

Protocol Overview of Create Opportunities Everywhere (COE) Discussion Sessions

Dr. Carylynn Larson of [Creating Open Space](#) will be contracted to facilitate COE discussion sessions. The protocol for this process is outlined below.

❖ Phase I: Planning and Preparation

1. **Gather input from Deputies:** A meeting with the facilitator will be held with NSF Deputy Assistant Directors (DADs) to provide an overview of the process for obtaining input on the COE Budget Roadmap. The meeting will include sharing the goal of the COE Budget Roadmap, explaining the plan to hold discussion sessions, and asking for support from directorates and offices. The facilitator will also ask the DADs: *What questions should we ask to get the best input on this roadmap?*
2. **Ask Deputies for support:** Deputies will be asked to advise staff about the upcoming **voluntary** discussion sessions.

❖ Phase II: NSF-Wide Meetings to gather input from NSF staff and leadership

3. **Email invitation:** After receipt of expedited approval, an email will be sent to NSF program staff with a short message and poll asking for volunteers to participate in one of four 60-minute discussion sessions to inform the COE Budget Roadmap.
4. **Email confirmation:** Poll respondents receive a meeting invitation to the date/time selected. The meeting invitation includes a link to the NSF public website and FY 2025 budget request (which includes a section on COE theme), a draft Logic Model, and Discussion Questions.
5. **Data Collection and Summation of Input from Discussion Sessions 1-4:** Following a quick introduction, the facilitator leads the discussion sessions using the questions provided in the confirmation email. Each of the sessions builds on the previous with a Graphic Artist attending the final session to create a visual representation of the input provided

❖ Phase III

6. **Roadmap Update:** Aggregated data will be summarized by the facilitator. The COE Roadmap Leads and DADs use the input to update the COE Roadmap and Logic Model.
7. **Dissemination of Revised Roadmap:** An updated version of the COE Roadmaps is shared with the NSF Executive Leadership Team and the National Science Board.