

Proposal for Collaboration - SCHAC and eduPerson

SCHAC and eduPerson: Collaboration Possibilities

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Introduction

In 2014, a project started to bring the SCHEMA for ACademia (SCHAC) up to date, consolidating approximately two years' worth of updates and changes to the schema and its governance structure. As part of that work, a question was re-asked regarding the relationship between SCHAC and the eduPerson schema. Should these two schemas, both used by research and education networks around the world, be more closely tied together? What would that look like, and does it make sense?

This short document looks briefly at the history of both schema, their current status, and reviews possible avenues of collaboration between them, and concludes with a recommendation for moving forward. Many thanks to the individuals who offered their input to this work, including: Keith Hazelton, Leif Johansson, Ken Klingenstein, Rhys Smith, Ann West, Tom Barton, Nick Roy, and members of MACE-Dir, the SCHAC Editorial Board, and the participants in REFEDS.

History of SCHAC and eduPerson

eduPerson was first released in 2001 and has continued receiving updates as coordinated by the Internet2 Middleware Architecture Committee for Education, Directory Working Group (MACE-Dir) group since that time. Updates happen in a very slow and considered fashion, which is considered both a strength and a weakness to the schema. The most recent revision is eduPerson (201310).

SCHAC is a more recent schema, with its first release in 2005. Additional releases through April 2015 were coordinated through the TERENA's TF-EMC2 and REFEDS. Updates to this schema have also been slow, though the schema was created out of a desire to move more quickly than eduPerson allowed for at the time. The schema is managed by an editorial board as described on the SCHAC wiki (see <https://wiki.refeds.org/display/STAN/SCHAC+Editorial+Board>).

The schemas can be seen as complementary, with eduPerson providing a strong core schema, and SCHAC offering the additional detail sometimes needed by academic institutions, primarily in Europe. Given this complementary nature, the idea of potentially collaborating more formally on the schema or their governance seems to be a sensible direction.

IPR considerations

Both schemas are freely available for use. Internet2 owns the copyright for eduPerson; the IPR scheme is under discussion but likely falls under the general Apache2 license as per other Internet2 middleware projects. The IPR for the SCHAC schema, while not explicitly mentioned in the specification, is considered by the community to be covered by the Creative Commons CC 3.0 license, as per the [REFEDS Participant's Agreement](#). Additions to the eduPerson schema must go through MACE-Dir; additions to SCHAC go through REFEDS and the SCHAC Editorial Board.

Potential Avenues for Collaboration

While eduPerson and SCHAC serve a common audience, there are several possibilities when it comes to defining the possible avenues to direct further collaboration. From the very informal discussions on mailing lists to merging governance models, there is a continuum of options available. This section looks at the pros and cons of options at each end and the middle of the spectrum.

Informal collaboration

This is the model followed today. There is some overlap between the MACE-Dir and REFEDS mailing lists, and groups are free to discuss possible changes to either schema through these lists. It has the advantage of reflecting only as much energy as the community wants to put into the matter; it is the typical survival-of-the-fittest model that is part of the open source world.

- Pros: Requires no additional work
- Cons: Items may be missed; production deployments need the responsible bodies to be ready to respond to changes in community needs without offering conflicting guidance

Formal collaboration

Both eduPerson and SCHAC have or are establishing governance bodies. Internet2 is discussing the creation of a body within the Internet2 Trust and Identity area that would be the organizational home for MACE-Dir and eduPerson. SCHAC has the SCHAC Editorial Board. A more formal way to encourage collaboration and communication between the entities is to have cross-representation between the two bodies. Having designated individuals with a clear responsibility to shepherd any conversations about schema (or other common topics) between the groups will help ensure both groups are as aligned as possible

- Pros: Helps ensure that items will be properly communicated and discussed in the proper forum
- Cons: More work to designate and manage individuals; Internet2 is still finalizing plans for the organizational home for MACE-Dir and eduPerson

Shared governance

Rather than have the schema continue under two separate governance structures, the governance for both may be merged under one organization. While making any collaboration much simpler, the level of effort required to both agree to and facilitate such a model may be higher than the level of energy within the communities for schema management would support. Also, the question of whether REFEDS or Internet2 would give up their leadership role over the respective schema is a difficult question.

- Pros: Negates the need for any complex collaborative relationship; may encourage stronger continuity for both schema
- Cons: A significant amount of work for an uncertain benefit, given the low level of energy in terms of new community requirements for both schema

Recommendation

Schema discussions are largely a thing of the past; largely, but not entirely. Both eduPerson and SCHAC have defined attributes to carry ORCID identifiers. MACE-Dir has defined eduPersonOrcid attribute, currently considered under 'experimental' status. For their part, SCHAC has defined the attribute urn:schac:personalUniqueCode:int:orcidID. As one more example, there is a growing need for an attribute to carry the meaning 'under age 13' to help comply with the US Children's Online Privacy Protection Act (COPPA <<http://www.coppa.org>>). Another discussion recently started in REFEDS regarding a site that is looking for the proper replacement to the obsoleted SCHAC attribute schacUUID. If any formal collaboration or governance is going to happen, now is the time to do it while renewed energy is coming into this space.

Given the political climate and expected slow down of activity when this current set of issues is dealt with, while also anticipating the possibility for future re-engagement by the community when new requirements develop, I recommend the formal collaboration model described above. The community will know what to expect as the schemas evolve, and know who to go to in case of specific issues or concerns. There will be less dependence on someone catching a possible change via a broad mailing list discussion, as presumably specific changes will be discussed by the various governance bodies.

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