

# **COIT Software Evaluation Policy**

## **Introduction**

Under the provisions of the City and County San Francisco Administrative Code, information resources are the strategic assets of the City and County of San Francisco that will be managed at the direction of the Committee on Information Technology (COIT). The COIT Software Evaluation Policy will require a standard, rigorous evaluation of the operational benefits and total cost of ownership of new software. The Software Evaluation Policy will require departments to consider open source alternatives, when available, on an equal basis to commercial software, as these may reduce cost and speed the time needed to bring software applications to production. (Open source software means that the underlying source code is not copyrighted and therefore available free of charge to read, modify, and build upon.) This policy is part of the City's Open SF project which is intended to engage our constituents in developing creative solutions to our shared challenges.

## **Purpose**

The purpose of the COIT Software Evaluation policy is to ensure that all departments thoroughly and fairly evaluate software alternatives, including open source prior to acquiring new software. New software means an additional software system or a complete replacement of an existing system, rather than an upgrade or modification to an existing system. COIT believes that a rigorous evaluation process will help departments make software choices that meet operational requirements, reduce costs, and possibly speed the time to bring software applications into production. The intent is that this process occurs concurrent with existing procurement process and does not add additional time to the procurement process.

## **Policy**

The Software Evaluation Method or equivalent method must be used for all new software purchases over \$100,000. COIT directs that the Software Evaluation Method or equivalent method be used for all new software purchases, including non-application software, such as databases, operating systems, web application servers. The Software Evaluation Method shall be available on the COIT website and will be developed and maintained by the City's Chief Information Officer.

- Departments are responsible for completing the Software Evaluation Method or equivalent method at two possible junctures:
  1. In cases where requirements have been established, but no software solution identified, the Software Evaluation Method or

equivalent must be part of the evaluation of responses to a Request for Proposal or similar procurement vehicle; or

2. In cases where a software solution has been identified, the Software Evaluation Method must be applied prior to commencing a request for bids through the Technology Store or similar procurement vehicle.
- The CIO will reject purchases that do not document that they have followed the COIT Software Evaluation Method or equivalent process.
  - The CIO will determine whether a department has made a good faith effort to consider open source software alternatives, and may reject purchases that do not.
  - The Performance and Planning and Budget Subcommittees will review each Software Evaluation as part of its oversight of IT projects.
  - New enterprise agreements for existing software used by the City are not considered a new software acquisition.
  - Exceptions to this standard can be granted by COIT upon request by department.

### **Dates**

Approved by Resources Subcommittee: January 6, 2010

Approved by COIT: January 21, 2010

Effective Date: February 1, 2010