Current state of policy/procedure

- Currently in working draft “status”
- Goal: to come up with a policy that allows authors to license their software when needed
- Jefferson Lab policy will cover staff and research funded through the Lab
  - Collaborators should work with home institutions and funding organizations for their policies as well
When to license

• (per Lab legal dept) Code has a default license/copyright
• In most cases, license not needed
• Policy is to license when Jefferson Lab or DOE has an interest in formal documentation
  — Limit liability
  — Enable compatible licenses for work with industry partners
  — Formal deliverables
  — Software with substantial potential commercial value

• In many cases, collaboration agreements should handle some of the things that licensing might cover
  — Rules of behavior, attribution, etc.
• Citations, DOI’s also useful to accomplish these goals
Procedure

- OSS should be registered using an online form, specifying at a minimum
  - Name and short description of the software
  - Funding source
  - Location (e.g., GitHub repository)
  - Description of license

- Approvals
  - Software owner with comments assessing potential intellectual property/commercial value
  - If potential value, route to CTO
  - CIO
  - Legal Counsel

- Lab STI Manager responsible for submission to DOE/OSTI
- Lab will provide public listing of all OSS software
Draft license: most cases will use a version of the MIT license

• 5 important attributes
  – Copyright claim
  – Permission to licensee to modify and redistribute
  – Disclaimer of liability
  – Acknowledgment (attribution) requirement for redistributions
  – Non-endorsement (of downstream development/usage)

• Additional language to cover special cases
  – Restrict development of software
  – Limitations based on expectation of downstream use of software
  – Retention of rights for possible commercial value
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Restricting development of the software

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LGPL option: strong downstream restriction

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Roles / Responsibilities

- Software owners and authors will identify software that should be formally documented through this policy, and are responsible for ensuring that the license for their OSS is appropriate.
- Sponsors/supervisors are responsible to help perform preliminary assessments as to whether software has potential commercial value.
- The Lab CTO and Technology Transfer Committee will review software license requests to review intellectual property/patent opportunities.
- The Lab CIO will maintain this policy and is responsible for the overall software environment at the Laboratory, and will ensure that requests to formally document OSS software are appropriate.
- The Lab Legal Counsel will review formal OSS software documentation to ensure that legal compliance requirements are met, that the licensing described is appropriate, and as a final review for intellectual property/patent opportunities.