



This composite document comprises four parts:

1. The original Memorandum of Understanding between Hydra's originating Steering Group members signed by senior staff at the three universities and at MediaShelf LLC.
2. The amendment to the Memorandum of Understanding signed by the then members of the Steering Group. This document has the effect of changing all references to Hydra into references to Samvera.
3. For information, a version of the Memorandum of Understanding which implements the amendments from (2).
4. A blank Letter of Agreement to be signed by new Samvera Partners as part of the formal Partnership agreement.



Hydra Project

**Collaboration and Partnership Memorandum of Understanding
Hydra Originating Steering Group Members – March 26, 2012**

I. Project Background

Hydra is an inter-institutional collaboration to build a common, open source framework for multi-function, multi-purpose, repository-powered applications. As symbolized by its name, Hydra's architecture reflects a "one body, many heads" design: a robust digital repository (the body) anchors feature-rich applications (the heads), tailored to content-, domain- and institution-specific needs and workflows. The operating motto of the project is

"If you want to go fast, go alone. If you want to go far, go together."

As a community framework, Hydra provides like-minded institutions with the mechanism to combine their individual development efforts, resources and priorities into collective solutions with breadth and depth that exceeds the capacity of any single institution to create, maintain or enhance on its own. Hydra's ultimate objective is to produce a community-sourced, sustainable application framework that provides rich and robust repository-powered solutions as an integrated part of an overall digital content management architecture.

II. Intellectual Property Licensing and Ownership

In keeping with the long-term vision of Hydra as a robust and distributed open source product, Hydra Partners and code contributors adopt and are governed by the following principles:

1. Code contributors ("Contributors") warrant that their work created for the Hydra project does not infringe on the legal rights of any person or entity, including but not limited to intellectual property rights. This warranty includes ensuring that Contributors have properly addressed any institutional rights of their "home" or employing institutions, and that they have properly treated any third party software that has been incorporated, including any open source software.
2. The Hydra Steering Group determines at its sole discretion if a Contributor's code is in scope and appropriate for the Project.
3. All code contributed and accepted to the project will be distributed as open source software, licensed under an Apache 2.0 license (or an appropriate Apache or Open Source Initiative (OSI) approved license *sequellae* that is designated by the Hydra Steering Group). Contributors must agree to and sign the applicable (individual and/or corporate) licensing agreement before contributing any code.
4. Hydra project documentation, designs and other written artifacts will also be made available under a Creative Commons or similar license. For the avoidance of doubt, the Hydra name and identity is subject to legal protection and is not subject to use by others except with the permission of the Hydra Steering Group.



III. Project Membership and Governance

1. Hydra Steering Group:

The following entities, each of which is a signatory to this founding Memorandum of Understanding, constitute the originating “Hydra Steering Group:”

- Stanford University
Contact:
Tom Cramer
Chief Technology Strategist, Stanford University Libraries
tcramer@stanford.edu
- University of Virginia
Contact:
Robin Ruggaber
Director, Online Library Environment
robin.ruggaber@virginia.edu
- University of Hull
Contact:
Christopher Awre
Head of Information Management, Library and Learning Innovation
c.awre@hull.ac.uk
- MediaShelf, LLC
Contact:
Matthew Zumwalt
Managing Partner
matt.zumwalt@yourmediashelf.com

Communications to the entire Hydra Steering Group can be addressed to:
hydra-steering@googlegroups.com. See also <http://projecthydra.org>.

The Hydra Steering Group is a small coordinating body of the originating Hydra partner institutions that will steer the technical and community development of Hydra. The Hydra Steering Group is not obligated to adopt additional members. Its members have demonstrated a significant commitment and made corresponding investments in the success and growth of Hydra not only for themselves, but as a collaboration and vital open source effort. Hydra Partners (described more fully in Section 2, below) that have demonstrated commitment to Hydra, made significant investments in the community and effort, and that would make positive contributions to the Steering Group may be nominated to join the Steering Group by a member of the Steering Group. To officially join the Steering Group, institutions must be voted in by a majority of all Steering Group Members. Decisions in the Steering Group are



made by consensus, with each institution receiving a single vote; in the event that consensus cannot be reached, decisions will revert to majority rule. The Steering Group is charged with coming up with processes for making decisions at Steering Group meetings, Partner meetings, and for day-to-day operational matters. Steering Group members can resign at any time with notification to the other members of the Steering Group. Steering Group members can be removed by a majority vote of the other members.

Responsibilities of Hydra Steering Group members include:

- Appoint individuals who have institutional authority to act on behalf of that member institution/entity
- Collaboratively roadmap the project's technology & community development
- Coordinate resources
- Provide governance of the "technology core"
- Decide what becomes official Hydra components
- Help maintain official Hydra components
- Manage the licensing of Hydra code components
- Maintain and grow the community
- Serve as evangelists & seed / support the development of "User Groups"
- Maintain the official Hydra website
- Provision and support the project infrastructure
- Organize and plan Hydra meetings
- Update the governance structure of the project
- Formally admit new Hydra Partners
- Formally accept new Steering Group members
- Manage the Hydra brand
- Represent the Hydra Project to funding agencies and (possible) commercial partners

2. Hydra Partners.

Hydra Partners are institutions, corporations, individuals, or other groups that have committed to contributing to the Hydra community and wish to become fully participating Hydra Partners. They not only use the Hydra technical framework, but also add to it in at least one of many ways, including: code, analysis, design, support, funding, or other resources. Hydra Partners collectively advance the project and the community for the benefit of all participants. Partners get to attend Hydra Partner meetings, provide input on the community and technical direction, and represent Hydra to the broader community. Candidates can join Hydra Partners by being nominated by an existing partner to the Steering Group, and being voted in by the Steering Group. Hydra Partners can be voted out by a majority of the Steering Group members. Partner participation is a privilege not a right. New Hydra partners must execute the Partner agreement to be countersigned by a designated representative of the Hydra Steering Group.



What are the responsibilities of Hydra partners? Any or all of the following, or the like, as deemed by the Steering Group as valid contributions:

- Hydra head development
- Code contribution to the “core”
- Maintenance of previously contributed code
- Design contribution
- Documentation and sharing of contributions
- Resource coordination
- Recruiting
- Evangelism

IV. Financial Structure

Hydra Partners (whether originating or new) are each individually responsible for their financial expenses; however, they intend to share certain common project costs, including code management and hosting of Hydra. As part of its planned review of the structure and operations, the Steering Group will provide a structure for such sharing of specific financial obligations and shall propose specific agreements from time-to-time to address those costs. However, the Steering Group does not have the authority to commit institutional resources of any of the Hydra Partners.

V. Term and Termination

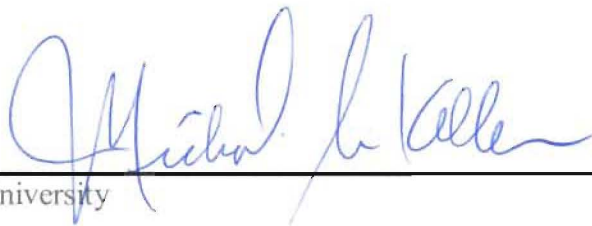
The Hydra Steering Group is committed to establishing Hydra as an ongoing collaborative project. The vote of a majority of the Steering Group may, however, serve to dissolve this Memorandum of Understanding and with it, Hydra as a formal organization. Similarly if no action is taken under this Memorandum of Understanding for a period of three years, it is dissolved.

VI. Additional Understanding of the Originating Hydra Steering Group Members


The original signatories to this Collaboration and Partnership Memorandum of Understanding acknowledge and agree that all intellectual property including but not limited to software/code that each has contributed to the Hydra project is, and is intended retrospectively, to be governed by the same terms outlined in Section II. “Intellectual Property Licensing and Ownership.” For avoidance of doubt, each signatory hereto specifically agrees that existing software/code contributions provided on Attachment A are and shall be governed by Section II 3.




ACKNOWLEDGED AND AGREED TO:


Stanford University 120328
Date


University of Virginia 3.26.12
Date


University of Hull 4.12.12
Date


MediaShelf, LLC 3.27.2012
Date



FIRST AMENDMENT TO MEMORANDUM OF UNDERSTANDING

This First Amendment to Memorandum of Understanding (“**Amendment**”), is effective as of December 1, 2017 (“**Amendment Effective Date**”), is made and entered into by and between the current members of the Samvera Steering Group which are as follows: the University of Hull, Data Curation Experts, The Leland Stanford Junior University, Indiana University, Penn State University, DuraSpace, and the University of Virginia (together referred to as the “Parties”).

WHEREAS, the Hydra Steering Group, then consisting of The Leland Stanford Junior University, the University of Virginia, the University of Hull and MediaShelf, LLC, entered into the Hydra Project Partner Collaboration and Partnership Memorandum of Understanding dated March 26, 2012 (“Memorandum of Understanding” or “MOU”), and

WHEREAS, the Samvera Steering Group, which is the current steering committee for the “Samvera Community” formerly known as the Hydra Project, wishes to rename the “Hydra Project” as the “Samvera Community” and in all other respects, to replace “Hydra” with “Samvera” on a going forward basis;


WHEREAS, as result of the foregoing recital, the Parties wish to amend the Agreement solely and expressly as stated herein.

NOW, THEREFORE, in consideration of the foregoing and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

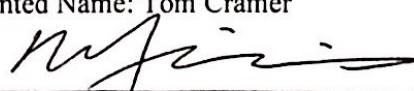
1. Page 1, Title, entitled “Hydra Project” is amended by deleting the words “Hydra Project” and replacing these with “Samvera Community”; and deleting the line “Hydra Originating Steering Group Members – March 26, 2012”.
2. Section I, first paragraph, replace the words “As symbolized by its name” with “As symbolized by its original name, Hydra,”.
3. Page 1-5, *seriatim*, all instances of “Hydra Project” shall be deleted and replaced with “Samvera Community”.
4. Page 1-5, *seriatim*, all remaining instances of “Hydra” shall be deleted and replaced with “Samvera”.
5. Section III(1), delete reference to “hydra-steering@googlegroups.com” and “<http://projecthydra.org>” and replace with “samvera-steering@googlegroups.com” and “<https://samvera.org/>”.
6. Section III(2), delete the bullet point “Hydra head development” and replace with “Samvera application development”.
7. In all other respects, the MOU remains in full force and effect. In the event of a conflict between the terms set forth in the MOU and the Amendment, this Amendment shall prevail.

IN WITNESS WHEREOF, the Parties have caused this Amendment to be executed as of Partner's signature date below:


SAMVERA STEERING GROUP




Stanford University Date Jan 23, 2018
Printed Name: Tom Cramer



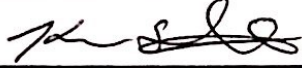
Stanford University Date 1/23/2018
Printed Name: Mike Giarlo



University of Hull Date 1/23/2018
Printed Name: Chris Awre




University of Hull Date 1/23/2018
Printed Name: Richard Green




Penn State University Date 1/23/2018
Printed Name: Karen Estlund




University of Virginia Date 1/23/2018
Printed Name: Robin Ruggaber




Indiana University Date 1/23/2018
Printed Name: Jon Dunn



Data Curation Experts Date 1/23/2018
Printed Name: Mark Bussey



Data Curation Experts Date 13 Feb 2018
Printed Name: Bess Sadler



DuraSpace Date 1/23/2018
Printed Name: Debra Hanken Kurtz



Samvera Community

Collaboration and Partnership Memorandum of Understanding

I. Project Background

Samvera is an inter-institutional collaboration to build a common, open source framework for multi-function, multi-purpose, repository-powered applications. As symbolized by its original name, Hydra, Samvera's architecture reflects a "one body, many heads" design: a robust digital repository (the body) anchors feature-rich applications (the heads), tailored to content-, domain- and institution- specific needs and workflows. The operating motto of the project is

“If you want to go fast, go alone. If you want to go far, go together.”

As a community framework, Samvera provides like-minded institutions with the mechanism to combine their individual development efforts, resources and priorities into collective solutions with breadth and depth that exceeds the capacity of any single institution to create, maintain or enhance on its own. Samvera's ultimate objective is to produce a community-sourced, sustainable application framework that provides rich and robust repository-powered solutions as an integrated part of an overall digital content management architecture.

II. Intellectual Property Licensing and Ownership

In keeping with the long-term vision of Samvera as a robust and distributed open source product, Samvera Partners and code contributors adopt and are governed by the following principles:

1. Code contributors (“Contributors”) warrant that their work created for the Samvera Community does not infringe on the legal rights of any person or entity, including but not limited to intellectual property rights. This warranty includes ensuring that Contributors have properly addressed any institutional rights of their “home” or employing institutions, and that they have properly treated any third party software that has been incorporated, including any open source software.
2. The Samvera Steering Group determines at its sole discretion if a Contributor’s code is in scope and appropriate for the Project.
3. All code contributed and accepted to the project will be distributed as open source software, licensed under an Apache 2.0 license (or an appropriate Apache or Open Source Initiative (OSI) approved license *sequellae* that is designated by the Samvera Steering Group). Contributors must agree to and sign the applicable (individual and/or corporate) licensing agreement before contributing any code.
4. Samvera Community documentation, designs and other written artifacts will also be made available under a Creative Commons or similar license. For the avoidance of doubt, the Samvera name and identity is subject to legal protection and is not subject to use by others except with the permission of the Samvera Steering Group.



III. Project Membership and Governance

1. Samvera Steering Group:

The following entities, each of which is a signatory to this founding Memorandum of Understanding, constitute the originating “Samvera Steering Group:”

- Stanford University
Contact:
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Chief Technology Strategist, Stanford University Libraries
tcramer@stanford.edu
- University of Virginia
Contact:
Robin Ruggaber
Director, Online Library Environment
robin.ruggaber@virginia.edu
- University of Hull
Contact:
Christopher Awre
Head of Information Management, Library and Learning Innovation
c.awre@hull.ac.uk
- MediaShelf, LLC
Contact:
Matthew Zumwalt
Managing Partner
matt.zumwalt@yourmediashelf.com

Communications to the entire Samvera Steering Group can be addressed to:
samvera-steering@googlegroups.com. See also <https://samvera.org>.

The Samvera Steering Group is a small coordinating body of the originating Samvera partner institutions that will steer the technical and community development of Samvera. The Samvera Steering Group is not obligated to adopt additional members. Its members have demonstrated a significant commitment and made corresponding investments in the success and growth of Samvera not only for themselves, but as a collaboration and vital open source effort. Samvera Partners (described more fully in Section 2, below) that have demonstrated commitment to Samvera, made significant investments in the community and effort, and that would make positive contributions to the Steering Group may be nominated to join the Steering Group by a member of the Steering Group. To officially join the Steering Group, institutions must be voted in by a majority of all Steering Group Members. Decisions in the



Steering Group are made by consensus, with each institution receiving a single vote; in the event that consensus cannot be reached, decisions will revert to majority rule. The Steering Group is charged with coming up with processes for making decisions at Steering Group meetings, Partner meetings, and for day-to-day operational matters. Steering Group members can resign at any time with notification to the other members of the Steering Group. Steering Group members can be removed by a majority vote of the other members.

Responsibilities of Samvera Steering Group members include:

- Appoint individuals who have institutional authority to act on behalf of that member institution/entity
- Collaboratively roadmap the project's technology & community development
- Coordinate resources
- Provide governance of the "technology core"
- Decide what becomes official Samvera components
- Help maintain official Samvera components
- Manage the licensing of Samvera code components
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2. Samvera Partners.

Samvera Partners are institutions, corporations, individuals, or other groups that have committed to contributing to the Samvera community and wish to become fully participating Samvera Partners. They not only use the Samvera technical framework, but also add to it in at least one of many ways, including: code, analysis, design, support, funding, or other resources. Samvera Partners collectively advance the project and the community for the benefit of all participants. Partners get to attend Samvera Partner meetings, provide input on the community and technical direction, and represent Samvera to the broader community. Candidates can join Samvera Partners by being nominated by an existing partner to the Steering Group, and being voted in by the Steering Group. Samvera Partners can be voted out by a majority of the Steering Group members. Partner participation is a privilege not a right. New Samvera partners must execute the Partner agreement to be countersigned by a



designated representative of the Samvera Steering Group.

What are the responsibilities of Samvera partners? Any or all of the following, or the like, as deemed by the Steering Group as valid contributions:

- Samvera application development
- Code contribution to the “core”
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- Recruiting
- Evangelism

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Samvera Partners (whether originating or new) are each individually responsible for their financial expenses; however, they intend to share certain common project costs, including code management and hosting of Samvera. As part of its planned review of the structure and operations, the Steering Group will provide a structure for such sharing of specific financial obligations and shall propose specific agreements from time-to-time to address those costs. However, the Steering Group does not have the authority to commit institutional resources of any of the Samvera Partners.

V. Term and Termination

The Samvera Steering Group is committed to establishing Samvera as an ongoing collaborative project. The vote of a majority of the Steering Group may, however, serve to dissolve this Memorandum of Understanding and with it, Samvera as a formal organization. Similarly if no action is taken under this Memorandum of Understanding for a period of three years, it is dissolved.

VI. Additional Understanding of the Originating Samvera Steering Group Members

The original signatories to this Collaboration and Partnership Memorandum of Understanding acknowledge and agree that all intellectual property including but not limited to software/code that each has contributed to the Samvera Community is, and is intended retrospectively, to be governed by the same terms outlined in Section II. “Intellectual Property Licensing and Ownership.” For avoidance of doubt, each signatory hereto specifically agrees that existing software/code contributions provided on Attachment A are and shall be governed by Section II 3.



ACKNOWLEDGED AND AGREED TO:

Stanford University

Date

University of Virginia

Date

University of Hull

Date

MediaShelf, LLC

Date



Samvera Community

Partner Letter of Agreement

For the purposes of this Partner Letter of Agreement “Samvera Community” or “Samvera” shall mean the inter-institutional collaboration to build a common, open source framework for multi-function, multi-purpose, repository-powered applications referenced herein. Samvera's ultimate objective is to produce a community-sourced, sustainable application framework that provides rich and robust repository-powered solutions as an integrated part of an overall digital content management architecture.

The Collaboration and Partnership Memorandum of Understanding of the Samvera Originating Steering Group Members, as amended from time to time (hereinafter “Samvera MOU”) which is attached to this letter agreement and incorporated herein by reference describes the project background, intellectual property licensing and ownership, project membership and governance, the responsibilities of the Samvera Steering Group members (a current list of which can be found at <https://wiki.duraspace.org/display/samvera/Samvera+Steering+Group+membership>) and the responsibilities of Samvera Partners. As provided in the MOU:

Samvera Partners are institutions, corporations, individuals, or other groups that have committed to contributing to the Samvera community and wish to become fully participating Samvera Partners. They not only use the Samvera technical framework, but also add to it in at least one of many ways, including: code, analysis, design, support, funding, or other resources. Samvera Partners collectively advance the project and the community for the benefit of all participants. Partners get to attend Samvera Partner meetings, provide input on the community and technical direction, and represent Samvera to the broader community. Candidates can join Samvera Partners by being nominated by an existing partner to the Steering Group, and being voted in by the Samvera Steering Group. Samvera Partners can be voted out by a majority of the Samvera Steering Group members. Partner participation is a privilege not a right. New Samvera partners must execute the relevant Partner agreement to be countersigned by a designated representative of the Samvera Steering Group.

By executing this Partner Letter of Agreement, the entity named below indicates its wish to join the Samvera Community as a Samvera Partner and further confirms that it has reviewed, understands and agrees with the terms outlined in the Samvera MOU. The applicant has been nominated by an existing Samvera Steering Group Member.

Entity	Authorized Signature	Date
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Authorized Signer's Printed Name	Title
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Nominated by: _____ (Steering Group Member)

Application Accepted by the Samvera Steering Group: ____ Yes ____ No Date: _____

Samvera Steering Group Authorized Signature: _____
(Name)