

Chair Updates - GGF10

Charlie Catlett, GGF Chair
Steve Crumb, Executive Director



Agenda

- Overview of GFSG Decisions and Initiatives
- Clarifications on GGF Documents
- OGSi → WSRF Evolution
- GridForge Updates
- Review of Key Document Processes

Overview of GFSG Initiatives

- OGSA as a “flagship” architecture
 - Doesn't imply “only”
 - But at this point in time OGSA represents a significant opportunity for GGF to provide coherence and direction to the Grid community
 - Focus efforts to make OGSA successful
 - Gap analysis (outreach to component groups)
 - Architecture-oriented groups (some overlap allowed)
 - OGSA-AUTHZ-WG
 - CDDLM-WG
 - OREP-WG
 - Etc...
 - Grid Logging (BOF)
 - In practice, we want to encourage OGSA work
 - Existing WG's may wish to adjust charter to do specific OGSA work
 - Existing WG's are free to NOT adjust charter, in which case a group may be formed to do the OGSA work and there may be duplication and/or overlap with the existing group

Overview of GFSG Initiatives

- Group Health “metrics”

- Area Directors to be much more involved in measuring group progress and success
 - Working within charter
 - Progress toward milestones
 - Posting of minutes and other materials
 - Critical for WG’s due to IP policy
 - Activity between GGF Events

Overview of GFSG Initiatives

- Intellectual Property Policy

- Decision to adapt IETF's recently revised IP wording
 - *Clarification and expansion of "Contributions"*
 - *Clarification and expansion of "Rights"*
- GGF Process Working Group holding BOF this event
 - Scope is to rewrite GFD.1 and perhaps GFD.2 and GFD.3

Overview of GFSG Initiatives

- Birds-of-a-Feathers (BOFs)

- Implications of past BOF policy seemed too rigid
- BOFs can be for many different purposes, not just to discuss a charter prior to group formation
- GFSG wants to encourage these types of interactions
 - Grid deployment
 - Grid management
 - Etc.
- “Charter Discussion BOF”
- Ad-hoc meeting (GGF IPR not in effect)

Overview of GFSG Initiatives

- Liaison Efforts with other Stds Bodies
 - WSRF and others have encouraged greater cooperative efforts between GGF and other bodies
 - Actively pursuing management-level and group-level liaisons with:
 - OASIS
 - DMTF
 - DCML
 - WS-I
 - W3C
 - IETF

Overview of GFSG Initiatives

- Research Groups

- All different kinds
- Identify a set of guidelines for chartering and for management (different than working groups) - In Progress
- Application Focus groups
- In general, GFSG believes RG's are fundamentally different from WGs and need more freedom and less "hands-on" management - looking for guidance from RG chairs in terms of how we can help



Overview of GFSG Initiatives

- Design Teams

- IETF concept
- Small, “private” group engaged to solve a particular issue of interest to the overall group

“It is often useful, and perhaps inevitable, for a sub-group of a working group to develop a proposal to solve a particular problem. Such a sub-group is called a design team. In order for a design team to remain small and agile, *it is acceptable to have closed membership and private meetings*. However, the membership should be agreed by the working group (consensus) and the design team should *keep the working group informed of its progress. The output of a design team is always subject to approval, rejection or modification by the WG as a whole.*”

Clarification of GGF Documents

- Encourage “Individual” Submissions
 - INFO and EXPERIMENTAL can come from individuals or groups of authors.
 - CP and REC can also come from individuals or groups of authors, but would be assigned to a working group for review.
- Encourage Experimental document submissions
 - “Informs the community of the results of Grid-related experiments, implementations, operational experience, *or to propose an experimental specification*”
 - Not just experiment results
 - Propose a protocol or other “spec” for experimentation
 - Recommendations have a 2-year “timer” after which they may be dismissed

Clarification of GGF Documents

- Clarification of Community Practice Docs
 - “inform and influence the community regarding an approach or process that is considered to be widely accepted by consensus and practice in the Grid community”
 - Currently, mostly internal processes

OGSI→WSRF Evolution

- Opening Plenary Session to discuss technical details
- Additional discussion in OGSI-WG sessions

OGSI→WSRF Evolution

- WS Community does standards differently
- Not uncommon for draft proposals to be created offline and submitted to a technical committee
- OGSI-WG participants had involvement

OGSI→WSRF Evolution

- Impact?

- GGF-sourced concepts and requirements are supported (GGF influenced the WS community)
- OGSA is fully intact with minimal update and impact to design patterns
- More widely accepted “plumbing”
- Can focus on higher-level services, which is our “bread and butter”
- Compliance with existing toolsets (expedience)

IT’S A WIN/WIN for both communities!

GridForge Update

- Chair Project

(<http://forge.ggf.org/projects/newchair>)

- Contains:

- “Cookbook” and Administrative and User FAQs
- IP Policy
- Document series information
- Proposed New Group Status Tracker
- “How to ...”
 - Propose a new group
 - Submit a draft to the GGF Editor
 - Schedule a session at a GGF Event

Review of Processes

- Submitting a GGF Working Draft

<http://forge.ggf.org/projects/ggf-editor>

- Template

<http://forge.ggf.org/projects/ggf-editor/document/GFD-Template>

- Front page of Editor project contains a link to the submission form

https://forge.ggf.org/tracker/index.php?func=add&group_id=90&atid=414

Attached document **MUST** be in an editable format (no pdf)

- Copyright and IP Policies included
- Named appropriately (draft-ggf-wg-brieftitle-version)

Review of Processes

- Checking Status on a submission

https://forge.gridforum.org/tracker/index.php?func=browse&group_id=90&atid=414

Review of Processes

- Public Comment

<http://sourceforge.net/projects/ggf>

- Download document
- Comment via Forum (discussion thread) associated with each document
- Positive comments welcomed!!

GridForge Update

- Goals for Admin of a Project
 - Overview of leadership and purpose
 - Mail List information
 - Accessible (most recent) Charter
 - Link to current drafts
 - Link to Agendas and Minutes
- Project Template
 - Look and feel
 - Consistency among groups
- Repository for IP reasons

Open Q & A

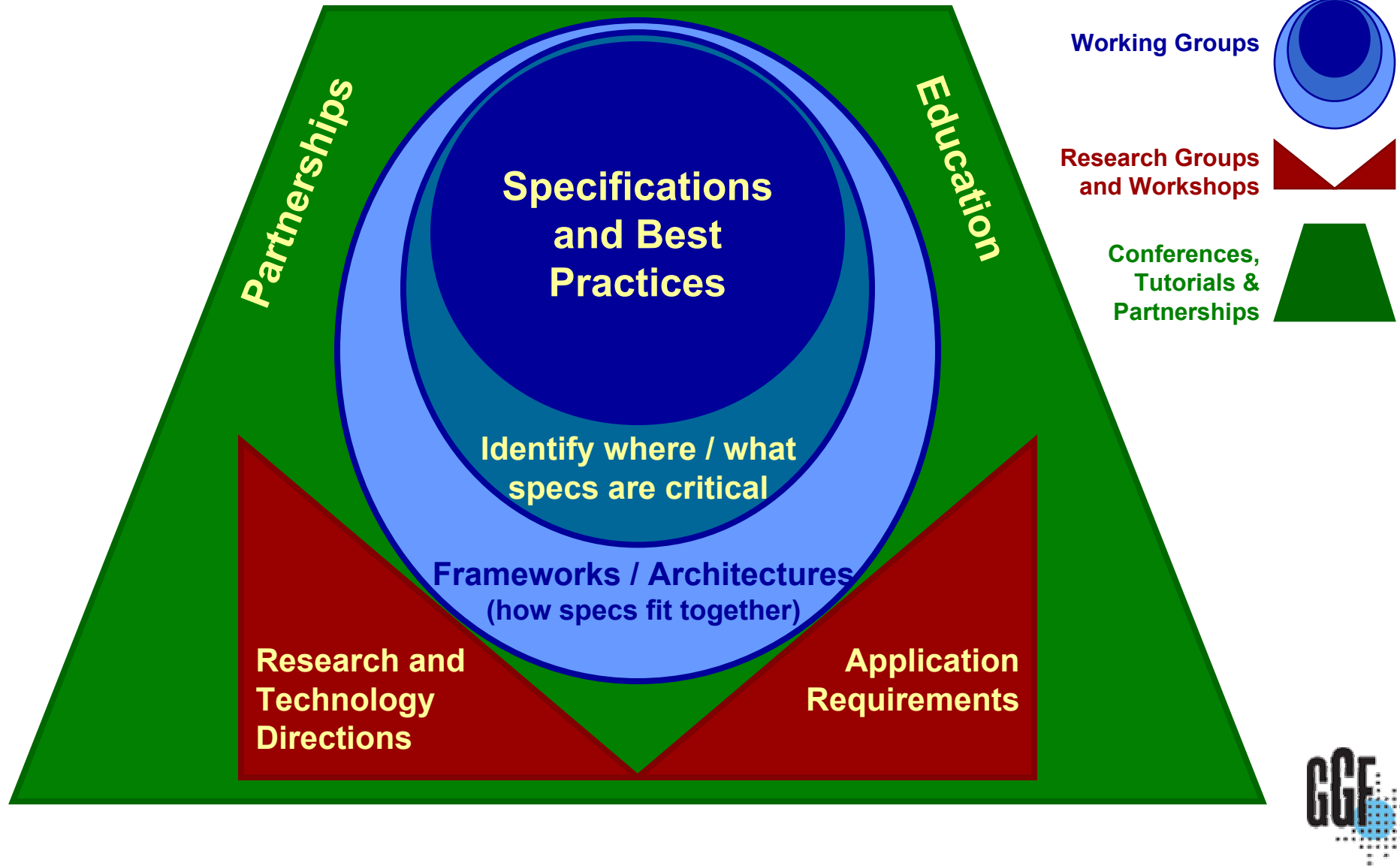
- End of “Updates” session
- After break, another session on “basics” of being a chair

Why GGF?

- An Open Process for Development of Agreements and Specifications
 - Grid “Recommendations” process
 - modeled after Internet Standards Process (IETF, RFC 2026)
 - Persistent, Reviewed Document Series
 - similar to RFC series; initiated October 2002
 - Intellectual Property policies (RAND) modeled after IETF policies
- A Forum for Information Exchange and Collaboration
 - Comparing notes on experiences, approaches
 - Spanning vertical layers, including people who are
 - Doing Grid Research
 - Designing and Building Grid software
 - Deploying Grids
 - Using Grids
 - Spanning technology areas- from directory services to scheduling to data handling to security to collaboration environments to...



Working Groups and Research Groups



Key GGF Strategies: Process

- Open Standards Process

- All participants have an equal voice
- All meetings announced
- Major document revisions and decisions announced to mailing list
- Meeting minutes available

- Meetings

- Frequency
 - Phone: Frequency is Decision of Chairs
 - Interim: Frequency is Decision of Chairs
 - GGF Meetings: 3x/yr, working groups strongly urged to meet
- Openness
 - All meetings must be announced to mailing list and in GridForge
 - Interim meetings should be announced with adequate time to arrange travel (suggested 4 weeks, *minimum* 2 weeks)
 - Phone dialin must be allowed for interim meetings



Key GGF Strategies: Groups

- Working Groups (WG)
 - Crisp focus on development of a specification, guideline, etc.
 - Clear milestones based on delivery of drafts
- Research Groups (RG)
 - Focus can be broader than WG, but must be clear
 - Milestones based on delivery of drafts, organization of workshops, and workshop reports

Key GGF Strategies: GridForge

- Why GridForge

- Single repository for GGF work and information
- Self-managed sites (“projects”) allows scaling *with consistency*
- Public forum for processes (public comment, document submission, editorial pipeline status, etc.)

- Relationship to Mailing Lists

- A group participant should be able to follow major decisions and document drafts solely via the mailing list
- A group participant should be able to follow major decisions and document drafts solely via using GridForge
- *More on this in “GridForge Common Practices” later*



Key GGF Strategies: Documents

- Four Types of Documents
 - Informational
 - Experimental
 - Community Practice
 - Recommendations (2-state process)
- Document Process and Editor/Publisher
 - Open, Public Review Process for GGF Drafts
 - GFSG reviews recommendations and community practice drafts as first stage of pipeline
 - Informational and Experimental drafts reviewed by editor, optionally by GFSG

GGF Structure

GGF Corp.

Secretariat: Operations

Board of Directors

(Catlett, Messina)

- Financial, Legal Responsibility
- Appoints GGF Chair

Conference Mgmt

Sponsor Programs

Finance/Legal

IT (Website, etc.)

Staffing & Services

Holds *non-exclusive* copyright
for document series

GGF

Document and Standards Work

Steering Group

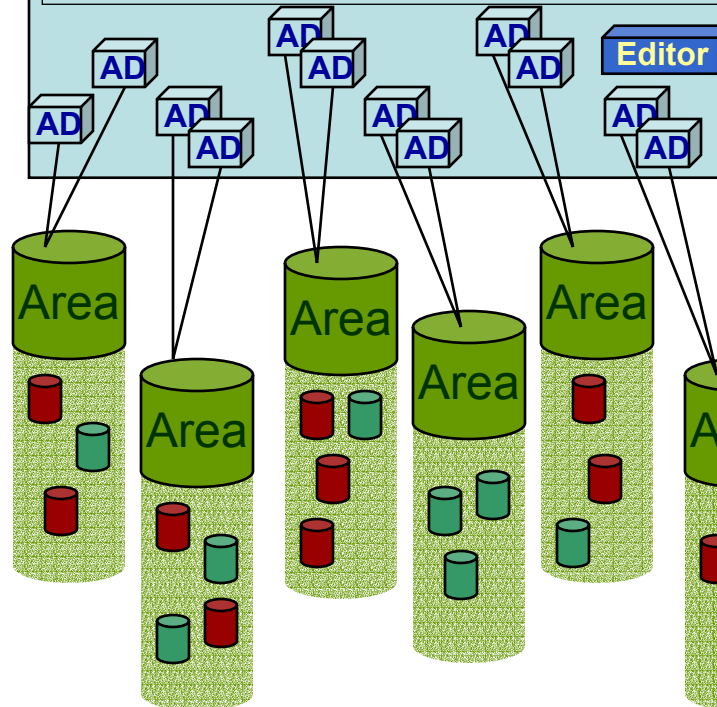
- GGF Management
- Document Series Review

Chair

A-Large
Committee



Editor





GGF Advisory Committee

- Advise on strategic direction,
industry, government
- Advise on governance

Grid Research Oversight Council

- RG/WG Workshop series
- Advise on Research Issues

 = working group
 = research group



Key GGF Strategies: Management

- Individual Groups

- Working Group and Research Group Chairs work with Area Directors to track progress based on charter.

- Area Directors

- Responsible for assisting chairs
- Review drafts prior to submission to editor
- Promote communication
- As a group, AD's approve charters and advance CP and R documents

- GFSG At-Large Subcommittee

- Responsible for implementing “appeals” process for group charter approval and document advancement decisions
- Oversee liaison activities with other groups
- Advise on long-term strategies

Key GGF Strategies: Advice

- **GGF Advisory Committee (GFAC)**
 - Advises GGF Chair and GFSG on long-term institutional strategies
 - Evaluates performance of GGF overall and of GGF Chair
 - Singular governing role: approves nomination, by GFSG, of GGF Chair
- **Grid Research Oversight Council (GROC)**
 - Facilitates the involvement of research community in GGF
 - Responsible for reviewing and approving workshop proposals
 - Advises GFSG on the formation of new research groups
- **Grid Marketing Advisory Council (GMAC)**
 - “Anti-Hype” Working Group
 - Advises GGF Chair and GFSG on marketing strategies for Grid Computing
 - Identifies and publicizes usage of Grid in industry, research, and academia

Key GGF Processes

- Proposing a new group (BOF, Charter (criteria), AD and GFSG approval, mail list and project)
- Running a productive group
- Submitting drafts (document types, naming convention, overview of process, IPR and Copyright)

Proposing a New Group

- Identify a concise area of interest (check of existing overlaps)
- Identify potential leadership
- Identify consumers
- Identify (draft) purpose and deliverables
- Request BOF from ADs and GFSG (draft charter encouraged)

“7 Questions”

- **FOCUS**
 - Is the scope of the proposed group sufficiently focused?
- **Clarity and Relevance**
 - Are the topics that the group plans to address clear and relevant for the Grid research, development, industrial, implementation, and/or application user community?
- **Necessity**
 - Will the formation of the group foster (consensus-based) work that would not be done otherwise?
- **Overlap**
 - Do the group's activities overlap inappropriately with those of another GGF group or to a group active in another organization such as IETF or W3C?
- **Critical Mass**
 - Are there sufficient interest and expertise in the group's topic, with at least several people willing to expend the effort that is likely to produce significant results over time?
- **Demand**
 - Does a base of interested consumers (e.g., application developers, Grid system implementers, industry partners, end-users) appear to exist for the planned work?
- **Appropriateness**
 - Does the GGF have a reasonable role to play in the determination of the technology?

What does it mean to be “chartered”

- The charter is a contract between the GFSG and the group
 - allows the group to work on the items described in the charter
 - Obliges the GFSG and editor to accept work as input to the review process for GGF documents.
- Work outside of scope of charter requires renegotiation of charter
- Promotes overall coherence in GGF work
- Breach of contract has implications

Bureaucracy

- Group must have an acronym
- Approved Charter goes into GridForge
- Group gets mailing list from ggf:
acronym-wg@gridforum.org
acronym-rg@gridforum.org
- Groups are given a GridForge project where they post running info, minutes, meetings, drafts, etc.

Typical Working Group Activities

- Develop ideas
- Review proposals
- Jury
- Find consensus about proposals
- Produce specifications
- Recommend specifications to GGF

Role of Research Group

- Identify and collect research
- Hold workshops
- Produce informational docs
- Often lead to WG proposals

The following copyright notice and disclaimer shall be included in all GGF documents

"Copyright (C) Global Grid Forum (date). All Rights Reserved.

This document and translations of it may be copied and furnished to others, and derivative works that comment on or otherwise explain it or assist in its implementation may be prepared, copied, published and distributed, in whole or in part, without restriction of any kind, provided that the above copyright notice and this paragraph are included on all such copies and derivative works. However, this document itself may not be modified in any way, such as by removing the copyright notice or references to the GGF or other organizations, except as needed for the purpose of developing Grid Recommendations in which case the procedures for copyrights defined in the GGF Document process must be followed, or as required to translate it into languages other than English. The limited permissions granted above are perpetual and will not be revoked by the GGF or its successors or assigns. This document and the information contained herein is provided on an "AS IS" basis and

THE GLOBAL GRID FORUM DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO ANY WARRANTY THAT THE USE OF THE INFORMATION HEREIN WILL NOT INFRINGE ANY RIGHTS OR ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE."



The following IPR notice must be included in all GGF documents

The GGF takes no position regarding the validity or scope of any intellectual property or other rights that might be claimed to pertain to the implementation or use of the technology described in this document or the extent to which any license under such rights might or might not be available; neither does it represent that it has made any effort to identify any such rights. Copies of claims of rights made available for publication and any assurances of licenses to be made available, or the result of an attempt made to obtain a general license or permission for the use of such proprietary rights by implementers or users of this specification can be obtained from the GGF Secretariat.

The GGF invites any interested party to bring to its attention any copyrights, patents or patent applications, or other proprietary rights which may cover technology that may be required to practice this recommendation. Please address the information to the GGF Executive Director.

GGF Copyright

- This document and translations of it may be
 - copied and furnished to others, and
 - derivative works that comment on or otherwise explain it or assist in its implementation may be prepared, copied, published and distributed, in whole or in part,
- without restriction of any kind, provided that the above copyright notice and this paragraph are included on all such copies and derivative works.
- However, this document itself may not be modified in any way,
 - such as by removing the copyright notice or references to the GGF or other organizations,
- except as needed for the purpose of developing Grid Recommendations
 - in which case the procedures for copyrights defined in the GGF Document process must be followed,
- or as required to translate it into languages other than English.



GGF IP Policy: Note Well

- Contributions

- All statements related to the activities of the GGF and addressed to the GGF are subject to all provisions of Section 17 of GFD-C.1 which grants to the GGF and its participants certain licenses and rights in such statements. Such statements include verbal statements in GGF meetings, as well as written and electronic communications made at any time or place, which are addressed to:
 - the GGF plenary session,
 - any GGF working group, research group, or portion thereof,
 - the GFSG, or any member thereof on behalf of the GFSG,
 - the GFAC, or any member thereof on behalf of the GFAC,
 - any GGF mailing list, including any working group or research group list, or any other list functioning under GGF auspices,
 - the GFD Editor or the GWD process
- Statements made outside of a GGF meeting, mailing list or other function, that are clearly not intended to be input to an GGF activity, group or function, are not subject to these provisions.



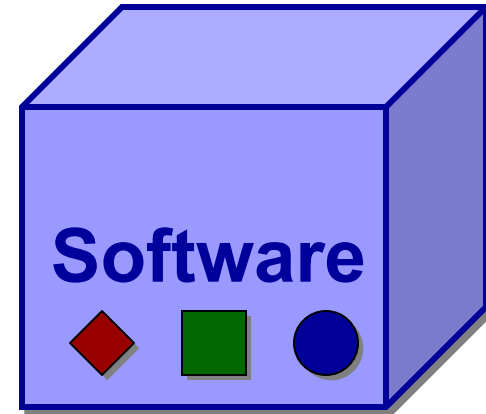
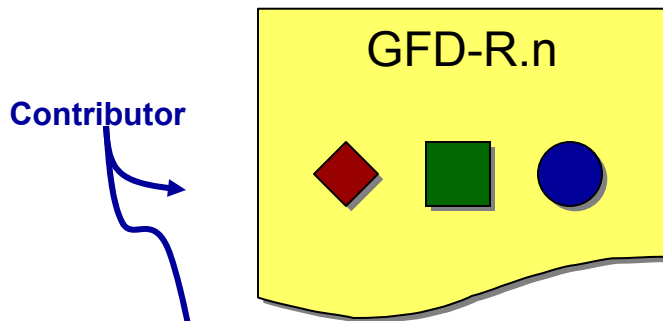
GGF IP Policy: Notices

- *Where the GFSG knows of rights, or claimed rights,*
 - *the GGF secretariat shall attempt to obtain from the claimant of such rights, a written assurance that*
 - *upon approval by the GFSG of the relevant GGF document(s),*
 - *any party will be able to obtain the right to implement, use and distribute the technology or works when implementing, using or distributing technology based upon the specific specification(s)*
 - *under openly specified, reasonable, non-discriminatory terms.*
 - *The working group or research group proposing the use of the technology with respect to which the proprietary rights are claimed may assist the GGF secretariat in this effort.*
 - *The results of this procedure shall not affect advancement of document, except that the GFSG may defer approval where a delay may facilitate the obtaining of such assurances.*
 - *The results will, however, be recorded by the GGF Secretariat, and made available.*
 - *The GFSG may also direct that a summary of the results be included in any GFD published containing the specification.*

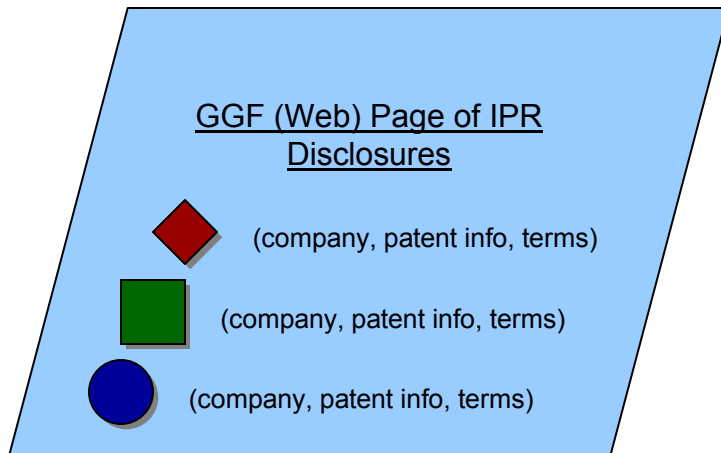
Intellectual Property Scenario

GFD-R.n technical spec using 3 patented ideas

Implementation of GFD-R.n spec



GGF policy requires disclosure of IP by contributors to spec or participants with knowledge of claim. WG Chairs push for this as early in the process as possible. Due diligence built into 2-week GFSG review, 60d public comment. Contributors agree that *terms* will be RAND. Working group has opportunity to weigh terms against benefits of including the patent in the spec.



Concepts

Copyright – Documents

(e.g. describing specifications)

Patent – Ideas/Concepts

(e.g. an algorithm or idea used in a specification)

License – Implementations

(e.g. software implementing a specification)

catlett@mcs.anl.gov



Document types and purposes

- GGF-draft documents (drafts@gridforum.org)
 - represent a draft document that has been submitted to the draft editor for discussion and eventually enter into the GFD review process (12 months).
- Informational Documents
 - inform the community of an interesting and useful Grid-related technology, architecture, framework, or concept.
- Experimental Documents
 - inform the community of the results of Grid related experiments, implementations, or other operational experience.
- Community Practice Documents
 - inform and influence the community regarding an approach or process that is considered to be widely accepted by consensus and practice in the Grid community.
- Recommendations Documents (2 phases)
 - document a particular technical specification or a particular set of guidelines for the application of a technical specification. The recommendations documents are intended to guide interoperability and promote standard approaches.



Document names

- For drafts:
 - draft-ggf-[acronym]-[short title]-[version].doc
 - draft-ggf-[author]-[short title]-[version].doc
- For approved docs:
 - Editor publishes as GFD.[number].pdf

Documents must include:

- All documents, including ggf drafts, must include the following components:
 - Author name(s), institution(s), and contact information
 - Date (original and, where applicable, latest revision date)
 - Title, table of contents, clearly numbered sections
 - Security Considerations section
 - GGF Copyright statement
 - GGF Intellectual Property statement.

Informational and Experimental Drafts

- Docs may originate from individuals or groups
- If from individuals:
 - Editor will generally send for review to WG or GFSG (2 weeks)
- If from GGF group:
 - consensus must be reached within that group
 - chair must mail the editor that the draft indeed is from that group!
 - Area Directors should review
- After initial review, 30d public comment period
- Depending on extent of changes to address comments, the draft may or may not need another 30d public comment period

Community Practice Drafts

- Must come from WG or GFSG
 - Again, the chair(s) have to mail the editor about the drafts
 - External submissions can be considered on case-by-case, likely to require passing the draft through an existing or specially formed working group.
- WG must have done internal 2 week last call
- 15 day GFSG review
- 60d Public Comment Period
- Depending on extent of changes to address comments, the draft may or may not need another 30d public comment period
- If approved and published then later updated, the original doc gets obsolete status (but is not deleted)

Recommendations Draft Process

- MUST come from WG
- Must have good consensus, last call, etc.
- If draft comes from outside it will be assigned to a WG.
- First stage is *Proposed* Recommendation
- 15 day review in GFSG
- 60 day review in GGF
- 24 month time to achieve operational experience
- Minimal 6 months in Proposed stage
- Final stage is Recommendation
 - Significant implementation
 - Multiple interoperable implementations (when appropriate)
 - Successful operational experience
 - Seen as generally useful, i.e., widely used

Names on Documents

- Authors must be acknowledged
 - definition of author may be hard
 - major contributors
- WG define *up front* authorship policy
- Typical to have document editor's name (as "Editor") or author(s) of original draft
- Avoid lots of authors
 - More authors do not make a specification more important
- Note - chair should normally not be document editor (2nd chair might be)

What makes a good specification?

- Competence: technically sound
- Constituency: users and providers
- Coherence: clearly & concisely written
- Consensus: clear (may be rough)
- Clarity of purpose
- Clarity of writing
- Clarity of solution

“done when there is nothing left to be thrown out”

balanced against

“simple as possible but no simpler”

So How Do I Run a Group?

- Consensus
- Chair Roles
- Group Style and Venues
- Conflict Resolution
- Appeal process
- Role of GFSG and GGF Chair
 - Final decision re: Document and group approval
 - Management (via ADs) of group progress
 - Management of group leadership
 - Adherence to IP-related policies
- Help available (AD's, GFSG At-Large, Secretariat, GROC)

Running a Group

- Organizing a meeting
- Scheduling a GGFx session
- Managing a meeting
 - opening with IPR, sign-in sheets, etc.
- Recording and reporting results
- Consensus
- Area Director involvement

How to organize a meeting

- **Must** announce meeting one month before date
 - Allows people to obtain cheaper tickets, hotel rooms, maybe.
- **Must** publish agenda at the same time
 - Allows people to determine if they want to attend
- **Must** schedule GGFx session 2 weeks prior
- All drafts to be discussed **must** be send two weeks before meeting to the drafts repository (posted to mail list & GridForge project)
 - Change tracked docs may be acceptable for WG's (update from above!)
 - People not present but following discussions on mailing list have also access to the discussed material
 - You **shall** not discuss unpublished drafts at the official wg/rg meetings.

The meeting itself

- Open the meeting with IPR statement
- Find two note takers (secretary + one)
- Start circulating the attendance lists (blue sheets)
- Put the agenda up for bashing
- Go through the items
- Collect the attendance lists
- Collect the notes and **publish them within 2 weeks**
- Advice: one chair keeps time and process flow
- Advice: one chair starts out with giving an overview of the status of drafts and pending discussions with GFSG
- End meeting when agenda done or time up

Consensus

- Clearly dominant agreement
- Does not have to be unanimous
- Judging consensus can be hard w/o voting
 - Humm (supposed to be anonymous)
 - show of hands
 - What about 40 agrees from one company
- Even harder on a mailing list
 - ask for "hummm" & provide list of hummers at end?
- May have to discard parts to get consensus on rest

Chair Roles

- How to be boss

- predefine agenda & schedule
- allow adequate debate but no more
- maintain clear focus
- take care when rehashing old issues
- limit presentations, focus on document issues

- Proactive management

- maintain pressure for forward process
- talk to AD (and GFSG) if process stalled
 - i.e. ask for help, don't flounder

Working Group Style

- Free-flowing

- works with

- cohesive group
 - clear purpose
 - smaller groups

- Tightly-managed

- better with

- complex topic
 - group diversity
 - differences in philosophy
 - larger groups

WG Venues

- Email & GridForge

- international collaboration
- not as efficient but extensive discussion

- Face-to-face meetings

- at GGF, other times, interim meetings
- must be well advertised well ahead of time
- cannot make “final” decisions
 - Verify decisions on email

Help Available

- Area Directors
- GFSG At-Large
- GGF Chair
- Secretariat
 - Scheduling, Administrative Support
Stacey Bruno (bruno@ggf.org)
 - GridForge, IPR, Other
Steve Crumb (scrumb@ggf.org)