**Joint Statement of Agreed Upon Principles between OSG and TeraGrid**

**DRAFT,**

**July 30th 2009**

TeraGrid (TG) and Open Science Grid (OSG) jointly subscribe to the vision of a common long-term US National Cyberinfrastructure (CI)that is based on a federation of CIs. We strongly believe that establishing a coherent framework across all cyberinfrastructure programs will significantly enhance the effectiveness of our national investments. Together we plan to work on forming such a common view of a “national federation” of cyberinfrastructures, including relationships and interaction points. We also agreed that we will use the joint activities as a "laboratory" for defining, building and maintaining inter-CI interfaces. What we learn from this experience will help us guide other CIs and hopefully lead to an effective model for a national CI community. The activities described here are guided by this longer-term vision and commitment.

OSG and TG agree on the following principles and goals that will guide joint discussions and activities over the next year. These joint goals and directions will drive our approaches at both the management level and within the work activities – that is the OSG Areas and TG Working Groups. To the extent possible we will identify common capabilities to maximize leverage and to ensure interoperability (e.g. harmonized access implementations).

This document covers only a small set of immediate actions. There are many more ways we can work together in the future. For example, developing ways to communicate and collaborate with international CIs could be a topic for future discussion.

In the next 12 months we plan to:

1. Enact ways to collaborate at the management and implementation levels.

Cross-project teams will be formed of individuals who have time allocated for joint activities. . Each team will prepare a one to two-page statement of work, including milestones and deliverables. Brief status reports will be provided to management of both team every six weeks. Effort will be given to align with established report schedules of both projects. OSG and TG management will convene to discuss progress before TG prepares its quarterly reports. (Tim Cockerill and Chander Sehgal will arrange these).

In addition, each project will appoint a delegate to serve as an ex-officio member of the other at OSG semi-annual Executive Council meetings, and TG’s Quarterly Meetings. In both cases the ex-officio participant serves as a non-voting observer who is available to share information about their organization.

1. Develop a clearer understanding of each other’s organization, purpose and scope.

High-level organization will be shared: Paul Avery, co-principal investigator and founding member of OSG will present at the September 24-25, 2009 TG Quarterly Meeting, and John Towns, TG Forum Chair, will present at the August 10, 2009 OSG Executive Council meeting. Working group-level discussions will begin with Matt Heinzel, TeraGrid GIG director’s participation in an OSG Area Coordinators phone meeting.

A shared goal for this initiative is to identify who our common customers are and gain a better understanding of their expectations. TG and OSG serve distinctly different, yet overlapping subsets of the US scientific community. TG customers are any person or project that uses or supports a TG Science Gateway or has been granted an allocation of resources. OSG customers are the owners, application developers, users, and administrators of OSG resources.

1. Develop ways to access resources managed by TG and accessible through OSG via a unified process and single mechanism.

We will explore how OSG might operate as part of the TG allocation policy and process. This will include defining an OSG allocations policy and the inclusion of opportunistically available resources in the TG allocations.

We will begin by planning a face-to-face Blueprint discussion about allocations policy with a small group before Thanksgiving, 2009. [fewer than 10 people, the following are suggested - Ralph Roskies, Richard Moore, John Towns, Dave Hart(SDSC), Kent Milfeld, …, Paul Avery, Kent Blackburn, Miron Livny, Ruth Pordes]

Another meeting with representatives of TG’s Allocations Working Group and OSG’s registration and accounting areas will be held before the end of 2009. [Chander Sehgal, Kent Milfeld to organize]

1. Explore how education, outreach, training, and external relations activities can be coordinated to maximize leverage and impact.

A meeting will be held with TG Campus Champions Program Coordinator, Kay Hunt, Advanced User Support Area Director, Amit Majumdar, OSG Engagement Area Coordinator, John McGee, and OSG Campus Grids Coordinator, Sebastien Goasguen to explore how our Campus Outreach activities can be coordinated to maximize leverage and impact. [Scott Lathrop and Ruth Pordes to organize]

OSG and TG’s External Relations teams will explore ways to collaboratively reach the scientific community, report science highlights, and facilitate access to information via the Internet. Targeted communication strategies to reach specific scientific domains and user groups will be explored. [Elizabeth Leake and David Ritchie]

1. Work together to more effectively support the needs of research teams who rely on TG and OSG resources.

Candidate research teams have been identified for which we will explore joint support for over the next six months. [Amit Majumdar, Dan Katz, John McGee, Ruth Pordes to coordinate]

1. We want to establish activities that will contribute to the success of the future XD program and provide continuity as we transition from today’s TG - OSG to the future XD – OSG’ era.

OSG will interact equivalently with all XD proponents.