

Routing Chair Training

Working Group Charters and Milestones

Just to level-set on a few things

Spencer is not, and has never been, a routing chair or routing AD ...

... but Spencer does evaluate and ballot on RTG charters and recharterers

There are BCPs that cover this, but ...

... philosophy and practice on charters and milestones varies among ADs

Please interrupt, if “that’s not the way we do things around here”!

Applicable BCPs

IETF Working Group Guidelines and Procedures

- (From RFC 2418/BCP 25)
- A charter is primarily **negotiated** between a prospective working group Chair and the relevant Area Director(s),
- although **final approval** is made by the IESG **with advice** from the Internet Architecture Board (IAB).
- A charter is **a contract between a working group and the IETF to perform a set of tasks.**

(draft-crocker-rfc2418bis-wgguidelines is a major revision to BCP 25, if you're interested)

A Charter:

- Lists **relevant administrative information** for the working group;
- Specifies the **direction or objectives of the working group** and describes the approach that will be taken to achieve the goals; and
- **Enumerates a set of milestones** together with time frames for their completion.

A Charter has these sections (from BCP 25)

- Working group name (and maximum 8-character acronym)
- Chair(s)
- Area and Area Director(s)
- Responsible Area Director
- Mailing list
- Description of working group
- Goals and milestones

Most recent RTG working group charter

Bit Indexed Explicit Replication (bier)

Chairs:

Greg Shepherd <gjshep@gmail.com>

Tony Przygienda <tonysietf@gmail.com>

Assigned Area Director:

Alia Atlas <akatlas@gmail.com>

Mailing list

Address: bier@ietf.org

To Subscribe: <https://www.ietf.org/mailman/listinfo/bier>

Archive:

<http://www.ietf.org/mail-archive/web/bier/current/maillist.html>

Description

From RFC 2418:

To facilitate evaluation of the intended work and to provide on-going guidance to the working group, the charter must describe the problem being solved and should discuss objectives and expected impact with respect to:

- Architecture*
- Operations*
- Security*
- Network management*
- Scaling*
- Transition (where applicable)*

Deliverables

BIER is initially chartered to do experimental work on this new multicast forwarding mechanism as follows:

1) BIER architecture: The WG will publish an architecture, based upon draft-wijnands-bier-architecture-04. It will discuss the security properties of BIER. It will include the normative algorithm for how BIER packet forwarding is done. It will specify the information that is required to be in a BIER header so that a router can support BIER forwarding.

<eight more deliverables omitted>

Coordination

The BIER working group will coordinate with several different working groups and must include the relevant other working groups during working group last call on the relevant drafts. BIER will coordinate with MPLS on the MPLS-based encapsulation and associated MPLS-based OAM mechanisms. BIER will coordinate with ISIS and OSPF on extensions to flood BIER-related information. BIER will coordinate with BESS and IDR on the applicability of existing BGP-based mechanisms for providing multicast group membership information. BIER will coordinate with PIM on the applicability of and extensions to PIM, IGMP, and MLD to support BIER; BIER will work directly on the applicability statements, as needed.

What else could have been in this charter?

- WG Secretaries
- Technical Advisors (what RFC 2418 calls “Consultants”)
- “Additional URLs” (lots of possibilities. “do the right thing”)
 - Where’s your wiki?
 - Where’s your issue tracker?
 - What other links would be helpful for someone in the WG to know?
- What’s OUT of scope (if that’s helpful, to guide the work)
- External liaison relationships (can be informal, from the IETF’s side)

The Charter Process

Where charters come from

- From RFC 2418: “A working group may be **established at the initiative of an Area Director** or it may be **initiated by an individual or group of individuals.**”
- These days, IETF-wide, almost all are initiated by a group of individuals
- RFC 2418 sec 2.1 has two pages of “Criteria for Formation”
 - This is a fairly comprehensive list of what many ADs look at
- These days, IETF-wide, almost all come out of a BOF (RFC 2418 sec 2.4)
- That’s not required. We’ve been chartering about one/year without a BOF
- BOFs are a topic all their own - see RFC 5434 for suggestions
- So, let’s assume that you have a proposed charter, probably from a group of individuals, probably coming out of a BOF, and you hand it to your AD

RFC 6292 - Informal IESG review

- This is the initial state, when an AD creates a WG record in the datatracker.
- Some ADs cycle versions here for a while, others wait to create a WG record.
- This might be more accurately named “Informal AD Noodling”, but the rest of the IESG can see what’s happening (as can anyone who knows there’s an unannounced proposed WG record in the datatracker).
- The normal next state is "Internal review" if the idea is accepted, or "Not currently under review" if the idea is abandoned.

RFC 6292 - Internal review

- The IESG and IAB are reviewing the charter.
- This is the initial IESG and IAB review. We usually allow one week.
- In Spencer's opinion, the ballot question is "does this pass the laugh test yet?" so that the IESG and IAB aren't having a deep dark secret discussion.
- By default, the datatracker notifies the IESG and IAB.
 - Some ADs add proposed chairs and mailing lists to the notification list.
 - Doing so blurs the line between internal and external review (next slide).
 - It also confuses people who see ballots multiple times :-)
- The usual next state is "External review" if the idea is adopted, or "Informal IESG review" if the IESG decides the idea needs more work, or "Not currently under review" if the idea is abandoned.

RFC 6292 - External review

- The IETF community and possibly other standards development organizations (SDOs) are reviewing the proposed charter.
- The usual next state is "IESG review", although it might move to "Not currently under review" if the idea is abandoned during the external review.
- Think of this as “IETF Last Call For Working Group Charters”. You may see comments. From anyone.
- By default, the datatracker notifies ietf@ietf.org and the working group lists.
- The AD can specify whether or not to send the announcement to other SDOs (for new charters, we almost always do) using the New-Work mailing list (one of the best-kept poorly-kept secrets on the Internet).

RFC 6292 - WG exists

- The WG was approved by the IESG.
- The Secretariat publishes the charter and sends announcements.
- The WG remains in this state until there is a request to update the charter.
- This is where the people who proposed the working group wanted to be.
- (“why are you reading this? You have a working group, so get to work!”)

RFC 6292 - Not currently under review

- The proposed WG is not being considered at this time.
- A proposed WG charter will remain in this state until an AD moves it to "Informal IESG review".
- This includes “we decided not to do this” charters, but that’s a subset

Things to know

- You may see ballots to send the charter for external review - it's not finished!
- The ballot positions look like the ones we use for documents, except for one.
- “Discuss” really is a draft discussion. “Block” really is a block for charters.
- At least one AD has to WANT to be the responsible AD for a working group.
- Most ADs care what the community thinks about a charter most of the time.
- Charters are not IETF consensus documents. This is when the IESG steers.

Rechartering

- Rechartering works very much like chartering.
- The RFC 6292 states are Informal IESG recharter review, Internal recharter review, External recharter review, and IESG recharter review.
- ADs are more likely to approve recharterers without external review.
- If recharterers aren't sent for external review, they aren't sent to other SDOs.
- Each AD has some idea how often they want to revisit charters. Please ask!
- Rechartering is a fairly heavyweight procedure (IESG review, maybe external)
- **Rechartering helps avoid late surprises** from other areas

Spencer's "What not to do" with Charters

Classic Fails in BoF Requests and Charters

- “Boiling the ocean” - “short-term” and “limited scope” are usually preferred
 - Try not to notice OSPF (started in 1988), IDR (started in 1994) and ISIS (started in 1998)
- “Gordian Knot” - combining two or three efforts necessary for one product
 - If you need three interfaces, do they all need to be in the same working group?
- “Swiss Army Knife” - combining efforts that belong in different areas
 - We’re seeing topics that really are on area boundaries. They aren’t easy to manage!
- “Forgetting your Audience” - a charter that’s only clear to RTG people
 - 12 of the 15 people who can state ballot positions on your charter aren’t RTG ADs

Milestones

Milestones (not “TBD”!) - theory

- Milestones are managed the same way as the rest of working group charters
- A contract between the chairs and AD - not between working group and IETF
- Initial milestones are often entered by ADs
- Milestones are maintained by the chairs with AD approvals as needed
- Most milestone changes are not reviewed by the IESG
- It's really easy to keep dates updated - please feel free to do that

Milestones (not “TBD”!) - practice

- Milestones may be added, changed, or deleted (with AD approvals)
- Dates may be changed without AD approval
- More than one draft can be associated with a milestone.
- Drafts can be associated with milestones without AD approval
- Some working group chairs use milestones to guide what to work on next
- Set milestones that are under working group control (adoption, WGLC, etc.)
- Working group deliverables might not be published - use cases, etc. in wiki.

Questions?