Survey and Interviews

1. why outreach
   a. chicken and egg: scenario planning advises, we chose scenario planning because out reach valuable
   b. future of federations tied to future of academia and research
   c. difficulty in determining the limit of federations - whose needs are included and whose are not - resear

2. developing the questions
   a. survey process document
   b. Ideally doing structured but open interviews, and a turned to the process of
   d. Used that to inform the questionnaire
   e. result qualitative data but rich
   f. * could see people answering all of these questions with answers which have nothing to do with identity or security. You could end up with answers that are much more like the results of an EDUCAUSE ECAR survey. If that is what you’re going for, I’m not sure how we will translate that into information that drives forward information. If this is intended to be just the first step with information gathered funneling into future surveys, it could be useful”

3. inviting participation
   a. limits of the working group
   b. resulting participants
      Three quarters of the participants had over ten years experience in the field, resulting in over four hundred and forty (440) years of total experience.
   c. We managed to get over a third of the participants from either academic endeavours or academic relying parties – or Less than half of he respondents were directly associated with federations or identity management.

4. survey process
5. interview process

Raw notes

Identification of constituencies
Create first pass at list of constituencies, lists, meetings, individuals we'd like to reach for their input

Developing the questions

3/2/19've not yet found examples of survey questions, but I am finding a common set of recommendations for structuring interviews. I've found a number of variations on "the seven questions". Included below is the list provided in Scenario planning: strategic interviews and conversations

The "seven-questions" approach. This originates in the work of the Institute of the Future (Amara and Lipinski, 1983), and has successively been refined by Shell (Schwartz, 1991), van der Heijden (1996) and ICL (Ringland, 1998). In essence, it comprises a set of questions, which have been adapted by the researcher generically to read:

- If you could pose three questions to a clairvoyant who can foretell the future, what would you ask?
- In the best possible world what would you hope for?
- In the worst possible world what are your greatest fears?
- What pivotal events from the past five years provide good lessons for the future?
- What major decisions with long-term implications are faced at the moment?
- What major constraints do you experience inside/outside the organisation/system?
- If all constraints were removed, and you could direct what is done, what would you do?

(There are other variants such as "What is your best dream?", "What is your worst nightmare?" and "What keeps you up at night?")

To see how these are adapted, slide 7 of this presentation shows one organization's refinements:
A quick report is that we are using the process of scenario planning. That process begins by casting a very wide net to understand the possible futures that are relevant to the community. The goal is to get a sense of broad trends in the environment Federations function in -- how are research collaborations changing? How is education changing? We analyze the trends to look for diverging possibilities that aren't clear yet, such as centralization vs decentralization or a dissolution of the boundaries between public vs private enterprise.

In Tallinn we will work to confirm what uncertain possibilities seem most important and we will develop two to four scenarios that describe possible futures. A decentralized future with a dissolved boundary might look like http://www.learningisearning2026.org/ (an education scenario built by The Institute for the Future). Once we have these divergent futures, the strategy begins. We will then ask what directions are obvious no matter the scenario? Perhaps the recommendation to develop a culture of mentorship. What decisions make sense only in one scenario or another? The extreme of the "learning is earning" future points to investment in a blockchain and self-sovereign identity technology. What would signals be that indicate that REFEDS should recommend that all federations become a node in some particular ledger to ensure it's available?

In order to pull out the extremes of the possible futures, the questionnaire is constructed with "the seven questions" as referenced in https://nctic.fws.gov/courses/alc/alc3194/resources/publications/scenario-planning/Ratcliffe_2002.pdf and Chermack, Thomas J. Scenario Planning in Organizations: How to Create, Use, and Assess Scenarios. San Francisco (California, USA): Berrett-Koehler, 2011. They are a tested set of questions that are designed to encourage the respondent to stretch and share a wide vision. They are not the questions the community expects! In sitting in on one of the first telepresence interviews, the questions did seem to successfully create the environment to get the broad responses we are looking for.

I hope this is enough to inform you all of the context of the questions and encourage your involvement by answering and passing along to colleagues outside of the federation community who will also have insight.

Survey process

Various platforms were considered. Google docs despite flaws

Interview process

recordings for 1,2,3,4,5,7,8,
Recordings, where available, may be available via the workgroup chairs.

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<tr>
<td>Experience of survey participants</td>
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<td>Background of survey participants</td>
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Recordings, where available, may be available via the workgroup chairs.
Conversation notes #2.pdf

Conversation notes #3.pdf

Conversation notes #4.pdf
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<td>T 5/14</td>
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Conversation notes #5.pdf

Conversation notes #7.pdf