These are notes from the conference call, not a transcription of what was said. The time code refers to the initial unedited version of the audio record.

00:36 Charlie: To schedule call at the end.

00:48 Opinion about recording Comfortable working in the open. Not certain about value, but perfectly okay.

02:44 Charlie: Talking about priorities. Not time to rank.

03:24 Charlie: [From last meeting] Policy issues are what is standing in the way. Between federal e-Auth and InCommon Come up with working groups to seek resolution

04:02 Brett: Minutes--What happened to the wrap-up discussion.

04:17 Results missing. High level desired outcome. Facilitating and bringing about the inter-federation of Incommon, EAI, Meteor and potentially a K-12 federation.

04:56 Charlie: Will revise meeting minutes.

05:11 Ken: Work on peering federations at least between InCommon and EAF working actively on document of SAML2 plan. Now aspire for EAF targeting peering at SAML1.3; work underway EA2 can play role providing motivation for that work to move rapidly.

Follow up with Charlie Colemen identify applications of interest to both communities.

06:10 Ken: First application by end of year, but lack sense of urgency

06:37 Ken: More applications more emphasis.

Nancy: Question: Motivation for whom [to support federation]. For the first round, who are we targeting, K-12, early adopters, or broad spectrum?

07:19 Ken: Targets indicate first applications were limited impact on [resources of] Department of Ed. Careful startup. Appreciate, but look for “big splash. Move on agency time frames.

08:09 Secondly, we are pursuing a number of different agencies and applications and “killer aps”; nothing big enough to motivate institutions. No one challenges federated identify, but will delay as long as possible to join.
09:00 Ken: Coleman email list of applications. Who were the constituencies on campus targeted. Applications being advanced initially targeted for institutional researchers, financial aid officers, registrars as they file federal reports. Two or three people at each institutions. Applications were LOA2 and LOA1 applications. Going to require campus more vigorous identity management. Campuses will find challenging, but can do it for the several people involved.

11:00 Ken: Reporting as contrasted to transactions. [The Department of Education is] Concerned about applications requiring Internet scale implementation.

11:46 Ken: ED unable to list 28 applications, willing to provide edited version later. When incorporated will talk about first three applications.

12:33 Adele: Meteor took a year [to establish volume].

12:42 Adele: Meteor not a high volume yet.

13:00 Because of number of schools, even a few on each campus is a large number.

13:25 Could work with InCommon teaming with guaranty agencies. Different ways to look at it.

14:00 Jim: Money can solve technology. Procedures most difficult. [Earlier] PESC Conference [discussion] on LOA; [registrars] know about regular students, but not many others.

14:41 Ken: Uniform LOA not required. Orientation requires InCommon Silver to do peering. Take a number of months to do that. Hoping to find some “really low” LOA applications [to achieve] broad use

15:25 Institutions do not have infrastructure for low LOA?

15:33 More volume and hand holding, strategic important, but relatively low number of applications

15:54 What are they looking for/ IPEDS

16:06 Ken: Checking for Charlie’s email

16:20 Go to low LOA for high volume

16:35 Ken: Vision is real clear, significantly resource constrained. ECB

Adele: [ECB stands for] E-Campus based; a very low volume.
Ken: The next three: FP datamart, PEPS Eligibility, EZ Audit.

17:45 Larry: EZ Audit Accounting review process with feds less broadly than IPEDS. Finance reporting.

18:07 Ken: [ED] Applications selected by business owner readiness, manageable demand, fit with other partnership, etc complex set of parameters all [LOA] level 2,

18:32 Ken: NIST 800-63, NIST is revising the document that is the basis of this. Essentially done, making a new assessment process. See that [status] on phone call next week.

18:55 Ken: Draft MOU with InCommon and EAF Things are moving forward.

19:16 Ken: Revision happening wont’ change soon.

19:38 What is now?

19:44 Ken: Phone call moved week, Georgia Marsh to talk abut peering arrangements. Revised credential framework. Talking weeks.

20:20 Ken: Document vetted; higher ed leading customer base at this point. Credential frameworks

20:40 Charlie: Need to more EAF testing on campuses?

20:45 Ken: Will find that out… I don’t have an answer, Charlie.

21:00 Ken: Question whether InCommon Silver can be self-assessed or require external assessment. Initially [GSA] said assessment can be done on campus. Hopefully policing will be done on campus to make sure the campus is complying with the standards and InCommon Silver will just need to ensure the campuses have adequate documentation and documentation is in place to validate the campus activities.

22:00 Charlie: That is good because [during vetting of the federal document] the InCommon Silver campuses can do a self-assessment themselves and can share issues and practices among themselves to see if there are any “stoppers.”

22:18 Ken: The venue for that conversation will be InCommon Tech. One Tech committee could serve all three levels of federation. Invite to get involved.

23:00 Charlie: How can this group push sense of urgency.

23:10 Ken: It has already been valuable in terms of that first meeting. Follow up conversations with the registrar community may begin to explore other activities. Need broadly across for different pockets of interests to know the value of the model.
24:00 Ken: Talk with Google. Google education.

24:21 Google highly interested.

24:30 Ken: Google scholar and Google IT now talking. Each segment within Google saw value in InCommon, but hadn’t put it all together.

24:50 Ken: Same process is needed on campus. Every constituency is willing to stay with their current “work around” rather than develop one piece of the infrastructure that benefits all.

25:21 Member of EA2 serve as focus points on the campus to say “We are going to help you do the addition here” that would justify and encourage infrastructure supporting federated identity and joining the federation.

25:30 Nancy: I would agree with that completely. The different efforts coming together will move this forward. I would suggest another level of discussion that needs to go in “our constituency” [registrars and admissions officers]. It needs to be basic: What are we talking about when we say “identity management”? There really isn’t much visibility at most institutions who are not in the circles we are talking about. People get excited when they are talking about possibilities down the road and when they understand how this can come together. But the challenge is when they say “Where do we start?” “Where would be any information that would help me get started.” How do I talk to my IT people?

Visibility at a basic level.

26:45 Charlie: I couldn’t agree with you more. I think there is great communication within the technology community. And great communication within functional areas on the campus. I was encouraged to see some PR work that JISC has done recently to educate the average functional person on a college campus when federation is so valuable.

27:11 Ken: Ah, the famous “floating disk” animation. Delivered with a nice crisp British accent.

27:20 How much more authoritative could you be?

27:35 Ken: We need to make some headway on that front.

27:43 Charlie: Ken, should we be focusing on other federal agencies too? I lament the loss a great “FastLane” demo.

28:00 Ken: Let me answer that briefly Charlie. We are continuing to work with other agencies. We are within a micron opening up three NIH applications and keeping them open using federated identity. MOU NIH and InCommon on an ad hoc basis. We are
hoping to announce within a week or so three applications are now available by federated identity. That is the beginning of a long list from them.

28:49 Charlie: That is good news. Goal to encourage eAuth in InCommon, Meteor and other federations.

29:20 Brett: I would like to stick with the phrasing “bring about.” Challenge any idea that comes up against that very tangible outcome. To help us prioritize. And it will tell us whether we are done or not. If they are using federation in those environments, then we have done it. No, we are done yet.

29:50 Charlie: We should worry about policy issues within the Incommon eAuth policy working group. Is there anything we should be doing on that front at all?

30:20 Brett: Georgia couldn’t join, but we know they are talking. Ask the parties in our main priority statement list to tell us if we can help. If something is going well, we are hands off and if they ask us for help somewhere, we can step in.

31:10 Charlie: Glad to hear we are close to getting stuff up. New EAF document out in a couple of weeks. I am interested at looking on our campus to see if we can participte in the first three Department of Education applications. I would like to see us put pressure on the Department of Education to come up with a high volume, low assurance application. And I don’t know what that is.

32:30 After a high volume, low level of assurance application, we can get to a high volume, high level of assurance application.

32:50 Ken: By low level are you meaning an LOA1 or an LOA2.

33:00 Charlie: I suppose I have a preference for 1 – a lower bar. Are the Department of Education applications categorized that way?

33:17 Adele: Anything that involves financial data is at last an LOA2. But there may be other things – organizational data perhaps—which is what I think they are talking about the financial partners datamart. That would be a lower level of assurance, but then you are not talking about high volume either.

33:40 Jim: To provide some additional information, the definition of LOA applies to all federal agencies uniformly. Also some of the state data that comes the federal. Data from a student FAFSA is supplied to state agencies such as New York’s Higher Education Services Corporation. Adele [Meteor] is going to follow the federal definition of LOAs?

34:28 Adele: Since there is a new 800-63 coming out, we are going to wait until we saw that. There are some things such as whether it includes multi-layer authentication or things like that. Then we are planning to move to that in the relatively near future.
35:00 Jim: The intent is, if you can, follow the federal.

35:07 Adele: We didn’t see much to changing it now until we see what the new guidelines are.

35:13 Jim: And if I recall right, the state CIOS organization tends to follow the federal because virtually every application this have has federal data in it.

35:20 Ken: Just because there is federal data does not mean it is LOA2. The Department list included LOA1, but they were not broken out whether they were LOA1 or LOA2.

35:40 Jim: There are LOA1. If I recall right, reserving a campsite [which requires a deposit] is an LOA1 application.

35:50 Brett: That sounds like a good action item—getting that [Department of Education] list broken out by LOA1, LOA2.

35:55 Ken: I am deeply respectful of the resource limitations that Charlie is alluded to.

36:30 Ken: A date and a target is sufficient to get everybody to move I hope.

36:32 Charlie: Are any of the applications broad based? That would apply to a big bunch of students?

36:40 Ken: Yes.

36:42 Charlie: Are they further down on the list? Are any a slow but steady roll-out along.

36:55 Ken: Yes.

36:58 Charlie: That is encouraging.

37:05 Ken: One other positive factor is the Department of Ed is interested in using Shibb as their service provider software. Which means they will avoid the pains of large-scale federation that most of the commercial products don’t address.

Shibb has been certified as an IDP, but not as a service provider. We need to work with ___ to do that. At lot of this will hinge around Shibb 2. Shibb 2 is just now in the hands of the first group for Alpha testing. I think progress is forward; lots of things are moving on slow but steady steps. It is the impatient types of the 60s who want the world to change overnight.

38:13 Charlie: The Department of Education list, the imminent release of Shibb 2.0 over the next quarter, the 800-63 revision plus new CAS? Silver document for vetting and review all four of those things together are really encouraging.
38:40 Ken: As far as I can tell with the exception of the MOU agreement, there are no holes that are not being addressed.

38:54 Charlie: I happy to hear about NIH. Is NSF in play or so we .. Who beyond the Department of Education and NIH are the most viable federal partners?

39:15 Ken: We are still working with the TeraGrid and those pilots. We have seen from [the Department of] Energy some interest. I think there is wide-spread content on the model and it is just a question of which agencies have the wherewithal to make the transition to the point where they can wind up saving money. It takes a certain investment to get to the point of savings. I think patience is what is required here.

40:00 Jim: Well we have had ten years of patience.

40:12 Jim: When there was a meeting recently here at the Convention Center that included federal people, there were a number of agencies that had applications. One of them happened to be the Office of Personnel Management for online filing of applications for federal employment. I don’t know how many students want campgrounds [reservations], but Interior was piloting reservations and payment for campgrounds.

40:40 Ken: Absolutely all agencies have some interesting and useful applications. The trick is how many do we do with one[-to-one] auths and how many do we do when we have the framework with EAF and InCommon established. NIH is ready to move forward. Education is waiting for the peering agreement to be in place. That will keep us honest about keeping the peering agreement concluded. The agencies will have to make a decision whether to move or to wait for the peering agreement to be in place. The good news is the EAF is aware of our activities.

42:20 Now there is good alignment between moving ahead on these experimental efforts such as NIH and using those to inform the peering structure we want.

42:30 Charlie: Did Charlie [Coleman, U.S. Department of Education] give you any indication when he thought the first things on his list could or should be done?

42:40 Ken: That first ECB application was to go into production in December and we are looking for campuses to do testing.

43:00 One demoralizing thing happened. I had asked a group to identify what attributes they might be needing from campuses so campuses can have an idea what attributes to maintain. They didn’t want to provide that information to us. Each agency wants to decide on its own what attributes it wants and what those attributes mean. Coordinating among agencies was something the agencies were not ready to do.

43:45 Charlie: it is kind of a bummer.
43:55 Ken: You will have to look each application to make sure you have the right [attributes]. Some may require you populate some items in your directory that you have not populated.

44:10 Charlie: Has the Department of Education decided what attributes they will want for the first handful of applications they are proposing to use Shibb?

44:18 Ken: I don’t know the answer and that is a good question. My guess is they will just want some identify. The good news, since [the user] is known to the application, now with federated identity someone will have to match the new identifier with the former [or current] identifier. Charlie said they were already looking at it. That was a good sign they understood the issue.

45:13 Charlie: That is encouraging. They are thinking about matching the current id with the old id.

45:35 Ken: Let’s call that account linking. They are moving slowly because account linking must be done manually. But we have software that does that. It shows they have given thought to the problem space. They didn’t think any of the obstacles were intractable. December is the timeframe for the first one. Who can identify schools who can test this? Penn State is one school.

46:45 Jim: Ellen Blackmum can provide you that list. So probably the best is to send Ellen the list of those in InCommon and then ask her to come back to you to tell which ones. She not only is in contact with the financial aid officers, but she knows how much support each financial aid officer is getting from IT at the present time.

47:09 Ken: Great could you follow up

47:25 Jim: The way I understand Charlie’s suggestion, if you identify any federal application with a low LOA, then it could be moved more quickly. When you look it from the agency’s perspective only colleges and universities have a really good identification process [for regularly admitted students].

48:00 Ken: Let’s remember FastLane was an LOA1. That is a good candidate. The stuff from NIH are all LOA1s.

48:25 Jim: At the first meeting you mentioned attributes; maybe what we ought to do is document what attributes some of these proposed pilots are going to use so the people doing the pilots will know what others are using. Is that a reasonable staff exercise?

48:42 Ken: Well that is the basis for which I went to the federal agencies about a couple of weeks ago. That is when I got rebuffed.
49:13 Jim: But if you look beyond the federal agencies, say to publishers. It seems some of the publishers are asking for different attributes.

49:35 Ken: I haven’t seen anything in the content application space that is deeply analogous to what an agency would use. Almost all of those application just want “member of the community” and maybe an opaque identifier. They are so concerned about privacy issues they are not asking anything deeper. What we got from NIH was pretty interesting. That was the first place where they needed to know the “Green Card” status.

50:12 Nancy: We have visa status on everyone.

50:28 Charlie: We do too.

50:30 Nancy: We were required to do that by SEVIS. And I think we have it on all of our employees as well.

51:00 Ken: NIH applications are aimed at faculty and staff more than students.

51:02 Nancy: And graduate students.

51:07 Jim: Is there a publicly available document that describes what NIH wants?

51:15 Ken: If a document was available, it would be public, but there isn’t one.

51:50 Brett: From the discussion it seems we want to focus on high volume as our deliverable. Not just establish the federation, but the desire to establish high volume at two different LOA levels.

52:08 Ken: I think so, but that is based on what will make campuses make the most significant commitment. I have always believed high volume would, but servicing a few important people also is sufficient though again you can find “work arounds” for a few people, where you can’t find “work arounds” if you are servicing the larger community.

52:35 Charlie: Will FastLane ever go back on the table once the CAS process.

52:40 Ken: At the meetings I am at right now I saw Ardath and I will ask her.

53:10 We are getting close to the end of this call, do people have thoughts on how we should do this? A monthly call would be valuable. We talked about a lot of things that are happening. Even getting a status report on Shibb load testing is and how the peering group is doing, when the CAS document will be out, maybe something being discussed at the I2 meeting in two weeks, would be useful. Are people agreeable to that?

53:45 [Murmurs of agreement]
53:50 We will target a call for the middle of May.

54:00 Mike: Does this time work for everybody?

54:20 Mike: May 9th at 2:00?

54:22 Charlie: Wednesdays are my best days.

54:28 Mike: It is better to have a call on the books.

54:40 Charlie: Okay May 9th. We will get another version of the minutes. The minutes from this call will be very valuable too.

55:00 Charlie: I am encouraged by much of what I have heard today.

55:30 Brett: What we are not hearing is any progress on Meteor’s role in this. This was all InCommon and EAI.

55:40 Charlie: That is true. But when Shibb 2.0 is available and some agreed upon CAS? process between eAuth and InCommon would you consider a pilot for a Meteor school?

56:16 Brett: Certainly we would.

56:40 Brett: It is not too early to determine whether we are going to have a K-12 participant or not.

56:50 Charlie: There is significant interest in that community. A few pilot schools that would be willing to play in this space. I actually talked to folks in California that are interested.

We should keep our charge as broad as possible. We do intend to bring about a federation that includes K-12.

57:40 Ken: Charlie if you could send out that animation it would be of interest to people.

57:49 Charlie: I will be happy to.

57:50 Ken: I will send Charlie Coleman’s comments to the list.

57:59 Ken: About the K-12 space. I had a telephone call about ten days ago with a group. We had a good conversation. I don’t know where that goes. We had a nice icebreaker with 6 to 12 people from the K-12 space.

58:18 Larry: There is interest in the K-12 space. We would like to be part of this an help out as much as possible. Our constituents are asking for this ability. We would be actively involved and get anyone involved you need to for the project itself.
58:33 Charlie: That is fantastic Larry. Thanks Thank you all.

58:47 Brett: May 9th is not good for the Meteor Advisory Team folks. We have a meeting scheduled for that week. How about May 16th.

59:00 Ken: I can’t be there, but I can have someone.

The call was scheduled for May 16th.

59:18 Jim: A number of you are going to be at the PESC Conference April 23rd. I know, Hans, that you are going to here. It might be useful if you wanted to pick a time a group of those going to be at PESC and involved in EA2 could meet. We could provide notes to others.