2019 REFEDS Workplan

These are the proposed top level areas for the 2019 workplan, drawn from proposals crowdsourced in 2019.

- REF19-1: REFEDS Coordination and Management
- REF19-2: Specialist Working Groups
- REF19-3: Promotion and Communication
- REF19-4: Standards and Specifications
- REF19-5: REFEDS Services

REF19-1: REFEDS Coordination and Management

Lead: 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 GEANT project, ISOC and Kantara.

<table>
<thead>
<tr>
<th>WORKITEMS</th>
<th>DESCRIPTION</th>
<th>COMMENT</th>
<th>ASSIGNED TO</th>
<th>START DATE</th>
<th>END DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF19-1A</td>
<td>REFEDS BOFS</td>
<td></td>
<td>Nicole Harris</td>
<td>01/19</td>
<td>12/19</td>
<td></td>
</tr>
<tr>
<td></td>
<td>at appropriate meetings</td>
<td>throughout the year</td>
<td>(maximum of 2).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>REF19-1B</td>
<td>Maintain and develop the REFEDS blog, wiki and website</td>
<td></td>
<td>Nicole Harris</td>
<td>01/19</td>
<td>12/19</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>REF19-1C</td>
<td>REFEDS annual meetings</td>
<td></td>
<td>Nicole Harris</td>
<td>01/19</td>
<td>10/19</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>REF19-1D</td>
<td>Implement 2019 REFEDS Survey</td>
<td></td>
<td>Nicole Harris</td>
<td>09/19</td>
<td>12/19</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>REF19-1E</td>
<td>Manage REFEDS contracts with third parties</td>
<td></td>
<td>Nicole Harris</td>
<td>01/19</td>
<td>07/19</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>REF19-1F</td>
<td>Manage REFEDS Sponsorships</td>
<td></td>
<td>Nicole Harris</td>
<td>12/18</td>
<td>01/20</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>REF19-1G</td>
<td>REFEDS Distinguished Engineer Programme</td>
<td></td>
<td>Heather Flanagan</td>
<td>02/19</td>
<td>08/18</td>
<td>COMPLETE</td>
</tr>
</tbody>
</table>

REF19-2: Specialist Working Groups

Lead: Heather Flanagan

Aim:

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

<table>
<thead>
<tr>
<th>WORKITEMS</th>
<th>DESCRIPTION</th>
<th>ASSIGNED TO</th>
<th>START DATE</th>
<th>END DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF19-2A</td>
<td>FOG: Federation Operators Group</td>
<td>Peter Schober with support from Nicole Harris</td>
<td>01/2019</td>
<td>12/2019</td>
<td>Continuing as usual. There are 128 subscribers as of 14 January 2020.</td>
</tr>
<tr>
<td>REF19-2B</td>
<td>OIDC(re): OpenID Connect for Research and Education</td>
<td>Niels van Dijk with support from Heather Flanagan</td>
<td>01/2019</td>
<td>12/2019</td>
<td>This group was closed and work shifted to the OIDF Research &amp; Education working group</td>
</tr>
</tbody>
</table>
The REFEDS Assurance suite was approved in October 2018. 2019 has focused on encouraging adoption of the profiles.

Conduct a post-mortem for entity categories in general.

Work for REFEDS R&S next steps: R&S2, affiliation, academia
- define approaches to abstract attributes to allow groups of attributes to be used.
- feed into proposals to produce guidelines on attribute release for edugain.
- create registry of attributes if appropriate.

Exchanging entity attributes outside of those with global definitions (e.g. R&S, Sirtfi etc) creates a potential for mounting conflict; part of handling this is orchestration and handling. There may also be tags that are defined within a federation, but not cross federation. This creates a vocabulary control challenge. Who handles the responsibilities among the fed ops to consider this and does this need managing? This work area will initially focus on discussion here (best practice), clarifying use cases and create a matrix to inform the discussion. Recommendations on future steps to support this (including potential registries, rules for stripping using MDQ etc.) will be made.

The existing identifier complexity is maddening, and changes to recommendations in SAML2INT may significantly impact the attributes supported within R&S. Possibly push for adoption of the Subject-ID spec everywhere an identifier is needed, to reduce complexity for all involved going forward. Replaces eduPersonTargetedID, SAML 2.0 persistent NameID, eduPersonUniqueID and (partially) eduPersonPrincipalName. Might help align with private/public identifiers in OIDC.

Promotional material and support for entity categories
Promotional material and support for entity categories is needed to help federations promote the benefits of using entity categories.
Nicole Harris
04/2019
09/2019
Still an outstanding need for a benefits doc to be hosted at: https://refeds.org/research-and-scholarship.

REFEDS Discovery Guide, Mark 2
Consent is used often within identity federations. While on a national level it may be clear what asking and giving consent entails, unfortunately consent does not mean the same thing in various countries as the legal grounds for consent vary. Also there are many ways to implement consent. What makes a good consent page and what does not? When is it (not) user friendly, what should be shown to make it legally usable? What are the best practices around consent globally?

This activity investigates what it means to ask and give consent in various countries. In addition it describes recommendations for 'good' and 'bad' consent pages similar to the REFEDS Discovery Guide.

Include note on how hub and spoke federations manage discovery.
Heather Flanagan
01/2019
08/2019
Work postponed until RA21 pilots are completed.

REF19-3: Promotion and Communication
Lead: Nicole Harris
Aims:
- To provide materials and support mechanisms to help federations promote effective approaches to IdPs and SPs.
- To provide feedback on documents produced by other groups to support clarity of messages.
- To reach out to target groups where specific messaging could be beneficial.

<table>
<thead>
<tr>
<th>WORKITEMS</th>
<th>DESCRIPTION</th>
<th>ASSIGNED TO</th>
<th>START DATE</th>
<th>END DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF19-3A</td>
<td>Promotional material and support for entity categories</td>
<td>Nicole Harris</td>
<td>04/2019</td>
<td>09/2019</td>
<td>R&amp;S pages updated. Still an outstanding need for a benefits doc to be hosted at: <a href="https://refeds.org/research-and-scholarship">https://refeds.org/research-and-scholarship</a>.</td>
</tr>
<tr>
<td>REF19-3B</td>
<td>REFEDS Discovery Guide, Mark 2</td>
<td>Heather Flanagan</td>
<td>01/2019</td>
<td>08/2019</td>
<td>Work postponed until RA21 pilots are completed.</td>
</tr>
</tbody>
</table>
REF19-3C Publisher engagement

It is proposed that concerted effort continue in 2019 to engage publisher groups and tackle some of the wider problems in the publisher space. This will be in coordination with the "RA21" group.

Work will expand in 2019 to include development of a scholarly resource entity category.


REF18-3D SP Engagement Plan

Develop/enhance an engagement plan for service providers. The goal is threefold: 1) to gain deeper insights about the needs of SPs within the community, 2) to better integrate SPs in general community engagement (conferences, working groups, discussions, etc), and 3) to develop a resource for gaining SP support, feedback, and contributions. (Follow up from the Technology Exchange ACAMP session, SPs Unite!; http://bit.ly/ACAMP-SPsUnite)

Laura Paglione, Heather Flanagan 01/2019 12/2019

REF19-4: Standards and Specifications

Lead: Heather Flanagan

Aims:

- To provide support for the development of standards and specifications under the REFEDS banner.
- To pilot specification work to support implementation requirements.
- To put in place structures to ensure specification and schema sustainability.

<table>
<thead>
<tr>
<th>WORKITEMS</th>
<th>DESCRIPTION</th>
<th>ASSIGNED TO</th>
<th>START DATE</th>
<th>END DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF19-4A</td>
<td>Schema management</td>
<td>Heather Flanagan</td>
<td>01/2019</td>
<td>12/2019</td>
<td>Monitoring, editorial board, response to proposals</td>
</tr>
<tr>
<td>REF19-4B</td>
<td>Standardize requirements for logos in metadata</td>
<td>Keith Wessel with support from Heather Flanagan</td>
<td>01/2019</td>
<td>12/2019</td>
<td>There is little overlap and a lot of contradictions in requirements for logos in metadata among federations. We could improve the UI experience throughout eduGAIN if we standardized requirements internationally. Starting point from 2018 ACAMP: <a href="https://docs.google.com/document/d/1KoTywvEkPwr6cC3oFr/n868ByMTbOW8pxBQNbgDk/edit?heading=h.essj1b7du95">https://docs.google.com/document/d/1KoTywvEkPwr6cC3oFr/n868ByMTbOW8pxBQNbgDk/edit?heading=h.essj1b7du95</a></td>
</tr>
</tbody>
</table>

REF19-5: REFEDS Services

Lead: Nicole Harris

Aims:

- To continue using MET and enhance where possible.
- To support the basic REFEDS infrastructure needs (website, wiki and mailing lists).

<table>
<thead>
<tr>
<th>WORKITEMS</th>
<th>DESCRIPTION</th>
<th>ASSIGNED TO</th>
<th>START DATE</th>
<th>END DATE</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF19-5A</td>
<td>MET</td>
<td>Contractor</td>
<td>01/2019</td>
<td>12/2019</td>
<td></td>
</tr>
<tr>
<td>REF19-5B</td>
<td>REEP/PEER</td>
<td>Licia Florio</td>
<td>01/2019</td>
<td>12/2019</td>
<td>Outstanding decision on EOL.</td>
</tr>
</tbody>
</table>