

## TA TEAM FOCUS GROUP INVITATION EMAIL

Dear [NAME OF TA TEAM PERSONNEL],

I am writing on behalf of 2M Research (2M) to invite you to participate in a focus group about your experience delivering technical assistance (TA) to NSF INCLUDES launch pilots.

NSF has contracted 2M to provide developmental evaluation support for continuous learning during the implementation of the NSF INCLUDES initiative. As part of its evaluation efforts, 2M will be conducting in-person focus groups with a sample of NSF INCLUDES TA personnel. Skype focus groups are also an option. In these focus groups, we would like to learn from your experiences delivering TA to launch pilots. We will use the information to understand participation in TA and how lessons learned from TA delivery can inform the continued development of NSF INCLUDES in the upcoming years.

**Focus groups are voluntary**, but input from the TA team 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 focus groups into general themes and no individuals will be identified by name or organization.

**Focus groups will take approximately 30 minutes and will be conducted in person or by Skype to minimize burden on your schedule.** Please send us your availability for the month of October and we will follow up with you to schedule a time that works best for you.

Sincerely,  
Ashley Simpkins  
Senior Research Analyst  
2M Research

**NSF INCLUDES  
TA Team Focus Group Protocol  
OMB CONTROL NUMBER 3145-0215**

**9-11-2018**

**Introduction**

Thank you for taking the time to talk with us today about the technical assistance (TA) being provided to the NSF INCLUDES launch pilots. My name is [NAME OF MODERATOR] and I'm a researcher at 2M Research, a consulting firm specializing in research and evaluation.

The TA team is an integral part of the implementation of the NSF INCLUDES initiative so we're interested in learning from your experiences with the launch pilots to answer the following NSF priority questions: how we can understand launch pilot participation in NSF INCLUDES TA, how can lessons learned from the TA for launch pilots inform the development of the Coordination Hub, and how we can understand the current theory of change (ToC) model for TA and its role in establishing a National Network?

There are no right or wrong answers—we'd just like to hear about your experiences providing TA to the NSF INCLUDES launch pilots so far.

**Confidentiality**

Your personal information will be kept confidential. We will organize responses from the focus group into general themes, and no individuals will be identified by name.

**Permission to Record**

We'd like to record today's focus group so that we can ensure 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 ONE OR MORE PARTICIPANTS DOES NOT GIVE PERMISSION] That's fine. We'll rely on our notes for this focus group.

Now that the recording is started, please state your name and say, "I consent to recording."

[ENSURE THAT EACH PARTICIPANT STATES CONSENT.]

Let's begin with a brief round of introductions.

**Launch Pilot Participation in NSF INCLUDES TA**

First, let's discuss what you've been seeing in terms of launch pilot participation in NSF INCLUDES TA.

1. What are your general impressions of launch pilot participation in TA? For example, who are the more active participants and the less active participants?
  - a. We've observed from TA reports that some launch pilots participate more than others. Why do you think that is?
  - b. What activities seem to draw the most participants?
  - c. What factors would you say are influencing the variation in TA needs and participation?

2. What kinds of things have facilitated your efforts in providing TA?
3. What would you say have been the most significant challenges you've faced in providing TA to the launch pilots?
  - a. How are you addressing the challenges?
  - b. What additional support from NSF or the evaluation team would help you further address those challenges?
4. One question that NSF has asked is, "How do you provide TA for a launch pilot that doesn't know what it needs?" How would you answer that question?

### **Lessons Learned for the Coordination Hub**

Now we'd like to talk about what you've been learning from delivering TA to the launch pilots that could inform the work of the Coordination Hub. The TA team has used a "light and medium touch" approach for NSF INCLUDES TA (that is, universal TA and responsive TA) and has also structured the TA for launch pilots as an arc, in which topics are introduced, discussed, and then followed up on.

5. What are you learning about the light and medium touch approach employed with launch pilots?
  - a. What aspects of the TA approach have worked particularly well?
  - b. What, if any, adaptations have you made to the approach based on what you've been learning?
  - c. What, if anything, would you do differently?
6. What are you learning about the TA arc employed with launch pilots?
  - a. What aspects of the TA approach have worked particularly well?
  - b. What, if any, adaptations have you made to the approach based on what you've been learning?
  - c. What, if anything, would you do differently?
7. What outcomes are you expecting from TA?
  - a. How will you know the outcomes that you have mentioned have been achieved?
8. If you were advising NSF on the development of the Coordination Hub, what would be your key recommendations for how the Coordination Hub approaches TA?

### **Role of TA in Forming a National Network**

Finally, we'd like to talk about the role of TA provided by the Coordination Hub.

9. What do you see as the role of TA in the NSF INCLUDES National Network?
  - a. What about the role of TA in guiding the development of a shared measurement system?
    - i. Is there anything you've already learned about shared measurement among the launch pilots?
  - b. What, if any, additional opportunities have you identified for TA, either for your team or the Coordination Hub in a National Network?

Thank you for your time today!