

The Open Identity Exchange UK Europe (OIX)

Project and White Paper Policy

(Effective 1st October 2017)

Introduction

OIX achieves its [Vision, Mission and Objectives](#) through the collaboration of organisations in highly focused, short-term projects and the reporting of findings in white papers. Key findings of OIX projects are published as project white papers, and are freely accessible to all, without obligation, on the OIX website.

1. PURPOSE

This policy is to set out the principles by which OIX projects should be formed, governed and executed with the intent of achieving a desirable outcome and to set out the principles relating to the publication of white papers. The objectives are to ensure OIX Projects:

- Further Identity
- Are clearly aligned to the OIX's vision, mission and objectives
- Are effectively managed within the limitations of the scope, resources and risk
- Findings are published on the OIX websites

2. WHAT KINDS OF PROJECTS RUN UNDER OIX

In our experience, most projects can be described at the outset as one of the following types:

Discovery	The focus is on researching user and/or business needs and understanding what constraints exist. These are used to inform the user and/or business requirements.
Alpha	Alpha projects take the user requirements and combine these with business requirements to build a prototype of a service. Further research may be performed using the prototype, to demonstrate the technical capabilities employed.
Beta	A Beta project is the development of a service that can be tested by users in a controlled 'live' (i.e. real) situation

At a member's request, other types of projects can also be run under OIX

3. FORMING AND FUNDING A PROJECT

A project may be formed (sponsored) by any member of OIX in collaboration with one or more other members. Non-member organisation may collaborate on an OIX project. All non-members are required to sign the OIX Participant Agreement ([Link](#)) to protect IPR.

There are three 'costs' associated with running an OIX project: Participation fee, Facilitation Fee and Project Funds.

Participation Fee: All participating organisations will pay a ‘participation fee’ (*see table below). The ‘participation fee’ is waived for all OIX members in good standing.

Facilitation Fee: An OIX project facilitation fee of £2,500 (+ VAT) applies to all projects up to the value of £25K. Projects over this value will be dealt with on a case-by-case basis. This fee enables OIX to facilitate:

- OIX Board review
- Necessary contracts
- Ongoing website project inclusion and updates
- Ongoing project communications
- Project Sponsor and Project coordinator support
- Dispute resolution
- Supplier payments
- White paper review, website posting and promotion on social media

Project Funds: Project related funds might be required to pay for specialist services or facilities to perform defined services. Examples include a user researcher, a user-testing lab, IT developers, a project coordinator and a report author. All project funding is provided by the one or more members participating in the project. It is the responsibility of the project sponsor to ensure the project is adequately resourced and funded.

All funds need to be deposited into the OIX bank account prior to a project proceeding

*Participation Fee Payable to OIX	UK £ (+ VAT)
Commercial less than 50 employees	330
Commercial more than 50 employees	3290
Academic/non-profit	660
Government	1645
*Waived for members in good standing	

4. PROJECT REVIEW

All projects must be reviewed by the OIX Board in order to ensure they are in accordance with the purpose and objectives of OIX. The Board will provide feedback to the project sponsor if the project does not meet the purpose and objectives of OIX.

The project submission shall comprise the following items:

- A description of the project, its purpose and scope
- A list of participants and contact information
- Details of funding requirements and sources of funding

- An outline project schedule
- A description of the project process or methodology

The project proposal template must be completed and can be downloaded from our website ([Link](#))

Once the project has been reviewed by the Board, and all project funds deposited with OIX, the project can commence as an 'OIX Project'.

5. BEGINNING A PROJECT

At the outset of a project, the following steps must be completed:

- All participants, who are non-members of OIX, must sign a Participant Agreement ([LINK](#)) and pay the project participation fee.
- The project proposal template must be completed
- All participants should complete a Statement of Work that reflects their contribution to the projects requirements set out; this forms part of the participant's obligations
- An abstract of the project will be published on the OIX UK website

During the course of the project, the project coordinator is expected to:

- Provide a report to the OIX Programme Manager, summarising progress and planned activity

On conclusion of the project, a report or white paper reflecting the findings of the project, must be published on the OIX UK website and the Executive Committee will review the report prior to its publication. Please review the White Paper points that follow.

6. CLOSING A PROJECT

Once a project has been concluded and all costs settled, the project is closed. The OIX website project page must be updated accordingly by the project coordinator.

The project sponsor may be asked to arrange a presentation of the findings to an OIX workshop.

7. WHAT IS A WHITE PAPER

A white paper can be

- A retrospective report on the outcome of a given project (hereafter referred to as a project report)
- A prospective discussion on a current issue or opportunity (hereafter referred to as a Member paper)

8. OIX PROJECT REPORTS

A project report reflects the outcomes of a project. It is written by an author who should be appointed on commencement of a project.

A project report is published to an international community. It should be concise and written for a predominantly business-level readership. Industry jargon should be avoided. It is good practice to include a glossary.

Additional project material may be published alongside a project report. This may include technical documentation and user research including audio and video content. The publication of audio and video content must be in accordance with express consent given by individuals who have participated in the user research. The full names and other identifying information of individuals who have taken part in user research must not be published. Note that this also applies to presentations that relate to the project.

In the spirit of collaboration, all participants in a project should reach a consensus on the content of a project report, in a timely manner. However, participants may hold differing views and these should be fairly and objectively reported, along with disclaimers if appropriate.

A project report should be approved and signed off by the participants as a true reflection of the outcomes. All agreed feedback and review dates will be adhered to, ensuring timely issuing of project reports. If a minority of participants are unwilling to sign off the paper, the OIX Executive Committee can provide an arbitration function. The OIX Executive Committee approve all project reports before they are published to ensure they adhere to the OIX vision and mission and have the right to remove a white paper that has been published.

The project report should be accompanied by a short abstract for publication on the OIX website.

9. OIX 'MEMBER' WHITE PAPER

A Member paper may be written by one or more OIX members. It should reflect a current issue or opportunity that is relevant to the purpose of OIX and is to further identity

A member(s) who wishes to write a paper and publish it through OIX, should initially produce a synopsis of the intended paper and present it to the OIX Executive Committee. The Executive Committee will provide comment as to whether it believes it is suitable and relevant and, if not, offer informed guidance to the member(s). It is the responsibility of the member(s) to source the resources and funds required.

On completion of the member paper, it must be submitted to the OIX Executive Committee for approval. If approval is withheld, the Executive Committee will provide appropriate assistance and guidance, should this be necessary, so that the member paper can be modified and approved at a later date. The OIX Executive Committee have the right to remove a white paper that has been published.

There is an OIX facilitation fee of £750 + VAT for member white papers - this fee enables OIX to facilitate:

- OIX Executive Committee review

- White paper review
- Website posting
- Promotion on social media

This fee is waived as a benefit for those members in good standing.

The discussion paper should be accompanied by a short abstract for publication on the OIX website. The member may be asked to arrange a presentation of the findings to an OIX workshop.

A non-member may not have this type of paper published through OIX.

10. CODE OF CONDUCT

At all times, participating members and non-members in projects and white papers must observe the Code of Conduct.