

REFEDS Work Plan 2014

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1. Overview

The third funded period of REFEDS completes on 31st December 2013. A full report relating to the third period of operation has been prepared and circulated to REFEDS participants via the mailing list, and is available on the REFEDS website:

https://refeds.org/work/work_documents.html.

Major achievements in 2013 include the first ratified Entity Category for REFEDS, publication of the REFEDS Discovery Guide, further developments for the 'Code of Conduct' work, first drafts of Federation Operator Practice Statements and on-going work and liaison with eResearch groups via the FIM4R programme.

This workplan will be circulated to all REFEDS participants for comments, presented to the REFEDS Steering Committee for final approval of content and the REFEDS Sponsoring Group for confirmation of expenditure.

2. Inputs

As per the process undertaken in previous years, REFEDS put out a call for work areas for the 2014 work programme in November 2013 (https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2014) and discussed these issues in more detail at the REFEDS Fall 2014 meeting in Burlingame, California. Based on feedback from participants via these mechanisms, discussion with partner organisations such as GEANT, Kantara, ISOC and the FIM4R group the following workplan has been proposed.

In order to effectively manage the workload and focus of REFEDS work, we believe that no more than 6 main work items should be proposed in any one year. It is also essential that each work item has a strong leader to both support the direction of the work and report back to the community on progress. Where work item leaders have not been identified so far, calls will be made to the community for volunteers.

3. Work Items

The following work items have been proposed for the REFEDS workplan in 2014:

1. REF14-1: REFEDS Coordination and Management
2. REF14-2: Assurance and Policy.
3. REF14-3: Standards and specifications.
4. REF14-4: Services.
5. REF14-5: Specialist Work Areas.



3.1 REF14-1: REFEDS Coordination and Management

This work item is the hub at the centre of REFEDS and represents the work to keep the group moving forward organisationally and administratively. It also manages the communications efforts for REFEDS. Increasingly, as REFEDS produces more outputs, there will be a need for the effort in this work area to increase to support lightweight maintenance of outputs.

Licia Florio and Nicole Harris will carry out work in this area with support from in-house staff at TERENA.

REF14-1: REFEDS Coordination and Management
Lead: Licia Florio / Nicole Harris
Aim: <ul style="list-style-type: none">• To progress REFEDS position as an important player within the access and identity management space internationally.
Work Items: <ul style="list-style-type: none">• Continue liaison work with Kantara and ISOC.• Provide logistical and infrastructure support to REFEDS community.
Sponsored Output: <ul style="list-style-type: none">• 2 x REFEDS BOFs with specific community focus.• www.refeds.org maintenance/development.• Maintaining the REFEDS blog.• 2 x standard REFEDS meetings.• REFEDS PR material (newsletters, REFEDS map).
Budget: 24000 euros – REFEDS Coordinator time.
Reference: <ul style="list-style-type: none">• www.refeds.org.• https://blog.refeds.org/.

3.2 REF14-2: Assurance and Policy

This workpackage will take the ground-work developed in 2013 to create a set of Federation Operator Practice Statements for REFEDS. These will be proposed as defining documentation for a base level of assurance that all federations should reach in order to be considered a formal Research and Education Federation.

The Federation Operator Practice Statements will include:

- Metadata Registration Practice Statement;
- Key Management Practice Statement;



- Assurance Practice Statement;
- Monitoring Practice Statement.

Due to the increasing interest in assurance, REFEDS will also establish a cross-organisational working group on LOA during the year. This will include representatives from GEANT, Kantara, ISOC and other interested parties. The goal of this group will be to discuss and formulate requirements for a REFEDS Level 1 Assurance Profile.

REF14-2: Assurance and Policy

Lead: Nicole Harris

Aim:

- To create an accepted LOA1 for research and education federations and start work towards LOA2.
- To review monitoring tools for SAML federations and future work plans for this area.

Work Items:

- Complete MRPS and KMPS documentation.
- Work with eduGAIN to implement MRPS and KMPS documentation.
- Set-up cross-organisational working group on LOA.
- Liaise with Kantara and GEANT work areas to establish requirements for LOA1 profile for research and education.

Sponsored Output:

- MRPS template.
- KMPS template.
- Recommendations document for R&E assurance profile.

Budget:

24000 euros REFEDS Coordinator time.

Reference:

FOP:

https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Federation_Operator_Best_Practice_Documents.

Assurance:

https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Levels_of_Assurance:_What.27s_My_Level.3F

Code of Conduct:

https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Data_protection_Code_of_Conduct_-_extending_beyond_the_EU.2FEFA

3.3 REF14-3: Standards and specifications

REFEDS is taking more of a significant role as a body that works on standards and

specifications for the community. It has been agreed that where appropriate, this work should be developed as much as possible via IETF RFC mechanisms. The aim for 2014 is to embed the work that REFEDS has begun in this area and begin to build up from the basework. In 2014, this will include further work on the Metadata Query Protocol work, which is essential for the development of metadata aggregation and management, a review of existing attribute schema considering requirements in this area, and Entity Category development.

Due to the significant nature of this work, external consultants will be hired to provide the focus needed for development and implementation.

REF14-3: Standards and specifications. Lead: Licia Florio
Aim: <ul style="list-style-type: none"> To use REFEDS as home for specifications and standards relating to identity federations using robust and tested mechanisms.
Work Items: <ul style="list-style-type: none"> Develop use of RFC process for documentation. Shepherd new entity categories through sign-off process. Develop Metadata Query Protocol work. Review of SCHAC in light of existing attribute schema.
Sponsored Output: <ul style="list-style-type: none"> 2-3 new Entity Categories defined. Metadata Query Protocol documentation submitted. Attribute schema and management review.
Budget: <ul style="list-style-type: none"> 10000 euro Metadata Query Protocol and REEP support work, Ian Young. 10000 euro Review of attribute schema and state of the art in this space. 10000 euro REFEDS Coordinator time.
Reference: <ul style="list-style-type: none"> https://refeds.terena.org/index.php/Entity_Categories. https://refeds.terena.org/index.php/SCHAC_Work. https://tools.ietf.org/html/draft-young-md-query-01.

3.4 REF14-4: Services

Workarea 4 will focus on the services that have been developed as part of REFEDS and continue to support their operation and usability. In 2014, this will include development work for the PEER software to improve the functionality of SAMLmetaJS as a core component of the usability of PEER / REEP. A key signing ceremony will be held to enable REEP to enter full operational mode, and federations will be encouraged to experiment with REEP metadata.

Further requirements for MET will be gathered based on usage by federations but no further enhancements are planned for this work period unless requested by the community.

REF14-4: Services

Aim:

- To operationalize REEP and continue to test metadata flow from public repositories.
- To improve MET as a management tool for federations.

Work Items:

- REEP service implementation, including key ceremony in Stockholm.
- Use of MET and improvements plan.

Sponsored Output:

- Completion of REEP MRPS and KMPS.
- SAMLmetaJS enhancements, software output and related material.
- Report on REEP testing and implications.
- Requirements for MET documentation.

Budget:

- 10000 euro PEER maintenance contract with Yaco Sistemas.
- 20000 euro PEER development contract with Yaco Sistemas.
- 10000 euro REFEDS Coordinator time.

Reference:

- <https://reep.refeds.org>.
- https://refeds.terena.org/index.php/REEP_Policy.
- <http://met.refeds.org/met>.

3.5 REF14-5: Specialist Work Areas

REFEDS provides the opportunity for new ideas and innovations that do not yet have defined outputs to be incubated for specialist work areas. It also supports infrastructure to allow closed discussion groups for more sensitive conversations relating to federation operations.

Any participant in the REFEDS community can propose a specialist work area. The REFEDS Coordinators will provide wiki space, mailing lists and other infrastructure to allow the groups to operate, but it will be the responsibility of each group to foster discussion and develop ideas.

REF14-5: Specialist Work Areas

Lead: Groups lead by proposer as appropriate

Aim:

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

Work Items:

- Continuation of the FOG group.
- Managing additional requests for work items.

Sponsored Output: <ul style="list-style-type: none">• None.
Budget: <ul style="list-style-type: none">• None.
Reference: https://refeds.terena.org/index.php/FOG .

4. Budget Requirements

Work Area	Amount
REF14-1:	24000 euros
REF14-2	24000 euros
REF14-3:	30000 euros
REF14-4:	30000 euros
REF14-5:	No allocation
Travel budget	12000 euros
TOTAL	120000 euros

