GLOBALGRIDFORUM.ORG

GGF-WG/RG chairs training

Cees de Laat

P2P AD and GFSG to IETF Liaison

**Based on "Working Group Workshop", IETF - training
Scott Bradner, Steve Coya, Jeffrey Schiller
and many others…**

I E T F

GGF

Topics

- **Agenda**
  - ♣ **Why? Why me? The goal of this meeting**
  - ♣ **GGF Structure - Names**
  - ♣ **Document process**
  - ♣ **Creation of a group**
  - ♣ **How to organize a meeting**
  - ♣ **Document production**
  - ♣ **Chair Roles**
  - ♣ **WG Management Roles**
  - ♣ **Conflict Resolution**
  - ♣ **Appeal Process (not yet final)**
  - ♣ **IPR (not me)**
  - ♣ **AD & WG Chair Powers**

Documents

- **Process defined by:**
  - **GFD-C.1.pdf**
    - Global Grid Forum Documents and Recommendations: Process and Requirements
  - **GGF-Governance-Apr2002.pdf**
    - Global Grid Forum Governance
  - **GGF-Management-Apr2002.pdf**
    - Global Grid Forum Management Structure and Processes
  - **GGF-Structure-Apr2002.pdf**
    - Global Grid Forum Structure
  - **And GFSG**
  - **See also IETF: RFC 2026, 2014, 2418, 1543**

Why

- **GGF large & diverse**
  - ♣process increasingly formal
  - ♣Big bunch of volunteers/experts/stakeholders/entrepreneurs
  - ♣No voting means rough (sometimes very rough) consensus and running code
  - ♣Avoid running consensus and rough code
- **Hard to make progress and still be fair**
  - ♣listen to all points of view
  - ♣keep working group focus
- **Chairs must understand the process in which they participate**
- **Chairs need to know their powers & limitations**
- **Rules of engagement**

GGF Mission & Goal

- **The GGF mission is**
  - ♣ to focus on the promotion and development of Grid technologies and applications via the development and documentation of "best practices," implementation guidelines, and standards with an emphasis on "rough consensus and running code".

- **GGF Goals (from the home page):**
  - ♣ …bla bla bla …
  - ♣ To address architecture, infrastructure, standards and other technical requirements for computational grids and to facilitate and find solutions to obstacles inhibiting the creation of these grids
  - ♣ … lots of bla bla …

GGF Structure - Names

- **GGF,Inc.**   **Global Grid Forum**

  legal umbrella, support functions

- **GFAC**   **Grid Forum Advisory Committee**

  for high level advice

- **GGF secretariat**   **Staff support**
- **GFSG**   **Grid Forum Steering Group**

  GGF management

  standards approval

  process appeals, liaisons

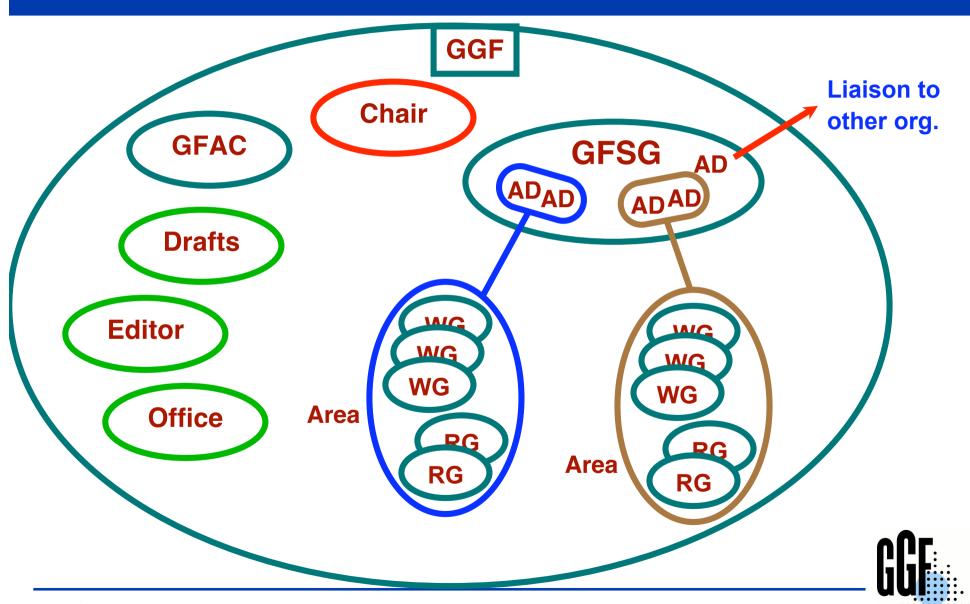- **AD**   **Area Director**

  oversight for set of working groups

- **Working group**   **the people who do the work**
- **WG chair**   **manage a working group (YOU!)**

GGF Structure - Overview

GGF

Chair

GFAC

Drafts

Editor

Office

GFSG

AD AD

AD AD

Liaison to other org.

Area

WG
WG
WG
RG
RG

Area

WG
WG
WG
RG
RG

GGF Areas

- **Applications and Programming Environments**
  - ♣Satoshi Matsuoka, tbd
- **Architecture**
  - ♣Bill Johnston, Jeff Nick
- **Data**
  - ♣Peter Clarke, Satoshi Sekiguchi
- **Information Systems and Performance**
  - ♣Domenico Laforenza, Ian Baird
- **Peer-to-Peer**
  - ♣Cees DeLaat, Andrew Chien
- **Scheduling and Resource Management**
  - ♣Bill Nitzberg, Jennifer Schopf
- **Security**
  - ♣Marty Humphrey, Steve Tuecke

How to get started

- Group of people see a need for some research or spec
- Make a mailing list (yourself!) and discuss
- Approach an AD or the GGF Chair for advice
- If still enthusiastic: write a charter (next slide)
- If that did not kill the initiative: come up with an agenda and ask your area-AD (area assigned to you by GFSG) for a BOF slot on the next GGF
- Based on BOF: refine charter and start negotiations with AD (and GFSG) to get it approved
- PLEASE PLEASE come up with as small as possible context and scope, I see too many mini-ggf charters

Charter

A GGF WG or RG charter consists of two components:

- **Administrative:**
  - **Group name, acronym**
  - **Names and contact information group chair(s), group secretary**
  - **website (or web page) address, ggf provided mail list address.**

- **Description and Objectives:**
  - **Description of Group (including type- RG or WG)**
  - **Define scope (often limit)**
  - **Define goals for the group**
  - **Milestones and dates**
  - **list of intended products**
    - **e.g. what specific documents**
    - **not "will explore..."**

What does it mean to have been chartered

- The charter is a agreement between the GFSG and the group which allows the group to work on the items described in the charter and when the work put down in documents is submitted to the editor requires the GFSG, after Quality Control and possible overlap and security resolution, to accept the work as GGF practices and standards.
- This means that a WG working within its charter may be reasonably sure that its work gets accepted
- This means that a WG exploring other work than chartered for may try to get re-chartered or expect corrective AD's to pop up
- This means that the GFSG has a true responsibility in terms of coherence and complementary among WG's
- Breaching the agreement is a breach of trust

Bureaucracy

- Group must have an acronym
- Group gets mailing list from ggf:

  acronym-wg@gridforum.org

  acronym-rg@gridforum.org

- Approved Charter goes on GGF website
- Meeting announcements and minutes also in the end go to GGF website!
- Groups has/makes its own web site containing running info, pointers to drafts, etc.
- Area wide lists (under discussion)

Mailing conventions

- **chair@gridforum.org**
- **drafts@gridforum.org**
- **editor@gridforum.org**
- **secretariat@gridforum.org**
- **office@gridforum.org**
- **acronym-wg@gridforum.org**   **c**
- **acronym-rg@gridforum.org**   **c**
- **gfsg@gridforum.org**   **c,ns**
- **gfac@gridforum.org**   **c,ns**
- **gf-chairs@gridforum.org**   **c,ns**
- **Archived**
- **Majordomo based with subscriber self approval**

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 (GFD-I)
  - inform the community of an interesting and useful Grid-related technology, architecture, framework, or concept.
- Experimental Documents (GFD-E)
  - inform the community of the results of Grid related experiments, implementations, or other operational experience.
- Community Practice Documents (GFD-C)
  - 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 (GFD-R / GFD-R-P)
  - 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.

GFD-I and GFD-E process

- **Docs may originate from individuals or groups**
- **If from individuals:**
  - ♣ Editor can send it for review to WG or GFSG (2 weeks)
- **If from group:**
  - ♣ consensus must be reached within that group
  - ♣ chair must mail the editor that the draft indeed is from that group!
- **After those reviews the draft will enter a general GGF 30 day last call**
- **Depending on changes of recommendations the draft will be approved, changed and re-enter the process or deleted**
- **Authors may not review their own docs**

GFD-C

- **Must come from WG or GFSG**
  - ♣Again, the chair(s) have to mail the editor about the drafts
- **WG must have done internal last call of 2 weeks**
- **Will be reviewed by GFSG (15 days)**
  - ♣(oh boy what are we optimistic :-)
- **Start of 60 day last call GGF-wide (even public)**
- **Depending on issues, changes, restart the process**
- **If approved and published and later updated, the original doc gets obsolete status (but is not deleted)**

GFD-R(-P)

- **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 (-R-P)**
- **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
  - ♣Successful operational experience
  - ♣Seen as generally useful, i.e., widely used

DRAFT-GGF documents

- **Drafts can come from:**
  - ♣WG's
  - ♣RG's
  - ♣GFSG
  - ♣Individuals
  - ♣Beer-tap
- **Not to be referred to**
- **Non-refereed process**
- **In near future:**
  - ♣drafts@gridforum.org
  - ♣First draft from WG or RG must be approved by chair based on consensus and he must inform the draft-editor
  - ♣Drafts will just reside for max one year in a drafts repository

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Document names

- **For drafts:**
  - ♣draft-ggf-[acronym]-[short title]-[version].doc
  - ♣draft-ggf-[author]-[short title]-[version].doc

- **For approved docs:**
  - ♣gfd-i.[number].doc
  - ♣gfd-e.[number].doc
  - ♣gfd-c.[number].doc
  - ♣gfd-r-p.[number].doc
  - ♣gfd-r.[number].doc

(.doc replaceable by .pdf)

Documents must include:

- All documents, including ggf drafts's, 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
  - List of contributors
  - Security Considerations section
  - GGF Copyright statement
  - GGF Intellectual Property statement.

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

GGF

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.

For those who did not have enough time to copy that:

- You can find this text in:

GFD-C.1.doc

The Working Group Process

- Document production
- Chair roles
- Group style
- Group roles
- Venues
- Conflict management

Role of Working Group

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

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
- **All drafts to be discussed must be send two weeks before meeting to the drafts repository (`drafts@gridforum.org`)**
  - ♣Change tracked docs may be acceptable for WG's (update from above!)
  - ♣People can decide by themselves if they want to print them, the secretariat will not do that anymore!
  - ♣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.

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The meeting itself

- Open the meeting, remind IPR policy applies
- 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
- Send notes to ggf \\\\\\\\\\\\\\\\\\\
- 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

Names on Documents

- **Authors must be acknowledged**
    - ♣definition of author may be hard
    - ♣Contributors should be acknowledged
- **WG define *up front* authorship policy**
- **Normal is to have document editor's name (as "Editor") or author(s) of original draft**
- **Avoid lots of authors**
    - ♣but make sure all contributors indicated
    - ♣More authors do not make a specification more important
- **Note - chairs should normally not be document editor (one of the chairs might be)**

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"

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 "humm" & 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

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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

GGF Venues

- **Email**
  - ♣ international participation
  - ♣ inefficient but extensive discussion
- **Face-to-face meetings**
  - ♣ at GGF, other times, interim meetings
  - ♣ must be well advertised well ahead of time
  - ♣ can not make "final" decisions
    - ♣ Verify decisions on email
- **Phone conferences**
  - ♣ Must have minutes (send out on mailinglist!)
- **Hallway discussions**
  - ♣ Remind about IPR

Conflict Resolution

- **Conflict types**
  - ♣ technical
    - ♣ specific detail
    - ♣ philosophies
  - ♣ process
    - ♣ unfair process (against chair)
    - ♣ specification not reflect WG consensus (against doc editor)
    - ♣ topic skipped

Appeal Process (not yet final)

- **Process &/or technical appeal to WG chair**
- **Process &/or technical appeal to AD**
- **Process &/or technical appeal to GFSG**
  - ♣via email to GFSG via secretariat
- **Process &/or technical appeal to GGF-Chair**
  - ♣via email to chair
- **Process &/or technical appeal to GFSG+WG-RG-Chairs**
  - ♣via email to GFSG+WG-RG-Chairs via secretariat
- **Final appeal to plenary at GGF**
  - ♣via open mike discussion at plenary

Appeals

- **Make clear, concise statement of problem**
  - ♣with backup documentation (separate)
- **Make it clear that it is an appeal (not just info)**
- **Make specific suggestions for remedy**
- **Do not try and jump the steps**
  - ♣wait for specific response for each step
- **Avoid personal attacks**

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Liaison

- **AD members can have liaison roles for GGF towards other organizations (I (CdL) am liaison to the IETF)**
- **The GFSG has final say about statements made on behalf of the GGF towards other organizations**
- **The liaison coordinates statements on behalf of GGF to the specific other organizations**
- **So:**
  - ♣If you are inclined to make a statement on behalf of the GGF to another organization, always copy the liaison, so that he can approve (or rollback).
  - ♣Best is to always first coordinate with liaison
  - ♣Contributions in other standardization bodies are in general personal statements, not on behalf of GGF
  - ♣If GGF statement is required -> Liaison

IPR

- **IPR a BIG problem**
- **Many patents on technology now granted**
- **Will be hard to avoid encumbered technology in future**
- **Should prefer technology with well understood IPR issues**
- **Use standards process to see if licenses are fair**
  - ♣multiple implementations may need multiple licenses
  - ♣all licenses must be checked

IPR Disclosure

- **WG participants should disclose IPR conflicts to WG chair**
  - ♣may not be able to - patent pending
  - ♣may not know what others in company are doing
- **WG participants should not push technology when they have a known but undisclosed IPR conflict!!!**

GGF

AD & WG Chair Powers

- **Chair can replace document editor & scribe**
    - ♣should have backing of AD
- **AD can strongly recommend replacement of document editor & scribe**
- **AD can replace chair**
    - ♣Should have backing of GFSG
- **AD + GFSG can close down WG**
    - i.e., AD is Area management
        - GFSG is GGF management

This only if all else fails, this is a human best effort

GGF

Last slide

- **Last advice:**
  - ♣ Use some humor to run your group but always remember:

  ## *Potentially big interests and peoples jobs are involved*

- **Questions?**

- **Go forth and make progress**