

# 2018 REFEDS Workplan

These are the proposed top level areas for the 2018 workplan, drawn from proposals [crowdsourced](#) in 2018.

- [REF18-1: REFEDS Coordination and Management](#)
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## REF18-1: 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
REF18-1A	REFEDS BOFS at appropriate meetings throughout the year (maximum of 2).	Suggestions for where to target BOFs in 2018 welcomed	Nicole Harris	01/18	12/18	
REF18-1B	Maintain and develop the REFEDS blog, wiki and website.	As normal.	Nicole Harris	01/18	12/18	
REF18-1C	REFEDS annual meetings.	TNC and Internet2 Technology Exchange Meeting.	Nicole Harris	01/18	10/18	
REF18-1D	Implement 2018 REFEDS Survey.	Rolling out towards the end of the year seemed to be effective in 2017 and helps feed into the work planning.	Nicole Harris	09/18	12/18	
REF18-1E	Manage REFEDS contracts with third parties.	These are contracts with external parties that support REFEDS such as Spherical Cow Consulting and RETI.	Nicole Harris	01/18	07/18	
REF18-1F	Manage REFEDS Sponsorships.	<a href="#">Current sponsor list.</a>	Nicole Harris	12/17	01/19	

## REF18-2: 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
REF18-2A	<a href="#">FOG: Federation Operators Group</a>	Peter Schober with support from Nicole Harris	01/2018	12/2018	
REF18-2B	<a href="#">OIDC(re): OpenID Connect for Research and Education</a>	Niels van Dijk with support from Heather Flanagan	01/2018	12/2018	Proposed addition to the charter: OIDC re federations are moving into pilot phases and discussions on how to run hybrid SAML/OIDC federations are happening now. Rather than having to go back and try and normalize the policies for OIDC re federations, let's take a look at what we think the policy space should look like and create the necessary templates.
REF18-2C	<a href="#">SIRTFI</a>	Tom Barton with support from Nicole Harris	01/2018	12/2018	<a href="#">SIRTFI</a>  Activity to investigate and report on the various ways Identity Federations have implemented incident response handling internally.  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 Sirtifi and eduGAIN e-Science support activities within AARC GÉANT projects.  Template for federation operators.  Scoping tools to automate Sirtifi response testing and compliance.

REF18-2D	<a href="#">IdPs of Last Resort</a>	Pete Birkinshaw with support from Heather Flanagan	01/2018	12/2018	<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>
REF18-2E	<a href="#">Assurance</a>	Mikael Linden with support from Heather Flanagan	01/2018	12/2018	<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>
REF18-2F	<a href="#">Entity Category Support</a>	Nicole Harris	01/2018	12/2018	<p>Conduct a post-mortem for entity categories in general.</p> <p>Work for REFEDS R&amp;S 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> <p>The existing identifier complexity is maddening. Possibly push for adoption of the <a href="#">Subject-ID</a> 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.</p>
REF18-2G	<a href="#">Federation Trust 2.0</a>	TBA	TBA	TBA	<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>

## REF18-3: 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
REF18-3A	Promotional material and support for entity categories	Nicole Harris	04/2018	09/2018	R&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> .

REF18-3B	<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>	Heather Flanagan	TBA	TBA	Work postponed until RA21 pilots are completed.
REF18-3C	<p>Publisher engagement</p> <p>It is proposed that concerted effort continue in 2018 to engage publisher groups and tackle some of the wider problems in the publisher space. This will be in coordination with the "RA21" group.</p>	Heather Flanagan	08/2018	07/2018	Tracked via Heather's engagement with RA21.
REF18-3D	Two-pager for SPs	GÉANT	TBA	TBA	
REF18-3E	<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/1GHHerhDYfwlgjN5-pQEryJF0RqOp7R_tWuHiuW5gTdjQ">https://docs.google.com/document/d/1GHHerhDYfwlgjN5-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	02/2018	07/2018	Report is at: <a href="https://docs.google.com/document/d/1P6bCZusitj3aOCtaKw7B1WwB96aSpr7ZtSqlNrRjnac/edit?usp=sharing">https://docs.google.com/document/d/1P6bCZusitj3aOCtaKw7B1WwB96aSpr7ZtSqlNrRjnac/edit?usp=sharing</a> . Next step is to finalise as a white paper.

## REF18-4: 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
REF18-4A	eduPerson / SCHAC liaison - Work on adding new values to eduPerson (pre-attendance).	Heather Flanagan	01/2018	12/2018	Monitoring, editorial board, response to proposals
REF18-4B	REFEDS RFC Process	Heather Flanagan	01/2018	12/2018	Awaiting publication of first RFC!

## REF18-5: 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
REF18-5A	<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	01/2018	12/2018	
REF18-5B	<p>REEP/PEER</p> <p>Evaluate service and determine what, if any changes are required to maintain</p>	Licia Florio	01/2018	12/2018	Outstanding decision on EOL.

