

# 2017 REFEDS Workplan

These are the final top level areas for the 2017 workplan, drawn from proposals [crowdsourced](#) in 2016.

- [REF17-1: REFEDS Coordination and Management](#)
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## REF17-1: 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.

WORKITEMS	DESCRIPTION	COMMENT	ASSIGNED TO	START DATE	END DATE	STATUS
REF17-1A	REFEDS BOFS at appropriate meetings throughout the year (maximum of 2).	Suggestions for where to target BOFs in 2017 welcomed - in 2016 we went to WACREN and APAN.	Nicole Harris	01/17	12/17	No specific REFEDS activities in 2017 apart from 2 x general meetings and a workplanning meeting.
REF17-1B	Maintain and develop the REFEDS blog, wiki and website.	As normal.	Nicole Harris / Licia Florio	01/17	12/17	Ongoing work as normal.
REF17-1C	REFEDS annual meetings.	TNC and Internet2 Technology Exchange Meeting.	Nicole Harris / Licia Florio	01/17	10/17	2 x meetings held and blog posts from the meetings circulated.
REF17-1D	Implement 2017 REFEDS Survey.	Rolling out towards the end of the year seemed to be effective in 2016 and helps feed into the work planning.	Nicole Harris	09/17	12/17	Comments are with the Steering Committee.
REF17-1E	Manage REFEDS contracts with third parties.	These are contracts with external parties that support REFEDS such as Spherical Cow and RETI.	Nicole Harris / Licia Florio	01/17	06/17	Delayed due to problems with new processes at GÉANT. All issues now resolved.
REF17-1F	Manage REFEDS Sponsorships.	<a href="#">Current sponsor list.</a>	Nicole Harris / Licia Florio	12/16	01/17	

## REF17-2: 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
REF17-2A	<a href="#">FOG: Federation Operators Group</a>	Peter Schober with support from Nicole Harris	01/2017	12/2017	Operating as normal.
REF17-2B	<a href="#">OIDC(re): OpenID Connect for Research and Education</a>	Niels van Dijk with support from Heather Flanagan	01/2017	12/2017	<a href="#">OIDC(re)</a>

REF17-2C	<a href="#">SIRTFI</a>	Hannah Short with support from Nicole Harris	01/2017	12/2017	<p><a href="#">SIRTFI</a></p> <p>Activity to investigate and report on the various ways Identity Federations have implemented incident response handling internally.</p> <p>The result should provide national federations with insight on what to expect when contacting a peer, and opportunity for alignment and improvement. In addition it could support Sirtfi and eduGAIN e-Science support activities within AARC GEANT projects.</p> <p>Template for federation operators.</p> <p>Scoping tools to automate Sirtfi response testing and compliance.</p>
REF17-2D	<a href="#">ORCID</a>	Laura Paglione with support from Heather Flanagan	01/2017	12/2017	<p>The Group published a paper of recommendations in April 2017. This paper was presented during TNC17: <a href="https://tnc17.geant.org/core/presentation/25">https://tnc17.geant.org/core/presentation/25</a>.</p>
REF17-2E	<a href="#">IdPs of Last Resort</a>	Keith Hazleton with support from Heather Flanagan	01/2017	12/2017	<p><a href="#">Un-Affiliated IdP Working Group Draft Annual Report, 2017</a>. Need to consider how to use this in conjunction with Academia to differentiate IdPs.</p> <p>Continue on work to define ways of tagging IdPs of Last Resort and defining a specification for minimum requirements of such an IdP within federation environment.</p>
REF17-2F	<a href="#">Assurance</a>	Mikael Linden with support from Heather Flanagan	01/2017	12/2017	<p>Work progressing well, second round of consultation planned. MFA profile in place, work on single factor / good entropy expected.</p> <p>Various work has been put into better defining the baseline requirements for activity in federations - including via InCommon and the REFEDS assurance group. This work will look to operationalise this work in the context of existing federations and eduGAIN.</p> <p>Work is underway on baseline expectations for IdPs and an Assurance Wireframe. The assurance working group will continue in 2017. The intention is to expose the assurance profile to a community consultation until end of March and then update the assurance profile and publish it as an AARC deliverable. After that, in AARC2, we probably need to have a small pilot before it can be rolled out.</p>
REF17-2G	<a href="#">Entity Category Support</a>	Nicole Harris	01/2017	12/2017	<p>Work on Academia in progress.</p> <p>Work for REFEDS R&amp;S v1.3 completed. Next steps: R&amp;S2, affiliation, academia</p> <p>Abstract attributes</p> <ul style="list-style-type: none"> <li>- define approaches to abstract attributes to allow groups of attributes to be used.</li> <li>- feed into proposals to produce guidelines on attribute release for edugain.</li> <li>- create registry of attributes if appropriate.</li> </ul> <p>Exchanging entity attributes outside of those with global definitions (e.g. R&amp;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.</p>
REF17-2H	<p>Federation Trust 2.0</p> <p>Design, resource, and deploy a global metadata distribution infrastructure for both per-entity and aggregate metadata serving needs, for all federations to use, at global scale.</p> <p>Per-entity metadata and dynamic federation ideas force a rethinking of how Federations Operators signify their validation or endorsement of certain metadata statements, and consequently a rethinking of much of the process of operating a federation. Deliverables:</p> <ol style="list-style-type: none"> <li>1. Define workflows that endow trust in dynamic federation metadata, ie, work out operational aspects of Roland's paper.</li> <li>2. Define an architecture or design in which it is easy for each recipient to validate dynamic metadata.</li> <li>3. List ramifications for standard federation operating procedures in a dynamic metadata environment.</li> </ol>	TBA	TBA	TBA	No progress

## REF17-3: 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
REF17-3A	Promotional material and support for entity categories	Nicole Harris			
REF17-3B	<p>REFEDS Discovery Guide, Mark 2</p> <p>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?</p> <p>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.</p> <p>Include note on how hub and spoke federations manage discovery.</p>	TBD			
REF17-3C	<p>Publisher engagement</p> <p>It is proposed that concerted effort be spent in 2017 to engage publisher groups and tackle some of the wider problems in the publisher space. This will be in coordination with the "RA21" group. Heather to produce a proposal on this.</p>	Heather Flanagan			
REF17-3D	2pager for SPs	GÉANT manpower			
REF17-3E	<p>Service Catalogue definition</p> <p>Various proposals have been made to create a federation service catalogue, most recently at ACAMP: <a href="https://docs.google.com/document/d/1GHerhDYfwlgjN5-pQErYJF0RqOp7R_tWuHiuW5gTdjQ">https://docs.google.com/document/d/1GHerhDYfwlgjN5-pQErYJF0RqOp7R_tWuHiuW5gTdjQ</a>. This work will focus on defining staged requirement sets for a service catalogue and make recommendations as to how to implement such a service and where this should be hosted.</p>	Heather Flanagan			

## REF17-4: Standards and Specifications

**Lead: Nicole Harris**

### 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
REF17-4A	eduPerson / SCHAC liaison - Work on adding new values to eduPerson (pre-attendance).	Contractor			
REF17-4B	REFEDS RFC Process	Contractor			
REF17-4C	Federation Metadata Submission API standard	Contractor			

## REF17-5: 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
REF17-5A	<p>MET</p> <p>Contract in place with GARR for central operations. Development work to be contracted to RETI (Andrea).</p> <p>New features added and delivered in Oct.</p>	Contractor			