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 GÉANT project, ISOC and Kantara.

WORKITEMS	DESCRIPTION	COMMENT	ASSIGNED TO	START DATE	END DATE	STATUS
REF19-1A	REFEDS BOFS at appropriate meetings throughout the year (maximum of 2).	Suggestions for where to target BOFs in 2019 welcomed. Proposal for an "unconference" style REFEDS meeting has been circulated to the community for discussion.	Nicole Harris	01/19	12/19	
REF19-1B	Maintain and develop the REFEDS blog, wiki and website.	As normal.	Nicole Harris	01/19	12/19	**COMPLETE**
REF19-1C	REFEDS annual meetings.	TNC and Internet2 Technology Exchange Meeting.	Nicole Harris	01/19	10/19	**COMPLETE**
REF19-1D	Implement 2019 REFEDS Survey.	Annual REFEDS Survey to go out in September 2019.	Nicole Harris	09/19	12/19	**COMPLETE**
REF19-1E	Manage REFEDS contracts with third parties.	These are contracts with external parties that support REFEDS such as Spherical Cow Consulting and RETI.	Nicole Harris	01/19	07/19	**COMPLETE**
REF19-1F	Manage REFEDS Sponsorships.	Current sponsor list.	Nicole Harris	12/18	01/20	**COMPLETE** All sponsorship invoices sent out.
REF19-1G	REFEDS Distinguished Engineer Programme.	Programme to bring 2 engineers from developing federations to TNC.	Heather Flanagan	02/19	08/18	**COMPLETE** 2 engineers have been identified and issued with an invitation to attend.

REF19-2: Specialist Working Groups

Lead: Heather Flanagan

Aim:

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

WORKITEMS	DESCRIPTION	ASSIGNED TO	START DATE	END DATE	STATUS
REF19-2A	FOG: Federation Operators Group	Peter Schober with support from Nicole Harris	01/2019	12/2019	Continuing as usual. There are 128 subscribers as of 14 January 2020.
REF19-2B	OIDC(re): OpenID Connect for Research and Education	Niels van Dijk with support from Heather Flanagan	01/2019	12/2019	This group was closed and work shifted to the OIDF Research & Education working group

REF19-2C	SIRTFI	Tom Barton with support from Nicole Harris	01/2019	12/2019	See the group wiki page for an update on the status of work items for this group.	
REF19-2D	IdPs of Last Resort	Pete Birkinshaw with support from Heather Flanagan	01/2019	12/2019	Work is largely dormant in this group.	
REF19-2E	Assurance	Mikael Linden with support from Heather Flanagan	01/2019	12/2019	The REFEDS Assurance suite was approved in October 2018. 2019 has focused on encouraging adoption of the profiles.	
REF19-2F	Entity Category Support	Nicole Harris	01/2019	12/2019	Conduct a post-mortem for entity categories in general. Work for REFEDS R&S next steps: R&S2, affiliation, academia Abstract attributes - 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.	
REF19-2G	Federation Trust 2.0	Tom Barton and Judith Bush with support from Heather Flanagan	01/2019	12/2019	The working group kicked of a process of scenario planning; work will continue in 2020 to develop a final report as a result of that effort.	

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.

WORKITEMS	DESCRIPTION	ASSIGNED TO	START DATE	END DATE	STATUS
REF19-3A	Promotional material and support for entity categories	Nicole Harris	04/2019	09/2019	R&S pages updated. Still an outstanding need for a benefits doc to be hosted at: https://refeds.org/research-and-scholarship.
REF19-3B	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.

REF19-3C	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.	Heather Flanagan	01/2019	12/2019	Tracked via Heather's engagement with RA21.
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.

WORKITEMS	DESCRIPTION	ASSIGNED TO	START DATE	END DATE	STATUS
REF19-4A	Schema management	Heather Flanagan	01/2019	12/2019	Monitoring, editorial board, response to proposals
REF19-4B	Standardize requirements for logos in metadata	Keith Wessel with support from Heather Flanagan	01/2019	12/2019	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: https://docs.google.com/document/d/1KsTywvEkPwr6cC3oFIrRnj868ByMTbOW8hpxBQNbGDk/edit#heading=h.eesjm1b7du95

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).

WORKITEMS	DESCRIPTION	ASSIGNED TO	START DATE	END DATE	STATUS
REF19-5A	MET Contract in place with GARR for central operations. Development work to be contracted to RETI (Andrea). New features added and delivered in Oct.	Contractor	01/2019	12/2019	
REF19-5B	REEP/PEER Evaluate service and determine what, if any changes are required to maintain	Licia Florio	01/2019	12/2019	Outstanding decision on EOL.