



## Memorandum of Understanding

**This memorandum of understanding summarizes a grant to the State of Oregon acting by and through the State Board of Higher Education on behalf of Oregon State University (OSU) made by the Northwest Academic Computing Consortium (NWACC) for an *open source helpdesk project* as described below.**

### Project Background

The first generation of OSU Helpdesk Project was launched in January 2003 by Oregon State University's Information Services unit. The project was a response to unsuccessful attempts by various departments to address helpdesk software needs via commercial products or self-developed systems. The goal of the project was to create a modular, web-based, open-source system, subsequently named *Coho*, to meet a variety of users' needs.

The current implementation of the software — *Coho I* — includes a call-tracking module plus optional knowledgebase, calendar, and inventory modules based on various open source products. Coho I has been in production at the OSU Computer Helpdesk since May 2003 and serves more than 19,000 students and over 4,000 staff and faculty. It is also successfully deployed by other universities and organizations.

The Coho I helpdesk project is in the process of becoming a community source project, with partners in state government, private industry, and higher education. Current work includes a major rewrite of the system to produce a 2<sup>nd</sup> generation version — *Coho II*. In the meantime, Coho I continues to be supported and a migration strategy for current users of the first generation is being developed.

NWACC seeks to provide financial support for the Coho Helpdesk Project in order to: (a) help make Coho I easier for NWACC institutions to implement; and (b) participate in the development of the list of feature enhancements and additions to be included in Coho II; and (c) facilitate the use of open source software by NWACC member institutions.

### Deliverables

NWACC's investment in Coho is divided into two phases. Phase I funding is intended to support an upgraded release of Coho I and production of installation scripts and documentation of core modules. Phase II funding is intended to support software development for new or enhanced features to be included in Coho II, proposed by

NWACC and approved by the Coho Open Source Community Governance Committee. Specific deliverables include:

### **Phase I**

- Finalize Coho I core features, installation scripts & documentation
  - Core features: call-tracking, knowledgebase, calendar and inventory modules
  - Installation scripts and documentation for each of these core modules
- Provide installation assistance to NWACC institutions including:
  - Remote support for up to 12 sites
  - Onsite assistance (1 day) for up to 3 NWACC sites

At the conclusion of Phase I, NWACC will propose a list of desired functionality additions or modifications to be considered for inclusion in Phase II. The list will be derived from feedback provided by NWACC members testing Coho I. The Coho Open Community Governance Committee will indicate whether or not items on the list are feasible to include in the Coho II development targets. Based on this information, NWACC will decide whether or not to proceed to Phase II funding.

### **Phase II**

- NWACC proposed Coho II software development
- Development status report for the NWACC November board meeting

### **Project Timeline**

- June 7, 2006 – Project update delivered to NWACC board
- June 30 – Programming and other staff appointed and NWACC install test sites identified
- July 20 – Memorandum of understanding executed by both parties
- August 18 – Coho I released to NWACC schools for implementation
- November 15 – Project report delivered to NWACC board; discussion of future steps
- November 30 – Decision on NWACC funding of Coho II
- December 1, 2006 – Final project invoice(s) delivered

### **Payment Terms**

Oregon State University shall receive, monitor, and report to NWACC on the disposition of project funds. Total funding provided by NWACC shall be limited to \$50,000, payable to OSU as follows:

- Phase 1 (\$15,000) – payable to OSU upon mutual execution of this Memorandum of Understanding;
- Phase II (up to \$35,000) – payable upon NWACC decision to proceed to Phase II and based upon receipt of invoice(s) and supporting documentation for services rendered;

- final project invoice(s) to be received by NWACC not later than December 1, 2006;
- a maximum of 5% of total project funding (\$2,500) may be allocated to project administration.

**Project Budget – Phase I**

<b>Item</b>	<b>amount</b>
Finalize Coho I	\$10,000
NWACC Installation Assistance	\$3,500
Phase 1 Project Administration	\$1,500
<b>Total</b>	\$15,000

**Project Budget – Phase 2**

<b>Item</b>	<b>amount</b>
Coho II Development	\$34,000
Phase 2 Project Administration	\$1,000
<b>Total</b>	\$35,000

**Project Team**

A team consisting of the following individuals shall monitor this project on behalf of NWACC:

Greg Smith, Chief Technology Officer, George Fox University  
 Don Harris, Chief Information Officer, University of Oregon  
 Curt Pederson, Chief Information Officer, Oregon State University

Oregon State University shall designate the following individuals to serve as liaisons with the NWACC project team.

Tammy Barr, Director Technology Support Services, Oregon State University  
 Chris Sinnett, Project Manager, Oregon State University

The Project Team will:

- ensure that the project adheres to the timeline, budget, and deliverables;
- identify NWACC institutions that wish to utilize Coho I software;
- collect feedback on Coho I usage and future enhancement requests from NWACC sites;
- assist OSU in the development of a Community Source governance structure to facilitate future use and growth of the Coho software and other open source packages;
- ensure that NWACC is represented on the Open Community Governance Committee.



## **Project Evaluation**

Evaluation of the Coho I software and documentation will be assessed by soliciting feedback from NWACC institutions involved with the Coho I release. This feedback will be instrumental in determining the desired deliverables for Coho II that will be worked on in 2006. NWACC reserves the right to withdraw funding for Phase II if it is determined that the goals for Coho II do not match the needs of NWACC members using Coho I. NWACC's decision on whether or not to move forward with Phase II funding will be determined by August 31th, based on a report prepared by the project team. This decision will be influenced by progress made with the Coho Open Community Governance committee which should have development goals that can be matched to NWACC Phase II goals. Progress on the project will be evaluated again at the November NWACC board meeting, based on software development milestones on Coho II.

**Accepted on behalf of Oregon State University and the NorthWest Academic Computing Consortium by:**

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Signature	Date
Jim Corbett Director of Administrative Services Oregon State University	

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Signature	Date
Martin Ringle President NorthWest Academic Computing Consortium	