

Repository Management Policy

COIN-OR Foundation

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1 Principles

The mission of the COIN-OR Foundation (the Foundation) is to create and disseminate knowledge related to all aspects of computational operations research to the general public, and in particular to students, educators, and practitioners in the field. To this end, the Foundation maintains an Internet repository of open-source software, documentation, and related content. The following principles should be used to guide the development of policy and procedure related to the content and management of the repository.

1.1 Open Source

The COIN-OR Foundation is motivated by the belief that open-source software for operations research provides a benefit to the operations research community as a whole. The Foundation supports the principles of open-source software as stated in the Open Source Definition of the Open Source Initiative¹. Further, the Foundation supports the extension of these principles to all content in the COIN-OR Foundation repository.

1.2 Utility

COIN-OR welcomes a broad range of contributions, including software, standards specifications, interfaces, benchmark problem sets, tutorial materials, models, and documentation. To maximize the utility of the contents of the repository to the operations research community, these principles should be observed:

- The contents of the repository should be of use to practitioners of operations research, including students, researchers, and professionals.
- The contents of the repository should contribute to the advancement of the state of the art in computational operations research.

¹<http://www.opensource.org>

- The contents of the repository should be actively managed and updated to maintain relevance and utility.

1.3 Respect for Intellectual Property Rights

The ownership of intellectual property rights for all content in the repository must be respected.

2 Definitions

A *project* consists generally of a collection of related digital files with a common purpose.

A *production software project* is a project whose purpose is to maintain and improve existing, functioning software. Such projects will consist of source code, documentation, data sets, and other associated files.

A *development software project* is a project whose eventual goal is to develop working software, but that has not achieved that goal yet.

A *non-software project* is a project that does not include software source code. Such projects may include documentation, tutorials, written standards, and data sets, among other things.

A *project manager* is a person designated by the owner(s) of a project to manage development of the project.

A *contribution* consists of one or more digital files or modifications to existing files to be incorporated into the repository in accordance with this policy. Contributions may consist either of a new project or improvements to an existing project.

3 Responsibilities

The Strategic Leadership Board (SLB) will be responsible for establishing and maintaining broad policies regarding management of the COIN-OR repository.

The Technical Leadership Council (TLC) will be responsible for developing specific procedures for repository management in accordance with established policy, including

- procedures and criteria for accepting new projects,
- requirements for the content of a new project.
- acceptance criteria for contributions to existing projects, and
- criteria for determining the significance of a contribution to an existing project (see Section 4.1), and

- procedures and criteria for ensuring projects are actively maintained.

The acceptance criteria for contributions is specified by the TLC. If the TLC is unable to reach a decision regarding a particular project, the question is referred to the SLB.

Project managers are responsible for developing specific contribution procedures for their individual projects, in accordance with policies and procedures established by the SLB and the TLC.

4 Contribution Requirements

4.1 Legal Requirements

In order for a contribution to be accepted into the COIN-OR repository, the following requirements must be satisfied.

1. All contributions must be licensed under an open source license approved by the Open Source Initiative. If a contributor feels that no approved license is appropriate, alternatives will be considered on a case-by-case basis.
2. Each contributor must complete a *Statement of Respect for Ownership* (Appendix A) when their first significant contribution is accepted into the repository. A single contribution whose intellectual property content is deemed insignificant with respect to a larger work will not trigger this requirement. However, frequent insignificant contributions from a single contributor will trigger this requirement. The TLC will establish guidelines for determining if a contributor qualifies for this exemption.
3. Before a new project can be accepted into the repository, the contributor must submit a *Statement of Ownership and Licensing* (Appendix B) for approval, together with a *Confirmation of Licensing* (Appendix B) or equivalent documentation from each legal owner.

4.2 New Project Requirements

Production Software Projects. A new production software project must include the source code for the software, a copy of the open source license, documentation, a test, and installation instructions. The software must work. The software is deemed to work if it can be built from its distribution by following the installation instructions and it passes the included test. The requirements for the content and packaging of a software distribution will be specified in procedure set by the TLC.

Development Software Projects. It is a regrettable truth that it may take a substantial amount of time for a large software project to reach a point where it can perform any useful function. Requests to host development projects will be considered according to procedure specified by the TLC. Development projects will be hosted in a clearly identified *development* section of the repository.

Non-software Projects. Non-software projects must include a copy of the license under which the contribution is being made available. Contributions should include the normal source form of the contribution whenever this is possible and useful.

5 Care and Maintenance Requirements

Where a contribution constitutes a new project (§4.2), the Foundation requires that the contributor designate an individual (the project manager) who will have primary responsibility for maintenance of the project and who will be the liaison with the COIN-OR administration. The project manager will be given access rights to the repository sufficient to maintain the project and any associated material specified in COIN-OR policy and procedure. The project manager will observe COIN-OR policy and procedure for maintaining the project and associated material in the repository.

The TLC will establish guidelines to ensure that projects in the repository remain relevant and are actively maintained. The TLC will also establish procedures for ensuring that projects adhere to these guidelines and for taking action when a project fails to meet established criteria. Review of projects will take place on a regular basis. Review may also be initiated by either the TLC or SLB at their discretion.

6 Coin-OR Infrastructure

The Foundation will provide an infrastructure for maintaining the repository of contributions. For each project, the Foundation will provide an infrastructure for maintaining an electronic mailing list or equivalent forum for communication among project users and maintainers, and for any other requirements specified by COIN-OR policy and procedure.

Appendix A Contributor's Statement of Respect for Ownership

Contributor's Statement of Respect for Ownership

I _____, certify that

- (a) I have read and understood the statement below on Ownership of Intellectual Property;
- (b) for any contribution I make to the Foundation repository, I will make all reasonable efforts to determine the legal owners of the contribution, and I will obtain the permission of the owners of the contribution to make the contribution available under an open source license certified by the Open Source Initiative;
- (c) for any contribution I make to an existing project, I will use the same license the project was released under.

Ownership of Intellectual Property

The creator of a work may not be the sole owner of the intellectual property associated with the work. In general, *any* individual or organization which contributed resources to the development of a work may be a co-owner. The legal ownership depends on the particulars of the situation and the contracts involved. Some employment contracts assert that the employer has ownership rights to any work created by the employee, even if that work is created outside of regular working hours and without the use of the organization's resources. Also, an employer may be fine with contributions to one project but not to another.

Contributors should consult with their management, legal counsel, and/or technology transfer officers when determining the legal ownership of a contribution.

Appendix B Documentation of Ownership and Licensing for New Projects

Contributor's Statement of Ownership and Licensing

I, _____, represent that:

- (a) the individuals and organizations listed immediately below are the only owner(s) of the contribution _____;

- (b) if any part of the contribution is not owned by the individuals and organizations listed in (a), that part was obtained under an open source license certified by the Open Source Initiative; and

- (c) all owners have agreed to license the contribution under the _____, an open source license certified by the Open Source Initiative.

Owner's Confirmation of Licensing

I, _____, am an owner of the contribution _____, and I agree to license any portion I own under the terms of the _____, an open source license certified by the Open Source Initiative.