

# REFEDS Sponsorship Model

**Author:** Licia Florio and Nicole Harris

## 1. Introduction

To ensure that results are delivered in line with the yearly workplan and to maintain its lightweight infrastructure and administration, REFEDS needs sponsorship. A sponsorship can be given in the form of a yearly donation or in the form of manpower (or both). However only offers in manpower are not sufficient to ensure successful operations as a yearly budget is needed to support the REFEDS website, wiki, blog, meetings and promotional material and more in general to ensure sustainability of resources offered by the GÉANT Association (formerly known as TERENA). All these functions can be grouped as the REFEDS secretariat.

This document proposes a new sponsorship model for approval by the REFEDS-SC. This is inline with the current REFEDS Participants agreement<sup>1</sup>, but seeks to streamline the sponsorship process and provide greater clarity to sponsoring organisations giving greater input into section 4 of the agreement.

## 2. Motivations

REFEDS Participation is open to anyone with an interest and as such is difficult to determine the total number of active participants in REFEDS at any time. Naturally, some participants are more active than others. Nevertheless, from examination of meeting registration lists, there are about 30 participating organisations. However only one third of them are contributing sponsorship. Unsurprisingly they are also the most active manpower contributors.

The REFEDS community has strongly indicated that REFEDS should remain independent from external funding streams to maintain its open agenda and to allow the community to govern its own direction, therefore an adequate sponsorship income is needed to guarantee operations.

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<sup>1</sup> [https://refeds.org/about/about\\_agreement.html](https://refeds.org/about/about_agreement.html).



There have been discussions about the REFEDS sponsorship during different meetings, although this has never been a predominant theme. This is largely because so far REFEDS has been able to gather enough sponsorship to execute the yearly workplan and to run the REFEDS secretariat without any shortfall.

However, due to the economical climate, some (potential) sponsors ask for more tangible benefits associated with their sponsorship to be identified. This is very difficult to determine due to the way REFEDS operates: all REFEDS results are publicly available and in line with the mission of the GÉANT Association, seats in the REFEDS Steering Committee are not linked to the sponsors. This may be something to revisit should that be necessary, although it will not be the most desirable option. Some sponsors have also expressed concern that the burden of financial input is not evenly spread across benefitting organisations.

The lack of a structured model would also make it difficult to 'increase' the REFEDS sponsorship fee, should that be needed, as there is no specific definition or set level of sponsorship.

### **3. Current Model**

Until now, REFEDS has taken a very open approach to the sponsorship, by allowing organisations to contribute as much (or as little) as they could. Currently the range varies from as little as 500 eur to as high as 30K eur.

Although this approach has worked fairly well, it imposes additional overhead on the REFEDS coordinators in terms of holding every year bilateral negotiation to finalise the sponsorship with each sponsoring organisation.

Due to the growth of REFEDS, it seems appropriate to formalise the sponsorship to make the process easier to manage. A more structured way of defining a fair REFEDS contribution should also make it easier to justify REFEDS sponsorship for organisations. It is worth noting this is not an attempt to reduce the interactions with the sponsors; on the contrary we feel that not having to negotiate the sponsorship fees would allow time to be used to better understand the wishes of the sponsors.



#### 4. Proposed Model

The aim is achieve consistency and fairness amongst sponsors and provide a more stable funding mechanism for REFEDS. In the longer term, the hope would be to encourage more organisations to contribute sponsorship.

The new sponsorship model would have a tiered approach as indicated below:

Levels	Fee
Platinum	10000 eur or more
Gold	6000 eur
Silver	3.000 eur
Bronze	1.000 eur

Clearly a list of benefits for sponsoring organisations should be produced and be available on the REFEDS website. The following is a proposed way of describing these levels:

**BRONZE:** Organisations that regularly send attendees to REFEDS meetings or participate on the mailing list are encouraged to become BRONZE sponsors. This will ensure that REFEDS is able to maintain its basic infrastructure to support this engagement (mailing lists, website, wiki) and ensure that REFEDS can offer attendance at meetings for free to all attendees.

**SILVER:** Organisations that wish to contribute to the yearly workplan are encouraged to become SILVER members. SILVER contributions will ensure that we can allocate time to work-items over the course of any given year and support the development and execution of the yearly workplan.

**GOLD:** Organisations that actively use REFEDS outputs are encouraged to become GOLD members. This may be organisations that use tools such as MET (Metadata Explorer Tool), REEP (the REFEDS Public Metadata Registry), Entity Category definitions or documentation such as the FOP (Federation Operator Practice) guidelines, Discovery Guidelines or other templates. This sponsorship will ensure time allocation for the REFEDS Coordinators or other external consultants to ensure that these activities are sustained in the long term.

**PLATINUM:** Organisations that wish REFEDS to



pursue specific goals to support their own identity management roadmap are encouraged to become PLATINUM sponsors. Platinum sponsors will enable REFEDS to be truly innovative and responsive as an organisation. Platinum sponsors will be given the opportunity to explicitly plan and direct work items on the REFEDS workplan each year.

To streamline the process it is proposed to introduce a light weighted funding agreement with each sponsoring organisation. The agreement would indicate:

- The tasks performed by the REFEDS Secretariat as well as the costs associated with this;
- Details of how work is outsourced as appropriate;
- A link to the yearly workplan;
- Main benefits for the sponsors.

The proposal is for the prospect sponsors to select their level, sign the agreement once and unless one of the parties notifies the other one, each year they would receive an invoice correspondent to their level.

Sponsors at the end of the year will receive the yearly report detailing all the costs and the achievements as per the existing model. They will also receive a copy of the proposed workplan for the following year for comment. The REFEDS Steering Committee will ratify this plan in January of each year.

