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Request for Quotation (RFQ)

And

Call for Participation (CFP)

OGC Web Services Initiative - Phase 8 (OWS-8)

Annex D

Communications Plan

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1 Overview

This document is an integral part of OWS-8 RFQ. It describes the Communications Plan for OWS-8. The plan includes a defined OGC approach as well as policies and procedures for effective communications among selected organizations, participants, sponsors, and the OGC Interoperability Program (IP) Staff.

Each organization, regardless of any teaming arrangement, shall provide a designated Point of Contact (POC) who will be available for scheduled communications about OWS-8 status. That POC shall identify alternatives that will support the designated POC in scheduled activities and represent the organization as-needed in *ad hoc* discussions of IP issues. The designated and alternative POCs shall provide contact information including their e-mail addresses and phone numbers. All proposals shall include a statement or documentation of their understanding, acceptance, and handling of the communications plan.

OGC will designate technical Team Leaders for activities described in the Work Breakdown Structure for the OWS-8 Initiative. The Team Leaders shall work with IP Initiative Management, responsible participants, and the sponsors to ensure that OWS-8 tasks/activities are properly assigned and executed. The team leader is accountable for activity and schedule control and team communication. They must also raise issues of concern rapidly and proactively on schedule slippage, resource issues to OGC's management assigned for OWS-8 Initiative

2 Communications Plan

The following elements of the communications plan are directed to one or more tasks/activities in the WBS or requirements in Annex B:

- The need to proactively and rapidly alert participants of events, deadlines, and decisions that affect them,
- The need to keep participants apprised of the status of all participants to ensure coordination and cross-communication,
- The need for participants to post items of interest, status reports, and software for distribution amongst the participants,
- The need for participants who are in remote locations to provide to IP Staff or other participants with software for installation at various support sites, and
- The need for groups of participants to communicate/discuss and resolve ongoing definitional and development issues and related solutions.

The following tools are implemented for use during the OWS-8 initiative:

- Interoperability Program **email reflector** (OWS-8@lists.opengeospatial.org), plus lists for each thread.
- **Public project web site** (<http://www.opengeospatial.org/projects/initiatives/ows-8>).
- Project **Twiki** site for team collaboration
- Web portal (<http://portal.opengeospatial.org/>) with the following modules:
 - **Calendar** for assigning, viewing and coordinating schedules,
 - **Contact list** of participants, staff and other key individuals,
 - **Discussion Forum** for technical discussions,
 - A web-based **file upload** mechanism,
 - **Project timeline** tracking,
 - **Action items** tracking, and
 - A procedure for arranging, announcing, and executing **teleconferences**.

Each of these tools is described below.

2.1 OWS-8 Email Reflector

Non-technical electronic mail communications should be sent to the single email reflector for the OWS-8 program. This email list is OWS-8@lists.opengeospatial.org. There may be heavy traffic on this e-mail list, so to make it easier to follow pertinent threads and to avoid back channel communications, please follow the guidelines listed below. All technical discussions will take place on the email list. Reminders will be issued if the guidelines are not used.

Participants should carefully consider the subject of email. To facilitate sorting, email to this list will automatically contain the Prefix in the Subject line of each message: [OWS-8].

The OGC IP lists get heavy traffic. In order to facilitate efficient handling of that traffic and to reduce redundancy, all replies will go to the list not the sender. OGC is currently using the Mailman Software package to manage and maintain our lists. Mailman allows OWS-8 users to customize many preferences, for example, you can change your settings to allow for Mailman to digest the messages per day, to receive “no mail” when you are on vacation, etc.

PLEASE NOTE: the email reflector is not intended for exchanging files with others. A procedure for uploading files to the project web sites is described below. When files are uploaded, automatic notification is sent to participants.

2.2 OWS-8 Public Web Site and Participant Portal

A portion of the Open Geospatial Consortium web site (in the Interoperability Program area) will be dedicated to communications of the OWS-8 effort.

<http://www.opengeospatial.org/projects/initiatives/ows-8>

Figure 1 shows the initial hierarchy of the OWS-8 Participant Web Sites.

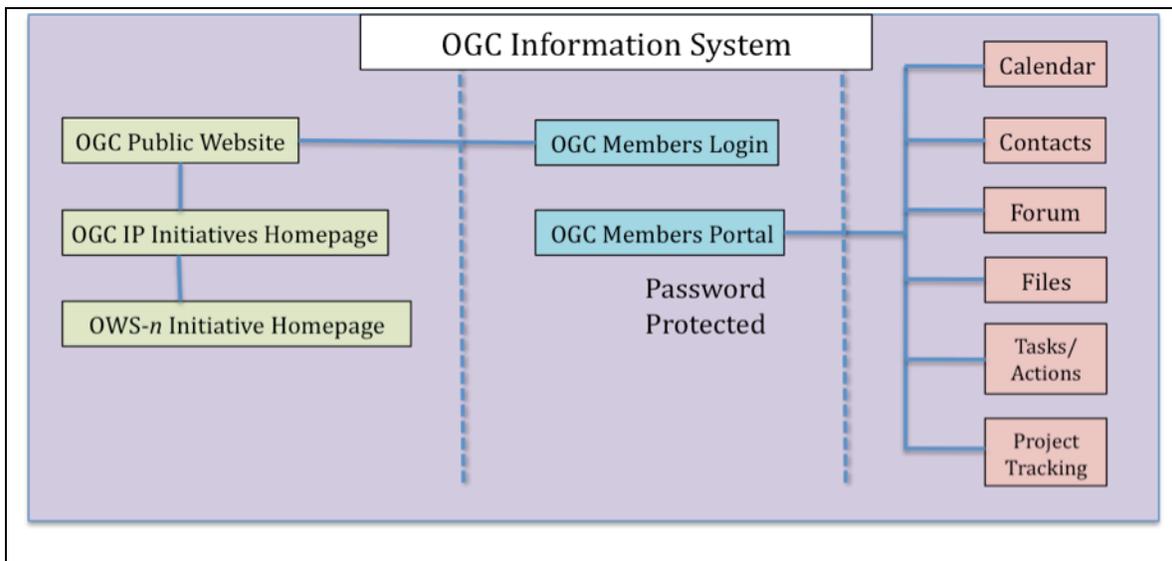


Figure 1—Initial Hierarchy of the OWS-8 Participant Web Sites.

The initial pages and their content are described here:

- OGC Information System—Database of important current and historic data regarding everything from requirements and use cases, to contact information and documentation status. There are various levels of access within the OGC Information System. This asset will continue to grow and mature.
- OGC Public Website—publicly available information to help aid in the process of Specification Development.

- OGC Members Page—A valuable resource for all members to get the latest information from the Specification Program.
- OGC IP Initiative Homepage—Links to archived, current and future IP Initiatives:
(<http://www.opengeospatial.org/initiatives>)
- OWS-8 IP Initiative Homepage—Home page for the OWS-8 Initiative effort:
(<http://www.opengeospatial.org/projects/initiatives/ows-8>)
- OGC Web Portal - User specific page giving basic tools and information based upon the users Login Access.
- Calendar - Calendar for assigning, viewing and coordinating schedules,
- Contact Information - a listing of the participants, Staff and other Key individuals,
- File Manager - A web-based file upload mechanism,
- Task/Action Items - Action Items tracking,
- Project Tracking - Project timeline tracking,

Although the site will begin with the above layout, it will change and evolve over the life of the OWS-8 project. Participants who would like to contribute content to the web site should follow the directions in the next section for submitting material for the Web site.

2.3 Web-Based Upload Mechanism

Participants that wish to place materials onto the OWS-8 Web Site described above may transfer these materials to any of the file upload locations described in this section. Participants should follow the procedure detailed herein to ensure effective communication of file uploads. PLEASE NOTE: This is the preferred mechanism for exchanging files with other participants. It prevents those who have no need to receive files from having to do so, while making sure that all parties are informed of the availability of files.

Posting Procedure

1. The participant shall connect to the OGC Web Portal via a personal log-on using a web browser. (<http://portal.opengeospatial.org/>). The participant shall login using their assigned individual Username and Password. If you are a participant or observer, you can request access to the OWS-8 project files by contacting the Initiative Manager. Note that OWS-8 Observers typically do not have permission to upload files to the OWS-8 project directories; contact the Initiative Manager if this is an issue for you. Please ensure that you are logged into the Portal and have selected OWS-8 in the drop-down select box on the right end of the top navigation menu.
2. The second tier Navigation Menu has a tab labeled Files. Select this tab. You are now viewing the File Manager Web page for the OWS-8 Group.
3. The participant shall upload or submit a single file by selecting the New File tab. File submissions may be packaged (even if only a single file) using **a**) WinZip (for Windows-based submissions) or **b**) tar and Gzip or **c**) tar and compress for (Unix-based submissions).
4. The participant shall in the upload process provide certain metadata for tracking and recognizing the files on-line.
 - a. **Title:** *title of the submission*
 - b. **Authors:** *work group or area for which the document was developed*
 - c. **Description:** *or abstract, a paragraph describing the purpose and content of the submission, and*
 - d. **OGC Doc Type:** *identify the type of document for the submission,*
 - e. **Upload File:** *submitted file to be selected from the submitter's system.*
5. The participant shall click "Go".

Additional Collaborative Tools:

The OGC Interoperability Program may decide to institute the use of a collaborative workspace, such as, Web4-M Server, which has available free client software. The Virtual Workplace can provide online virtual sharing of information to be used in conjunction with Teleconferences. Web4-M provides whiteboarding, Chat, and most importantly, Application Sharing from a single user's system to be seen by many different users located in different locations at the same time. More details will be provided in the Portal area of the website and via email communications as this capability is stood up.

2.4 OWS-8 Twiki

Prior to the OWS-8 Kickoff, a Twiki site will be established for project collaboration purposes. This twiki will be a location for group collaboration, preparation and editing of raw content that may (should?) eventually work its way into an ER. When the editor(s) and contributors reach consensus on the form and content of a publication, then it should be moved to the Portal where it can be controlled (with versions) in a more formal manner.

2.5 Teleconference / WebEx Procedure

In general, any teleconference may involve either or both audio and webcast connections. Most threads will set up a standing teleconference time each week, with voice line and WebEx reserved for the duration of the testbed. However, threads and subgroups may occasionally wish to schedule additional teleconferences.

OGC maintains a sufficient number of USA-based telephone/audio lines to accommodate several simultaneous teleconferences without conflict. In addition OGC maintains a WebEx account that allows up to 15 simultaneous webcasts, which may use Voice Over Internet Protocol (VOIP) to avoid international calling charges (all callers must use either VOIP or dial-in telephone line; these cannot be mixed in a single WebEx session). These resources are not for sole use by the OWS-8 activities, but are shared with OGC TC working groups, the OGC Planning Committee, Board of Directors, and executive staff. The guidelines below have evolved to ensure productive and efficient use of these teleconference resources.

There are three phases in the execution of an OWS-8 Teleconference. These phases are initiation, planning, and execution. The procedure for each phase is defined below.

2.5.1 Teleconference Initiation

Due to the need to carefully manage the resources of the IP effort, a teleconference must be appropriately planned and approved by the relevant Thread Architect and the IP Initiative Manager. Before making a request, always check the Teleconference Calendar on the OGC Web Portal, to avoid obvious conflicts with other scheduled teleconferences. However, depending on the requesting participant's position and access permissions, not all scheduled events may be visible. For example, some OGC committee meetings are only visible to committee members and OGC staff. This is the main reason for following the guidelines below.

An **authorized discussion leader** must lead a teleconference. These individuals are typically identified during the Kickoff as Thread Architects and Cross-Thread Team Leads. However, any participant may initiate a teleconference by first contacting an authorized discussion leader to pre-plan the teleconference.

The authorized discussion leader must then obtain approval from the IP Initiative Manager.

Approval is gained by sending an email with the subject line "IP Teleconference Request" to the Initiative or Operations Manager for OWS-8 with the following format and content.

1. **Proposed Date and Time:** *the proposed date and time*
2. **Purpose:** *a description of the purpose of the teleconference*
3. **Designated Discussion Leader:** *the name, organization, and email of the designated discussion leader (must have been authorized to act in this role previously and must be available for the proposed teleconference)*

4. **Participants:** *a list of participants (name, organization, and email required) that should be involved*
5. **Resources Required:** *select one or both of: (a) voice line, and (b) WebEx line*
6. **Expected Duration:** *an estimate of the expected duration of the teleconference*
7. **Agenda:** *a detailed agenda, including the time to be spent on each topic*

Approval and setup should be sought well in advance, to avoid conflicts over telecon resources, but in any case must be sought **at least two business days prior to the proposed teleconference date**. It is recommended that **teleconferences involving participants on multiple continents** (Australia, Europe, Asia, and North America) **should be scheduled and announced at least three days in advance**.

If the request is approved, the authorized Teleconference Moderator, a member of OGC IP Team will then take over the initiation of the teleconference by entering the meeting information into the portal calendar and reserving the teleconference line.

If the request cannot be fulfilled, the IP Initiative Manager will work with the requesting individual, organization, or group to reach a satisfactory solution to all.

2.5.2 Teleconference Planning

The appropriate OGC IP Team member will arrange the teleconference. The details will also be posted in an area of the OWS-8 Participant Web Portal. An e-mail to notify all of the listed participants should also be sent.

2.5.3 Teleconference Execution

All participants will execute the teleconference by calling at the appointed date and time.

Teleconferences should not be extended without ensuring the resources remain available, and prior coordination. This requires that the designated discussion leader keep the teleconference on schedule with the agenda. Obviously, this means that vital agenda items should be covered first in the agenda and, if agenda items run over the time allotted, the discussion leader will need to adjust the agenda by deleting or shortening later topics.

The designated discussion leader will keep notes of the teleconference and forward a summary to the Initiative Manager and the IP Executive Director. The notes should contain documentation of decisions reached, action items (including a description and action item holder), and issues for resolution by IP Staff. The meeting minutes will be posted on the OWS-8 web portal or on the relevant OWS-8 twiki page.

2.6 Progress Reporting

The OGC IP staff will provide regular (monthly) progress reports on OWS-8 to the sponsors. To do this, **participants must submit technical and business progress reports by the 10th of each month, as detailed in Annex A, section 5.3.1**. Besides reporting progress in terms of “percentage complete” on each of the deliverables expected, another purpose of the **monthly technical reports** is to capture a record of decisions and actions taken, results obtained, lessons learned, and recommendations for any changes to the work program. This becomes a valuable record of the testbed activity experience. The purpose of the **monthly business report** is to provide the Initiative Manager, Financial Officer, and IP Executive Director with a quick indicator of the project health, from each Participant’s perspective. These reports have proved crucial to identifying underlying issues needing to be addressed, that may not have received adequate attention in the weekly telecons and other daily communications. Each Thread Architect consolidates their thread’s monthly technical reports to send to the Initiative Manager by the 15th of each month. The Initiative Manager then consolidates these into the progress reports submitted to the sponsors by the 20th of each month. The OGC IP staff and the sponsors also provide status reports about the program to the OGC Technical Committee and the OGC Planning Committee as feasible and appropriate. At those times the participants may present interface designs and other reports to the TC and PC. Demonstration scenarios and the architecture to support those demonstrations would be included in these presentations.

OGC IP staff will review action item status on a weekly basis with Team Leads and participants that are responsible for the completion of those actions. Action item status reports will be posted to the OWS-8 web sites each week. Email will be used to notify Team Leads and responsible parties of pending actions for a given week.

3 Interoperability Program Code of Conduct

3.1 Abstract

This document outlines the Principles of Conduct that shall govern personal and public interactions in any OGC activity. The Principles recognize the diversity of OGC process participants, emphasize the value of mutual respect, and stress the broad applicability of our work. A separate section of the Policies and Procedures details consequences that may occur if the Principles of Conduct are violated.

3.2 Introduction

The work of the OGC relies on cooperation among a broad cultural diversity of peoples, ideas, and communication styles. The Principles for Conduct guide our interactions as we work together to develop multiple, interoperable technologies for the Internet. All OGC process participants aim to abide by these Principles as we build consensus in person, at OGC meetings, in teleconferences, and in e-mail. If conflicts arise, we resolve them according to the procedures outlined in the OGC TC and IP Policies and Procedures.

3.3 Principles of Conduct

1. OGC process participants extend respect and courtesy to their colleagues at all times.

OGC process participants come from diverse origins and backgrounds and are equipped with multiple capabilities and ideals. Participants in related tasks are often employed by competing organizations. Regardless of these individual differences, participants treat their colleagues with respect as persons--especially when it is difficult to agree with them. Seeing from another's point of view is often revealing, even when it fails to be compelling.

English is the de facto language of the OGC process, but it is not the native language of many OGC process participants. Native English speakers are requested to speak clearly and a bit slowly, and to limit the use of slang in order to facilitate the comprehension of all listeners.

2. OGC process participants develop and test ideas impartially, without finding fault with the colleague proposing the idea.

We dispute ideas by using reasoned argument, rather than through intimidation or ad homonym attack. Or, said in a somewhat more consensus-like way: "Less heat and more light."

3. OGC process participants think globally, devising solutions that meet the needs of diverse technical and operational environments.

The goal of the OGC is to maintain and enhance a working, viable, scalable, global set of interfaces and protocols that provide a framework for interoperability in the geospatial domain. Many of the problems we encounter are genuinely very difficult. OGC participants use their best engineering judgment to find the best solution for the whole domain of geospatial interoperability, not just the best solution for any particular network, technology, vendor, or user. We follow the intellectual property Principles outlined in <http://www.opengeospatial.org/legal/>.

4. Individuals who attend OGC facilitated meetings are prepared to contribute to the ongoing work of the membership and the organization.

OGC participants who attend OGC meetings read the relevant Pending Documents, RFCs, and e-mail archives beforehand, in order to familiarize themselves with the technology under discussion. This may

represent a challenge for newcomers, as e-mail archives can be difficult to locate and search and it may not be easy to trace the history of longstanding Working Group, Revision Working Group, SIG, or Initiative debates. With that in mind, newcomers who attend OGC meetings are encouraged to observe and absorb whatever material they can, but should not interfere with the ongoing process of the group. OGC meetings run on a very limited time schedule, and are not intended for the education of individuals. The work of the group will continue on the mailing list, and many questions would be better expressed on the list in the months that follow.

5. It is expected that many of the participants working on related tasks are from competing organizations. To preserve and sustain our productive environment in which ideas are discussed openly, and all participants' viewpoints are respected, it is imperative that participants refrain from using OGC resources (mail lists, portal, twiki, teleconferences, etc.) for commercial messages favoring any particular products, business models, or ideology.

3.4 Acknowledgements

OGC acknowledges the work done by the IETF on a code of conduct (specifically RFC 3184). These principles of conduct are modeled on their work.