

Welcome Call Protocol

Greeting. Hello [DDLDP contact's name], I'm [TA liaison's name]. Thank you for taking the time to meet with me to talk about your NSF INCLUDES Launch Pilot project. I want to take this opportunity to welcome you to the initiative and to Cohort 2! Congratulations on your NSF INCLUDES award!

I'm part of the NSF INCLUDES Technical Assistance (TA) Team. Our role is working with Design and Development Launch Pilots (DDLDPs) to bring resources and connections to the INCLUDES community in support of achieving project and program goals. Our team is made up of staff from Education Development Center, Westat and Equal Measure and we've been leading the NSF INCLUDES TA for a year now.

The goal of this phone call is to welcome you to the NSF INCLUDES community and to learn more about your project plans. In addition to taking this opportunity to get to know you better and find out where you are now, I want to point you to some of the resources available to you, and talk about how you can best leverage the offerings of the TA Team and the INCLUDES community. Again, thanks for making time to talk today – the call should take about 30 minutes.

Guiding questions, conversation starters

1. In preparation for this call, I had the opportunity to take a quick look at your proposal. [Mention something interesting or exciting about the proposal – e.g., I noticed that your proposal aims to influence the transition from high school to college in STEM. What an important moment in a student's trajectory! Can you tell me more about your project plans and goals?]
2. I noticed from your proposal that your project is operating at the [insert state, city, regional, national or ask what level if none is specified in their documents] level(s) and that you're addressing the following BP goal(s) [insert goals]. Have those changed since the proposal was submitted?
3. As you go forward with the work of the DDLDP, what strengths does the DDLDP bring and what challenges do you anticipate as the DDLDP carries out this work?
 - a. How can NSF and the TA team help?
4. Have your partners changed at all—e.g., have you added any new partners since the proposal was submitted? If so, what partners are you currently working with and in what way(s)? (Probe: What are your partners' strengths? What role will each partner play?)
5. What assets does your team bring to achieving your goals [Possible probe topics are below]
 - a. Experience in equity/broadening participation for the targeted population
 - b. Experience engaging communities in a shared vision and shared decision-making
 - c. Experience working with partners as a platform for collaborative action
 - d. Experience leading in ways that increase communication and visibility within and outside the project team
 - e. Experience building capacity to expand, sustain, and/or scale programs
 - f. Experience developing goals and metrics related to targeted outcomes
 - g. Background in Evaluation design and methods

h. Other (identify additional assets and resources)

Follow-up question to any one of these [What resources can the TA team provide?]

6. Are there gaps in your DDLP team's prior experience and/or other issues that may pose a challenge to achieving the project's goals? [Probe: Please briefly describe any gaps and related challenges.]
7. What support to the infrastructure will help build support and buy-in for addressing the BP challenge(s) your team is targeting? Which stakeholder groups are included (or do you plan to include) in your DDLP?
8. Talk to me a little about your evaluation plan. [note to Liaison: add 1-2 lines that summarize what we learned from the document review so that this part of the conversation is focused on those aspects of the evaluation plan and corresponding outcomes that we want them to focus on] [Additional probes below]
 - a. What can NSF expect to learn from your project-level evaluation?
 - b. What kinds of measures will you use to ascertain whether key outcomes have been achieved? (Probes: e.g., Performance measures? Are there existing measures and/or instruments you plan to use or adapt? Which ones and what outcomes will they measure? [traditional student outcomes? DDLP specific?])
 - c. How can the TA team help DDLPs in this area?
9. What 2-3 areas can the TA team deliver technical assistance on to be most helpful to your Launch Pilot?
10. What big unanswered questions would you like NSF to address as you move forward in your work?

Ending the Call. Thank you [**DDL Contact's Name**] for taking time to speak with me today, I really appreciate it! On behalf of the TA team, we look forward to working with you and all of the Cohort 2 of DDLPs on NSF INCLUDES. If you have questions, don't hesitate to ask. Thank you again!