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Calls for Expressions of Interest:
Shibboleth Consortium Operator

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1. Overview

The Shibboleth Consortium is looking to appoint a Consortium Operator to become the administrative home of the Shibboleth Consortium. The appointment will be from 1 January 2012 – 31 July 2013 in the first instance. The appointment is expected to involve two major roles:

- To host the administrative services required by the Shibboleth Consortium with a monthly charge to the Consortium from the Operator for such services.
- To issue contracts for developers (and other staff where appropriate) involved in the Shibboleth project and other services.

Further information about the Shibboleth Consortium can be found at:

<https://wiki.shibboleth.net/confluence/display/consort/Shibboleth+Consortium>.

2. Background

The Shibboleth project began as an Internet2 Middleware activity in 2000; later that year the project connected with the work of the OASIS SAML Working Group and has been connected with the development of the SAML standard ever since. Shibboleth 1.0 was released in 2003, and was quickly adopted by the worldwide Higher Education/Research community. It implemented SAML v1.1 and its corporate sector use cases, along with extensions to address Higher Education use cases. With SAML 2.0 in 2005 and Shibboleth 2.0 the following year, the SAML standards grew to include all the multi-lateral, metadata driven approaches pioneered by Shibboleth.

Shibboleth is now a mature piece of software, used by over 15 million users worldwide. In order to support this wide user base and to allow Shibboleth to continue to evolve and develop in the changing identity management landscape, a review of the sustainability of Shibboleth was deemed appropriate.

In 2010, three organizations – Internet2 in the US, JISC in the UK, and SWITCH in Switzerland – that have been the locus of Shibboleth development to date engaged in an effort to establish a solid and broader foundation for future Shibboleth development. The Consortium has researched potential models for securing the future of Shibboleth and has published its findings as the Shibboleth Consultation and Review (<https://wiki.shibboleth.net/confluence/display/consort/Shibboleth+Consortium>).

This Call for Expressions of Interest seeks to fulfill one of the recommendations from the Review by establishing an administrative home for the Shibboleth Consortium – the

Shibboleth Consortium Operator. Once established, the Operator will play a core role in helping meet the other recommendations from the review to establish the Shibboleth Consortium Board and the Shibboleth Members structure.

3. Requirements

The Consortium Operator will be expected:

- To appoint an Operational Manager to oversee the day-to-day administration of the Consortium. This Operational Manager will:
 - Act as a liaison between the consortium and the operating organization;
 - Serve as an initial point of contact for questions regarding consortium membership;
 - Provide secretariat support to the Shibboleth Consortium Board;
 - Receive and submit incoming invoices for payment;
 - Manage information and business processes relating to the Consortium on the Shibboleth website and wiki (www.shibboleth.net);
 - Provide detailed Consortium financial information at least once a month.
- To host the Shibboleth software infrastructure, or to establish a close partnership with a 3rd party organization to provide hosting for the infrastructure (such as the current arrangement with EDINA), according to the requirements of the Shibboleth Core Team. This must include:
 - 2 servers (physical or virtual) with 4 IP addresses each. Servers must run RedHat or CentOS and root access must be provided to the consortium.
 - Proven backup system for the infrastructure servers.
 - Support for mailing lists to be hosted on the infrastructure servers; at a minimum this means allowing inbound and outbound SMTP access.
 - Power and network connectivity for on Mac Mini "server".
 - Communication of any planned downtime or service interruption for this hardware or associated network connectivity.
- To manage registration of any domain names associated with the Consortium;
- To manage contracts with staff, their home organization, and other organizations (e.g., federation operators) including contributor agreements assigning appropriate rights relating to the Shibboleth codebase. Individual contracts may be in different legal jurisdictions.*;
- To work to attract and maintain membership of the Shibboleth Consortium;
- To set up dedicated bank accounts for the Consortium;
- To act as the consortium's accounts payable and receivable. This will entail performing the following actions, in multiple currencies, for example:
 - Receiving memberships payments and donations;
 - Issuing periodic invoices for membership dues;

- Issuing monthly payments to consultants working for the consortium.

*Bidders should provide detailed information as to how these specific areas will be managed, including minimum service levels.

4. Term

The Consortium Operator will initially be appointed for a period of 18 months as a hosted service relationship. A monthly fee will be paid to the Operator for administration of the Consortium alongside appropriate funding to cover contracts for Shibboleth Project staff. The relationship will be reviewed by the Shibboleth Consortium Board after an initial 12 month period. The relationship with the Operator may also be terminated by a majority vote from the Board in cases of misconduct.

5. Funding

Funding available to the Consortium Operator will be determined in part by the success of the Consortium itself in attracting funds. This should be structured in to the bid. The Consortium Operator will be expected to take a pragmatic view of central funding requirements against core development requirements and where possible charge a monthly fixed rate to the Shibboleth Consortium for administrative costs.

Budget will be approved by the Shibboleth Consortium Team in the first instance, and then by the Shibboleth Consortium Board once established.

6. Structure of Proposal

Bidders are invited to submit a proposal of no more than 10 pages of A4, including annexes to contact@shibboleth.net by 11th November 2011. The proposal should include:

- Background on bidding organisation;
- Experience and background knowledge of Shibboleth;
- Experience of operating membership organisations;
- Proposed structure for Consortium Operations;
- Minimum Service Levels to be applied;
- Budget;
- Overview of staff to be involved;
- Cover letter of support from senior manager within the organization.