**OSG year6 International Outreach Work Plan**

# Strategy

Many areas and activities of the OSG interface to external collaborators both in the U.S. and abroad. As an inclusive, open, organization OSG teams with communities (research, science, campus, etc) in many different ways to move the consortium’s mission and program of work forward.

The international outreach effort is part of the Cross-Project Support area. It is effort constrained at 0.5 FTE of the total of about 30 FTE in the project staff. Thus we can only accomplish our goals by working closely with all the other areas.

The International Outreach effort’s primary objective is assure that the current Americas Outreach Initiative”[[1]](#footnote-1) continues to progress and be successful to meet the needs of our Brazilian and Colombian collaborators, and to foster and follow up on other international outreach efforts in South Africa, Mexico and Asia.

our team executes a project management system which assures that the project does what is says it will do in each functional area’s work plans (as updated based on documented changes); and that we communicate our work accomplishments, status, issues/concerns, and future plans to the funding agencies, members of the consortium, and within our project team.

# Requirements

Requirements for the activities are taken from the communities and stakeholders with whom we work, as well as the strategic and tactical goals of the OSG.

# Tactics and Changes in our Methods

There are two important changes from prior practice that we propose to implement in year6 in how we perform this function:

1. Each area coordinator will be responsible for planning, documenting, and tracking their work program; the project manager assists each area coordinator. Jointly, they will track progress, document any needed changes, and issue alerts to OSG management. We expect that the area work plans are living documents and can be changed, if needed; however, we expect all such changes to be documented and made visible to the OSG-ET and affected stakeholders. The area coordinators will be responsible for keeping current the “captured on-line representation” of their work plan using the common OSG methods and tools.
2. A significant part of what we do is on-going activities and starting in year6 we will separate these items from the date driven project tasks. Thus we can add needed focus to these and do much better at describing these work items and why we think they are being executed well (in general, it is not very useful to say 8% done for each month that elapses). Thus, we will work to establish “goodness” measures for each of these so as to these describe how well we are performing these on-going activities. This will be a learning path for us and it will evolve over time; but we will start by stating a draft measure for each on-going activity (in collaboration with the assessment work being done by Rob Gardner).

# High-level Goals

## Projects (with Date targets)

1. Workshop in Colombia on “How to form and support Virtual Organizations”. Internally this will be done in collaboration with the Education and other areas of OSG – Dec 2011 – see appendix 1
2. Implementation of the first phase of the visitor program – see appendix 2.

## Ongoing Tasks

|  |  |  |
| --- | --- | --- |
|  | Activity | Measure |
| 1 | Monthly contact with ColombiaGrid and GridUNESP to check on status and needs. | These communities continue to progress and thrive. |

# Staffing Plan

* Jose Caballero – 50%

Contributors

* Horst Severini – the DOSAR VO contributes to the international outreach community and Horst is the liaison to the Brazilian regional grid community.

# Risks and Concerns

1. The International Outreach activity can only be successful with the contributions and engagement of other areas in OSG. This has sometimes been hard to achieve and, more especially, to sustain.
2. Progress can only be made with the engagement and contributions of the international partners. Synchronizing their availability and needed work with that available from OSG needs ongoing attention.

# 7. Appendix 1 – VO workshop

Workshop on Virtual Organizations creation and management: This idea has been motived by their comments on their difficulties to start with the process of creating a new VO. The proposal consists on an event where all aspects, from technical to logistic, involved in the process of creating and managing a VO are involved. Brazilians have showed interest on hosting such type of event. Suggested list of topics:

* + 1. how do I create a VO? Do I need some paperwork? Do I need to have some documents with rules and norms? Where can I found a template?
    2. Where do I register it? Am I allowed to register my VO as an OSG VO if my country has not yet the infrastructure? Will then the "Americans" ask me for something as a compensation?
    3. How do I install a VOMS server? Where? VOMS server Administration
    4. How do I manage security?
    5. How do I gridify my application? Which part should be pre-installed and which part is sent along with the jobs? How do I pre-install that software in the sites?
    6. How do I handle my data?
    7. Do I need a site to create a VO, or I can create a VO that just uses opportunistic resources?
    8. How do I contact sites, in my country or different one, to ask them to give support to my VO? How do I negotiate quotas and priorities? Is there a set of rules for this negotiations? List of best practices based on experience?
    9. If I am a site, how do I setup those rules?
    10. How do I quote the Grid Infrastructure in my papers? How can I account the benefits, in term of cost saved thanks to the Grid?
    11. At a NGI level, how do we develop an Engagement program

# Appendix 2

Proposal for collaboration between OSG sites and members and emerging National Grid Initiatives in South America and South Africa

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June 2011

# Summary of the proposal:

One of the many areas OSG is working on is outreach and education. As a part of this effort, the OSG is conducting a program to promote the collaboration and educational activities with other countries, particularly in South America and South Africa[[2]](#footnote-2). This is a joint effort between the OSG Outreach team and DOSAR, a grass roots grid organization which also specializes in grid education.

The goal of this activity is to support the development and deployment of National and/or regional grid infrastructures in those countries, and to establish collaborations with them to mutual benefit.

Typically the collaboration starts with a series of workshops and training courses where representatives from both the academia and research institutions, as well as fabric infrastructure and funding agencies, are introduced to the grid computing paradigm and to the OSG computational model. All topics from the introduction to basic concepts, end-user training, scientific applications migration, site deployment and administration, and National Grid Initiatives (NGI) management, are covered.

In a second step, we establish technical and scientific collaboration, supporting the deployment of National Grid Infrastructures and sharing resources for common scientific projects. These activities will lead, with the support of OSG and EGEE, to the deployment of International Grid Infrastructures.

These methods have todate proven useful in Brazil and Colombia

The work proposed here aims to improve the collaboration during the second step, benefiting from the broad expertise accumulated in the Open Science Grid institutions running operations at large scale, improving the rate of transfer of knowledge and reducing the time to the collaborators being able to “act and support themselves”.

The goal of this proposal is the creation of a framework to establish point-to-point collaborations between OSG members (sites and experts) and their equivalent in the existing collaborations (initially), to disseminate knowledge and expertise, and to help the formation of these new National Grid Initiatives.

We propose two initial activities: training foreign system administrators at OSG member sites, and finding co-advisors to help in the supervision of research and development activities conducted by foreign engineering and PhD students. The work would initially rely on contributions from members of the OSG, and, with an intent to seek a modicum of funding from elsewhere if the program is seen as successful.

# Description of the program of work:

1. System Administration Training

Sites in the Open Science Grid have been running real operations for a few years, and therefore their system administration members are fully trained in the installation and maintenance of grid middleware and services in a production environment.

At the same time, the OSG Grid Operation Center (GOC) has also been providing reliable support services. System administrators operating in the new NGIs will require to reach the same level of expertise to give an equivalent level of reliable service to their local scientific communities.

This proposal aims to identify OSG members who would host, for a period of time, a system administrator from one of these NGIs, who can be trained in the day-to-day operations in a real production environment and also contribute to the site administration and support while resident there.

OSG members would participate on a completely voluntary basis. The hosting institution and the student's home institution would decide on the total amount of time that the student would spend at that OSG site. It is recommended that the student stays enough time to be fully trained on installation and administration of grid services, and also to have the opportunity to perform some real work at the hosting institution that can help him/her to practice the new skills and to spend some time doing actual work for the hosting institution as a reward for the time invested in his/her training.

Both, the OSG hosting site and the student's home institution would need to arrange also the details for the student's maintenance. It is recommended for a student who will work at a site giving support to a particular scientific community to get this training time at an OSG site that is also supporting the same scientific project or experiment, if possible. However, that would not be a requirement, just desirable.

The student could also be offered the chance to spend half the training time at the OSG Grid Operation Center, to be trained in GOC services.

We would propose to start the program with one or two hosting institutions, and decide the continuity or cancellation of the program based on the experience.

Therefore, some mechanism would be needed to measure the level of success of the program. This mechanism should include a channel for the student's home institution to report the level of performance of the student after his/her return from OSG. After the evaluation of the results, the continuity of the program as a whole would be studied, as well the continuity of the each OSG hosting institution.

## Co-supervising on Research and Development Projects.

It is very common that new NGIs in South America and South Africa involve engineering students and master or PhD students in Computer Science or similar engineering branches. These students, as part of their research project or their university degree graduation project, have to perform some research or development activities.

When these research and development activities are related to grid computing, the expertise of the Open Science Grid member could be an invaluable input. Many OSG members have been working on grid computing activities for several years, including operations on running experiments. This experience can give them a clearer idea of what type of ideas can be more likely useful or adapted by the international grid community, which research is easier to be published, or what type of development tasks could be integrated into the current middleware or services.

This proposal consists of the identification of OSG members who would be prepared to collaborate in the supervision of these undergraduate or graduate students involved in some research and/or development project related grid computing. The OSG member would act as a co-adviser or co-supervisor, in the terms he/she negotiates with the actual student's adviser from his/her home university, including the percentage of time the OSG co-adviser would dedicate to this tutoring activity, the inclusion of the OSG member in the list of advisors in the final thesis document the student has to present to the university, and the inclusion of the OSG member in the list of authors of any possible paper or publication as a result of the research project.

The OSG member would clearly not interfere with the regular relationship between the student and his/her home university and actual adviser. The OSG member would provide advice and guidance, based on his/her experience, on what specific research line is interesting, useful, publishable, etc. He/she would help to identify specific research topics where the student can make a noticeable contribution, and help the student publish the research or integrate the software developed into already existing tools or repositories. But the guidelines, methods, projects, and policies already established by the student's home university would always respected and accepted.

It would in the first instance be the responsibility of each OSG member to find funds for his/her tutoring activities if needed, but OSG would help try to find other sources of funds if need be. There are at least two possibilities for collaboration: (a) students can advertise their research or development program, and OSG members interested can contact them, (b) OSG members can advertise proposed ideas for research or development work, and students can evaluate their interest on those ideas.

We propose to start the program with only one or two co-supervision projects, and decide the continuity or cancellation of the program based on the results. Therefore, some mechanism would be needed to measure the level of success of the program. After the evaluation of the results, the continuity of the program as a whole would be studied, as well the continuity of each OSG co-adviser member.

1. <http://osg-docdb.opensciencegrid.org/0008/000830/001/OSG_Americas_Outreach.pdf> [↑](#footnote-ref-1)
2. http://osg-docdb.opensciencegrid.org/0008/000830/001/OSG\_Americas\_Outreach.pdf [↑](#footnote-ref-2)