USENIX Association
Draft Notes on Strategy Meeting
Woodfin Suite Hotel, Emeryville, CA
March 1, 2004

Attendees:

Board of Directors:
Kirk McKusick, Board President
Lois Bennett
Tina Darmohray
John Gilmore
Jon "maddog" Hall
Mike Jones

Board of Directors Candidates:
Clem Cole
Alva Couch
Geoff Halprin
John Nicholson
Brian Noble
Ted Ts'o

Guests:
Eric Allman
Dan Appelman
Mary Baker
Cameron Cooper
Andrew Hume
Steve Johnson
Jeff Mogul
Peter Mui
Keith Packard
Margo Seltzer

Staff:
Ellie Young
Cat Allman
Anne Dickison
Alain Henon
Rob Kolstad
Jane-Ellen Long
Tara Mulligan

The meeting began at 9:00 a.m. All persons above were present at the beginning of the meeting except where noted.

ROUND TABLE: INTRODUCTIONS AND USENIX MISSION DISCUSSION

Kirk McKusick, USENIX Board President, began the discussion. He referred to the USENIX Mission Statement provided in the materials, which was as follows:

> **USENIX Association Mission Statement**
>
> February 2004
>
> USENIX, the Advanced Computing Systems Association:
>
> - Fosters technical excellence and innovation
> - Supports and disseminates research with a practical bias
> - Provides a neutral forum for discussion of technical issues
> - Encourages computing outreach into the community at large
>
> Since 1975, the USENIX Association has brought together the community of engineers, system administrators, scientists, and technicians working on the cutting edge of the computing world.
>
> The USENIX conferences have become the essential meeting grounds for the presentation and discussion of the most advanced information on the developments of all aspects of computing systems.

McKusick asked that everyone introduce themselves, state their association with USENIX and the community, comment on the mission statement, and offer their comments on the Association in general.

Andrew Hume – Researcher at AT&T, long time member of USENIX, former Board member and President. The USENIX mission statement has only one bullet that defines money making potential (the second which says "disseminates research"), but he doesn't feel that the statement necessarily ought to, or has to define a revenue stream. He believes the question is how to sustain the organization, and suggested that perhaps it should be allowed to gracefully decline if a radically different course would change it.

Anne Dickison - USENIX Marketing Communications Manager. She stated that she views USENIX as a presentation forum, and is interested in new areas to get our message out to.

Cat Allman - USENIX Director of Sales and Marketing. She believes USENIX has traditionally been a place for peer review, and would like to know if that is what we want to continue to focus on.

Al Henon - USENIX Managing Editor of *;login:*. He is concerned that USENIX has reached a plateau, with membership dropping and conferences barely surviving. He feels the organization needs new excitement.

Steve Johnson - former USENIX Board member and President. He sees the role of USENIX as moving information from where it is, to where it isn't. Membership in USENIX has been a way to spread information and get *;login:* out to the community, but was never meant to be the focus of or the money-making arm of the organization. He does not feel that membership is a goal of the community, and doesn't believe it is how they define themselves.

Tina Darmohray - current USENIX Board member. Doesn't feel that "production environment" gives a great sense of purpose, and is not sure what the USENIX position is.

Dan Appelman - USENIX Attorney since mid 1980's. He has seen the organization go from questioning its purpose, to euphoria (in the late '90's), to questioning again. He feels that economic trends are affecting USENIX. He believes USENIX should focus on constituents and who they are. He believes that the creation of SAGE may have changed our constituency.

Clem Cole - current USENIX Board candidate, has been in the community since the late 1970's. Feels that economic issues play a large part in the current environment. Believes USENIX serves the role of being a "university at large," helping those who develop and use technology, which are not always the same. Concurs that some focus was lost with SAGE, and that common ground is a bit less certain.

Keith Packard - employee of Hewlett-Packard, Program Chair of Freenix '04, has been active in the open source community for six years. He doesn't feel that USENIX is serving its original purpose of helping the Unix community. He believes we present papers at the Annual Technical Conference that many attendees don't understand, and believes that many academic presenters are submitting only in order to be published.

Lois Bennett - current USENIX Board member, works in system administration at Harvard. She believes USENIX's role should be primarily about community, which is vital for information sharing.

Jane-Ellen Long - USENIX Director of Production/IS. USENIX has been known for its practical bias and neutrality. She noted that the mission statement does not refer to membership, and is interested in whether the group feels that should change.

John Nicholson - current USENIX Board candidate, attorney at Shaw Pittman LLP, has written for *;login:,* has brief USENIX experience. He became involved with the community by responding to a discussion list query regarding the legality of honeypots. He has attended LISA conferences and finds them exciting, as he gains a lot of knowledge. He thinks cross-disciplinary areas are powerful, and could potentially be

used for spreading technical knowledge. He would like to see USENIX take traditional forums and adapt them for younger generations that have grown up on email and IRC's.

Margo Seltzer - researcher at Harvard, and Associate Dean of the Harvard CS Dept., co-founder of Sleepycat Software, feels at home in the USENIX community. She mentioned that Harvard is going through the same self-searching that USENIX is. She believes the mission statement is pretty good as it is, and would like the USENIX community to recapture the buzz and excitement of earlier days, especially now that open source has transformed the industry. She does not feel that tech has had its hey-day. She likes the idea of reaching out to non-technical folks.

Mary Baker - works at Hewlett-Packard Labs, formerly at Stanford, has assisted with planning of USENIX events. She finds USENIX to be a low-overhead place to get information disseminated. She likes the trust and professionalism of the organization, and believes the most successful events are the tutorials and educational activities. She suggests broadening the charter to disseminate information to other people, and exploring smaller communities in new areas. She questioned whether tutorials/training have to be offered only in conjunction with conferences, and asked if USENIX has considered offering stand-alone training programs.
[It was noted that SANS already does this, with 40 'training' conferences per year, and only one conference that has paper presentations.]

Alva Couch - Academic Researcher at Tufts University, chaired LISA '02, USENIX Board candidate. He was drawn to the organization because of its unique community and because we fight the problems on the edge of theory and practice.

Ellie Young - USENIX Executive Director for 15 years. Thanks the Board and community for having her aboard as the operations and staff leader. She is okay with the mission statement, but feels USENIX is treading water without enough innovation. She is curious to learn how to reach out to younger persons and students in the community. She commented that conference attendance has decreased, and in turn has caused a decrease in the number of members.

Tara Mulligan - USENIX Member Services Manager, Executive Assistant, and Student Programs Manager. Interested in maintaining membership numbers and hearing how this group believes USENIX can better reach students.

Geoff Halprin - President of the SAGE Executive Committee, USENIX Board candidate, has been a member for 10 years. He would like to see USENIX reach out to the "next generation" of those who primarily work online, and who lack rigor. He would like USENIX to explore what other services can be offered. He believes there is a new generation out there who look with disdain on those who went before, and don't want to learn from the "old folks." He would like USENIX to identify target demographics.

Rob Kolstad - SAGE Executive Director, Editor of *;login:,* organizer of the USA Computing Olympiad (for High School students learning computer programming). He

feels USENIX has done a poor job of addressing the needs of generalists. He would like to see new services, ideas, and products offered.

Jon "maddog" Hall - Executive Director of Linux International, current USENIX Board member. Believes computer users are in the third generation: the first being from '41-'80 when it was individually done by hand; the 2nd from '80-'00 which saw an increase in manufacturing and systems development; and currently, without as much development happening. He gives talks all over the world and hears younger folks asking many questions, sees them making the same mistakes that were made in the 2nd generation, and believes information offered by our community can help prevent those mistakes. He believes that technology development is breaking out of the confines of universities. He would like USENIX to continue to do what it does well, as well as new things. He thinks training is an obvious way to bring in income.

Cameron Cooper - student at Ohio State University majoring in Electrical Engineering, began programming at a very young age, and had his own version of "fat Linux" distributed when he was 14. He hasn't much USENIX history. He is here to offer an opinion from the "younger generation."

Peter Mui - USENIX Marketing Consultant, early employee at O'Reilly, worked at USENIX as the trade show Manager years ago, and is currently working as a consultant to USENIX helping to boost conference attendance. He believes that people like to interact, and community is important. He would like to see a bridge between the academic and professional (commercial) environments.

Jeff Mogul - researcher at Hewlett-Packard Labs, has been indirectly involved with USENIX for 20 years. He believes USENIX plays a role doing what no-one else in the industry does: it is an easy place to do conferences, and brings together disparate communities. He feels that if conferences go away, there wouldn't be much point to USENIX. He does not believe that membership numbers should be used as a metric of success for the organization. The academic conferences offered are OSDI, Mobisys, NSDI and FAST, and at the other end of the spectrum is LISA, and in the middle is ATC, which puts USENIX in the odd place of needing to be a lot of different things to different types of technology workers.

Brian Noble - Assistant Professor at University of Michigan, Ann Arbor; has been involved in USENIX for 10 years. For him, USENIX events serve two important roles:

1) as a venue that publishes work that he is interested in
2) conference attendees have "real" work-world problems that he doesn't always encounter at the university, and so finds it very informative

He would like to see the decreasing membership numbers and conference attendance addressed.

Jones joined the meeting at 9:50 a.m.

Ted Ts'o - Linux Kernel developer, organizes and runs the Linux Kernel Developers Summit. Ted believes face-to-face meetings are important, and that many folks are not interested in the "publish or perish" mentality. He warns USENIX to be careful about arrogance. He sees a lot of enthusiasm for technology with the younger generation--how do we encourage rigor without turning them off? He questioned why, if things got done in the early USENIX days, they aren't getting done now.

Eric Allman - former USENIX Board member, founder and CTO of Sendmail, Inc., member of the editorial Board for ACM Queue Magazine. He believes that historically, USENIX members have been the "obnoxious twits" that questioned traditional ways of doing things and changed the face of the computing industry, and warned that disruption comes from below, from the folks who feel marginalized. USENIX conferences 20 years ago were exciting, but he feels that USENIX now has a tendency to go to the academic side and do the obvious. He believes that if things aren't working, something else should be done.

Mike Jones - current USENIX Board Vice President, will be the next USENIX Board President, researcher at Microsoft Research for 12 years, previously a graduate student at Carnegie Mellon University, has been publishing at USENIX conferences for awhile. He believes USENIX should look for ways to serve new communities, such as those at the Linux Kernel Summit and FAST, but should also be conscious about what is affordable. He feels that USENIX has been successful, particularly with conferences. He mentioned that other organizations ask USENIX to run their conferences for them. He said he is proud to represent USENIX in other communities.

Break from 10:45 a.m.-11:05 a.m.

WHO IS THE USENIX CONSTITUENCY and WHOM ARE WE SERVING?

Eric Allman reviewed the survey information provided in the materials. A discussion followed about the nature of conference-goers, and who the USENIX audience is.

Baker commented on how intimidating going to a conference can be if you don't know the people there.

Nicholson mentioned that some persons are less shy online than they are in person.

Appelman said that the USENIX audience seems to have grown more diverse, now including academia, researchers, and system administrators.

Hume mentioned that other disciplines could use the skills of the USENIX community.

Gilmore joined the meeting at 11:25 a.m.

Nicholson used the flip chart to draw a graph of the constituents broken into 3 groups:

"1's" being the "wizards," luminaries, and those involved in research
"2's" being technical users such as SIG members, and
"3's" being general users who aren't developers and don't know much about technology.
Going forward in the discussion, these groups were referred to as "1's", "2's", and "3's".]

Jones said the strengths of the USENIX community are in the "1's", but that the primary income is from the "2's" and "3's."

Darmohray said that USENIX has held fast to academia, but may be able to come up with a better revenue model if we let go of that.

Ts'o believes that the USENIX membership is somewhat schizophrenic.

Gilmore said that there could be a new business model in the free software space.

Jones responded that the Annual Technical Conference (ATC) reformatting was an attempt at getting back interest in the Freenix area, and that perhaps we should focus on open source again.

Hume mentioned that the only plausible place for generalists to publish is at ATC, and that 15 years ago, it was cutting edge.

Hall said that perhaps there is a large group of "3's" that USENIX will never be able to serve, but that by getting into the market of training those who train that group, it could be lucrative.

Cole said that the "1's" represent the research community, and that USENIX needs to transition into the commercial aspect of things.

Couch pointed out that the LISA conference has a coherent model for reaching all of the above groups, and it works well.

Ts'o mentioned that many "3's" are attending the O'Reilly Open Source Convention (OSCON), and said that while ideas trickle down, people trickle up as their knowledge increases, and perhaps USENIX could market to them. He noted that the "1's" talk to each other, and the "2's" talk to each other, but that USENIX needs to create an environment in where the two groups can communicate with one another.

Eric Allman mentioned income, and the need to keep an eye on the commercial viability of our audience. He noted that it is easy with LISA as it is designed for a specific group.

Mogul pointed out that ATC still has the highest number of attendees of all conferences, that it is not a total failure. He does not buy into the "1" "2" "3" model, and feels that USENIX has and should essentially serve researchers, and secondarily reach out to the freenix and SAGE groups. He believes that the "middle" folks have a home at ATC, and

that while "middleness" may be hard to sell, there is a great value in that USENIX is the only organization that even attempts to.

Seltzer stated that ATC is a great place for people with research ideas to put them into practice, and that it is a great niche. She does not feel that it should be a marketed as an event where people can publish, but rather a place where they can get their ideas into practice. She asked if USENIX has even considered a GRID conference.

Jones noted that the USENIX workshops are cutting edge, but that they mostly lose money, and that USENIX needs to find a way to support them. He believes this can be done without conflicting with the mission. He wondered whether USENIX should have two or three training/tutorial organizers.

Lunch break, 12:30 p.m.-1:35 p.m.
Eric Allman left the meeting at 12:30 p.m.
Dan Appelman left the meeting at 12:30 p.m.

CONFERENCES, AND WHAT USENIX NOW DOES SUCCESSFULLY

McKusick began discussion by asking attendees to give their input about what they believe has been successful for USENIX, and what other types of conferences could be successful for USENIX. Following is a list of the ideas from the attendees:

- Successful catering to "1's", focus on selling to "3's."
- Focus on implementers (luminaries), and give more "how-to" instructions.
- GRID area conferences
- TinyOS workshops (micro-sensors)
- Sensory devices workshop
- Scientific Computing
- Windows "SA" – possibly as a track at LISA
- Medical-infomatics – MRI data
- Bio-infomatics
- Emerging law and bleeding edge technology
- Legal computing/Security
- No- or low-futz computing
- Train the trainers
- Focus on the system administrators who are not currently coming to LISA
- User Interface Engineering
- Best practices Wiki
- "UNG" – USENIX Not Google
- USENIX certified geeks
- Component thinking
- Legacy Applications
- "Problem Domains" – areas that have been problematic and need solutions

- Join and collaborate with other groups and disciplines such as the American Medical Association and National Health Institute in terms of sharing speakers and developing symbiotic relationships
- Government regulations area (legalities of technology and data management)
- Technology "briefings" to other groups, or as a track at USENIX conferences

[Specifically mentioned here was the "Computers, Freedom & Privacy" conference and Harvard's "Internet Society"]

- Replicate the successful USENIX conference model in developing countries such as India, China, and Latin America
- Portable computing – offer tutorials on how to "port" information
- Practically oriented conferences and workshops – designed for user's, not developers

[Advocacy issues began to be discussed at this point in conjunction with potential conferences]

- Electronic voting area coupled with advocacy
- Conferences in conjunction with the EFF; it was mentioned that the EFF is moving more toward the technology area, hiring two technologists to investigate issues, as well as hiring a CTO – they are good at communication and legislation, and USENIX is good at communication and technology – they should get together
- Free Linux and licensing issues; more positions such as the SCO issue response letter recently sent by the USENIX Board to congress; USENIX had a supporting member join because of it
- Email technology conference
- Privacy and legal issues workshops

OTHER IDEAS ON WHAT USENIX CAN DO IN THE FUTURE

McKusick asked the group to talk about other ideas USENIX should explore in the future. He began the discussion by mentioning the following two previously tried ideas:

- Tutorial-only offerings – this was attempted by USENIX some years ago, and failed for lack of proper marketing
- Distance learning – also tried by USENIX, but the community didn't buy it, preferring in-person instruction

Ideas from the attendees:

- Use of Value Added Resellers to get the USENIX name more widely recognized
- Focus on what USENIX can afford to do financially, not everything USENIX would like to do professionally
- More collaboration with Corporate and Supporting members; i.e., having companies offer training at USENIX events
- Franchise USENIX conference materials such as papers and tutorials

- Regional conferences
- Practitioners Track
- Weekend events so that attendees don't miss work
- University located conferences – would help with reaching out to students and younger folks who can't always afford to travel or get time away from school
- Investigate campus "entrepreneur groups"
- Technical Manager training - it was noted that good technologists don't want to be managers, and good managers don't always understand technology
- Technology liability issues
- USENIX emerging technology – ex.: pure product to web services
- Restart USENIX Journal – it was mentioned that this was not successful in the past because there were not enough submissions, it wasn't getting in citations, and the lead times were long
- Start a USENIX electronic Journal
- Create a repository of USENIX papers
- Offer a 10-year "impact" award every decade, which would demonstrate USENIX longevity and significance
- International outreach via stipends, speakers and content; help other countries set up their own events by having a USENIX "old hand" guide them (an example of this is Peter Honeyman's work with the SANE (System Administration and Network Engineering) conference)
- Activism – educate the USENIX membership so they can take action with Congress regarding technology issues.
- E-voting
- Corporate campus located conferences
- Blog and wiki focus as a way to reach younger generation of users
- Strategic Software initiatives

Eric Allman returned to the meeting at 4:30 p.m.

SUMMARY ROUND TABLE

McKusick asked that based on discussion through-out the day, he would like each person to highlight the areas that stood out for them as important for USENIX.

Eric Allman: Missed much of the afternoon meeting, but advises USENIX against becoming a "dinosaur."

Ts'o: Suggests interchange between developers and users, and finding new topic areas.

Noble: Would like to lower the barrier of "entry" and target undergraduate students; believes the distinguishing characteristic of USENIX is bringing together the wizards and general users.

Mogul: Believes it would be a mistake to panic--USENIX does conferences very well, and should not charge off doing new things, but should continue to do training and conferences.

Mui: Would like USENIX to better identify its customers and find products that attract them and will keep them loyal.

Cooper: Suggests that USENIX should do more university located conferences, which he believes younger folks and students would attend. He suggested "giving away" products, much as Microsoft does, to encourage use among students.

Hall: USENIX has always been on the cutting edge, and he feels it should continue to do that with research papers, academic or otherwise. He would like USENIX to look into holding low-cost regional conferences, and doing managerial training, and consider cross-disciplines such as music/math/computers.

Jones: Agrees that USENIX is already doing conferences very well, but that there is room to improve. He feels that will happen as long as USENIX continues to find new areas in which to stay relevant. He would like USENIX to do more public policy statements, and revisit the stand-alone training sessions with good tutorial staff.

Kolstad: Would also like USENIX to do more regional, training-only type of events.

Gilmore: Stated that he sees a lot of diversity, but no clear strategy.

Halprin: Thinks that the training model is a good idea, and that USENIX should look into marketing to general users. He believes that the Managers Track and GRID computing would be great.

Couch: Would like to see USENIX tap into the Slashdot/wiki/blog market for potential papers.

Baker: Feels there is a need for a new focus at USENIX, and that should be accomplished by going onto campuses, and more activism.

Seltzer: Said she would like to see USENIX help people to do useful work taking technical information and putting it into practice. She does not believe that online work is replacing the exchanges that occur in an in-person environment.

Nicholson: Believes that advocacy is a great means to communicate interest and passion, and anything that drives interest will drive revenue.

Long: Would like to see USENIX become more visible/high profile, and believes activism is one way to do it, with the right position on the right issue (which can be tricky). She would like to see regular new content on the USENIX Web site. She feels USENIX should tap the expertise of its members and use them to train the trainers.

Bennett: Believes USENIX should take more stands in public policy, which will help build community. She feels university outreach and bridging the digital divide is important.

Packard: Feels that there are two technology worlds out there, the old Unix, and the new Linux, and he would like to see the gap bridged. He believes USENIX should co-opt or adopt portions of the Linux community, thereby gaining younger members. He feels that there is push-back from those that want it to go in a more "researchy" way.

Cole: Stated that in the past few years USENIX has become focused on academic research, and has lost some anchors in the practice of technology. He cautions that advocacy can be very difficult politically and culturally.

Darmohray: Has been worrying about stagnation within USENIX, and very much likes the idea of the 10-year paper award. She would like to see USENIX look into regional conferences for future revenue streams, as well as look into GRID computing, heterogeneous environments, and legal technical issues.

Johnson: Is interested in USENIX developing regional conferences and increasing the quality and breadth of offerings. Warns that advocacy attracts people with extreme positions, and if USENIX proceeds with that, that it should allow for evolution (and not take extreme stands).

Cat Allman: Likes the idea of GRID computing. She would like to see USENIX better identify its audience, and further develop the "where theory meets practice" idea.

Dickison: Enjoyed hearing the comments of the group, and mentioned that USENIX is working on different tactics that may incorporate ideas brought up here.

Hume: Believes that USENIX is about the open source movement, and that it would help to bring in the Linux crowd. He loves USENIX the way it is, this is where he publishes, and he would hate to "break it." He said that USENIX used to do a lot more outreach, and he would like to see it do more.

McKusick: Would like to see USENIX focus on revenue sources, continuing to cater to the wizards and technology users ("1's" and "2's" demographic). He likes the idea of GRID computing, and reaching out into the legal and/or medical communities.

The meeting ended at 6:00 p.m.