



# NIEMOPEN

Workshop

14 & 15 February 2023

Ms. Katherine Escobar  
NIEMOpen Project Governance Board Chair

# VENUE

## Hands-on NIEMOpen NMO Domain Workshops

- 9AM – 12 Noon EST
- Tuesday, 14 Feb 2023 or
- Wednesday, 15 Feb 2023

Location: Georgia Tech Research Institute (GTRI), Rosslyn City Center, VA

Address: 1700 N Moore St UNIT 1910, Arlington, VA 22209

Phone: (703) 312-2540

[GTRI Washington DC](#) | [GTRI \(gatech.edu\)](#)

\* Some participants/briefers will join virtually but all are encouraged to attend at GTRI.

### Workshop POCs:

- Katherine Escobar (Chair, NIEM Open Project Governing Board)
  - [katherine.b.escobar.civ@mail.mil](mailto:katherine.b.escobar.civ@mail.mil)
  - (757) 203-8631
- Stephen Sullivan (Secretariat)
  - [stephen.m.sullivan.ctr@mail.mil](mailto:stephen.m.sullivan.ctr@mail.mil)
  - (757) 203-8619

### **Microsoft Teams meeting**

**Join on your computer, mobile app or room device**

[Click here to join the meeting](#)

**Or call in (audio only)**

[+1 410-874-6749,395650785#](tel:+14108746749395650785) United States, Odenton

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# MAKING THE MOST OF OUR SESSION

## *Virtual Meeting Etiquette*

### PLEASE:

- **MUTE** your mic when you're not talking
- Identify yourself before you start to speak
- **Speak** clearly
- **Disable** "call waiting" feature  
(the clicking noise can be heard by all)

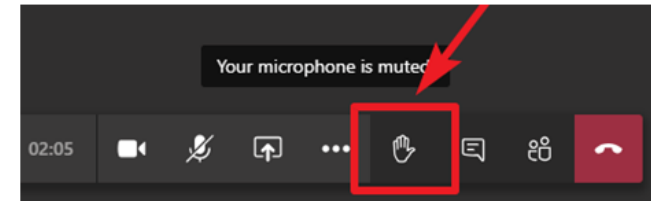
**Please note:** ESC sessions are audio recorded.

Meeting Minutes will be published and distributed to participants.

### QUESTIONS & ANSWERS ARE ENCOURAGED!

To signal you want to contribute without interrupting the speaker

- Enter comments via **CHAT window** at any time



To signal a question or respond to a question

- Click on 'Raise your hand' button on meeting toolbar

(Lower hand after you've talked by clicking hand button again)

**Presenters, please be mindful of timing**

# AGENDA 14/15 FEB

Time	Topic	Facilitator	Description
0900-0905	Welcome & Introductions Housekeeping	Katherine Escobar	Introduce participants & discussion of what we want to accomplish
0905-0925	Transition to NIEMOpen “Where We Are”	Katherine Escobar	Organization Structure; Roles: Project Governing Board (PGB), Technical Steering Committees (TSC), Maintainers; Governance Documents (NIEM Charter, TSC Governing Docs, ...), Transition Progress; 20 Oct 2022 & 25 Jan 2023 PGB Summary: NIEMOpen.org demo.
0925-0935	Q&A	Katherine Escobar, Kamran Atri/Thomas Krul	Open Discussion
0935-0955	Open Project Lightweight Rules	Chet Ensign/ Kelly Cullinane	Summary of Open Project Lightweight Rules; Focus on roles, voting, Contributor License Agreements, release process, specification workflow
0955-1005	Q&A	Chet Ensign/ Kelly Cullinane	Open Discussion
1005-1020	Hands-on	Chet Ensign/ Kelly Cullinane, Katherine Escobar	Introducing NIEMOpen Resources: groups, mailing lists, Git Repos, SLACK, Jira, Confluence; Filling out i-clas & e-clas, registering for mailing lists, ...

# AGENDA 14/15 FEB (CONT.)

Time	Topic	Facilitator	Description
1020-1030	NIEMOpen NBAC TSC Introduction	Kamran Atri/Thomas Krul	Governance Docs, Domains (NABC TSC Subcommittees), Sub-committee Management & Standing Rules Tiger Team, Sub-committee Voting Members, Transition Milestones for Sub-committees
10:30 – 10:40	Break		
10:40-10:45	Q&A	Katherine Escobar, Kamran Atri/Thomas Krul	Open Discussion
10:45-10:55	Hands-on	Kamran Atri/Thomas Krul	Introduce Subcommittee Governance Doc Template, begin a working draft with sub-committees, Q&A, propose suspense date for sub-committee completion of governance documents
10:55-11:05	NIEMOpen Requirements Process under Open Project	Kamran Atri	Open Discussion
11:05-11:20	NIEMOpen Harmonization Process under Open project	Christina Medlin	Open Discussion
11:20-11:40	Sub-committee Governance, Mature & Inactive Sub-committees/ Conservatorship	Thomas Krul	Open Discussion
11:40- 11:50	NIEMOpen Sponsorship	Carol Geyer	Advantages of becoming a NIEMOpen Sponsor
11:50	Q&A, Action Items Review (Last Call)	Katherine Escobar	Open Discussion
1200 Noon	Adjourn	Katherine Escobar	

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# TRANSITION TO NIEMOpen TOPICS

- Transfer of Governance
- NIEMOpen Organization
- Roles
  - OASIS Staff / OP Administrators
  - SPONSORS
  - PGB/ Voting & Non-Voting Members
  - TSCs
    - Subcommittees & Tiger Teams
  - MAINTAINERS
- Transition Progress
- Governance Documents
- PGB Meetings - Synopsis
  - 20 October 2022
  - 25 January 2023
- NIEMOpen.org Webpage Demo
  - Demo: Aubrey Beach (BAH)
- Resources - Highlights

# TRANSFER OF GOVERNANCE



- 20 October 2022 NIEM ESC is Sunset and NIEM Governance Transitions to the NIEM OPEN Project Governing Board (PGB) under the Auspices of OASIS OPEN Project
- ESC Principals remain in an Advisory Role
- Dr. Cully Transition Memo



CHIEF DIGITAL AND ARTIFICIAL INTELLIGENCE OFFICER  
9010 DEFENSE PENTAGON  
WASHINGTON, D.C. 20301-9010

October 20, 2022

## MEMORANDUM FOR NATIONAL INFORMATION EXCHANGE MODEL EXECUTIVE STEERING COUNCIL

SUBJECT: Transition of the National Information Exchange Model to the Organization for the Advancement of Structured Information Standards Open Project Program

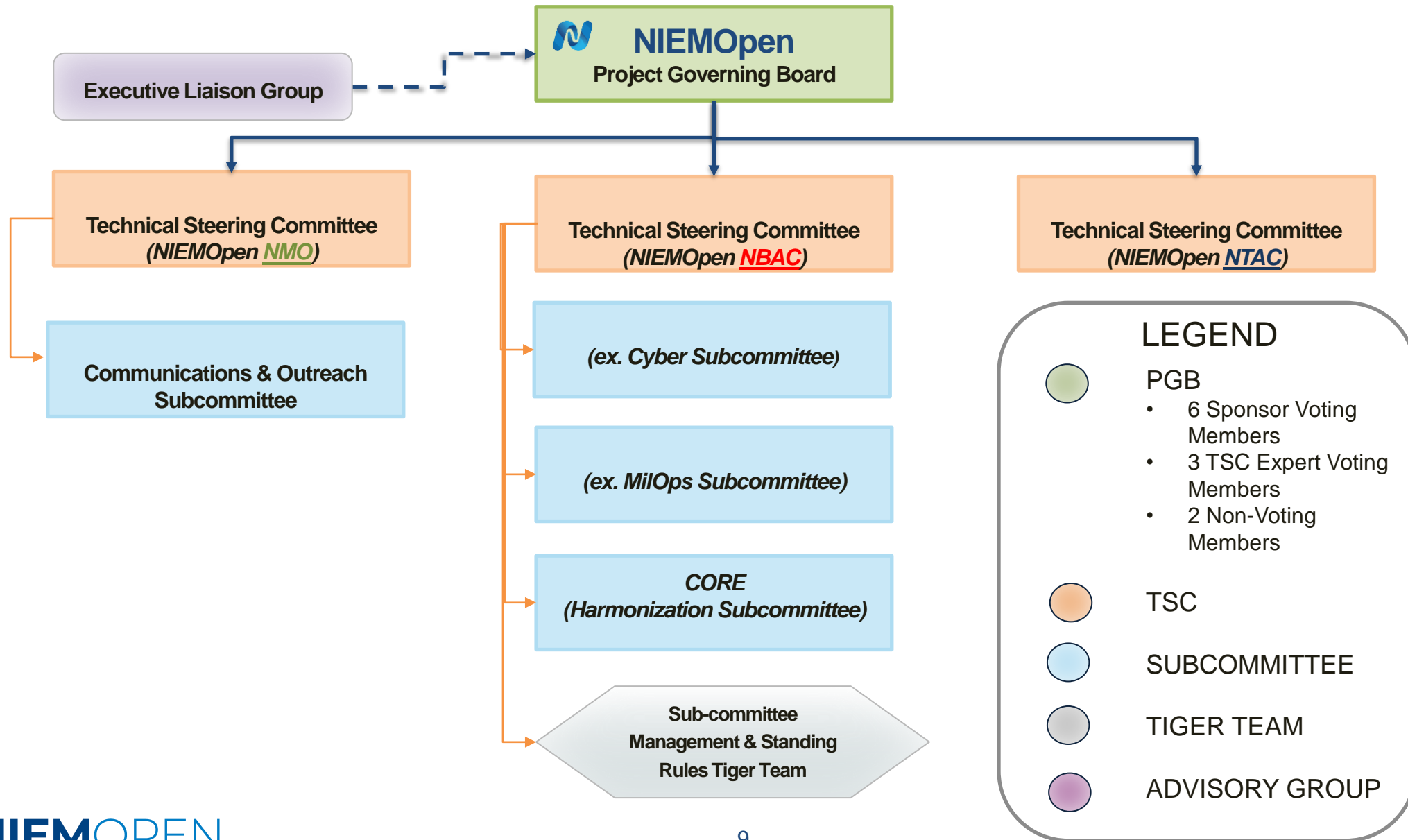
On September 21, 2021, the National Information Exchange Model (NIEM) Executive Steering Council (ESC) approved the transition of NIEM to the Organization for the Advancement of Structured Information Standards (OASIS) Open Project Program. On October 20, 2022, NIEM governance shifts to the new NIEM Open, Project Governing Board (PGB). The PGB exercises leadership, provides guidance, establishes policy, and approves model releases and content under the auspices of the OASIS Open Project Program. The PGB is supported by two Technical Steering Committees: NIEM Business Architecture Committee (NBAC) and NIEM Technical Architecture Committee (NTAC). The NBAC and NTAC provide day-to-day operational oversight.

The NIEM ESC is hereby sunset effective October 20, 2022, with the instantiation of the NIEM OPEN PGB. I encourage ESC members to continue to participate in an advisory capacity to the NIEM Open, PGB. Details of Open Project Sponsorship can be found online at "<https://www.oasis-open.org/join-2/>" and by contacting Dee Schur, the OASIS Open Source and Standards Advocate at [dee.schur@oasis-open.org](mailto:dee.schur@oasis-open.org).

J. Clark Cully, Ph.D.  
Deputy Chief Data Officer  
Department of Defense



# NIEMOpen Organization



# OASIS STAFF/ OP ADMINISTRATORS

- **Mr. Chet Ensign** – Chief Technical Community Steward at OASIS/ OP Administrator



- **Ms. Kelly Cullinane** – OP Administrator



- **Ms. Carol Geyer** – OASIS Open Chief Development Officer



# NIEMOpen SPONSORS

- **Sponsors**

- JS J6
- DHS S&T
- Equivant
- GTRI
- sFractal
- NAJIS
- IJIS

- **In Discussions**

- Microsoft
- DHS OBIM
- FBI
- MITRE
- DOT

- **Expressed Interest**

- Government of Canada
- NIST
- Veterans Administration
- Tyler technologies
- Ernst & Young



**Ms. Carol Geyer**  
– OASIS Open Chief  
Development Officer



# PGB VOTING MEMBERS



**Ms. Katherine Escobar**  
**PGB Chair**  
Deputy Division Chief,  
Data and Standards  
Division at Joint Staff J6  
and NIEM Managing  
Director



**Ms. Christina Bapst-Stump**  
Science and Technology  
Directorate, US Department of  
Homeland Security



**Mr. Gary Egner**  
Director Business  
Development,  
Equivant



**Mr. John Wandelt**  
Principal Research  
Scientist, Georgia Tech  
Research Institute



**Mr. Duncan Sparrell**  
CSO sFractal Consulting



**Ms. Maria Cardiellos**  
Executive Director  
Integrated Justice Information  
Systems Institute



# PGB EXPERT VOTING MEMBERS

## Technical Steering Committees



**Kamran Atri**  
**Co-Chair**  
NIEM Business Architecture Committee (NBAC)  
Technical Steering Committee (TSC)



**Jim Cabral**  
Vice President, Court  
Relations, InfoTrack



**Beth Smalley**  
**Co-Chair**  
NIEM Management Office (NMO)  
Technical Steering Committee (TSC)

# PGB NON-VOTING MEMBERS

## Technical Steering Committees



**Thomas Krul**  
**Co-Chair**  
NIEM Business Architecture Committee  
(NBAC) Technical Steering Committee (TSC)



**Dr. Scott Renner**  
**Co-Chair**  
NIEM Technical Architecture Committee  
(NTAC) Technical Steering Committee (TSC)



# TECHNICAL STEERING COMMITTEES (TSC): NBAC, NTAC, & NMO TSC CO-CHAIRS

TSC	Approved (TSC CHAIRS)
NBAC TSC	Mr. Kamran Atri & Mr. Thomas Krul
NTAC TSC	Dr. Scott Renner & Mr. Jim Cabral
NMO TSC	Ms. Katherine Escobar & Ms. Beth Smalley

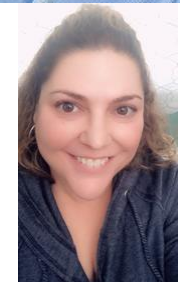
NBAC  
TSC



NTAC  
TSC



NMO  
TSC



# NIEM OPEN MAINTAINERS

GitHub Repos	Primary	Alternates
NIEMOpen	Ms. Christina Medlin & Mr. Aubrey Beach	Mr. Tom Carlson, Ms. Shunda Louis
NBAC TSC	Ms. Christina Medlin & Mr. Aubrey Beach	Mr. Tom Carlson, Ms. Shunda Louis, Mr. Steve Sullivan
NTAC TSC	Mr. Tom Carlson & Christina Medlin	Mr. Aubrey Beach, Ms. Shunda Louis, Dr. Scott Renner, Mr. Mike Douklias
NMO TSC	Mr. Aubrey Beach	Ms. Shunda Louis, Mr. Steve Sullivan, Mr. Mike Douklias



Ms. Christina Medlin



Mr. Aubrey Beach



Mr. Tom Carlson

# NIEM OPEN TRANSITION PROGRESS



## Complete

- ✓ Draft POA&M
- ✓ Draft and publish NIEM Open Charter
- ✓ J6 Sponsorship
- ✓ Transfer NIEM community Rosters/email distros
- ✓ Conduct First Sponsor Kickoff Mtg
- ✓ OASIS Admin Privileges
  - Web Presence (NIEMOpen.org)
  - Jira/Confluence
- ✓ Revising NBAC & NTAC Governance Docs Agreements
- ✓ TRANSITION ESC TO PGB ADVISORY BODY 20 OCT 22
- ✓ KICKOFF PGB 20 OCT 22
- ✓ Build Out NIEMOpen.org
- ✓ Update NIEM Branding
- ✓ Establish OASIS Jira & Confluence Site

## Planned/ In Progress

- Weekly Synch w/ OASIS Staff
- Assessing NIEM Model & NIEM GTRI GitHub Capital/Equities & Planning Transfer to OASIS
- Researching OASIS Release Process and Planning 1<sup>st</sup> Release Under OASIS
- Prepare the NIEM Conformance Targets Attribute Specification (CTAS) 3.0 for approval as a Project Specification (PS)
- Transition Domains as Subcommittees under NBAC TSC
- Plan / Develop 6.0 Release under OASIS Rules

## To Be Accomplished 2023!

- Physically Transfer NIEM Capital/Equities (Model, Specifications, Documentation) to OASIS
- Implement “New” development and release processes (lead developer actions)



Submit NIEM Project Specifications for Approval as OASIS Standard

- NIEM Model
- NIEM Technical Framework

## Recurring/On-Going

- Identify Potential Sponsors/Conduct Outreach
- Populate OASIS Jira & Confluence Site
- Conduct Weekly Synch w/ OASIS Staff
- Obtain Contributor License Agreements



# GOVERNANCE DOCUMENTS

- Charter as amended 25 Jan 2023 (APPROVED)
- TSC Governance Documents(APPROVED)
  - NTAC
  - NBAC
  - NMO
- Domain Management & Standing Rules Tiger Team Governance Doc (DRAFT)
- Domain Subcommittee Governance Template (DRAFT)
- Harmonization Subcommittee Governance Doc (TBD)

<https://lists.oasis-open-projects.org/g/niemopen-nbactsc/files/14-15%20Feb%202023%20Domain%20Workshop>

# PGB ACTIONS

- 20 October PGB
  - Established NIEMOpen
  - Stood-up PGB
  - Approved Charter
  - Established TSC & Appointed Co-Chairs
  - Approved TSC Governance Documents
  - Approved Maintainers
- 25 January PGB
  - Amended Charter
  - Adopted Standing Rules
  - Identified Initial Project Artifacts
  - Approved Domain Transition to NIEMOpen as NBAC TSC Subcommittees

<https://lists.oasis-open-projects.org/g/niemopen-pgb>

# PGB MOTIONS & OUTCOMES

Motions	Description	Vote	Notes
<b>25 Jan 2023 PGB Meeting Agenda</b>	Motion to Approve.	Approved, Unanimous Consent	
<b>20 October 2022 Meeting Minutes</b>	Motion to Approve.	Approved, Unanimous Consent	
<b>Charter Amendment</b>	Motion to amend the NIEMOpen charter to read: <ul style="list-style-type: none"> <li>• NIEM User Tools               <ul style="list-style-type: none"> <li>— Information Exchange Lifecycle Tools</li> <li>— ConTesA functionality</li> <li>— SSGT functionality</li> <li>— Migration Tool functionality</li> <li>— NIEM API</li> <li>— MEP Builder Tool.</li> </ul> </li> </ul>	Approved, Unanimous Consent	
<b>Adoption of Standing Rules</b>	1. Motion that NIEMOpen PGB Expert Voting Members from TSCs may be appointed by the TSCs on a rotating basis.	Approved, Unanimous Consent	Does not affect PGB quorum.
<b>Adoption of Standing Rules</b>	2. Motion that TSC chairs are invited to attend PGB meetings in expert voting member or non-voting member status as appropriate.	Approved, Unanimous Consent	

# PGB MOTIONS & OUTCOMES (CONT.)

Motions	Description	Vote	Notes
Adoption of Standing Rules	3.Motion that the PGB delegate TSCs the authority to approve TSC memberships in accordance with Open Project Rules with notification to the PGB. (as amended)	Approved, Unanimous Consent as Amended	PGB amended the original motion language proposed to reflect “the authority to approve TSC memberships”.
Adoption of Standing Rules	4.Motion that the PGB delegate to each TSC the authority to request the creation of new repos, and the responsibility that each repo have one or more maintainers	Approved, Unanimous Consent	
Project Artifact Proposal	<p>Motion to concur with TSC’s approach for handling initial Project artifacts:</p> <ol style="list-style-type: none"> <li>1. NTAC will prepare the NIEM Conformance Targets Attribute Specification (CTAS) 3.0 for approval as a Project Specification (PS)</li> <li>2. The TSC’s recognize that NIEM Version 5.2 was published under the existing niem.gov process. The TSC’s intend to accept the NIEM Version 5.2 artifacts as contributions to the NIEM Open Project</li> <li>3. The TSC’s will develop and issue NIEM 6.0 Release under the new NIEM Open Project</li> </ol>	Approved, Unanimous Consent	

# PGB MOTIONS & OUTCOMES (CONT.)

Motions	Description	Vote	Notes
Project Artifact Proposal	Motion that the PGB approve the Conformance Targets Attributes Specification (CTAS) as a Project Specification Draft (PSD) of the NIEM Open Project.	Approved, Unanimous Consent	
Establish former NIEM Domains as NBAC TSC Subcommittees	Motion to concur with the NBAC TSC proposal to establish the former NIEM Domains as subcommittees under the NBAC TSC.	Approved, Unanimous Consent	

- Highlights/ Demo
- Aubrey Beach Administrator

A screenshot of the NIEM Open website. The header features the NIEM Open logo on the left and navigation links (Home, About Us, Governance, Case Studies) on the right. The main content area has a large illustration of a laptop with various icons (gears, envelope, leaves, checkmark) around it, and two people standing on either side. Below this, there are four sections with icons and text: 'Increase efficiency and agility', 'Facilitate understanding', 'Connect with a community', and 'Open-Source Technology'.

**NIEMOPEN** Home About Us Governance Case Studies

## Discover The Value of NIEM

NIEM is a common vocabulary that enables efficient information exchange across diverse public and private organizations.

NIEM can save time and money by providing consistent, reusable data terms and definitions, and repeatable processes.

- Increase efficiency and agility**  
Organizations can reuse NIEM's common vocabulary, the engineering behind it, and standardized exchange development process to meet their specific requirements.
- Facilitate understanding**  
NIEM provides an understanding of data grounded in a consensus-based vocabulary, and interoperate and act as one while maintaining authority of their own existing systems.
- Connect with a community**  
Subject Matter Experts develop reliable, reusable content to meet community needs. NIEM has model content for 17 domains, which are community-specific business areas.
- Open-Source Technology**  
NIEM allows different systems to talk to each other even if they use different programming languages. Users just need to agree on the definition and structure for the data exchange.

[Home - NIEM Open \(wpengine.com\)](http://wpengine.com)

# RESOURCES

- [OASIS Open - OASIS Open \(oasis-open.org\)](https://oasis-open.org/)
- **NIEMOpen.org:** <http://NiemOpen.org>
- **NIEM.gov:** <https://www.niem.gov/>
- **Git Repos**
  - NIEMOpen: <https://github.com/niemopen/>
  - NTAC TSC
    - <https://github.com/niemopen/ntac-admin>
    - <https://github.com/niemopen/niem-naming-design-rules>
    - <https://github.com/niemopen/niem-conformance-targets>
    - <https://github.com/niemopen/niem-models>
  - NBAC TSC
    - <https://github.com/niemopen/nbac-admin>
    - <https://github.com/niemopen/niem-models>
  - NMO TSC
    - <https://github.com/niemopen/niem-management-office>
    - <https://github.com/niemopen/nmo-admin>
  - NIEMOpen Slack Channel: <https://niemopen.slack.com/>
- **Mailing Lists**
  - NIEMOpen: <https://lists.oasis-open-projects.org/g/niemopen>
  - PGB: <https://lists.oasis-open-projects.org/g/niemopen-pgb>
  - NTAC TSC: <https://lists.oasis-open-projects.org/g/niemopen-ntactsc>
  - NBAC TSC: <https://lists.oasis-open-projects.org/g/niemopen-nbactsc>
  - NMO TSC: <https://lists.oasis-open-projects.org/g/niemopen-nmotsc>

## POC/Administrator:

Aubrey Beach| [beach\\_aubrey@bah.com](mailto:beach_aubrey@bah.com)



## Follow Us On Twitter



[https://twitter.com/NIEMconnects?ref\\_src=twsrc%5Etfw](https://twitter.com/NIEMconnects?ref_src=twsrc%5Etfw)



<https://www.linkedin.com/groups/1903175/profile>



<https://www.youtube.com/channel/UCg9qV22PXLBJG41hc-EwVrQ>

Message Exchange  
Package (MEP Registry &  
Repository)

NIEM Message Exchange  
Package Builder



# TAKEAWAYS

- Domain Transition
  - Identify/Confirm Subcommittee Chairs/Co-Chairs, formerly Stewards
  - Identify/Confirm Subcommittee NBAC TSC Voting Members (maximum 2 per subcommittee)
  - Draft Subcommittee Governance Doc (replaces Domain Stewardship Agreements)
  - Register
    - Individual Contributor License Agreements (i-clas)
    - Entity Contributor License Agreements (e-clas)
  - Join NBAC TSC Mailing List
  - Attend NBAC TSC Monthly Meetings – Last Thursday of the Month Virtually on MS TEAMS, 1-2 PM EST
  - Consider membership in other TSCs
  - Visit/Join Resources Links
  - Consider Becoming a NIEMOpen Sponsor



# QUESTIONS

- Are there any Questions?



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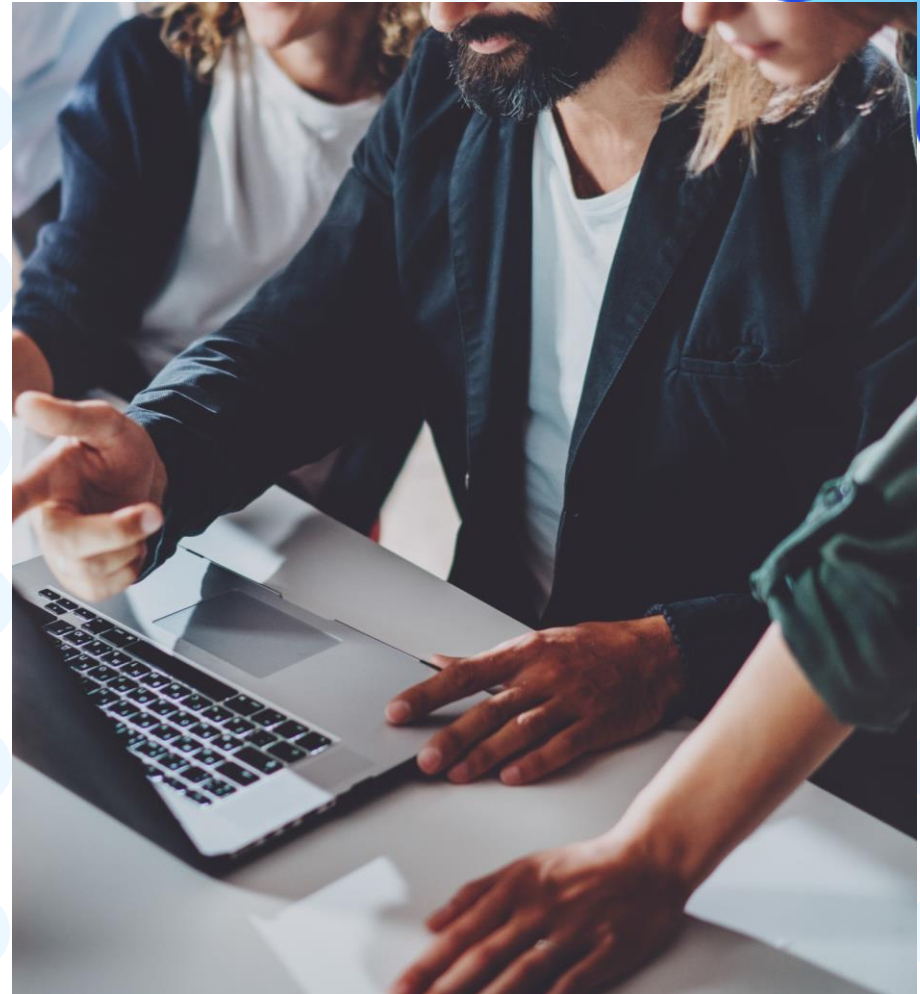


Setting the standard for open collaboration

# NIEM/OASIS Orientation

NIEMOpen NMO Domain Workshop

14 – 15 February 2023



# Goals

- Introduce OASIS and staff
- Go over mechanics: roles of participants, voting, CLAs
- Explain how content becomes OASIS Standard
- Resources available to you
- Answer questions



- Global, nonprofit, user-driven consortium advancing open standards and open-source projects
- Established 1993. International membership and participation
- Broad technical agenda including cybersecurity, e-commerce, cloud computing, emergency management, legal...
- Wide liaisons with other bodies including de jure SDOs like ISO, IEC (JTC 1), and ITU
- Home of many standards you may know: STIX, TAXII, UBL, ebXML, BDXR, SAML, ODF, CAP, TOSCA, OData, MQTT, AMQP, and more



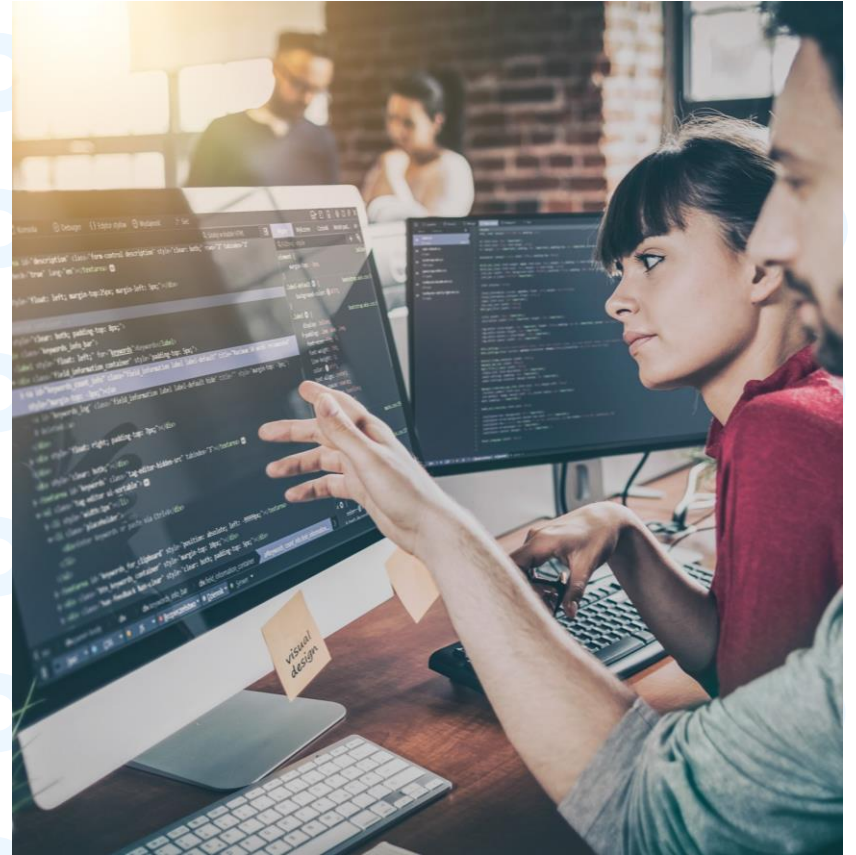


# OASIS community spans industries



See full roster: [www.oasis-open.org/member-roster](http://www.oasis-open.org/member-roster)

# Mechanics of Open Projects



# Roles in Open Projects

- 01 Participants (only observe)
- 02 Contributors (contribute material to the project)
- 03 Maintainers (manage the repos on behalf of the community)
- 04 Technical Steering Committee (oversee detailed technical work)
- 05 Project Governing Board (set overall direction and approve work)



# Roles in Open Projects

02

## Contributors

Contribute work / content to the project, mainly in repos

Must sign I-CLA & if contributing on behalf of an entity, must arrange for an E-CLA

Can be anyone (although project has no obligation to use a contribution)

# Roles in Open Projects

03

## Maintainers

Can be appointed by PGB or TSC if PGB delegates authority

Must sign I-CLA & if contributing on behalf of an entity, must arrange for an E-CLA

Act to carry out the technical consensus of the contributors, TSC, and PGB

# Roles in Open Projects

04

## Technical Steering Committee (TSC)

Formed by resolution of the PGB. Chairs/membership determined as documented by the PGB.

Must sign I-CLA & if contributing on behalf of an entity, must arrange for an E-CLA

Elects a representative to the PGB

Oversees community work, consults with/makes recommendations to the PGB

# Roles in Open Projects

05

## Project Governing Board (PGB)

Made up of representatives of OP Sponsors (1 ea) + elected representative from each TSC

Must sign I-CLA & if contributing on behalf of an entity, must arrange for an E-CLA

Final approval body for all official work products of project

# Purpose of Contributor License Agreements (CLAs)

- OASIS uses CLAs to collect agreements to the applicable license designated for all contributions donated to project repositories
- Contributors do not give up any IPR rights for contributed material. They grant NIEMOpen, OASIS, and downstream implementers the right to use the contribution in project work products
- Individual CLAs can be filled out at <https://cla-assistant.io/niemopen/oasis-open-project> or when you make your first pull request
- Entity CLAs can be filled out [at https://www.oasis-open.org/open-projects/cla/entity-cla-20210630/](https://www.oasis-open.org/open-projects/cla/entity-cla-20210630/)

# Decision-making

- Goal is to make decision-making as lightweight as possible
- Decisions can be made by consensus except:
  - where OP rules require formal approval, or
  - where PGB adopts a standing rule to require formal vote
- Open Project rules require formal votes for:
  - Changing charter scope
  - adding a new FOSS license to those used by the OP
  - approving a Project Specification
  - submitting a PS to OASIS membership as a candidate for OS
  - requesting OASIS submit an OS to a de jure SDO
- Also, Full Majority Vote required to:
  - elect a chair
  - adopt a standing rule

# Specification Workflow

# Types of Work Products

OASIS defines the following types of work products:

- Releases (a designated branch approved by the PGB as an official Release of the project)
- Standards track work products
  - Working drafts
  - Project Specification Drafts (on track to OS)
  - Project Specifications (on track to OS)
- Non-standards track documents
  - Project Notes, procedural, educational, promotional content
- Associated apis, schemas, etc. – associated with/stored with a standards track work



# Working Draft

- Iterative work on preparing a draft from one or more contributions
- Managed by the TSC under whatever process it adopts

## Project Spec Draft (PSD)

- Work on track to become a Project Specification and ultimately OASIS Standard
  - Work is not required to go all the way to OS. You all decide what to advance
- For each version of a spec, numbered PSD 01, 02, etc. Can iterate as much as you need.
- At your option, can go out for public review; typical process is 30 days first review, 15 days thereafter
- TSC recommends draft to the PGB for approval. PGB issues 14-day advance notice then can approve by consensus

## Project Spec (PS)

- Project Specification is an official standards deliverable and can be adopted and implemented by the broad community
- Numbered PS 01, 02, etc. Can iterate as much as you need.
- TSC can recommend approval to the PGB. PGB issues 14-day advance notice then can approve by Special Majority Vote set up and run by OASIS staff

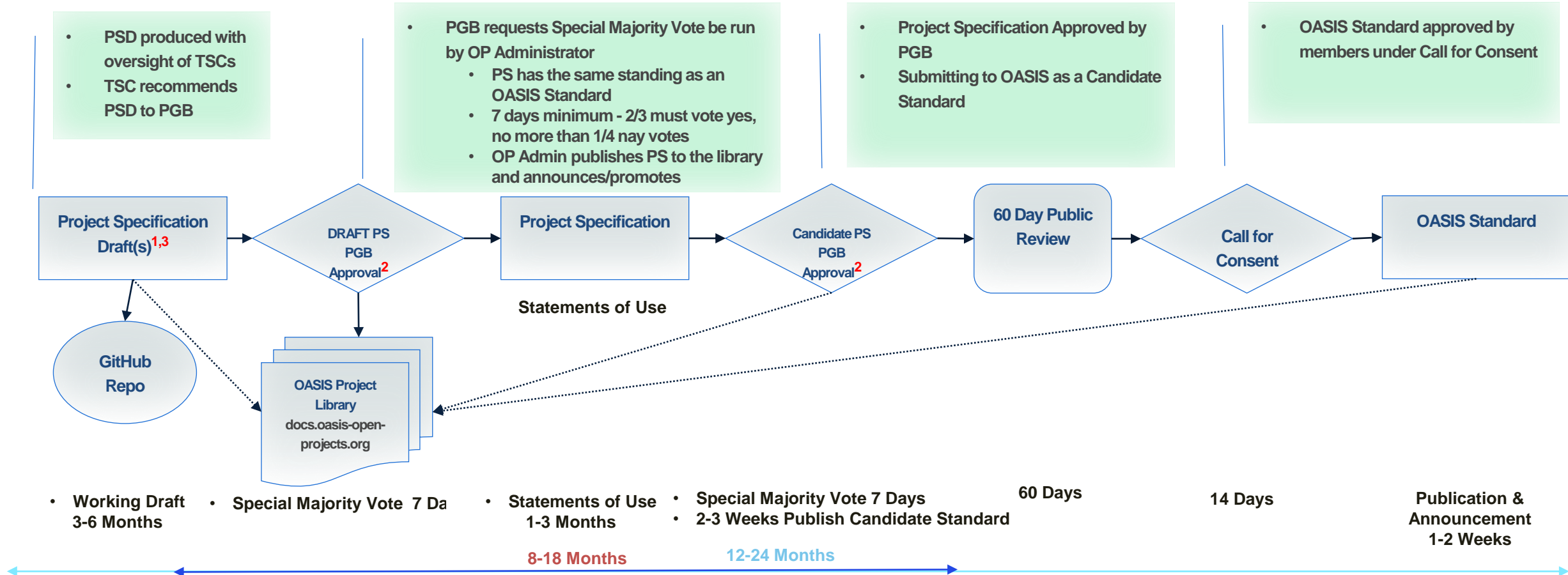
# OASIS Standard (OS)

- OASIS Standard is the final standards deliverable
  - Press release, listed on OASIS website, etc.
- Not numbered. New ones require new version #.
- PGB approves submitting PS to OASIS membership as a candidate for OASIS Standard via Special Majority Vote
- Requires at least 3 Statements of Use (minimal assertion that a party has implemented some or all of the PS)
- Approval starts a 60-day public review
- If no comments, staff runs a 14-day call for consent among OASIS members
- OS is eligible for submission to a de jure organization like ANSI, ISO, etc.

# Specification workflow and timeline

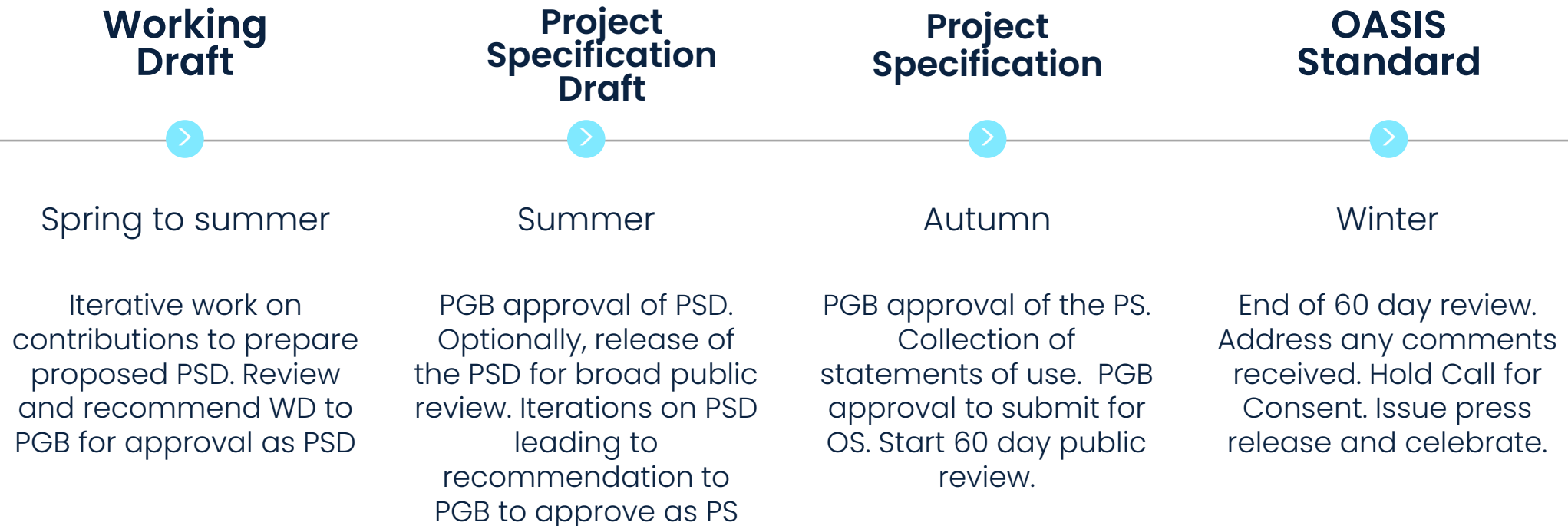
- Request a spec template from OP Admin
- Decide on editor(s)
  - Editor's job is to capture the intentions of the project team/TSC
  - Editor's Manual starting at <https://docs.google.com/document/d/1ITartcAzlqidzrCxuXFFiwdRDKRipqMnNsMS24SZdjg/edit>
- Create Project Specification Draft (PSD)

- PGB can decide to advance PS to OASIS for consideration as an OASIS Standard
  - Requires 3 Statements of Use and a Special Majority Vote run by OP Admin
  - 60-day public comment period
  - The Project Specification (PS) is put to OASIS Members in a 14-day Call for Consent. If no objections, work becomes an OASIS Standard, eligible for submission to other SDOs



# Time Frame

The main driver of the timeline is how much time you want to spend working on the content. To drive to OS by end of year, you'd generally follow a schedule



# AGENDA 14/15 FEB (CONT.)

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# AGENDA

## NBAC TSC Introduction (Kamran Atri & Thomas Krul)

- Definitions
- Lifecycle
- Organization
- NIEMOpen Charter (Amended 26 Jan 2023)
- NBAC TSC Governance Document (Approved 20 October) 2022
- Sub-committee Governance Template (strawman)
- NBAC TSC Governance Guidance Document (strawman)
- NBAC TSC Sub-committee Management & Standing Rules Tiger Team Governance Document (strawman)

## Requirements Process (Kamran Atri)

## Hands On (Kamran Atri & Thomas Krul)

## Harmonization (Christina Medlin)

## Domain Space Sub-committees under OASIS Open Project/NIEMOpen (Thomas Krul)

- NBAC TSC Expectations
- Assessment of Domain Space/Sub-committee Health
- Conservatorship
- Work-in-Progress

## NIEMOpen Sponsorship



# NIEMOpen TSC INTRODUCTION

## DEFINITIONS

- Domain/Domain Space
  - Refers to model / model content
- Sub-committee
  - Refers the Community-of-Interest and stakeholders organized around and managing a particular functional area of model content (i.e., biometrics, immigration, ...)

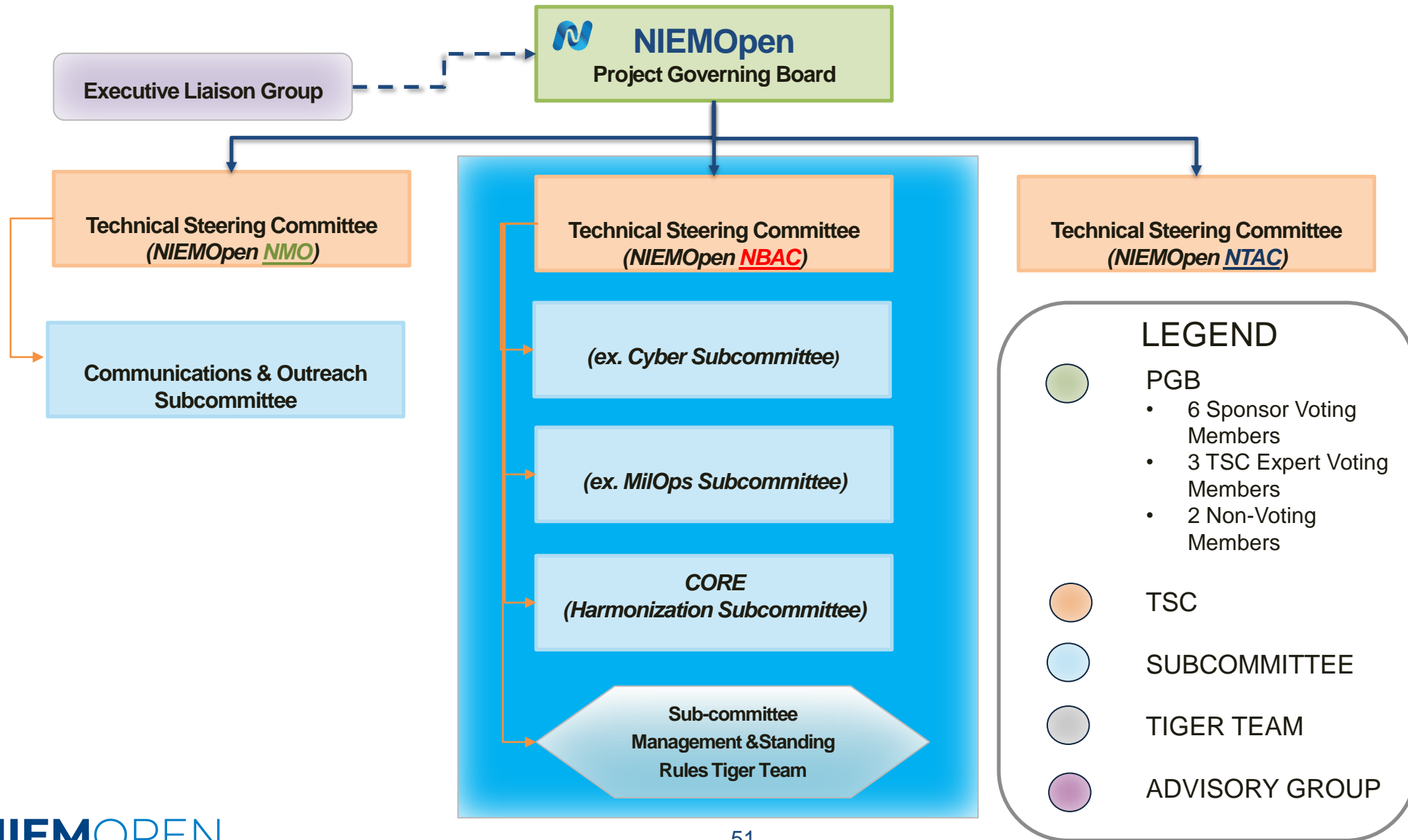
## SUB-COMMITTEE LIFECYCLE

- Newly Formed & Onboarded
- Active
- Mature
- Inactive

# ORGANIZATION OVERVIEW

- PGB
- NBAC TSC
  - Sub-committees
  - Tiger Teams

# NIEMOpen Organization



# CHARTER (SCOPE)

- **Statement of Purpose**
  - Problem Statement (Data sharing Challenges)
  - Proposed Solution (NIEM Framework)
    - NIEM Syntax, semantics & methodology
- **Business Benefits**
  - Saves organizations time and money by providing consistent, reusable, and repeatable data terms, definitions, and processes
- **Stakeholders (International, Federal, State, Local, Tribal, Industry, & .org)**
- **Normative Scope**
- **Relationship to Other Projects**
- **Repos & Licenses**
  - NIEM will operate under the following licenses:
    - Governance documents will be licensed under [CC-BY 4.0](#)
    - Code will be licensed under [Apache License Version 2.0](#)
  - The project shall create a repository for the following:
    - Specifications will initially be forked from <http://niem.github.io/reference/specifications/>
    - Releases (now referred to as versions) – The latest release (version) will be forked from <http://niem.github.io/niem-releases/>
    - Tools

- **Initial Contributions from Existing Work**
  - Specifications for all NIEM releases
    - NIEM Naming and Design Rules (NDR)
    - NIEM JavaScript Object Notation (JSON)
    - NIEM Code Lists Specifications
    - NIEM Conformance Targets Attribute Specification v3.0
    - NIEM Information Exchange Package Documentation (IEPD) Specification
    - NIEM Conformance Specification
    - Metamodel
    - The Common Model Format (CMF)
  - All intellectual Property - The [OASIS IPR policies for Open Projects](#) will apply
  - NIEM User Tools (**Amended 25 Jan 2023**)
    - Information Exchange Lifecycle Tools
    - ConTesA **functionality**
    - SSGT **functionality**
    - Migration Tool **functionality**
    - NIEM API
    - **MEP Builder Tool**
  - NIEM Brand

# NBAC TSC GOVERNANCE DOCUMENT

- Approved 20 October 2022
- Undergoing Review & Update
  - Language Consistency: domain, domain space, sub-committee
  - Expand Conservatorship discussion including Workshop input
  - Approval of NBAC TSC membership : NBAC TSC with notification of PGB (25 Jan PGB)
  - Approval of New Sub-committees and Sub-committee Chairs: NBAC TSC with notification to PGB (25 Jan PGB)
- Overview/Highlights
  - Scope
    - Coordinate, harmonize and unify model content as it relates to the NIEM data model and the code-list
    - Safeguard NIEM data model core content
    - Onboard new communities-of-interest as sub-committees

# NBAC TSC GOVERNANCE DOCUMENT (CONT.)

- Scope
  - Provide Training
  - Document SOPs
  - With NTAC TSC shepherd Project Specifications (PSD) through PS, Candidate Standard to OASIS Standard
  - Assess Sub-committee maturity, vitality and health and provide remediation if needed
- NBAC TSC Composition (membership approved by NBAC TSC)
  - Co-Chairs (appointed by PGB)
  - Voting members (Co-Chairs, + 2 per sub-committee)
  - Sub-committee Sponsor Executive (s) (formerly stewards)
  - Sub-committee members
  - Tiger Team Members
  - At Large members (not affiliated with a specific sub-committee)
  - NTAC TSC Co-Chairs
  - PGB Expert Voting Member
  - Guests & Observers

# NBAC TSC GOVERNANCE DOCUMENT (CONT.)

- Sub-committee Responsibilities (similar to former Domain Stewardship Agreement)
  - Appoint voting members (2 maximum)
  - Maintain a data dictionary of common elements and related code-lists
  - Maintain a sub-committee roster and mailing list
  - Perform outreach to COI stakeholders
  - Draft, publish, and maintain procedures for sub-committee governance and the processes related to domain data model and code list management
  - Participate in content harmonization and reconciliation activities supporting the NIEMOpen release cycle
  - Provide support to the NBAC TSC including annual reporting of progress, plans, requirements, and achievements
  - Provide support to the NIEMOpen Technical Architecture Committee (NTAC) TSC production of project specifications, requirements, tools, and associated artifacts
  - Provide ongoing identification of data requirements based on data exchange modeling and development efforts.

# NBAC TSC GOVERNANCE DOCUMENT (CONT.)

## – Decisions

- Most decisions, the NBAC operates by [lazy consensus](#).
- Simple majority vote
  - ▢ Approving minor version candidates for submission to PGB
  - ▢ Approving major version candidates for submission to PGB
  - ▢ Recommending work to the PGB for promotion to the standards track

## – Instantiating a New Sub-committee

- NBAC TSC establish process and document SOPs
- Approve candidate sub-committee



# SUB-COMMITTEE TRANSITION MILESTONES

- Subscribe to NBAC TSC Mailing list – target date ?
- Appoint NBAC TSC Voting Members (2 max) – target date ?
- Draft Sub-committee Governance Document – target date ?
- Execute i-CLAs, ECLAs – target date

# LOCATION OF DOCUMENTS

- Documents Including Work in Progress Currently Available:  
[niemopen-nbactsc@lists.oasis-open-projects.org](mailto:niemopen-nbactsc@lists.oasis-open-projects.org) | [Files](#)
- Final Approved Documents Being Migrated to:  
<https://github.com/niemopen/nbac-admin>

# BREAK

- 10 Minutes



# ADJOURN

Do any of our participants have questions ?



# AGENDA 14/15 FEB (CONT.)

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# REQUIREMENTS

- **A typical requirements process includes these steps:**

- Collect initial requirements from stakeholders
- Analyze requirements
- Define and record requirements
- Prioritize requirements
- Agree on and approve requirements
- Trace requirements to work items
- Query stakeholders after implementation on needed changes to requirements
- Test to verify and validate requirements
- Assess impact of changes
- Revise requirements
- Document changes

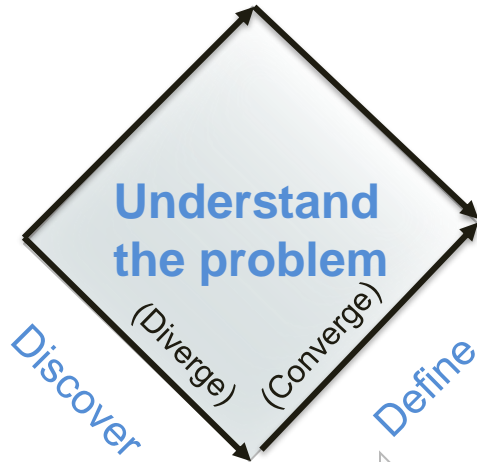
- **Requirements attributes:**

In order to be considered a “good” requirement, a requirement should have certain characteristics, which include being:

- Specific
- Testable
- Clear and concise
- Accurate
- Understandable
- Feasible and realistic
- Necessary

# REQUIREMENTS PROCESS

NBAC TSC



**Requirements**

- Collect initial requirements from stakeholders
- Analyze requirements
- Define and record requirements
- Trace requirements to work items

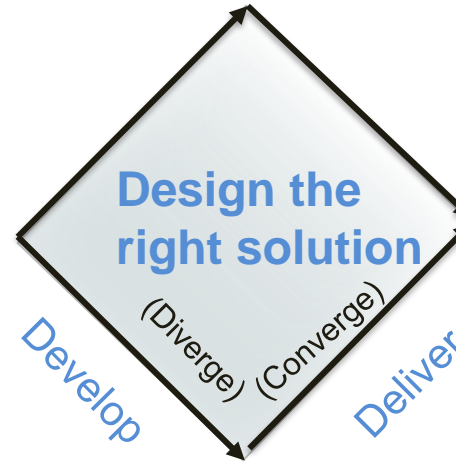
PGB



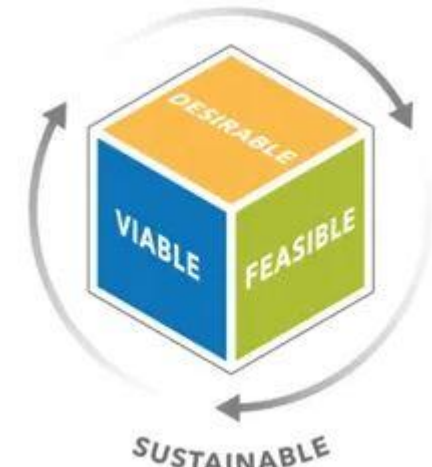
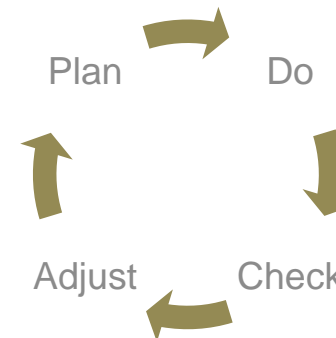
**Approval**

- Prioritize requirements
- Agree on and approve requirements

NTAC TSC



**Implementation**



- Query stakeholders after implementation on needed changes to requirements
- Test to verify and validate requirements
- Assess impact of changes
- Revise requirements
- Document changes



# WHAT TYPES OF REQUIREMENTS ?

- Business

- Business Rules
  - Approval of TSC Membership
  - NBAC TSC Document
- Harmonization Process
- Subcommittee Guidelines
- Subcommittee Activities
- Conservatorship

- Technical

- Model & Project Specifications
- Candidate Standard
- IEPD vs Message Speciation
- Renderings
- Ontologies

# AGENDA 14/15 FEB (CONT.)

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# HARMONIZATION

- Harmonization is an ongoing process to improve the quality of the NIEM model
  - Reduce semantic overlap
  - Improve consistency of modeling, naming, and definitions
  - Incorporate new and changing requirements (new domains, updated content)
- Cross-domain harmonization
  - Address overlap across multiple model domain spaces
- Core harmonization
  - Address overlap and quality issues across Core and model domain spaces

# HARMONIZATION PROCESS

- Identify and submit potential issues
  - Anyone can submit potential issues to the issue tracker in the [niemopen/niem-model](#) repo on GitHub
  - Lead developer performs reviews to identify new issues based on commonly used terms, qa checks
- Initial pass
  - Lead developer provides additional background information and potential options for a solution
- Discussion and recommendation
  - Harmonization Subcommittee meets to review issues and decide on recommendations
- Recommended changes are staged and reviewed
  - Lead developer stages changes to the model / schemas and submits a niem-model pull request
  - Harmonization Subcommittee confirms changes staged in the pull request
- Recommendations are approved (via lazy consensus) or sent back for further work
  - Lead developer summarizes upcoming issues and recommendations on the monthly NBAC calls
  - Lead developer emails the NBAC mailing list with details and deadline to solicit feedback or objections
  - Lead developer moves issues with feedback / objections back to the Harmonization Subcommittee
- Model updates are finalized
  - Lead developer accepts the approved issue's pull request and finalizes the changes

# HARMONIZATION SUBCOMMITTEE

- NBAC Harmonization Subcommittee to address issues related to:
  - Core and Core-related code sets
  - Inactive domains
  - External standards
- Recommend at least one member from each domain on the subcommittee
- Initial plan is to meet for an hour every two weeks, starting in March.

# HARMONIZATION RESOURCES

- [niemopen/niem-model GitHub repo](#)
  - Contains NIEM model schemas and documentation
  - NIEM 1.0 – NIEM 5.2 already added as contributions
- [Issue list](#) on niem-model repo
- [Project board](#) on niem-model repo
- mailing list and meetings coming soon

# NBAC PROJECT BOARD

NBAC issue tracker

Kanban board - All

6.0

Issues by repo

+ New view

Filter by keyword or by field

To Do

1

...

Not yet started or blocked

niem-naming-design-rules #3

Update documentation for appinfo schema components

6.0

model

utility

In Progress

2

...

Actively being worked on

niem-naming-design-rules #4

Create new structures:AdapterType

6.0

model

schematron

utility

6.0-psd1

niem-naming-design-rules #5

Add Representation Term Adapter

6.0

model

schematron

6.0-psd1

Harmonization Sub Review

0

...

Staged for Harmonization Subcommittee approval

NBAC Review

0

...


Staged for NBAC approval

Done

0

...

Completed

 **NIEMOPEN**

71

# NBAC PROJECT BOARD ISSUE LIST

</



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# NBAC TSC DOMAIN SPACE SUB-COMMITTEES

- Governance
  - i-CLAs & e-CLAs
  - Sponsors (s) & Executive (s) (formerly Stewards)
  - Sub-committee Chair (s)
    - ❑ Appointed by sponsor (s) and approved by NBAC TSC when initially formed and onboarded
    - ❑ Elected by sub-committee as prescribed by sub-committee governance document going forward
  - NBAC TSC Voting Members (2 max)
  - Sub-committee Governance Document (formerly charter)
    - Developed by sub-committees approved by NBAC TSC
    - Template
    - Guidelines
    - Timeline
      - Collaboration with NBAC TSC
      - Approval

# EXPECTATIONS

- Sub-committees
  - Voting members attend NBAC TSC monthly meetings (frequency ?)
  - Participate in harmonization process, designate representative on Harmonization Sub-committee
  - Hold sub-committee/stakeholder meetings periodically (minimum frequency ?)
  - Manage Domain Space Model Content

## ASSESSMENT OF DOMAIN SPACE & SUB-COMMITTEE HEALTH

- Guidelines
- Process
- Reporting
- Follow-up actions

# CONSERVATORSHIP

- Process
- Notifications
- Remediation
- NBAC TSC Preservation of Model Content
- Appeal Process
- Timeline
- Formalize

# WORK IN PROGRESS

- i-CLAs & E-CLAs
- Tiger Team
- Sub-committee Governance Template (strawman)
- Sub-committee Governance Guidance Document (strawman)
- Sub-committee Governance Documents (formerly charters)

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# Become a NIEMOpen Sponsor

Ensure NIEMOpen standards are adopted on a global scale

Govern with a NIEMOpen Board seat

Influence development, make sure your use-cases are represented

Approve final deliverables

Determine if/when approved work should be submitted to ITU, ICC, UN, ISO, Etc....

Collaborate with prospects, suppliers, influencers

# Annual Sponsor Dues

	General Sponsor	Premier Sponsor
	<i>Dues fund core services for the Open Project</i>	<i>\$20K of dues may be designated to fund supplemental services for the Open Project</i>
2,000+ employees at your organization	\$29,000	\$65,000
500-1,999 employees	\$17,500	
100-499 employees	\$11,500	
10-99 employees	\$5,800	
Fewer than 10 employees	\$2,400	
Nonprofit, university, local government agency, or national government agency from a developing economy	\$1,200	

# MORE INFORMATION ON SPONSORSHIP

- General details:

<https://www.oasis-open.org/join-an-open-project/>

- Membership Agreement

<https://bit.ly/3HK9WbX>

- Points of Contact:

- Carol Geyer (Chief Development Officer): [carol.geyer@oasis-open.org](mailto:carol.geyer@oasis-open.org)
- Irene Heller (Payment Submission POC): [irene.heller@oasis-open.org](mailto:irene.heller@oasis-open.org)



# QUESTIONS

Do any of our participants have questions ?



adjourn

# BACKUPS

# ADVANTAGES OF SPONSORSHIP AT THE PREMIER LEVEL



**NIEMOPEN**  
Become A  
**Premier Sponsor**

**JOIN A COLLABORATIVE COMMUNITY**

Collaborate with other leading organizations to help make standards-based, interoperable data exchanges a reality. Technical participation is free and open to all developers. That's why NIEMOpen relies on a core group of stakeholder organizations whose financial commitment ensures that the initiative stays on track and receives the resources it needs to succeed.

 <b>Recognition</b> Your logo & use cases highlighted on our website and marketing material	 <b>Promotion</b> Spotlight your events on our calendar; amplified to our social media channels	 <b>Priority</b> Priority registration for NIEM workshops; tailored technical training for your org	 <b>Support</b> Elevated help desk support; Exclusive Q&A session with NIEM instructor
 <b>Visibility</b> Express approval to use NIEMOpen logo for your marketing & collateral	 <b>Governance</b> Establish your sub-committee for managing a domain & model content	 <b>Mentorship</b> Business/project management support & mentorship for NIEM adoption	 <b>Resources</b> Apply up to \$20K of Premium Credits towards a qualifying activity

**PREMIER BENEFITS FOR YOUR ORGANIZATION.**

Discuss Membership:  
[join@oasis-open.org](mailto:join@oasis-open.org)

 **NIEMOpen**  
An OASIS Open © Project  
[NIEMOpen.org](http://NIEMOpen.org) | [NIEM.gov](http://NIEM.gov)

**POINTS OF CONTACT**

 <b>Katherine Escobar</b> PGB Chair	 <b>Carol Geyer</b> OASIS CDO
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# ADVANTAGES OF SPONSORSHIP AT THE PREMIER LEVEL

Become a Premier  
Sponsor



- Apply up to \$20K of Premium Credits towards a qualifying activity
- NIEMOpen Premier Spotlight
  - Your logo displayed on the NIEMOpen website & marketing materials
  - Your use cases/success stories posted to NIEMOpen website
  - Webpage on NIEMOpen website promoting your organization/achievements
  - Spotlight events on NIEMOpen *Events Calendar* & Social Media Channels
  - Express approval to use NIEMOpen logo for your collateral
- Priority registration for NIEMOpen hybrid technical training general offerings
- Tailored training focused on your organization's unique needs
- Access to one-on-one time with NIEM instructors
- Priority help desk support
- Business/project management support & mentorship for NIEM adoption, onboarding, and establishing your sub-committee for managing a NIEM domain space & model content
- Technical support for creating Message Specifications (formerly IEPDS)

# SPECIFICATION WORKFLOW AND TIMELINE

- Request a spec template from OP Admin
- Decide on editor(s)
  - Editor's job is to capture the intentions of the project team/TSC
  - Editor's Manual starting at <https://docs.google.com/document/d/1ITartcAzlqidzrCxuXFFiwdRDKRipqMnNsMS24SZdjg/edit>
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