



## REFEDs Support, Priorities and Funding

### **1. REFEDs Governance**

The following organisational and funding structure is proposed for REFEDs.

Organisations can be listed as '**REFEDs Participants**'. The names of these organisations will be shown, with their logo and a very short description of the organisation, on a special 'REFEDs Participants' page on the REFEDs website.

Participation in REFEDs meetings (the International Federation Workshops) and subscription to REFEDs mailing lists is not restricted to employees of REFEDs Participants. However, organisations whose staff members regularly participate in REFEDs activities are strongly encouraged to have themselves listed as REFEDs Participants to show their support to the REFEDs initiative.

REFEDs Participants will be invited to become **REFEDs Sponsors**, i.e., to provide funding for the work to be carried out in support of REFEDs. Those REFEDs Participants that are REFEDs Sponsors will be listed with their logo on a special 'REFEDs Sponsors' page on the REFEDs website.

It is not mandatory for REFEDs Participants to contribute to the funding, and the size of the amount that a REFEDs Sponsor contributes is for that Sponsor itself to decide.

Annually, the TERENA Secretariat will draft a workplan for the next one-year period with a corresponding budget. These documents will be discussed on a REFEDs mailing list and/or in a face-to-face REFEDs meeting, in order to achieve consensus about the priorities among the people actively participating in REFEDs.

The REFEDs group will appoint a **REFEDs Steering Committee (SC)**. The SC will oversee the workplan, will provide inputs for the meetings agenda and may propose new work items for the workplan, which will be discussed for approval during the REFEDs meeting and/or on the REFEDs mailing list.

After possible amendments resulting from these discussions, the TERENA Secretariat will send the workplan and associated budget to the REFEDs Sponsors and potential REFEDs Sponsors, and ask them for a financial contribution for the coming year.

After the end of the year, the TERENA Secretariat will send the REFEDs Sponsors a report on the actual work carried out in the past year and its results, as well as a financial report. If the expenditure for the year has been less than the contributions collected from the REFEDs Sponsors, then the surplus will remain with TERENA to cover part of the costs for the next year of REFEDs activities.

The work described in the annual workplan will, in as far as is possible in view of the funding committed by the REFEDs Sponsors, be carried out by TERENA Secretariat staff and if needed by external experts under subcontract with TERENA. For budgeting and claiming manpower costs, TERENA will use the same tariffs and methods of calculation as for other projects (e.g. EU-funded projects). When external experts are subcontracted, TERENA will aim for similar tariffs.

## **2. Workplan and budget 2010-2011**

Below is a proposal for a workplan and corresponding budget for the period from August 2010 up to and including August 2011. It is based on a draft REFEDs Priority List drawn up in February 2010, on the comments received during the REFEDs Meeting (May 2010) and on the final inputs received via the mailing list.

Indirect costs (equipment, housing, IT and secretarial support staff) are included in the amounts mentioned below.

<b>REF1: Raising the profile of REFEDs</b>
<b>Aim:</b> Promote REFEDs, strengthen the position of REFEDs in the wider community, coordination and reporting
<b>Work items:</b> <ul style="list-style-type: none"> <li>• Coordination of the various work items in the workplan and overall reporting (15 days)</li> <li>• Create and maintain REFEDs website (10 days)</li> <li>• Review and improve the quality of information about federations and entities provided by REFEDs. This includes establishing points of contact with dependable communications with major R&amp;E federations and Virtual Organisations. (4 days)</li> <li>• Promotion of REFEDs (4 days)</li> <li>• Improve the presence and coordination of REFEDs and its participants in international fora such as Kantara and provide feedback to relevant work in the GN3 project</li> <li>• Organise two main REFEDs meetings per year (10 days)</li> </ul>
<b>Sponsored output:</b> REFEDs website, meetings and PR material.
<b>Time allocation:</b> 43 days
<b>Sponsored budget:</b> € 34,850 (€ 21,850 manpower; € 8,000 travel costs for REFEDs promotion; € 5,000 meeting costs)
<b>REF2: Domesticating applications</b>
<b>Aim:</b> Simplify the process for integrating new Service Providers into federations, effectively communicate changes in federation processes to Service Providers, gain economies of scale for all federations from domestication tools
<b>Work items:</b> <ul style="list-style-type: none"> <li>• Address the concerns of publishers in relation to the current process for joining and understanding the requirements of R&amp;E federations (5 days)</li> <li>• Create a strategy for engaging with domesticated applications</li> <li>• Investigate how Document Object Identifiers assigned to electronic publications can be resolved in such a way that federated access can support them</li> <li>• Investigate 'federated rewriting proxies', products like EZProxies</li> </ul>
<b>Sponsored output:</b> Report focused on communicating and understanding publishers' needs for integration of

federated information resources
<b>Time allocation:</b> 5 days (excl. non-sponsored manpower)
<b>Sponsored budget:</b> € 1,750
<b>REF3: Interface and discovery</b>
<b>Aim:</b> Improve the federated user experience in the R&E sector and align this experience with identity selector processes in the commercial, health and government environments
<b>Work items:</b> <ul style="list-style-type: none"> <li>• Complete the work on the 'eduID' study and integrate the results into the workflow of federations</li> <li>• Create full brand guidelines in conjunction with work developed as part of the Internet2 Discovery Roadmap and the Kantara UMA group</li> <li>• Review of R&amp;E experience in the current identity context (4 days)</li> </ul>
<b>Sponsored output:</b> Report on how to improve the user experience, from user-centric to technologies
<b>Time allocation:</b> 4 days (excl. non-sponsored manpower)
<b>Sponsored budget:</b> € 1,400
<b>REF4: Federation harmonisation</b>
<b>Aim:</b> Work across R&E federations to align technologies, policies and schema where harmonisation benefits have been identified. Align direction of R&E federations with broader communities where appropriate.
<b>Work items:</b> <ul style="list-style-type: none"> <li>• Achieve agreement on the use and recommended application of eduPerson attributes across REFEDs participants</li> <li>• Make recommendations for appropriate extensions to the eduPerson schema</li> <li>• Support the integration of the SAML2 international profile among REFEDs participants</li> </ul>
<b>Time allocation:</b> 0 days (excl. non-sponsored manpower)
<b>Sponsored budget:</b> € 0
<b>REF5: Inter-federation</b>
<b>Aim:</b> Explore all avenues of inter-federation to create business models that work in a variety of contexts for the inter-federation experience
<b>Work items:</b> <ul style="list-style-type: none"> <li>• Achieve an understanding of issues in providing metadata for shared community resources (e.g., the REFEDs wiki, the Czech medical atlas etc.)</li> <li>• Support the implementation of eduGAIN and make appropriate recommendations around implementation and use</li> <li>• Make recommendations on how to develop a lightweight 'listing' service of aggregated metadata to support short-term virtual organisation scenarios (7 days)</li> </ul>
<b>Sponsored output:</b> Report with recommendations on how to develop a lightweight 'listing' service of aggregated metadata to support short-term virtual organisation scenarios
<b>Time allocation:</b> 7 days (excl. non-sponsored manpower)
<b>Sponsored budget:</b> € 2,850
<b>REF6: Identity assurance</b>

<b>Aim:</b> Ensure that identity assurance profiles can be used across multiple federations and within inter-federation contexts
<b>Work items:</b> <ul style="list-style-type: none"><li>• Evaluate the current InCommon and Kantara assurance frameworks to produce a recommendation for an assurance profile to be used across R&amp;E federations</li></ul>
<b>Time allocation:</b> 0 days (excl. non-sponsored manpower)
<b>Sponsored budget:</b> € 0
<b>TOTAL SPONSORSHIP NEEDED</b>
<b>Total days:</b> 59
<b>Total sponsored budget:</b> € 40,850