

National Transit Adaptation Strategy (NTAS)

Expert Interview Plan (updated 1.21.22)

Institute for the Future (ITFF)
for
San Francisco Municipal
Transportation Agency (SFMTA)



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1. Background

Expert interviews are a critical part of IFTF's research methodology. We actively seek out the perspectives of diverse experts who can help us deepen our understanding of the issues we are exploring.

To that end, as part of this project, we plan to conduct primarily one-on-one interviews with 10-15 individuals whose area of expertise touches transportation from different angles. [Note some interviews will require interviewing more than one person at the same time from the same organization.] These interviews will allow us to go in-depth on a variety of topics with people who possess deep subject matter expertise, and will also give us the opportunity to test out theories and initial hypotheses, which will come from our draft summary report of future forces and shifts (draft sent to SFMTA 1/14/22). We will use the content of these interviews to inform our next phases of the project, as well as the final deliverables.

To ensure that we include a wide range of voices in these interviews, we are recruiting experts from the following areas/domains:

- **STEEP categories:** Sociological, Technological, Economical, Environmental, Policy/Political
 - We will aim to interview ~2 experts per area, recognizing that in some cases, areas of expertise will overlap and cover multiple categories.
- **Profession:** Academic/research, practitioner, government, non-profit, business
 - We will aim to have representation from across professions to maximize perspectives
- **Geography:** Local, national, international
- We will also recruit to optimize for gender and racial diversity among interviewees.

2. Interview logistics

These expert and stakeholder interviews will be conversational, so we will not ask experts to prepare anything in advance. The interviews will be conducted on Zoom, and we will record the interviews for the purpose of note-taking and record-keeping (including accessing the transcript). However, we will keep quotes anonymous unless we receive written permission to attribute a quote to someone. With the exception of government employees, we will compensate all experts for their time (\$250 for a one hour conversation).

IFTF will begin recruitment for the interviews in early January, and will plan to complete the interviews by mid-February. We believe that keeping these interviews small and intimate is a best practice for free-flowing conversation, so one member of the IFTF team will lead the conversation, and up to one other IFTF team member will join as schedules permit.

Subject experts // SF Government employees

As transportation is not an issue that exists in a silo, we think it will be critical to interview key leaders in a variety of SF Government departments. In addition to the one-on-one expert interviews, we will also plan to conduct 1-2 group roundtable discussions with people from across SF Government departments. Each interview will comprise no more than 6 people, and will last approximately 90 minutes. These interviews will be conducted after the individual expert interviews so that IFTF can gain insight into how the information from experts might apply to San Francisco and SFMTA.

3. Interview process and best practices

- While the experts we will be interviewing will all have different areas of expertise, they will all be able to contribute ideas that will inform scenarios of the future of transportation in San Francisco.
- We will ask the experts about what they see changing in the area they are tracking and also their perspective on what drives change.
- We will provide experts with some ideas about potential change to react to.
- We will solicit both bold ideas about future possibility and also sober assessments of constraints and limitations.
- We will ask for relevant current or historical examples that can help inform our thinking.
- We will ask them to identify key uncertainties or leverage points that they see as important in shaping the future of transportation.

A. Pre-interview

- Logistics prep:
 - Reach out to expert via email, using the copy below. Update status in spreadsheet.
 - Agree on a time and send them a calendar invitation with a Zoom link and verify they understand what the honorarium is and that they will be recorded.
 - Create a notes document in this folder, titled with the name of the interviewee and the date you're interviewing them.
- Content prep:
 - In all cases, we're interested in talking to these experts as input into the scenarios for the future of transportation in San Francisco.
 - Do some research on the interview subject. Look for articles they've written or interviews they've given to other outlets and take some notes in the notes document on what you might ask them. If you need suggestions for what to ask, reach out to the person who recommended them in the notes spreadsheet.
 - Plan to ask them how they see whatever it is they are an expert in changing in the next decade
 - Try to get a sense of how they see change happening (or not) in their domain, if this material isn't available, plan to ask, and maybe be ready with some futurist examples of things we see potentially happening
 - Bring some relevant current or historical examples for them to react to, and also plan to ask them if they have any of their own, including signals or other leads.
 - Try to get a sense of how their specific knowledge does or doesn't translate to our local context, plan to ask them what makes their area or issue unique, and if they have counterexamples in other places. If you can, identify some examples on your own in advance for them to react to.

B. Interview

- Quickly restate who you are, what this project is, and why you're interested in interviewing them. Make sure they are okay with recording. Ask for their consent for participating in the research verbally for the recording.
- Try to get them to put forth bold and speculative ideas. They might not be comfortable doing this, so you can reassure them not to worry too much about plausibility, or even ask something like, "what is your wildest imagination, biggest hope" and then contrast it with "what is your most plausible positive scenario."
- Offer to circle back to challenging questions later to give them more time to think.
- Conduct the interview. Make sure you record the interview via Zoom and one other method, such as a voice memo app on your phone. Update status in spreadsheet.

C. Post-interview

- Send a thank you note and check with Maureen to get honorarium processed.
- Upload the Zoom interview file and transcript to this folder.
- Generate some key takeaways from the transcript and memory and put it in the notes document.
- Notify Ilana that the interview is complete.

4. Draft interview script

Date of Interview:

IFTF staff person conducting interview:

Interviewee:

Organization:

Email address:

Phone:

IFTF Introduction

Thank you for taking the time to speak with me today. IFTF is a 53-year-old non-profit foresight organization based in Palo Alto, CA, and we are working with the SFMTA [include a sentence on what SFMTA does] to create future scenarios for their National Transit Adaptation Strategy. Our team identified you as a relevant expert whose knowledge and expertise would be helpful in thinking through possibilities for the future of transit in San Francisco and we were hoping you would be interested in and available for a hour-long interview. In the interview, we'd ask you to speculate on future possibilities, as well as share insights about current issues that are likely to be important in the future. All of your responses will be kept confidential. The information you provide us will only be used as background information to inform our thinking. We will not publish this interview, nor will we attribute anything you tell us directly to you in any way unless we first get your explicit permission. I will be recording this interview for note-taking purposes (ask if that's okay).

Part 1: Background and connection to transit

1.1. Please state your name, title, and organization/affiliation.

1.2. Tell us about your work/field of study and how it is connected to transit, mobility, etc?

Probe: Could you summarize your work and relevant insights for the future of public transit?

Probe: If possible, please situate your work in the larger discourse of transit (i.e. would you consider your position mainstream or more speculative, is your field new or long-established, is the connection between your work and transit widely understood or largely overlooked?).

1.3. What are the geographic boundaries of your expertise? (i.e., which regions are you most familiar with)? How much do you know about other regions?

Part 2: Directional changes

2.1. What changes do you anticipate in transit in San Francisco within the next decade? If it helps, you can think about shifts. Describe how we are moving from an old way of doing things to a new way of doing things. *[Create a list of changes or shifts to refer back to during the interview]*

Probe: What do you think is driving this change/shift? [Cycle through shifts and ask about STEEP drivers for each.]

Probe: What do you think would accelerate or slow this change? What might stop it completely?

Probe: How much consensus would you say there is about whether or not this change is happening and what is driving it?

Probe: Are you familiar with any counter arguments? If so, what are they?

Probe: Why is this change/shift important? Who wins? Who loses?

2.2. Where will the changes you describe occur? What aspects of it are global and what are regionally specific?

Probe: Where do you see this change today?

Probe: Are there any informative examples or counter examples from other regions? Are there analogous industries we should be looking at?

Probe: are these changes happening in legacy/established transit systems? emerging/growing systems?

2.3. What are people worried about now that will be irrelevant in 5-10 years?

Probe: What are people not paying attention to that you think they should be?

Part 3: Historical precedent

3.1. Describe the current state of public transit from your point of view. How did we get to the present state in your view? Describe the current state in your words and tell me how we got here.

Probe: Are there any historical analogues or precedents for the state of public transit

and the kind of change you anticipate coming?

3.2. Where will the changes you describe occur? What aspects of it are global and which are regionally specific? Where will it be different? What will it be like in CA/SF?

Probe: Are there any informative examples or counter examples from other regions?

Part 4: Future state

4.1. Where do you think the changes you've described are leading to? [Refer to and review the list captured by the interviewer and add any new changes/shifts not on the list, etc.]

4.2. What do you think is the most likely scenario for the future of transit in San Francisco?

Probe: Without thinking too much about probability/plausibility, what is the best scenario you can imagine?

Probe: What is the worst-case scenario?

Probe: What is the weirdest, most speculative possible scenario you can imagine?

4.3. What are some indicators or milestones we should track to know which of the aforementioned scenarios we are headed towards? So, for example, think about if X were to happen, then we know scenario x is unfolding.

Probe: What do we need to do to seize the biggest opportunities and avoid the worst mistakes?

4.4. Is there anything we didn't cover that you'd like us to consider?

Probe: Do you have any leads, i.e. people or organizations, we should connect with or learn more about?

4.5. Do you have any questions for us?

Takeaways

Summarize your top 3-5 takeaways from this interview, highlight key quotes above, list any keywords or themes for further study.

4. Outreach email copy

Email Subject

Subject matter expert interview with Institute for the Future for San Francisco future of transit project

Email Body

I'm writing from the Institute for the Future (www.iftf.org), a Bay Area nonprofit futures research organization that helps individuals and organizations think systematically about the future. We are currently working with the San Francisco Municipal Transportation Agency to create future scenarios for their National Transit Adaptation Strategy. Our team identified you as a relevant expert whose knowledge and expertise would be helpful in thinking through possibilities for the future of transit in San Francisco and we were hoping you would be interested in and available for a hour-long interview. In the interview, we'd ask you to speculate on future possibilities, as well as share insights about current issues that are likely to be important in the future. The interview would last approximately one hour and take place on the phone or over Zoom. No preparation is required. If possible, we'd like to record the interview for our own internal reference. We currently don't plan to feature any attributed quotes, but if we were to do so in the future, we'd seek your permission in advance. We would, however, list you as an expert we consulted in public materials relating to the project. *(Non-government employees only: We are offering an honorarium of \$250 for your time and expertise.)*

Please let us know if you are interested and available by [date]. And please let us know if you have any questions or would like any further information about the project or Institute for the Future.

5. Proposed list of experts (1:1 interviews)

NAME	ORG	TOPIC	STEEP	LOCATION	PROFESSIONAL SECTOR
Molly Turner	UC Berkeley, Technopolis podcast	Future of cities, tech + cities, urban development	Social, Policy	Bay Area	Academic, tech
Jonathon Kass	SPUR	Transportation Policy Manager	Policy	Bay Area	practitioner, policy
Shireen Malekafzali or Axel Santana	PolicyLink (Shireen - former PolicyLink; Chief Equity Officer @ San Mateo Axel: Transportation and Climate associate	Equity and Transportation and climate	Policy, Economy, Environment	National	practitioner, policy expert, academic
Sahar Shirazi	Oakland planning commissioner ; Nelson & Nygaard consulting	Policy expert, smart cities, mobility	Policy	CA	practitioner, policy
Corrina Gould / Johnella La Rose	Sogorea Te Land Trust	Land ownership	Social, environment, economy	Bay Area	activist, advocate
Debs Schrimmer	Lyft	Future of cities, cars, policy	Policy, Tech	National	practitioner, gov relations
Danielle Harris	Elemental Accelerator	Mobility Innovation	Environment	National	practitioner - business
Hasan Ikhata, Andrea Vidaurre,	CAL100	Transportation and land use	Policy, Social	CA	policy, academic

Jacob Wasserman					
Alice Poon Wai Han	Author	Critical (balanced?) view of Hong Kong transit system	Tech	Hong Kong	
Emily Zhang	Urban Land Institute	Urban planning & development	Economic	National	academic, policy
Dennis E Barrett	Transportation for America	Transportation policy, equity, arts	Social, Environment, Economic, Policy	National	academic, policy



Toshio Meronok	Journalist	PHIMBY, infrastructure, activism	Social, Economic, Policy	National	
Ryan Russo	Oakland DOT	Transportation policy	Policy	Bay Area	policy - gov
Jonathan Levine	University of Michigan	Land use and Transportation	Policy	National	academic
Alun Rydderch	Roads and Transport Authority of Dubai	Chief Specialist, Sustainability and Future	Policy, tech, futures thinking	Dubai	policy

5.1 SFMTA Notes

Others to consider for interviews:

NAME	ORG	TOPIC	STEEP	LOCATION	PROFESSIONAL SECTOR
Hana Creger	Greenlining Institute	Equity: health, economic, energy, environmental, technology	Sociological, Technological, Economical, Environmental	Oakland	advocate
Clarrissa Cabansagan	Transform	Creating Healthy, Connected Communities	Sociological, Economical, Environmental,	Oakland	advocate
	TBD workforce/ labor economist/ labor policy experts				
	TBD education (k-college) policy & admin experts				
Gabe Klein	Cityfi	civic innovation	Technological, Policy/Political	Washington, DC	policy
Seleta Reynolds	LA DOT			Los Angeles	practitioner
	TBD Airline Industry Rep				

6. Proposed list of SF Government agencies, organizations, and departments (group interviews)

1. SF Planning (Doug Johnson)
2. OEWD 
3. SFCTA (Tilly Chang, Joe Castiglione)
4. SFHSH (Homelessness and Supportive Housing)
5. SF Environment (Debbie Raphael, Cyndy Comerford)
6. DPH or SF Human Services Agency
7. Human Rights Commission
8. Office of Civic Innovation (Dee Prasad)
9. Board of Supervisors (Land Use and Transportation Committee members?) 
10. Mayor's Office (Alex Sweet, Transportation Advisor)
11. SFMTA Board of Directors 