



# STRATEGIC PLAN

2022 - 2027





# REFEDS

## STRATEGIC PLAN

### About REFEDS

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Established in 2005, REFEDS is a community-driven international group of thought leaders delivering cutting-edge innovative trust and identity solutions for research and education.

### Our Mission

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Our mission is to provide an open collaboration hub for stakeholders in the Research and Education identity federation ecosystem to learn, educate, and build standards and best common practices for federations internationally.

### Our Core Values

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- **Trust:** through openness, transparency, and pragmatism in everything we do;
- **Community:** we are an enthusiastic, collaborative and inclusive community that makes strategic decisions based on consensus; and
- **Leadership:** we are global leaders with expertise in trust and identity.

### Our Stakeholders

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Our expanding list of stakeholders include:

- Global federation operators and their stakeholders
- Local, regional, and international research infrastructure providers
- Libraries and providers of scholarly resources
- Software engineers in trust and identity
- Trust and identity policymakers
- Identity providers
- Industry providers of trust and identity solutions



# REFEDS

## OUR GOALS & OBJECTIVES

Our goals and objectives enable everything we do.



### Empower

We empower open collaboration by enabling interoperability and trust between federation operators and federation stakeholders through community-led initiatives.

### Support & Educate

We support and educate our stakeholders by promoting and facilitating knowledge exchange via meetings, working groups, peer support, and initiatives that enable our communities to thrive.

### Curate, Develop & Maintain

We curate, develop, and maintain standards, specifications, and best practices through supporting community-driven initiatives.



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## CRITICAL SUCCESS FACTORS

### 1. Sustainable Standards Development Process and Adoption

**Outcome:** Globally adopted tools and standards that support the use and uptake of federation technologies.

**KPI:** REFEDS metrics show a year-on-year increase of adoption where possible.

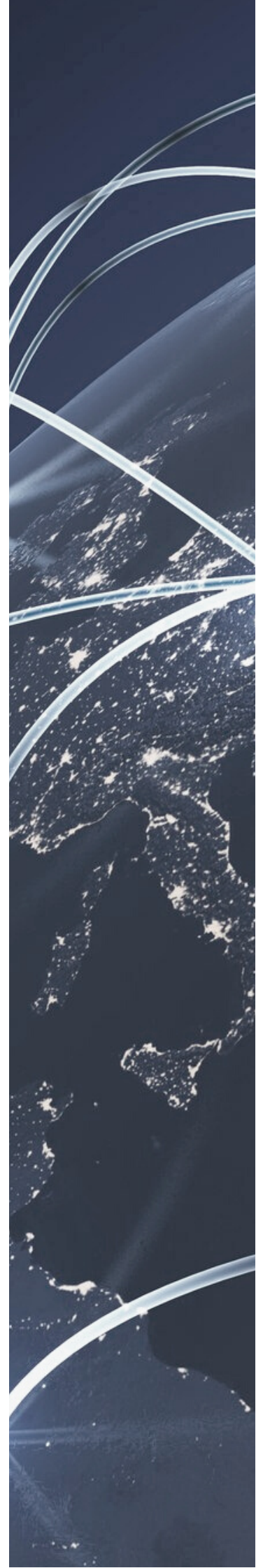
**Outcome:** Our standards are community developed and evolved in line with stakeholder needs

**KPI:** The working groups meet regularly, report that the meetings are valuable, and any resulting outputs are approved through the consultation process.

### 2. Supporting and Educating Stakeholders

**Outcome:** Our stakeholders are informed and educated of REFEDS initiatives

**KPI:** REFEDS has an ongoing communications plan and implements it.







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## CRITICAL SUCCESS

### FACTORS

### 3. Meeting Attendance and Community Representation

**Outcome:** Our global stakeholder groups attend REFEDS meetings, drive value from engagement, and participate on our mailing lists and slack channels.

**KPI:** Post-attendance surveys and community feedback that provide data on the breadth of community representation and whether participants have received value from the event/activity.

**Outcome:** Individuals build relationships and develop common ways of working through solving problems and free inquiry into possibilities.

**KPI:** Participation in REFEDS slack channels and mailing lists increase in use.

**KPI:** New community-driven initiatives are developed and reported at REFEDS meetings.