. IGeLU and ELUNA members will enter suggestions for resources to be implemented in NERS.

2. Voting cycles will be administered on a period basis to all each eligible institution to express their priority. Length of each voting cycle to be determined by IGeLU and ELUNA Product Working Groups and Ex Libris Product Managers.

3. Members can update their priorities during later cycles.

4. Top regional resources will be determined in a rolling fashion. Two regions are under consideration for each cycle; the regions will be rotated on each cycle. Region is defined according to the international telephone code.

5. After the voting, the Product Working Groups will provide Ex Libris with the top 10 most requested collections, on the condition that each of those collections has also been voted for by at least 10 separate institutions. Collections that were voted for by fewer than 10 institutions will be considered only if all institutions who voted for the resource come from the same region / language area.

6. Ex Libris will review the collections and add them to the Roadmap as soon as possible.

2.3 MetaLib Knowledge Base

Due to the diminished reliance on federated searching, the MetaLib Central Knowledge Base voting process is no longer required and will be discontinued in 2014.

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. This can be carried out by Advisory or focus groups.

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. In so far 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.

Ex Libris agrees to work with the IGeLU and ELUNA when forming ad-hoc advisory groups. (see Primo ranking group, Alma community zone group etc.)

D. Implementation Considerations:

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

This agreement supersedes the prior 2013 version of this agreement[1] and the 2011 CKB agreement[2].

Agreed By

Ex Libris: Matti Shem Tov, President & CEO

IGeLU: Jiri Kende, IGeLU Chair

ELUNA: John Greer, ELUNA Chair

[1]. Shem Tov, Matti, Jiri Kende, and Christina Meyer. Product Development Collaboration Agreement between Ex Libris, IGeLU, and ELUNA. 2008. PDF file.
[2] Shem Tov, Matti, Jiri Kende, and Laura Morse. Agreement on procedure for additions of resources to the Ex Libris Knowledge Bases between Ex Libris, IGeLU, and ELUNA. 2011. PDF file.