



THE INFORMATION TRUST EXCHANGE
**Trust, identity, personalization,
content and user sharing for the news industry**

DRAFT WORKING AGENDA (v3.0)

**TASK GROUP ON
USER DATA AND PRIVACY PREFERENCES EXCHANGE**

DINNER, Wed., Oct. 7, 7:15 p.m.
[Les Halles Park Avenue](#) Restaurant,
411 Park Avenue South (at 28th Street), New York NY 10016 212-679-4111

MEETING, Thurs., Oct. 8, 2015
[CoWorks](#), 115 East 23rd St., 3rd Floor
(Flatiron District, between Park and Lexington avenues
(enter between Citibank and New York Sports Club)
(A box lunch will be provided courtesy of Mozilla)

Meeting participants: Sean Bohan, Brendan Eich, Angie Epps, Jason Kint, Rick Lerner, Graf Mouen, Randy Picht, Brendan Riordan, Doc Searls, Mike Smith, John Taysom. (Members absent for this meeting: Ron Blevins, Peter Winter)

- PRE-MEETING BRIEFING MATERIALS: (<http://newshare.com/newyork>)
 1. [Mission](#) from Columbia:
<http://newshare.com/portland/ite-prototype-mission-objectives.pdf>
 2. [Preliminary Recommendations](#) from Cambridge:
<http://newshare.com/cambridge/ite-prototype-recommendations.pdf>
 3. Service Features/[Specification](#) (survey bullet points)
<http://newshare.com/portland/ite-service-design-specifications-v3-09-11-15.pdf>
 4. Ten questions and challenges
<http://newshare.com/newyork/questionnaire-nyc.pdf>

A. 8:30 a.m. – 9:00 a.m. / Orienting the Day –Bill Densmore / Randy Picht

- The role and intentions of the Reynolds Journalism Institute / “mission” from RJI, Sept. 16
- Dividing up the design – the four meetings / our task – managing user data and privacy
- Round the table (a minute each): Why are you here? How are you answering the “10 questions”? . . . reflections on dinner conversation(s); What is your (and our) best-possible outcome for today?
- Review/revise this agenda accordingly

B. 9:00 a.m. – 10:00 a.m. / Confirming landscape and challenges
(discussion, max. 15 minutes each topic)

- Lessons about collaboration and networks – (Peter Winter, Randy Picht, John Taysom)
 1. New Century Network, NewsRight LLC
 2. Capturing the network effect
 3. Critical points of collaboration; critical dangers
- User data – definition and application (Ron Blevins, Mike Smith, Angie Epps)
 1. The need for state and “uniques” Who cares about PII and why?
 2. Data ownership and use – common understandings
 3. xxx
- Privacy by design – what’s possible now? (Sean Bohan, Jason Kint, Brendan Eich)
 1. Defining and valuing privacy – alternate approaches
 2. As a design objective; as a business opportunity
 3. Laws and liabilities / privacy ended or enshrined?
- Personalization and privacy – (Graf Mouen, Rick Lerner, Brendan Riordan-Butterworth)
 1. What user data is needed for personalization?
 2. Implications for sharing, storage, updating
 3. Parsing the security tradeoffs – cost, liability, functionality

10:00 a.m.-10:15 a.m. – BIO / NETWORKING BREAK

C. 10:15 a.m.-11:45 a.m. / Design charette / Highlighting minimum requirements for ITE data exchange (Sean Bohan)

EXERCISE: Assert minimum user and business strategic requirements for ITE data creation and handling. Then list/rank necessary operational and service features. *Please refer to “Menu of System Design Features” (APPENDIX A, included)*

D. 11:45 a.m.-noon – Progress check-in

- Are we making useful progress toward a productive day?
- Confirm plans for use of time after lunch

E. Noon – 12:30 p.m. – LUNCH / DISCUSSION

Box lunches / beverages delivered at 11:45 a.m. courtesy of Mozilla

Optional discussion question during lunch:

What new (or updated) business model can best be enabled by a shared-content network involving trust, identity, privacy and information commerce?

F. 12:30 p.m.-1:30 p.m. / Design charrette – proof of concept / pilot(s)

What are the minimum requirements of prototyping? What will a proof-of-concept demonstration look like? How does it move to one or more working pilots?

Compare ITE user-data management and privacy minimum requirements from morning session with existing solutions. Identify 2-3 options for design to support prototyping/piloting with a combination of available and new applications. After sketching out design options screen each against these questions:

1. List proof-of-concept specifications for user data exchange and privacy
2. How much has to be added to existing solutions to support specifications?
3. List jobs to be done to deploy prototype service
4. Assess risks/challenges and resources required

PROPOSED PROTOTYPE PILOT DESIGN:

ITE Prototype Pilot Description and Protocol (draft)

<http://newshare.com/portland/ite-prototype-pilot-08-03-15.pdf>

G. 1:30 p.m.-2:30 p.m. / Business opportunity outlining

- What are the business opportunities that also benefit the public good?
- Who will respond to each opportunity?
- How do we make adoption simple?
- How do we demonstrate the necessity of network adoption?
- With a proof-of-concept and pilot(s) in place, who tells the story and how?

POSSIBLE OPPORTUNITIES (think of more!) (FROM [Service/Design spec](#))

- Make money selling other peoples' content bought wholesale, sold retail by subscription or per click. A "networked subscription."
- Improve CPMs by linking well tagged/identified content to people who really care about it
- Create new services around niches of shared content
- Sell personalized news/info services to individuals; with content aggregated by topic / interest not publication.

H. 2:30 p.m.-3:00 p.m. / It's show time

1. From planning to pilot -- What do we need from the other task groups?
 - Member/partner development task group
 - Authentication/identity task group
 - Content discovery, tagging, sharing, selling
2. Who is motivated to do the work? Ideas about cost? Timeframe?
3. When should an ITE governing body (non-profit) be formed?
4. How should RJI and others help? Who should be asked for \$\$\$ or participation?

I. 3:00 p.m.-3:30 p.m. / Wrap up and next steps

1. Summarize our work and conclusions for transmission to other three task groups
2. Who takes the next steps and what are they?
3. Did this gathering and process meet our needs?

--- ADJOURN --



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MENU OF SYSTEM DESIGN FEATURES

(discussion draft-10-05-15-BD)

Optional pre-meeting materials you might to consult:

- <http://newshare.com/newyork/READING-consumer-user-case.pdf>
- <http://newshare.com/newyork/READING-dire-straits-winter-wurzer.pdf>
- <http://newshare.com/newyork/elevator.pdf>
- <http://newshare.com/newyork/ite-service-design-specifications-v3-09-11-15.pdf>

DRAFT ASSERTION OF USER REQUIREMENTS (please revise/edit)

- Improves discovery, access to trustworthy, relevant information
- Create, manage, share, value “persona”
- Privacy rights understood, respected

DRAFT ASSERTION OF BUSINESS REQUIREMENTS (please revise/edit)

- Improves user advertising experience (load times, targeting, etc.)
- Organizes, makes transparent, marketplace for user data exchange
- Helps drive emergence of standards for use data ownership / sharing
- Reduces need/potential for regulatory interventions

CORE FEATURES?

1. Single-sign-on facility
2. Data exchange for user-identity information
3. Exchange for advertising and content value (\$\$\$ or other)
4. Ensures market competition on price, service, terms

OTHER POSSIBLE FEATURES?

5. User-created and updated profiles of preferences, interests and demographics
6. Ability to match dynamically-specified buyer interests with customized seller offerings
7. Ability to selectively share your interests with colleagues, family or friends
8. Discovery service focused on quality, trusted content, uniformly tagged/identified
9. Allows content owners (publishers) to track and control access to their work

10. Allows each content owner to price their own content for varied uses
11. Allows sale of content on a per-click or subscription basis
12. Allows user to be rewarded for viewing sponsored content
13. Does pre-empt or interfere with each publisher's own "silo" payment strategy
14. Allows content access to be variable depending upon user attributes
15. Allows publisher to apply price to digital content
16. Allows publisher to vary price depending upon use or user or time
17. Allows publisher to allow access based upon variable subscription rights
18. Exchange does not play any role in setting pricing or commercial service offerings, just transferring data about them. (*i.e.*, "managing the marketplace")

PROPOSED SERVICE REQUIREMENTS (please add, edit, delete)

1. No permanent, central names/identity database
2. Goal of compatibility with existing user data management systems
3. User has priority control over adding, removing, changing personal attributes
4. Supports plurality of both service and content providers
5. Variable trust/security levels consistent with financial value at stake
6. Capable of welcoming/cross-authenticating users from existing academic, commerce, government networks
7. Must facilitate sharing/aggregation of user attributes, *where permissioned by user*, for real-time ad serving (in principle no different than accessing other content; the ad server is a "content provider" who must be a member of the ITE).
8. Must enable periodic aggregation and settlement of access and payment records
9. Exchange does not play any role in setting pricing or commercial service offerings, just transferring data about them. (*i.e.*, "managing the marketplace")

MINIMUM ATTRIBUTES EXCHANGE

- 2) EITHER / Dynamic (temporary) caching at auth service of user attributes, such as:
 - First name salutation (if permissioned)
 - Zip code (if permissioned)
 - "Home base" unique identifier
 - Subscription identifier(s)
 - Credit auth. for single-item purchase (decrementable by auth service)
 - What else?
- 3) OR / Access key to user attributes stored at service provider
 - Similar attributes as above
- 4) Provision(s) for real-time sharing -- for customization/personalization of services -- of user profiles, preferences, permissions among system and content providers (including advertisers) who are certified ITE system members.

Logging by "central shared service" of user events/activities within network including specific attributes necessary for off-line aggregation and distribution of payments/charges. (*Design goal: This happens without PII, just a alphanumeric user ID that is opaque to all parts of the system except the user's identity service provider ("home base.")*)

PROPOSED PROTOTYPE PILOT DESIGN:

ITE Prototype Pilot Description and Protocol (draft)

<https://docs.google.com/document/d/1y4QgmoQbJdEXDY3kPHMImyNpbcanBHvHvJr6xaxQfd4/edit?usp=sharing> or printable version:
<http://newshare.com/cambridge/ite-prototype-pilot-08-03-15.pdf>