

CIOC Open Source Community of Practice Charter

Revision June 22, 2007

Business Opportunity	<p>BACKGROUND:</p> <ul style="list-style-type: none">▪ <u>In General:</u> Open Source Software (“OSS”) development and distribution provide viable information systems solutions. OSS is maturing in its diversity of offerings and technical functionality. It is having a growing impact and increasingly noticeable effect on the software industry. The possibility of developing or acquiring higher-quality software at lower costs serves as a primary appeal. Eventually, open source solutions will likely compete with a broad range of closed source products in all markets. Information organizations must engage in enterprise planning and policy-making if they are to leverage the best use of the opportunities presented by OSS.▪ <u>In the Public Sector:</u> International, federal, state and local governments are developing acquisition and use policies, practices and standards concerning open source products. Worldwide, the public sector increased its interest in open source products in the last two to three years. Information technology research and advisory experts recommend that public sector entities acquire open source products through best value and total cost of ownership assessments, comparing open source solutions to closed source alternatives. Subject matter experts across the country also emphasize the need for governmental entities to establish enterprise open source policies to maximize value and minimize risk.▪ <u>In the State of Oregon:</u> The State of Oregon is a globally recognized leader in open source innovation. Governor Kulongoski recognizes open source as key driver for Oregon’s economic development. Oregon is or has been home to the Linux Foundation, Open Technology Business Center, and Oregon State University Open Source Lab (OSU OSL). Linus Torvalds, the creator of the Linux kernel, relocated to Portland in 2004. And, OSU OSL is the host for the Linux kernel among other open source technologies. Oregon has hosted the Government Open Source Conference (GOSCON) since October 2005. In its debut and on its first anniversary in 2006, GOSCON participants represented federal/state/local/municipal governments, industry, and academia.▪ BUSINESS OPPORTUNITY: In the late 1960’s, a new technology emerged and 30 years later it had become ubiquitous - the Internet. With the advent of the Internet and the World Wide Web, information became accessible through a browser or thin-client. From an operating system, database, and Software application perspective, that information was and still is predominantly collected, processed, and made accessible via the use of proprietary or “Closed Source” Software. The widespread development, sharing and distributing of open source software applications emerged in a span of less than 10 years, becoming a significant force in the delivery of business solutions.▪ Open source represents a new business model for community-based development, maintenance and technology refresh of both utility and commoditized and public domain applications. Open Source Software is based on the principle that end-users
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	<p>should be provided the source code of information systems programs and should be free to use, share, modify and enhance software products within the rights and obligations outlined by applicable license agreements. The goal is widespread interoperability, permissive incorporation into new technologies and new systems, and control over the destiny of the systems employed by users and organizations.</p> <ul style="list-style-type: none"> ▪ Some open source products are available royalty-free. The precise rights and restrictions imposed on open source software depend upon the specific terms of the license under which it is distributed. Like closed source software licenses, open source licenses pose their own set of legal, business and technical issues for the users and the organizations employing them. There are nearly 60 different license types currently recognized by the Open Source Initiative (“OSI”), and others not recognized by OSI. The State must assess and determine which core group of such licenses it will consider as acceptable in forming an appropriate policy for acquisition, use and distribution of open source solutions.
Team Charge	<p>IN GENERAL:</p> <ul style="list-style-type: none"> ▪ To strategically engage the state (government)with the Open Source community ▪ To recommend standards, policies and methodologies for open source software evaluation, acquisition and use. ▪ To consider open source opportunities for accomplishment of the mission of state government. ▪ To achieve the State’s business objectives in compliance with State of Oregon law and regulation. <p>IN PARTICULAR:</p> <ul style="list-style-type: none"> ▪ The Open Source Community of Practice is charged with three (3) assignments for completion by December 31, 2007: <ol style="list-style-type: none"> 1. Develop a high level inventory providing a glimpse into the current usage of open source software throughout state government. The first version of this inventory has been completed, but depending on the results of the other two assignments, a second more detailed inventory analysis may be needed to provide the enterprise with the information necessary for future decisions. 2. Develop best practice processes and methodologies that agencies can use to evaluate desktop software solutions. 3. Conduct an analysis to develop recommendations for standard policies and methodologies concerning the evaluation, distribution and acquisition of open source solutions that are in compliance with State of Oregon law and regulation.
Business Objectives	<ul style="list-style-type: none"> ▪ Formalize strategic partnerships relating to open source solutions with government, industry, academia, and non-profit to the maximum degree possible under State law and regulation. ▪ Recommend standard open source business case development methodologies and templates that incorporate best value and total cost of ownership (i.e. lifecycle cost) concepts.

	<ul style="list-style-type: none"> ▪ Develop and recommend standard OSS evaluation and acquisition methodologies, including recommendations for OSS maintenance and support. ▪ Collaborate with the State Procurement Office (SPO), the Department of Justice and interested parties to propose acquisition processes that ensure equitable competition between open and closed solutions. ▪ Formulate and recommend statewide policies regarding the evaluation, acquisition, use and distribution of open source solutions.
Sponsorship	<ul style="list-style-type: none"> ▪ The Open Source Community of Practice is sponsored and promoted by the State CIO and the Chair of the CIO Council. ▪ The CIO Management Council will act as the Steering Committee for the Open Source Community of Practice. ▪ The full CIO Council will ratify the work of the Open Source Community of Practice.
Stakeholders	<ul style="list-style-type: none"> ▪ State CIO, CIO Council, State Procurement Office, Department of Justice, all state agencies, local government, interested trade organizations, interested open source communities, academia, and non-profit.
Outcomes/ Deliverables	<ul style="list-style-type: none"> ▪ Partnerships – Partnerships around open source solutions are established and strengthened. ▪ Inventory – An inventory of OSS is developed to a level necessary for policy level decision making ▪ Standard Methodologies and Templates - Standard open source business case, evaluation, acquisition and procurement methodologies and templates are developed and endorsed by the CIO Council. ▪ Statewide Policies - Statewide policies or guidelines regarding the evaluation, acquisition, use and distribution of open source solutions are drafted, endorsed by the CIO council, and promulgated throughout state government by the Department of Administrative Services in compliance with law and regulation. ▪ Evaluation Criteria - Open source technologies are afforded consideration and evaluation criteria in a blended technology environment. ▪ The State of Oregon maintains or enhances control over application and system lifecycles, avoiding vendor lock-in.
Key Benefits	<ul style="list-style-type: none"> ▪ A ‘community’ of interest; leveraged resources. ▪ Common understanding about the best and most appropriate methods for acquisition and use of Open Source solutions in the government information technology environment. ▪ Best practices. ▪ Potential cost savings and/or cost avoidances, allowing increased application of resources to programs needs. ▪ Public and private, government, academia and industry, strategic partnerships and business and technology collaboration.
Measures of Success	<ul style="list-style-type: none"> ▪ Agencies have a clear understanding and awareness of approved methods and policies for the acquisition, use and distribution of OSS within the state’s technology environment. ▪ Agencies actively compete and transparently evaluate open source and closed source technologies.

	<ul style="list-style-type: none"> ▪ Agencies pursue the use of open source solutions where the business case justification to do so exists. ▪ Evaluation criteria are consistent in a blended technology environment. ▪ Procurement law and rules are consistent for all business solution opportunities.
Time Commitment / Duration	<ul style="list-style-type: none"> ▪ The Open Source Community of Practice charter is extended through December 31, 2007. ▪ It is expected that workgroups of the Open Source CoP will be established for shorter durations to address specific challenges and opportunities. ▪ The activities and efforts of the CoP and any workgroups will be reviewed monthly and consideration will be given for continuance. ▪ Open Source CoP members can expect their work efforts to vary. The expectation is that the core group of CoP members will meet on a monthly basis. Supporting staff are expected to meet more frequently to complete assigned work.
Methodology / Process	<p><u>Methodology</u></p> <ul style="list-style-type: none"> ▪ The core team will identify and prioritize open source focus areas or areas of opportunity. A list may include: public sector Open Source business model, creation and recommendation of Open Source business case methodologies and templates, review and recommend modifications to procurement rules, identify business alternatives and open source opportunities. ▪ After prioritizing focus areas, the core team will form workgroups to research, evaluate and recommend open source business alternatives. It is recommended that the core team have no more than three (3) active workgroups. There is a high likelihood that the same individual would either volunteer or be assigned to multiple workgroups. ▪ The core team, or the CIOMC on their behalf, will ensure that invitations to participate are extended to appropriate subject matter experts, process owners, and stakeholders. ▪ The core team will assign a link-pin to each workgroup, and will establish reporting timelines and criteria.
Risks	<ul style="list-style-type: none"> ▪ Open source on a state government-wide basis is an emerging concept. ▪ State government-wide business plans and strategy with which to synch open source are not readily available. ▪ The CIO Council may not choose to remain involved in the development and implementation of state government-wide open source initiatives. ▪ Changes in sponsorship and leadership at the highest level could result in a loss of momentum. ▪ Resource requirements to achieve open source CoP outcomes/deliverables may divert scarce resources and inhibit the state's ability to pursue other high priority enterprise initiatives.
Reporting	<ul style="list-style-type: none"> ▪ The chair will periodically report progress to the CIO Management Council and the full CIO Council. ▪ Summary and supporting work-in-progress documentation will be developed on an iterative basis and will be available to interested members routinely.

Key Assumptions	<ul style="list-style-type: none"> ▪ Agencies are ready and willing to participate. ▪ DAS (EISPD, SPO, SDC, etc) will provide contributing staff to the effort. ▪ State executive management continues to support the initiative. ▪ There is a cross section of expertise that fairly represents the interests of Business and IT stakeholders and the IT community.
Current Initiatives	<ul style="list-style-type: none"> ▪ Open source software inventory initiative ▪ Open source desktop evaluation Methodology ▪ Open source software legal and acquisition analysis
CIOC Issues	<ul style="list-style-type: none"> ▪ Clarify the CIOC expectation regarding sustainable resourcing for the CoP. ▪ Identify Agency participants and CoP membership.

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