IETF ADMINISTRATION LLC

Request for Proposals

IRSG Ballots Tool

Date of Issuance: April 30, 2019
Proposal Extension Deadline: June 4, 2019, 5:00 P.M. ET

IETF LLC Request for Proposals

IRSG Ballots Tool

The IETF Administration LLC (IETF LLC) is soliciting proposals ("Proposals") to create a document balloting mechanism similar to the one used by the IESG tool for the IRTF chair and the IRSG.

Proposals from any commercial or non-commercial vendor are welcome.

Revised Timeline
30 Apr: RFP Issued (Original Date)
24 May: Questions and Inquiries deadline
28 May: Answers to questions issued, RFP Addenda and Update issued
04 Jun: Proposals due
11 Jun: Selection made, negotiations begin
14 Jun: Contract execution
17 Jun: Work begins

This is the process for the Request for Bids:

1. The Statement of Work (SOW) is in attached.

2. Any questions about the Work must be submitted by 24 May 2019. A response to all parties shall be provided by 28 May 2019. The response will include the questions asked and the answers, but will not identify the company asking the question.

3. Bids are due by 04 June 2019. The bid must provide a not-to-exceed price, the expected start date, the expected completion date, any assumptions, and a description of any dependencies that might cause delays in the schedule.

4. The IETF LLC will discuss the Bids and may ask questions by email and/or conference call.

5. Once the answers are received a decision will be made to select the bidder to perform the work and a Work Order will be prepared for execution. We anticipate an award on or before 14 June 2019.

6. This is the Bid format:

    a. Executive Summary

    b. Project Approach & Plan

    c. Schedule - When the work will begin and end, as well as dependencies and other milestones.

    d. Test Plan

    e. Cost & Payment Schedule

    f. Warranty & Late Delivery Consequence

    g. Technical Support & Maintenance

    h. Miscellaneous

7. Instructions for IETF Software Development Contractors will apply. See
   https://trac.tools.ietf.org/tools/ietfdb/wiki/ContractorInstructions?version=26

8. Additionally, bidders for the IRSG Ballots Tool also have the option to be considered as a qualified software vendor for Indefinite Delivery/Indefinite Quantity (IDIQ) Master Services Agreement (MSA) purposes. Please indicate your interest. IDIQ software vendors will be eligible for future software development projects to improve and expand to the existing IETF toolset, which has been substantially developed in Python using the Django framework.

Please reply with questions, if any, and a bid if you are interested in pursuing this opportunity to ietf-rfps@ietf.org.

Thanks in advance.

Portia Wenze-Danley

IRSG Ballots: Statement of Work

Background

The IRTF chair and the IRSG would like to have a document balloting mechanism similar to the one used by the IESG.

The IESG uses ballots to approve documents for publication as RFCs, to evaluate and approve charters, to approve status changes, and to process conflict review requests. All of these ballots are typically created by an Area Director, and other Area Directors are driven to take a position when the ballot appears on an IESG telechat. The positions an Area director can take varies by ballot, but all current ballot types include at least one "blocking" position. As long as a ballot has one or more blocking positions on it, it is not approvable. When a ballot becomes approvable, the secretariat typically close the ballot and starts the appropriate next action for the thing being balloted. The condition of being approvable varies with ballot type. For instance, for approving standards track documents, there has to be at least one YES position, no blocking positions, and positions from two-thirds of the IESG. IESG ballots are shown on an "IESG Evaluation" tab for any document that has a ballot. The ballots are also represented as a grid of colored squares on search result rows. For example, see <https://datatracker.ietf.org/iesg/discusses/>.

The IRSG's use of ballots will be different in these ways:
- There are no telechats, hence no computable "deadlines" for taking ballot positions, but it would be useful for the ballots to have a "please respond by" date;
- Only the IRTF chair (or the Secretariat acting on their behalf) will be able to create a ballot or close a ballot;
- There will be no blocking positions for an IRSG ballot, but a "not ready" ballot position really does call for attention; and
- There will be no minimum number of positions required to approve a ballot, but the current convention is to not proceed without at least two "yes" ballot positions and no "not ready" ballot positions.

There are usually more IRSG members than IESG members, and the number of IRSG members changes more rapidly than the number of Area Directors. The IRSG consists of the chairs of active and proposed Research Groups, and any at-large members appointed by the IRTF chair. Recent IRSGs have had 30-ish members, compared to the IESG's 15.

A given draft will almost never have both IRSG and IESG ballots associated with it. A typical IRTF draft will have an IRSG ballot. When that ballot is completed, the IRTF chair will request a conflict review from the IESG. The IESG will create a separate conflict-review document and ballot that. However, an occasional document may start processing in the IETF stream and transition to the IRTF stream (or vice-versa) and it is possible for such a document to have ballots of both types. It would be vanishingly unlikely that such ballots would both be open at the same time, but the code must handle that edge condition.

This project will consist of modification of the datatracker code to support IRSG use of ballots. All changes and additions to the datatracker code must be accompanied by a corresponding test or set of tests. This project will reuse existing views and helpers (with minor modification) to the extent possible. It is anticipated that very few, if any, new views need be created.

Deliverables

- Refactor of BallotPositionDocEvent to not be IESG specific, adjusting the views and templates that use it accordingly.
- Addition of a new 'irsg-approve' BallotType for documents of type 'draft'.
- Augmenting views to allow the IRTF chair or the Secretariat operating on their behalf to create an 'irsg-approve' ballot for a draft in the IRTF stream, and to close such a ballot.
- Addition of an "IRSG Evaluation" tab on the main page of drafts that have an IRSG ballot.
- Augmenting views to allow IRSG members or the Secretariat operating on their behalf to take or change their position on an open IRSG ballot.
- Ensuring proper graphical display of open IRSG ballots for documents returned in search results.

Details

The datatracker codebase can be browsed using <https://trac.tools.ietf.org/tools/ietfdb/browser/>. Instructions for one method of setting up development environments are at <https://trac.tools.ietf.org/tools/ietfdb/wiki/SprintCoderSetup>.
The contractor for this project will be supplied with a development branch in the repository.

The essential objects involved in balloting are DocEvent, BallotType, BallotDocEvent, and BallotPositionDocEvent, all located in ietf.doc.models. The BallotPositionDocEvent object currently has an "ad" field that should be refactored into a "pos_by" field. The member functions on BallotPositionDocEvent will have to be adjusted accordingly. Note that "by" is already a field on the base DocEvent. "by" and "pos_by" may differ when, e.g., a

member of the secretariat sets a position at the request of a person taking a position.

The graphical grid-display of ballot positions is primarily handled by filters in ietf.doc.ballot_icon. These filters will need to be refactored to not assume the ballot is IESG based. The current logic to build a grid 5 squares wide with enough rows to match the size of the balloting body should not need adjusting.

The logic for determining if a ballot is approvable lies primarily in ietf.doc.utils.needed_ballot_positions. It will need minor adjustment to be made aware of the new ballot type.

When an IRSG ballot is created or closed, email must be sent to the IRTF Chair, the IRSG members, the document authors, and the associated RG email list. Similarly when an IRSG member takes a new ballot position, email must be sent to the same recipients.

The new BallotType will have a 'positions' field set to ['yes','noobj','recuse','need more time','not ready']. 'need more time' is a new BallotPositionName object, and current convention extends the ballot by a week or so. 'not ready' is a new BallotPositionName object, and current convention treats it as blocking.

Care must be taken to not show IRSG ballots on pages like <https://datatracker.ietf.org/iesg/discusses/ or https://datatracker.ietf.org/iesg/past/documents/>. If those views do not already filter their ballot types, the querysets must be augmented to do so.

Secretariat Considerations

The datatracker will derive the current set of IRSG members by finding the chairs of proposed and active RGs and adding the at-large members from the group with acronym 'irsg'. Those Roll objects, particularly those for the at-large members, need to be carefully maintained going forward.

Glossary

IRTF	Internet Research Task Force
IRSG	Internet Research Steering Group
RG	Research Group
IESG	Internet Engineering Steering Group