Invitation Email

Dear [PI NAME],

I am writing to invite you to participate in a brief phone interview regarding your NSF INCLUDES Design and Development Launch Pilot.

NSF has contracted 2M Research Services (2M) to provide developmental evaluation support for continuous learning during the inaugural phase of NSF INCLUDES. As part of its evaluation efforts, 2M will be conducting phone interviews with a sample of launch pilot PIs. In these interviews, we would like to learn about your initial experiences implementing your launch pilot. We will use the information to understand how the projects are developing, and identify ways in which NSF can support launch pilot efforts in the year ahead.

Interviews are voluntary, but input from the PIs implementing the launch pilots is critical to the success of the evaluation and the program, and we thank you in advance for your participation.
Your personal information will be kept confidential. We will organize responses from PIs into general themes and no individuals will be identified by name or project.
Interviews will take approximately 30 minutes, and will be conducted by phone to minimize burden on your schedule. Please send us your availability for the month of August and we will follow up with you to schedule a time that works best for you. If you are unavailable in August and there is another key project staff member who is knowledgeable about your launch pilot, please let us know so we can schedule an interview with him or her.

Sincerely,
Stéphane Baldi
Vice President of Education
2M Research Services

CC: Cynthia Phillips
Contracting Officer's Representative, NSF INCLUDES
National Science Foundation

Interview Protocol

NSF INCLUDES
PI Interview Protocol
[ADD OMB APPROVAL NUMBER]
DRAFT
7/27/17

Introduction
Thank you for taking the time to talk with us today about your NSF INCLUDES Design and Development Launch Pilot. My name is [NAME OF INTERVIEWER] and I'm a researcher at 2M Research Services, a consulting firm specializing in research, program evaluation, and technical assistance. On the phone with me is my colleague [NAME OF NOTE TAKER] who will be taking notes during the interview.

2M has been contracted by NSF to conduct an evaluation of the NSF INCLUDES program. As part of our evaluation efforts, we're conducting interviews with PIs and key project staff members to learn more about your experiences implementing your launch pilot in the past year. NSF is interested to hear about your early successes, any challenges you've faced, and how NSF can support your implementation efforts in the coming year (for example, through technical assistance and conferences). This information may also help us, as the evaluation team, develop interview or survey instruments in the future.

There are no right or wrong answers—we'd just like to hear about your experiences with your NSF INCLUDES project so far.

Confidentiality
Your personal information will be kept confidential. We will organize responses from the interviews into general themes, and no individuals will be identified by name or project.

Permission to Record
We'd like to record today's interview so that we can ensure that our notes are accurate. We will not share the recording with anyone outside of the evaluation team. Do we have your permission to record?
[IF YES] Thank you. We'll start the recording now.
[IF NO] That's fine. We'll rely on our notes for this interview.
Do you have any questions before we begin?

1. We'd like to start the conversation by asking you what aspects of your launch pilot do you feel are working particularly well and why.
   a. How would you describe the role NSF has played in the aspects of your launch pilot that are working well?

2. What changes, if any, have you made to your original plan for your project?

Interview Protocol

3. Has NSF INCLUDES' emphasis on partnerships and collaborative models affected the way you're implementing your project?
   a. [IF YES] How so?
   b. [IF NO] Why not?

4. What would you say has been the most significant challenge you've faced implementing your launch pilot?
   a. How are you addressing that challenge?
   b. [IF EVALUATION/METRICS ARE NOT MENTIONED] What, if any, challenges have you faced related to evaluating the progress of your launch pilot so far?

5. What, if any, technical assistance activities offered by the NSF INCLUDES TA team have you or a member of your project team participated in? [EXAMPLES, IF NEEDED: webinars, affinity group discussions, conversations with a TA liaison]
   a. Have you requested any technical assistance from the TA team?
      i. [IF YES] What technical assistance have you requested?
   b. What support from NSF and the TA team would you find most useful at this stage of your project?

6. Have you or a member of your project team attended any NSF INCLUDES-sponsored conferences?
   a. [IF YES] If you remember, what conferences did someone from your project team attend?
   b. What, if anything, did your team learn from the conference(s) that you've been able to apply to your project?

7. Do you have any additional insights or recommendations about the INCLUDES program that you'd like to share?

Thank you for talking with us today!