

arXiv NG stakeholder interview process

One of our phase one project deliverables is a project charter, and we wanted to share a little information on our process, including who we're interviewing, and the kinds of questions we're asking. *NB: a broader communication plan is also a specific deliverable - we do plan to reach out to and engage arXiv's large and committed communities of readers, authors, and volunteer moderators.*

A project charter describes the project, addressing issues such as scope, desired results, and communication, and it documents a shared understanding of what a project is about. To gather input and reach some consensus on the scope of the first phase of arXiv-NG development, we're conducting a series of stakeholder interviews. In addition to eliciting information that can be included in the charter, the interviews serve as an opportunity to gather other useful information, such as specific suggestions for communication strategies, potential risks the project may face, and input on early technology decisions we have to make. Interviews are currently in progress, and it's our goal to finish them up in mid-January. We'll then draft the charter, and compile for later use the other useful information we receive.

Stakeholder groups we're interviewing:

- [Member Advisory Board](#) members
- [Scientific Advisory Board](#) members
- [arXiv NG IT Advisory Group](#) members
- arXiv staff and CUL leadership

We provided each participant with a two-page synopsis of our proposal to the Sloan Foundation, as well as information on our planned organizational and governance structures for the first phase of the project.

Interview template

Project scope and purpose:

- Having had a chance to review the proposal and list of deliverables, do you have any questions about the scope and purpose of the project (the first phase of planning and development for arXiv-NG)?
- Do you think we're missing anything?
- Does anything seem superfluous?
- What is important to exclude from this project?
- Do you have any other thoughts on the scope and purpose of this project?

Technology model - first principles:

- An important, early decision we face is deciding what kind of technology model we want to adopt. What are your thoughts on:
 - Using a complete commercial service or solution?
 - Using a hybrid solution - some contracted services, in conjunction with in-house development?
 - Complete in-house development using open source technologies and development methods?

Desired results and success:

- How would you measure success for this project?
- What specific outcomes would you like to see as a result of this work?
- Do you have any other thoughts on what success for this project will look like?

Potential risks and constraints:

- What essential work do you think we may have failed to account for?
- Where do you see the potential for scope creep, and how might we mitigate that?
- How might this project fail?
- Do you have any other thoughts on risks for this project?

Communication needs:

- *We start this section with a description of how the interviewee's stakeholder group is connected to arXiv-NG, and our proposed communication plan for that group.*
- Do you think this communication plan is adequate, for you and your stakeholder group? If not, what changes would you suggest?
- A broader communication plan is also a specific deliverable for this project. What other communication needs do you think we should pay attention to?
- Do you have any other thoughts on communication?