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# Open Source Product Adoption Evaluation Worksheet

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**A Tool for Evaluating Products**

September, 2018

This worksheet is designed to help an immunization program evaluate an open source product for potential adoption. The questions posed in this worksheet are derived from the Debian Free Software Product Guidelines<sup>1</sup> and include several aspects that should be considered before an open source product is selected for adoption, such as:

- Can the product's source code be manipulated?
- How much does the product cost?
- Are there licensing restrictions regarding distribution or use?
- How accessible is the product?
- How complex is the product?

Answering the questions in this worksheet will help your program think about and evaluate which aspects of an open source product are important to you and may help guide your final decision. Your program may have additional considerations to assess before making a final decision to adopt the product being evaluated.

It is unlikely that any one individual will have the answers to all of the questions posed below. As a best practice, this worksheet should be completed as a team: at a minimum, include a technical consultant (someone who understands code and development standards), a user/program analyst (someone who understands what your organization needs from a particular application), and a program manager (someone who can decide what kinds of resources can be invested in adopting and implementing the tool).

This document includes aspects of the Open Source Definition and is structured as a worksheet. It also includes questions to prompt further analysis as to whether a particular project is appropriate for your program to pursue. These questions are intended to help you understand what it means to be open source and how you can tell if the software you are considering is open source. Most importantly, the document guides you and your team in how to make decisions about whether an open source product is appropriate for the project you're considering.

Use the space in the comments section to keep notes of any discussion points, areas for further consideration, or questions that cannot be answered by the team you have assembled. At the end of the worksheet, there is a place for you to document your team's final decision about whether and why the application you are considering is worth pursuing.

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<sup>1</sup> <https://opensource.org/osd>

## Source Code

Does the product include source code, and is it available both as code as well as in a compiled form (i.e., as a functional application)? If not, can the code be obtained easily (e.g., downloading via the internet)? Is the source code in a format and language that a programmer could modify? Can the source code be manipulated without any translation or proprietary knowledge?

- Yes** – The source code is available, is written in a well-known programming language, and can be modified without proprietary information.
- No** – The source code is not available separately from the compiled application, or it is written in an obfuscated manner, requires translation or preprocessing to access, or requires other proprietary information to modify.

### Consider:

Does it require a technical resource to implement? Do you have the resources you need to implement the product? If modifications are required, do you have the resources to make those changes, or would you need outside resources? If the product is under development, is your program able to move that development forward, or do you need a final stable product?

Comments:

## Source Code Compatibility

Is the open source software platform compatible with other technologies that will interact with it? Do you have the resources needed to integrate technologies that are built on different platforms? (E.g., if the product is Java based but the technology it needs to interface with is built on a .NET platform, do you have resources that can bridge that gap?)

- Yes** – The product is built on the same platform, or my organization has adequate resources to help bridge compatibility gaps.
- No** – The product is built on a different platform from my core technology, and my organization does not have adequate resources to help bridge potential gaps.

### Consider:

If the open source software platform is intrinsically different from the core technology of the application that is consuming the open source capabilities, how will that affect adoption and implementation? Will you be able to maintain resources and skill sets to support multiple technology platforms? If the technology is based on a neutral service or API (application programming interface), what other issues might you encounter (e.g., network dependencies, costs, etc.).

Comments:

## Derived Works and Source Code Integrity

Often, products that are derived from source code must adhere to the original code's terms. Can this product and any derived works (i.e., any application that comes into existence as a result of this application) be modified and distributed under the same terms as the original product?

- Yes** – The product and any related work can be modified and distributed without any additional licensing, or the license explicitly permits distribution of the source code with “patch files” that modify the product at build time.
- No** – The product or any derived work requires a separate licensing review or may have associated costs.

### Consider:

Can you do what you need to do with this product as it exists today? Do you need it to do something different from what it was originally designed to do? Do you need only a piece of the product? If so, are you able to extract what you need and modify it without affecting the integrity of the original product? If you adopt this product and modify it, are you acting in accordance with the license under which it was originally distributed?

Comments:

## Security

Is there a process in place that controls who can make changes to the source code, including a mechanism for preventing malicious code from being introduced?

- Yes** – The processes for development, maintenance, review, testing, and deployment are well documented, and when vulnerabilities are identified, they are quickly and effectively remediated.
- No** – The processes for integrating source code changes are not documented or not well understood, or there is no code review process, or there is no mechanism for remediation when vulnerabilities are identified.

### Consider:

Does the development team have a track record of providing trustworthy and reliable products? If a security issue is identified, how will your team modify use of the product if a patch isn't immediately available?

Comments:

## Non-discriminatory

Can any person or group of persons use this product? Can any field of endeavor use this product? (E.g., if the tool was designed for one field of study but is freely available for modification by another group, would they be able to do that?)

- Yes** – The product can be used by anyone for anything.
- No** – The product cannot be used by everyone for anything.

### Consider:

If not, why can the product be used by certain persons only? If the product cannot be used by some organizations, what are the restrictions? Are these simply knowledge and subject matter limitations?

Comments:

## License Must Not Be Specific to a Product

Does the license allow use without requiring use of an otherwise licensed product? (I.e., does it require a separate license for a parent product, for example, to access the application or source code?)

- Yes** – The product can be used and distributed solely within the terms of its license, or all parties to whom the product is redistributed have the same rights as those that are granted in conjunction with the original distribution.
- No** – The rights attached to the product depend on its being part of a particular distribution.

### Consider:

If the license requires a specific product to be used, do you have access to that product and its license benefits? Does that access come with a cost? Do you plan to distribute the product beyond your program? Do you plan to share resources with partners that may not have the originating product?

Comments:

## Distribution of Product

Can the product and the source code be redistributed without the need for additional licensing?

- Yes** – The product and code can be redistributed either from the developer or after local modification without additional licensing.
- No** – Any redistribution of the product or code requires additional licensing.

Consider:

If additional licensing is required, does it conform to the open source definition?

Comments:

## Technology Neutrality

Does the license allow for any individual technology or style of interface to be used to implement the code? (I.e., the license does not restrict the type of hardware, software, device, browser, etc. with regard to implementing the source code.)

- Yes** – The product can be used on any modern technology and allows a variety of interfaces.
- No** – The product is predicated on a particular technology or must be used with a particular interface.

Consider:

Does the license restrict other product (hardware or software) use? Can the product be used with both other open source applications as well as proprietary applications? Are there organizational restrictions with regard to use of open source application?

Comments:

## Cost

Is the source code available free of charge? This includes any code required to keep the product up to date as well as any final compiled product.

- Yes** – The product components and application do not require any fee to obtain, use, modify, or distribute.
- No** – The product has a fee associated with some or all components.

### Consider:

If the product has no cost associated, does it require other in-kind costs (e.g., support services)? If so, how are they accounted for? If the product changes over time such that costs are associated with future releases, are you prepared to continue using the product?

Comments:

## Decision-Making

Do you have the ability to shape the future of the product or project?

- Yes** – There is a mechanism in place for me to inform the decision and prioritization processes for the evolution and ongoing support of the product.
- No** – A governing body that I do not have access to makes decisions about the evolution of the product.

### Consider:

Are there roles that allow you to inform the overall product direction and prioritize development? Is there a mechanism for you to report bugs, enhancement requests, and design?

Comments:

## Purpose and Utility

Does this product do what it purports to do? If it does not currently, do you have reason to believe that it will?

- Yes** – The purpose of this product is clearly articulated, and its functionality can be tested against documented requirements.
- No** – This product does not clearly articulate its purpose, or it does not have requirements that can be tested.

### Consider:

How believable are its claims? What's the history of changes made to date? Can you speak to someone who used this before and ask about their experiences with it?

Comments:

## Flexibility and Implementation

Without modifying source code, does this product allow customization so that it meets your specific needs?

- Yes** – My organization can start using this tool with little or no additional configuration (or the tool allows for customization that would allow me to start using this tool immediately).
- No** – I require additional functionality before considering implementation of this tool.

### Consider:

Will you be able to integrate this product into your workflow? Do you see immediate value by adopting the product as it exists today? If it does require customization, what will you need to do, and how long will it take? What kind of resources and support will you need to do it?

Comments:



## Ongoing Maintenance and Support

Do you have the resources to maintain this product or to help this project continue to evolve?

- Yes** – My organization has the resources to maintain this product as it evolves (regardless of whether or not we invest additional resources in its development).
- No** – This product cannot be used in its current form, or we do not have the resources needed to implement, maintain, or facilitate the evolution of this product.

### Consider:

Are you able to implement this without additional staffing? If you require staffing to implement, will it be one-time (implementation), intermittent (implementation and upgrades), or ongoing (routine maintenance)? Are there other open-source products in use in your organization, and are they well supported? Are there other support and maintenance resources or services you can contract with if needed?

Comments:

## Final Considerations and Recommendations:

Based on your answers above, evaluate your product/project. Is this a product you are willing to adopt? What are the potential challenges you see in committing to this product? If you are on the fence, how would this product need to change to be something you would consider?

Recommendation:

- Adopt this product.
- Do not adopt this product.

Comments: