

TAC Recommendations for 2015

The Programs subcommittee has asked the TAC to develop a set of thoughts and recommendations around InCommon Priorities for 2015. This effort builds on similar previous efforts, updated to reflect the changing environment and requirements. TAC has decided to respond to this request with two short lists -- Problems, and Recommended Strategies. The second list, of necessity, includes higher level objectives rather than specific SMART outcomes. These lists are shorter than in previous years. That reflects InCommon's experience in 2014, and is an attempt to be more realistic and focused.

It must be noted that the TAC approached this request by looking at InCommon as a whole, and by listening to our peers and collecting their thoughts and opinions about InCommon's current status and situation relative to other Higher Ed/Research Federations. We purposely did not limit ourselves to the narrower set of technical issues that we often focus on and solve. Once Steering and Programs have agreed on a set of objectives for 2015, the TAC looks forward to working with Programs to develop the set of associated SMART outcomes.

We note that several of our recommendations encourage InCommon to expand its role. InCommon has not traditionally engaged in extensive and sustained outreach efforts, nor in the development of tools "customized to InCommon." Given the rate of change in the worldwide Federated community, the changing profile of the new members of InCommon (especially staff size and skills), and the evolving requirements of longtime members we think InCommon needs to redefine its role and relationship to its members, adopting a model similar to other Federations. (see, for example, the description of Canarie programs: <http://www.slideshare.net/teamktown/caf-refeds-updatei2idweeksanfrancisco2013v2>).

Problems

1. We have learned that easy and effective Federated interoperation requires a common set of practices between campus Identity Providers and Service Providers. InCommon's current requirements for participation set a baseline that is so low that interoperation between members can fail. Although best practices are detailed in public wiki pages, InCommon has not created programs to build consensus around their adoption nor invested in the broad outreach necessary to convince Participants to adopt them. In addition, InCommon has not developed the monitoring necessary to track implementation progress and follow up as appropriate.
2. InCommon communicates with member campuses mainly via Central IT (which is often viewed as the "member"), yet much of InCommon's potential value lies in service to instruction and research. InCommon's perceived and potential value is thus dependent on the relationship between those groups and Central IT on each

campus. Recent experience has shown that those relationships, particularly with researchers, have weakened considerably in recent years.

3. It is still too hard for many Participants to federate. The main factors are maturity of campus-based identity management practice, resources required to implement and maintain federation technology, and perceived value of investing in those efforts in the context of campus priorities. Implementing a production level IDP within InCommon is still too challenging a task for most member campuses. They are often resource and skill-constrained, and InCommon has not provided a sufficient package of integrated resources (training, documentation, tools and aids, recommendations on policies, etc) to lead campuses through a confusing process. Affiliates are available to assist campuses, but too little has been done to publicize successful affiliate-campus engagements.
4. Campus IdM and Federation, inclusive of Interfederation, are rapidly becoming the integration fabric for instruction and research across the globe. Because it is so new, however, rapid change is still occurring and widespread adoption has meant that change is coming from many directions. InCommon as an organization is not optimized to accommodate, facilitate, and lead needed change at a high rate.
5. InCommon does not have a concise, easy-to-deliver, and memorable value statement that Steering Members can deliver when non-Members ask "why should I join InCommon?". They may have heard a variety of long and meandering responses, but there is as yet no single convincing elevator speech.

Recommended Strategies

1. Develop and promulgate a family of programs to facilitate interoperation at a variety of levels of trust; each Program would be composed of a set of practices. These practices should include Attribute Release policies that facilitate collaborative work, an improved POP, publishing and testing accuracy of security contact information, participation in federated security incident response programs, improved user experience by using MDUI metadata elements, and stricter compliance with InCommon's SAML deployment profile. Monitor and verify compliance by Participants, publish regular reports detailing degree of compliance achieved by Participant, and reach out to help sites that are significantly out of compliance. This would begin to address problem 1 above and also demonstrate a partial answer to problem 5.

2. Develop outreach programs to help campuses adopt published best practices, work their internal situations and evolve policies as necessary. Provide tools, aids, and programs to help campuses implement the recommended best practices. This could include, for instance, advocacy to change the community's perception of attribute release from "something to be avoided" to "something that is necessary in order for our communities to collaborate and something that is perfectly legal to do". It could also include help in evolving a vanilla installed Shibboleth IdP to a production state that is a good InCommon citizen and advice in implementing a federated security incident response process. This point is responsive to problems 1 and 2 above.
3. Create options for faculty and staff to access federated Research and Scholarship SPs from campuses that do NOT operate IdPs, or whose IdPs do not support R&S Attribute Release. Building on the work of the IdP of Last Resort Working Group, identify, make available, and support an implementation of an IdP of Last Resort for the research and instructional communities. In addition, make available and support a mechanism allowing people to use their existing social identities to access SAML SPs. This is responsive to problems 2 and 3 above. The slow rate at which this work has been progressing is symptomatic of problem 4 above.
4. Make it easier for a campus to be represented within InCommon by an IdP. This could include both help in evolving a vanilla installed Shibboleth IDP to a production state that is a good InCommon citizen (Canarie's IdP Installer is an example.) InCommon should also provide campuses with easier access and encouragement (eg success stories) to commercial partners and campus mentors who could operate an IdP for a campus in line with the recommendations emerging from the Alternative IdPs Working Group. This is responsive to problem 3 above.
5. Make InCommon a full participant in eduGAIN. This would mean implementing the required policy and legal documents changes, evolving metadata practices, and publishing a metadata file to InCommon members that includes the full eduGAIN aggregate file. This would address some aspects of problem 4 above.