

REFEDS SC Briefing

Background

Over the past ten years, REFEDS has witnessed significant growth in federations in operation around the world. Initiatives such as eduGAIN and the APAN BackFire project has stimulated this growth. More specifically, growth has been attributed to the vital role REFEDS provides to the international community in developing practice and alignment of policies, technologies, and procedures amongst federation operators.

Recent [REFEDS Annual Surveys](#) identified that skills development remains an ongoing issue for federation operators internationally. The REFEDS Steering Committee is committed to running an annual fellowship program to directly help address this gap.

Key benefits of funding an annual the program include:

- Building upon the strength of the international network of R&E federations in operation today
- Promoting the REFEDS brand as an international thought leader
- Ensuring established, less funded federations have the opportunity to participate with global policy procedure and technology discussions
- Skills development and career progression through being mentored as the next generation of federation leaders
- Increased participation in REFEDS as a whole by the international community with greater diversity in participation

Recommendations

It is recommended that the REFEDS Steering Committee endorse the continuation of the REFEDS Distinguished Engineer Program in 2020 by extending DE grants to two individuals for attendance at TNC2020. Expected costs are €5500 (including €1500 conference registration) per individual.

The REFEDS Distinguished Engineer Grant and Mentorship Program

The program is an exciting and unique opportunity that will link successful applicants with leading industry experts in research and education identity federations. Successful applicants will attend the international REFEDS meeting as well as the TNC conference in Europe. The program will help the successful applicant grow their understanding of the latest international best practices in federated identity management and build a global collegial network that will assist them and their region into the future.

The program will fund return economy travel to the event as well as a limited number of associated expenses.

The program will have a limited number of fully funded and partially funded places annually (subject to funding). The REFEDS Steering Committee will select the awardees based on the applicant meeting the selection criteria.

In 2020, two grants will be offered.

Indicative Budget

Costs must be in line with the GEANT volunteer agreement for TNC2020. See the table below.

REFEDS will provide resourcing for administrative support (set-up and coordinate the program annually) on an in-kind basis.

The final budgets are subject to REFEDS approval and may change depending on funding and or sponsorships available.

Claimable costs from REFEDS:

Hotel cost	Where accommodation is not provided. Actual cost will be reimbursed up to 200 euros per night including breakfast. A total of 5 nights (accommodation) may be claimed when the fellow is residing within Europe.
Air travel	All air travel should be Economy Class flights.
Rail travel	All rail travel should be second class rail.

Local travel	Most efficient and reasonably priced method of travel between point of arrival (airport, train station), hotel and venue.
Travel Insurance	Actual cost up to a limit of 5 days.
Lunch	If not provided. Actual cost up to a limit of <i>18 euros</i> per day.
Dinner	If not provided. Actual cost up to a limit of 50 euros per day.
Travel Visa Fees	May be supported by scans of Visa in passport showing cost.

About the Fellowship

The main purposes of the programme are to:

- Build upon the strength of the international network of R&E federations in operation today
- Provide a unique combination of experience and foster greater understanding of the operation of R&E identity federations and increase the level of participation by federation operators from emerging and developing identity federations.
- Provide an opportunity for networking with leading industry experts
- Identify and foster potential future leaders from new and developing R&E identity federations, and
- Partner new federation operators with federation operators from more mature federations.

Awardees will be paired with a number of industry mentors and provided with a schedule of activities and meetings they will be required to attend at the REFEDS meeting and TNC conference. In addition attendees will be asked to do a 5 minute presentation on their geographic region at the end of the REFEDS meeting on a topic agreed between the fellow and REFEDS. This will be followed by contributing to a blog post sharing their experiences with the community post the event.

Application Criteria

In order to qualify for a REFEDS Fellowship, applicants must:

- Be a developer or operator in a technical or technical management capacity in a new or emerging R&E identify federation.
- Demonstrate that they need financial assistance in attending the meetings through the program.
- Obtain the approval of their manager/supervisor before applying.

Preference will be given to applicants who originate from and reside in an emerging or developing economy that traditionally has low rates of participation within REFEDS meetings, online forums, and face to face events. While previous DE recipients may apply, priority will be given to new applicants.

Applicants will be assessed on their ability to demonstrate strong motivation for being part of the program, meeting new people and be open to new ways of doing things.

Applicants must respond in writing addressing the following criteria:

1. Why should you be chosen? (maximum 1 page). You should cover:
 - How your role (technical and non-technical skills) would benefit
 - How your organisation would benefit
 - How your geographic region would benefit
 - Confirm you have the support of your organisation/manager/supervisor should you be awarded a fellowship.
2. Your role with R&E federations (maximum ½ page). You should cover:
 - The name of your countries federation, how many participants are part of your federation.
 - What activities you have been involved in regarding the establishment and/or management of an R&E federation (e.g., technology, policy, process, communications)
 - If you don't have a federation yet, tell us what the plans are to create a federation.
3. What would you achieve through being awarded a fellow (maximum ½ page):
 - What you attend to accomplish or get out of attending a REFEDS meeting
 - how attending a REFEDS meeting would help you in your work or study
4. How you intend to apply experience when you return to your country (maximum ½ page):

- Outline a plan for sharing the experience and knowledge you will gain through the program with others in their local area or region.

5. Indicate if you are applying for a full or partial application:

- Outline the support from your manager/supervisor/organisation for partial or full funding.

Please note that the working language of REFEDS is English. Individuals applying for the Fellowship should be comfortable and able to follow technical discussions in the English language.

Application Process

The REFEDS Steering Committee will review all applications based on the Selection Criteria. The number of fellowships offered will depend on both funds available and quality of applications. If sufficiently qualified applicants do not apply, the fellowship will be put on hold until the next REFEDS meeting.

Proposed Timeline

- 31 January 2020 - submissions due
- 21 February 2020 - decision
- 8-11 June 2020 - REFEDS meeting and TNC20

Practical Information

Fellows receive the following:

- Travel, accommodation, and meeting registration fees to TNC;
- A schedule of meetings, conference events and introduction to a mentor from their area of interest to help them prepare for the meeting and network opportunities with other international experts in the field ;
- A stipend for incidental expenses in line with the approved budget; and
- A certificate of participation.

Any costs associated with acquiring a visa are the responsibility of the applicant.

Expectations of Fellows

Fellows are expected to:

- Prepare in advance of the REFEDS meeting by participating on the REFEDs mailing list and being familiar with various working-group discussions in their areas of interest;
- Attend a pre-defined program of events including the REFEDS meeting, plenary sessions, and relevant Trust and Identity sessions throughout the week;
- A 5-minute presentation on their geographic region during the REFEDS meeting on a topic agreed between the fellow and REFEDS.
- Share the experience and knowledge gained at the REFEDS with their local communities when they return home;
- After the event, contribute to a blog post about the program about what you learnt
- Assist with administrative aspects of the programme, including completion of a follow-up survey.

Logistics

1. Need to build a pool of mentors
 - a. Create a run-sheet of events the fellow has to stick to over the 5 days. We could tell them which sessions they need to attend, pair them up with a different lunch buddy every day. Pair them with a dinner buddy where the buddy pays in-kind for their dinner (I know AAF would be more than happy to do this).. also means, we could keep the cost of incidentals in the budget down.