

REFEDS Work Plan 2016

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1. Overview

The fifth funded period of REFEDS completes on 31st December 2015. A full report relating to the fourth period of operation has been prepared and circulated to REFEDS participants via the mailing list, and is available on the REFEDS website:

https://refeds.org/work/work_documents.html.

This workplan will be circulated to all REFEDS participants for comments, presented to the REFEDS Steering Committee for final approval of content and the REFEDS Sponsoring Group for confirmation of expenditure.

In parallel with finalising the Annual Report for 2015, the REFEDS Coordinators have carried out the planning process for the REFEDS 2016 Workplan.

2. Inputs

As per the process undertaken in previous years, REFEDS put out a call for work areas for the 2016 work programme in November 2015 (<https://wiki.refeds.org/display/WOR/2016+Work+Plan>) and discussed these issues in more detail at the REFEDS Fall 2015 meeting in Cleveland the December BoF in Vienna. This crowd-sourcing exercise is intended to represent the inputs and requirements from the community and does not constitute the full and final workplan for REFEDS. Based on feedback from participants via these mechanisms, discussion with partner organisations such as the GÉANT project, Kantara, ISOC and the FIM4R group the following workplan has been proposed and will be presented to the REFEDS Steering Committee for ratification. The proposals will also be shared with the REFEDS Sponsoring Organisations.

In order to effectively manage the workload and focus of REFEDS work, we believe that no more than 6 main work items should be proposed in any one year. It is also essential that each work item have a strong leader to both support the direction of the work and report back to the community on progress. Where work item leaders have not been identified so far, calls will be made to the community for volunteers.



3. Work Items

The following work items have been proposed for the REFEDS workplan in 2016:

1. REF16-1: REFEDS Coordination and Management.
2. REF16-2: Specialist Working Groups.
3. REF16-3: Promotion and Communication.
4. REF16-4: Standards and Specifications.
5. REF16-5: REFEDS Services

REF16-1: REFEDS Coordination and Management

This work item is the hub at the centre of REFEDS and represents the work to keep the group moving forward organisationally and administratively. It also manages the communications efforts for REFEDS. Increasingly, as REFEDS produces more outputs, there will be a need for the effort in this work area to increase to support lightweight maintenance of outputs.

Licia Florio and Nicole Harris will carry out work in this area with support from in-house staff at the GÉANT Association.

REF16-1: REFEDS Coordination and Management

Lead: Licia Florio / Nicole Harris

Aims:

- To progress REFEDS position as an important player within the access and identity management space internationally.
- To build on established relationships with GÉANT project, ISOC and Kantara.

Work Items / Milestones:

- REF16-1A REFEDS BOFS at appropriate meetings throughout the year.
- REF16-1B Maintain and develop the REFEDS blog, wiki and website.
- REF16-1C REFEDS annual meetings.
- REF16-1D Implement 2016 REFEDS Survey.
- REF16-1E Manage REFEDS contracts with third parties.
- REF16-1F Manage REFEDS Sponsorships.

Budget:

12000 euros – REFEDS Coordinator time.

10000 euros – travel budget.

References:

- <https://www.refeds.org>.
- <https://wiki.refeds.org>.
- <https://blog.refeds.org>.
- <https://lists.refeds.org>.

REF16-2: Specialist Working Groups

REFEDS provides the opportunity for new ideas and innovations that do not yet have defined outputs to be incubated for specialist work areas. It also supports infrastructure to allow closed discussion groups for more sensitive conversations relating to federation operations.

Any participant in the REFEDS community can propose a specialist work area. The REFEDS Coordinators will provide wiki space, mailing lists and other infrastructure to allow the groups to operate, but it will be the responsibility of each group to foster discussion and develop ideas.

In reaction to community demand, the working groups have been given a higher priority in this year's workplan and we expect to run more working groups than in previous years. This strategy presents some risks, as the groups are fully dependent on the enthusiasm of members to drive the work forward. REFEDS Coordinators will help with scheduling calls and pushing progress where appropriate, but it is vital that the interest comes from the REFEDS Participants.

REF16-2: Specialist Working Groups

Lead: According to WG Chair

Aim:

- To provide infrastructure and support for evolving ideas and areas in the REFEDS community.

Work Items / Milestones:

- REF16-2A FOG: Federation Operators Group.
- REF16-2B OIDC(re): OpenID Connect for Research and Education.
- REF16-2C SIRTFI.
- REF16-2D ORCID.
- REF16-2E IdPs of Last Resort Working Group.

Budget:

- 5000 euros REFEDS Coordinator time / Contractor time.

References:

- <https://wiki.refeds.org/display/GROUPS/Working-Groups+Home>.

REF16-3: Promotion and Communication

REFEDS has not typically invested in promotion and communication work, with the exception of the REFEDS Discovery Guide. The focus has typically been on creating standards and specifications and relying on federations to promote locally to IdPs and SPs. Consistent feedback has indicated that federations are struggling to effectively get the message out to entities / members and would appreciate more central support for REFEDS for this activity. To start addressing this, REFEDS has prepared some initial materials at the end of 2015 as a test approach, and has told federations to contact the REFEDS Coordinators if they would like a more bespoke approach for local promotion.

The community has asked for continuing support for advertising entity categories, which is a clear priority for REFEDS. Other areas that were suggested during the consultation process include:

- A focus on libraries, including outreach to publishers and sharing text to be used in model licenses. AARC has indicated that they would like to work jointly on this work item.
- The creation of a “evangelical SP” to show the benefits of federated access through a best practice demo SP. AARC is also interesting in working jointly on this work item.
- CIC Cloud Cookbook feedback / GÉANT Cloud feedback. Both CIC in the US and the GÉANT Cloud projects are looking for input and feedback on supporting federated identity for cloud.

REF16-3: Promotion and Communication

Lead: Licia Florio

Aim:

- To support federations in providing clear and consistent messaging to members / entities within federations and potential new members / entites.

Work Items / Milestones:

- REF16-3A Promotional material and support for entity categories.
- REF16-3B Evangelical SP.
- REF16-3C CIC Cloud Cookbook feedback / GÉANT Cloud feedback.
- REF16-3D Library focus.

Budget:

- 10000 euros REFEDS Coordinator time / Contractor time.

Reference:

- <https://wiki.refeds.org/display/WOR/2016+Work+Plan+Preparation>.

REF16-4: Standards and Specifications

REFEDS is taking more of a significant role as a body that works on standards and specifications for the community. It has been agreed that where appropriate, this work should be developed as much as possible via the RFC mechanisms.

The aim for 2016 is to embed the work that REFEDS has begun in this area and begin to pilot some of the development and practices. Where appropriate, further entity categories will be put out for consultation – this is likely to include “Academia” and “Affiliation”. REFEDS will also support the continuing conversation about general tagging for entities within metadata. REFEDS will also explore the concept of abstracted attributes, allowing entities a process to signal that they are willing to accept one of a specific group of attributes that achieve the same end (e.g.

REFEDS will also coordinate work to comment and input on developments elsewhere. In 2016, this is likely to include support for a revision of SAML2Int within Kantara, based on work initiated by Internet2. REFEDS will also coordinate liaison between eduPerson / MACE-Dir and REFEDS / SCHAC.

REFEDS has also been asked to continue its work supporting best practice for federation operators and processes that improve interfederation through services such as eduGAIN. A focus for 2016 will be the processes undertaken by federation operators to validate entities and entity claims, including investigating a proposal to enable DNS scope verification.

This work area will also look at defining structure need for governance, editing and oversight of the standards and specifications produced by REFEDS.

REF16-4: Standards and Specifications

Lead: Nicole Harris

Aim:

- To enable REFEDS to provide a home for the creation of standards and specifications relevant to the R&E identity federation community.
- To support federation operators in implementing standards and specifications created as part of REFEDS.

Work Items / Milestones:

- REF16-4A Support revision of SAML2Int.
- REF16-4B eduPerson / SCHAC liaison.
- REF16-4C DNS Scope verification.
- REF16-4D Entity categories.
- REF16-4E Abstract Attributes.
- REF16-4F REFEDS RFC Process.

Budget:

- 5000 euros REFEDS Coordinator time.
- 8000 euros Contractor time.

Reference:

- SCHAC: <https://wiki.refeds.org/display/STAN/SCHAC>.
- MDX: <https://wiki.refeds.org/display/STAN>.
- Entity Categories: <https://wiki.refeds.org/display/STAN>.

REF16-5: REFEDS Services

REFEDS provides support a range of lightweight services for Federation Operators and other parties. In 2016, REFEDS will continue to support the following services.

- MET has been supported for sometime to provide a non-technical overview of entities within federations and to track federation usage. Maintenance will continue in 2016 along with small upgrades.
- REEP has been in place for sometime but has not seen much take-up. In 2016, REFEDS and AARC will jointly pilot the use of REEP for pilots being developed by AARC and generally review the benefits of continuing with REEP operations.
- In 2016, REFEDS joins the GN4 project and the Vietsch foundation in funding FedLab. The goal will be to push entities through the appropriate tests and decide on a future service model for FedLab.

REF16-5: REFEDS Services

Lead: Nicole Harris

Aim:

- To support the infrastructure and maintenance of REFEDS services and other related services (MET, REEP and FedLab)
- To provide ongoing maintenance for services as appropriate.

Work Items / Milestones:

- REF16-5A FedLab.
- REF16-5B MET.
- REF16-4C REEP.

Budget:

- 12000 euros FedLab.
- MET – “in kind” sponsorship by GARR.
- TBD REEP.

Reference:

- FedLab: <https://github.com/rohe/fedlab>.
- MET: <https://met.refeds.org>.
- REEP: <https://reep.refeds.org>.

4. Budget Requirements

| Work Area | Amount |
|----------------------|--------------------|
| REF15-1 | 12000 euros |
| REF15-2 | 5000 euros |
| REF15-3 | 10000 euros |
| REF15-4 | 13000 euros |
| REF15-5 | 20000 euros |
| Travel budget | 10000 euros |
| TOTAL | 70000 euros |
| TOTAL INC VAT | 84700 euros |

5. 2016 REFEDS Income

| Source | Amount |
|--------------------------|--------------------|
| (2015 Carry Over Budget) | 15000 euros |
| Sponsorship | 75000 euros |
| TOTAL | 90000 euros |