Cooperation Agreement for OSIAM4HE

**Cooperation Agreement
for
Open Source Identity and Access Management for Higher Education**

(OSIdM4HE)

Vision

In the summer of 2011 several individuals from numerous higher education institutions, including representatives from existing community efforts (i.e. Internet 2, Kuali, Jasig) met in a series of meetings with the goal of forming closer cooperation on a multitude of disconnected OSIdM4HE projects underway. The motivating issue is the continuing lack of a complete Identity and Access management solution for meeting higher education needs , whether open source or commercial. For some, the loss of the commercial Sun IdM suite has made this issue feel even more acute.

From these meetings a vision of a comprehensive set of OSIdM4HE solutions emerged along with a strategy for escalating the development towards the vision. The following major areas were identified by subgroups as the most desirable work stream modules needing to be addressed to arrive at a comprehensive OSIdM4HE. These modules may involve enhancements to one or more current open source products, or may involve creation of a new code base.

Work Stream Modules	Products Involved	Major Enhancements
Person Registries	TBD	Identity Matching, etc.
Provisioning	TBD	Interfaces to Registries, etc.
Access Management	TBD	TBD
Authentication	TBD	TBD

Strategy

The following high-level cooperation strategy has three primary goals of: 1) articulating a framework of joint development agreements to accelerate development towards the vision 2) spur additional investments by providing details about targeted development paths 3) establish an oversight structure to keep multiple development paths in alignment.

Development efforts will be divided into multiple work steams each formed with a common Memorandum of Understanding (MOU). See Appendix A, Joint Development MOU Template. While each MOU will have a different mix of contributing members, each will be asked to follow common conventions for project administration and governance. Each MOU will have one "primary caretaker" partner that will have ongoing responsibility for sustaining the work products after initial development and release.

Each MOU will be expected to proceed in accordance towards a desired end state highlighted in the reference architecture detailed in Appendix B. This architecture explains which core products form the basis and beginning point of development efforts as well as which work streams are expected to address major gaps in an overall OSIdM4HE solution.

Agreements

Each MOU will designate a liaison to be responsible for coordinating with the other liaisons to ensure that work is carried out according to agreed upon principles, highlighted below. This group of liaisons will serve as an overall "coordination committee" and will meet on a mutually agreeable timeframe to address any cross MOU project coordination issues. They will be responsible for maintaining an overall product development roadmap for a comprehensive OSIdM4HE and for general communications about such efforts.

It is expected that each MOU outlines the decision making and governance processes for the individual work stream module it is addressing. Each individual MOU module recognizes that the other MOU modules may be dependent on the others to deliver the overall comprehensive OSIdM4HE solution. Each MOU will strive to deliver multiple iterative releases of its work stream module in a coordinated fashion to maximize testing and deployment options.

It is acknowledged that joint collaboration of an overall OSIdM4HE suite of products may result in the sharing of intellectual property contributions amongst and between the various modules. The protection of any copyrights, trademarks or other intellectual property shall follow common conventions of the Primary Caretaker organization.

Signatures

The following entities, by signing this cooperation agreement, acknowledge the benefit and value that a cross community development effort brings towards realizing a comprehensive OSIAM4HE suite of products.

Printed Name	Title /Office	Institution	Signature

Appendix A

OSIdM4HE Joint Development Effort

Memorandum of Understanding (MOU) Template

Joint Venture Partner Definitions and Responsibilities

The XXX Project (hereafter Caretaker Partner) and the following designated joint development partners (hereafter Venture Partners) agree to the following terms in respect to the development and support of new software (described below as MODULE) for the benefit of all partners.
All Partners under this Memorandum of Understanding agree to review, sign and abide by the Open Source Identity and Access Management for Higher Education (OSIAM4HE) Cooperation Agreement. That document outlines the vision, principles and basic terms of collaborative development efforts by higher education institutions in the pursuit of a comprehensive set OSIAM4HE solutions. As stipulated in the Cooperation Agreement it is expected that multiple MOU's similar to this one will be formed to work on different parts of the overall vision.

As the Caretaker Partner under this MOU XXX Project agrees to assume primary responsibility for the ongoing support and sustainability for MODULE. It is acknowledge that for the development of MODULE all Contributing Members agree to commit resources according to the contribution matrix below.

Overview of MODULE

- Vision and Goals of MODULE
- Benefits of MODULE
- Risks of MODULE

Objectives of MODULE

- Timeline expectations
- High level feature / functionality expectations
- Dependency with other software expectations
- Licensing / legal expectations

Contribution Matrix

The following matrix highlights the contributions and resource expectations for MODULE. Based on the objectives of MODULE the minimum number of FTE, or cash equivalent resources, needed to realize the objectives are XX. The MODULE development effort will not begin until the minimum resource requirements are established.

Resources	Resource Type /Role	FTE Percent	Duration
CareTaker Partner Resource 1 Resource 2 Resource 3 Resource 4 Resource 5	PM Bus Analyst Config Manager Developer QA		
Contributing Member 1 Resource 1 Resource 2 Resource 3 Resource 4 Resource 5	PM Bus Analyst Config Manager Developer QA		
Contributing Member 2 Resource 1 Resource 2 Resource 3 Resource 4 Resource 5	PM Bus Analyst Config Manager Developer QA		

Joint Development Venture Governance

The governance structure for the joint development effort shall follow the Caretaker Partners established practices, highlighted below, with variations or exceptions noted.

- MOU Coordination Committee Liaison
- Development Leadership Roles, Responsibilities, Decision Making Authority
- Product Roadmap Features and Timeline Setting
- Product integration and testing plans that consider the other OSIdM4HE modules
- Product documentation and training plans that consider the other OSIdM4HE modules
- Decision / Issue Escalation and Resolution Process
- Etc.

Joint Development Venture Support and Sustainment Model

The Caretaker Partner shall have primary responsibility for the ongoing support and sustainment of MODULE, highlighted below, with variations or exceptions noted.

- Joint marketing expectations
- Joint support expectations
- Additional contribution expectations
- Etc.

Guidelines and Principles

The following guidelines and principles will be followed during the development of CODENAME. They set forth expected best practices and expectations regarding the development and delivery of CODENAME.

- All software will be delivered as open source under an educational license agreement.
- All development will be carried out according to the overall high-level reference architecture. See Appendix B.
- All development strives to minimize redundant features across software products.
- Etc.

Appendix B

OSIdM4HE Reference Architecture

This section under development...