Revised Project Plan

Internet2, InCommon, SecondMuse

Version 1.0
Delivered to Internet2 August 8, 2023

(I) Project Overview

In this project, SecondMuse will facilitate a collaborative process between the InCommon Steering Committee, Internet2, a Focus Group, and the broader InCommon community to determine an aligned, inclusive strategic direction for Identity & Access Management (IAM) within InCommon. The contract period for this program is from July 1, 2023 to January 31, 2024.

To facilitate this work, SecondMuse will define and scope the program (Phase 1), conduct community consultation and desk research to gather insights and synthesize them (Phase 2), and draft and deliver a strategic report (Phase 3).

(II) Purpose of This Document

This is the Revised Project Plan that details the most up to date plan for how SecondMuse will collaboratively deliver a 2023-2028 Strategy Report on the above to Internet2 and InCommon Steering.

This document includes a complete description of three phases of work and their objectives, timelines and deliverables.

1. Phase 1 - Define and Scope
2. Phase 2 - Explore and Analyze
3. Phase 3 - Strategies and Recommendations

(III) Core Project Team Members

SecondMuse (Roles and Responsibilities in the Appendix):

- Mina Aiken, Project Manager
- Neisan Massarrat, Senior Strategic Advisor
- Katey Metzroth, Senior Research, Design and Innovation Advisor
- Sam Letscher, Research & Design Lead

Internet2:

- Ann West, Associate Vice President, Trust & Identity
- Kevin Morooney, Vice President, Trust & Identity & NET+ Services
- Romy Bolton, Project Manager

(IV) Key Areas to Address

These key areas and questions were identified in the two virtual kickoff sessions with Internet2 (Jul 28) and the InCommon Steering Committee (Aug 7). They will be included in Phase 2 consultations:

Responding to Trends & Challenges

1. What are the major trends in Higher Education and Research that the community will need to respond to in the next 5 years? What are the corresponding trends in industry and other external forces that institutions will have to consider?

2. How will these two questions affect what higher education and research IT will need to support or protect against?

3. How might InCommon itself continue to uplevel business and technical skills and capabilities to manage existing services in response to external challenges and community needs?

Evolving the InCommon Business Model

1. How does Identity & Access Management systems and processes influence business strategies across InCommon member organizations and InCommon's core business? Does IAM enable business strategy, or does it hinder it?

2. How might InCommon better articulate its offerings and strategies to distinguish its value proposition from commercial options?

3. What IAM capabilities need to be developed and what is no longer needed?

4. How should trends and external forces influence what happens within the organization at large – shifts, changes, challenges? How will this reflect the general "state of business" and key priorities and initiatives related to our core lines of business? What drivers should fuel us forward?

Leveraging & Growing the InCommon Community

1. How might InCommon better align with member organizations within its community (eg.: regional networks, libraries, K-12 schools and community colleges) to help them manage the complexities of identity federation and IAM?

2. How can InCommon effectively communicate its value proposition to both the existing community and those not yet part of it? How might our value proposition better align with the community's needs?

3. What will InCommon do to provide strategic value to the communities we serve? What should it not do?

4. Who does InCommon serve? How are those audiences segmented? What audiences will be strategically important as we move forward? What is the change they want to see from this work?

(V) Stakeholders

KeyStakeholder: The InCommon Steering Committee

This Committee consists of members from participating InCommon institutions, and governs InCommon LLC. Internet2 team members listed in Section III are performing the work outlined in this plan at the behest of the InCommon Steering Committee.

Community Stakeholders: The focus of Phase 2 is to consult members of organizations from within the InCommon community on key areas and questions that the Futures2 Planning Working Group aims to answer with its 2023-2028 Strategy for Identity & Access Management. These organizations have been prioritized based on InCommon's knowledge of the complex use cases these organizations may have, based on previous experience. They include the CIO/CTO audience, the CISO audience, sub-groups within InCommon, research and public infrastructure organizations, developers, higher education institutions, and industry providers.

Below is the engagement plan during the consultation part of Phase 2:

0. Tentative Sessions with Target Existing Community Groups

Three one-hour sessions for Advisory Committees, Staff and Catalyst groups respectively, noted as high priority in the Futures2 Planning document here. These sessions will be facilitated similarly to the two virtual kickoff sessions from Jul 28 and Aug 7. The feedback from these sessions will be incorporated into the needs assessment survey and interview guides.

Note: To be confirmed by Internet2 and SecondMuse before adding to scope.

1. Survey recipients from the broader InCommon Community

The survey recipients will be members of the broader InCommon community and InCommon Customer and Member Base. The distribution list will be provided by InCommon and supplemented by SecondMuse as necessary. This group will be engaged first in the consultation part of Phase 2.

2. 8-10 Priority Stakeholders

These stakeholders (WIP) have been identified from project kickoff sessions and the interviewee list will be finalized through a collaboration of the Internet2 and SecondMuse teams. They will be interviewed by SecondMuse's Project Manager and Research & Design Lead.

3. A Focus Group

These stakeholders (WIP) have been identified from project kickoff sessions. They will be interviewed by SecondMuse's Project Manager and Research & Design Lead.

(VI) Timeline

	PHASE 1										PHASE 2													PHASE 3												
	6/5	6/12	6/19	6/26	7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25	10/2	10/9	10/16	10/23	10/30	11/6	11/13	11/20	11/27	12/4	12/11	12/18	12/25	1/1	1/8	1/15	1/22	1/29	1/31
Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
Define and Scope																																				
Internal Kickoff	■	■																																		
External Kickoff			■	■																																
Refined Project Plan					■	■	■	■	■	■																										
Explore and Analyze																																				
Three Facilitated Sessions with Target Community Groups					■	■	■	■	■	■	■	■	■	■																						
Broad Community and InCommon Customer Survey					■	■	■	■	■	■	■	■	■	■	■	■																				
Key Stakeholder Interviews					■	■	■	■	■	■	■	■	■	■	■	■	■	■																		
Stakeholder Input Session/ Focus Group					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■																
Education and Research Landscape Trends & Opportunities					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■															

Task	Timeline
Data Analysis & Synthesis	▓▓▓▓▓▓▓▓▓▓
Strategies and Recommendations	
Report Development	▓▓▓▓▓▓▓▓▓
Feedback / Iterations (x2)	▓▓▓▓▓ ▓▓▓
Final Draft	▓▓▓▓▓▓▓
Project Close	▓▓▓▓▓▓▓▓

(VII) Deliverables

Phase 1 | Define & Scope (by Aug 8, 2023)

1) Set up the project:

- One virtual introductory meeting (Jul 14, 2023)
- Two formal virtual kickoff meetings to align on activities and objectives (Jul 28 & Aug 7, 2023)

2) Plan activities for the project

3) Plan and agree on how SecondMuse and Internet2 teams will communicate and convene

4) Start identifying key stakeholders to engage with according to target organizations as defined by InCommon and Internet2

5) By August 8, 2023: Deliver a 2-3 page revised project plan that includes:

- Project team members
- Formal activity plan with timeline
- Priority stakeholders to engage
- Major questions that will be answered during the consultation process (Phase 2)
    - Principles the drafting committee will use to guide final recommendations in the Strategy Report are included in the Appendix

Phase 2 | Explore & Analyze (Aug 8 - <mark>Nov 6, 2023</mark>)

1) Conduct a consultation process that includes:

- Facilitate three one-hour sessions with target existing community groups:
    - Session 1:
        - InCommon Technical Advisory Committee
        - Community Trust and Assurance Board
        - Community Architecture Committee for Trust & Identity
        - eduroam Advisory Committee
    - Session 2:
        - InCommon Catalysts (Corporate Support Partners)
        - Component Architects (Trust Access Platform Developers)
    - Session 3 with the Internet2 Staff, including the Trust & Identity Division
- Designing and executing a needs assessment survey, to be distributed by Internet2/InCommon to the broader InCommon community
- Designing and executing 8-10 priority stakeholder interviews with questions from Section IV
- Design and execute a workshop with a focus group of up to 8 participants
    - The objective of the workshop is to get buy-in and alignment on themes, trends and inputs toward a common vision and set of recommendations

2) Perform desk research in tandem with consultations

3) Synthesize findings from consultations and desk research in order to identify themes, trends, objectives, potential strategies and intervention points

4) Deliver a 3-page synthesis report from this process by <mark>Nov 6, 2023</mark>

5) Begin working on an initial draft of the Strategy Report in tandem with the above work

Phase 3 | Strategies & Recommendations <mark>Nov 6, 2023 - Jan 22, 2024</mark>)

1) Deliver a first draft of the Strategy Report the week of <mark>Nov 6, 2023</mark> to Internet2 (8-10 pages plus a 2 page executive summary)

- This will cover the following industry topics:
    - InCommon Business Context & Strategic Objectives
    - Education and Research Landscape Trends & Opportunities
    - Industry Assessment
    - Product/Service Assessment
- Internet2 will submit their first round of feedback to SecondMuse by <mark>Nov 13, 2023</mark>

2) Deliver a second draft of the Strategy Report the week of <mark>Nov 20, 2023</mark> to Internet2

- Internet2 will submit their second round of feedback to SecondMuse by <mark>Dec 4, 2023</mark>

3) Deliver the final Strategy Report, including an executive summary, by <mark>Jan 16, 2024</mark> to Internet2 (8-10 pages plus a 2 page executive summary).

4) Project close is January 31, 2024.

(VIII) Appendix

Additional Relevant Documents & Links

[Internet2 / InCommon Steering Contract Deliverables](#)

[InCommon's Planning Draft Process](#)

[Insights from the Jul 28 2023 Session with Internet2](#)

[Whiteboard from the Aug 7 2023 Session with InCommon Steering](#)

SecondMuse Team Roles and Responsibilities

Senior Strategic Advisor - Neisan Massarrat | Oversees all Technology Programs at SecondMuse with corporate, government and non profit clients. Provides direct strategic advisory and oversight to the Futures2 Planning Initiative Process from the SecondMuse perspective. He will weigh in significantly during the drafting of the 2023-2028 Strategy Report. The Project Manager reports directly to the Global Head of Technology Programs.

Project Manager - Mina Aiken | Responsible for the Project's task management, budget, and deliverables execution, and for managing all communications, meetings and relationships with the Internet2 working group and the InCommon Steering Committee where appropriate. Attends the monthly InCommon Working Group's meetings. Conducts all desk research in Phase 2. Has decision authority in accordance with what is specified in the Contract and SOW, but ultimate decision authority rests with SecondMuse's Global Head of Technology Programs. Reports directly to the Global Head of Technology Programs.

Senior Research, Design and Innovation Advisor - Katey Metzroth | Provides strategic support for this Project. Provides input on the Research & Design Lead's facilitation plans, the survey design, and interview and focus group scripts. Will weigh in significantly during the drafting of the 2023-2028 Strategy Report. The Research & Design Lead reports directly to the Global Head of Design & Innovation.

Research & Design Lead - Sam Letscher | Facilitates interactive sessions between Internet2, the InCommon Steering Committee and SecondMuse to align on program objectives, deliverables and stakeholders. Collaborates directly with the Project Manager to design and execute the consultation portion of this Program (survey, interviews, focus group workshop), and to analyze these results when brought together with desk research insights.

Guiding Principles for the Futures2 Planning Working Group

These will provide a basis for decisions this group makes during the process and have been pulled from [InCommon's Planning Draft Process](#):

- Our work together must stand up to the lens of the broader community. We must assume that we operate in transparency by default.

- It is essential to foster confidence and inclusion in our activities and messaging.

- The process we design to engage the community and develop the additional artifacts will be as important as the final document we produce. The process of producing this document has value in and of itself. This process is a community-engagement exercise with expected goodness and "bounce."

- We want individuals to see themselves (or someone like them) as contributing to the process in some way.

- Our decisions, strategies and recommendations can be traced to community or research-driven data or citations.

- The actors guiding this process are the community and Internet2. All decisions are driven by consensus by the Steering Futures2 Working Group.

- We will respect the opinions, business needs, and time of all members. We are advocates for each other.

- We will facilitate preparation with clear communication and the timely dissemination of information to the Steering Committee and the Community at-large. The likelihood of an impact will be higher if we communicate and tell the story as it unfolds.