Guide for Developing a Broader Impacts Menu

Description

A Broader Impacts (BI) Menu is a tool that outlines baseline options for BI activities hosted by an ISE or other organization. The items listed within a BI Menu can vary, but at a minimum include program name, description, and approximate cost.

A BI menu can be created by ISE staff within BID Teams. It can build from the material that comes out of the ISE Self-Inventory Worksheet. A BI Menu may be especially useful for large ISEs with a large number of programs/activities overseen by multiple staff members.

Benefits

A BI menu can be an effective communication tool for use within a BID team. It allows for the ISE staff member to clearly outline details of BI activities that other BID Team Members should know when considering including them in proposals. It can also highlight information that PIs may need to include in their proposals, such as target audience and number of participants reached. The process of developing a BI Menu is also useful for the ISE member of a BID team to check their understanding of BI activity options within their institution.

Limitations

Using a BI Menu comes with the risk of being too prescriptive with BI options. A BI Menu should not substitute for an individualized approach to each PI’s BI activity development when possible. If used inappropriately or without clear expectations set in advance, BI Menus can result in BI activities that are 1) ineffective or not a good fit for the PI, 2) not a good fit for the ISE at a given point in time, or 3) written into proposals without the necessary communication or coordination with the ISE.

Steps for Developing a Menu (to be led by the ISE member of a BID team)

<u>Step 1: Take an inventory of programs and opportunities</u>

Make a list of all opportunities at your institution that might be a good fit for partner participation. You may want to include programs/events that occur infrequently but could be offered more frequently with the participation of a partner and their resources.

This process may build on the work done in the Self-Inventory Worksheet, in which ISE staff identify their core values, desired audience impacts, strengths, and resources. The Self-Inventory should help guide the selection of programs that might be included in the menu.

<u>Step 2: Draft an early version of the Menu</u>

Create a table that lists the different programs and other opportunities the ISE partner has identified.

Criteria might include:

- Program name
- Program description
- Target audience
- Number served
- Whether the program requires direct interaction with the audience
- Time commitment required from PI or participants

- Approximate cost
- Point person within ISE
- Priority for participation (e.g., on a spectrum of “partner participation is essential for program” to “including a partner would be inconvenient but possible”)
- Keywords (to match opportunities with BI identity/legacy work)
- For ease of use, you may want to use one of the criteria to group BI activity options into larger categories. For example, Pacific Science Center lumped opportunities into five general categories: “On the Museum Floor,” “K-12 Focus,” “Special Programming,” “Professional Development,” and “Exhibits and Curriculum.”

<u>Step 3: Solicit stakeholder input</u>

Share the draft menu with stakeholders (e.g., program owners internally, other BID team members). Ask them to review menu options for factors such as accuracy, variety, feasibility, appeal, etc. Add, edit, and remove items as needed to create a working Menu.

An abridged example from Pacific Science Center can be found at the end of this guide.

<u>Step 4: Ensure ongoing maintenance and communication</u>

In many ISEs, programs and their specific details can change frequently. Decide with ISE internal stakeholders how and how frequently the menu should be examined and updated as needed, to change the details of program opportunities, add new opportunities, or remove opportunities that no longer exist. For example, some ISE staff may choose to review the menu quarterly as a part of formal recurring meetings. Other ISE staff might choose to encourage individual program managers to check up on Menu options virtually on their own time.

In addition, make sure that other program managers know how their programs have been written into proposals, and that they will be notified if the grant is awarded.

Using BI Menus within BID Teams

<u>Step 1: Gather background information on the PI</u>

Note: This step will vary depending on the number of PIs with whom the BID team works. This guide was developed based on use at Pacific Science Center, a relatively large ISE, and the University of Washington-Bothell, a relatively small HEI. For larger HEIs who consult with a large number of PIs, this process might have to be adapted or omitted.

Collecting background information can be done through an initial conversation or informal interview with the PI, a review of any BI Identity/Legacy work they have completed, or a combination of the two.

Questions might include:

- What outreach experiences have you enjoyed the most?
- What audiences have you enjoyed working with the most?
- Are there other audiences that you haven't worked with yet, but would like to?
- Are there outreach experiences that you would like to build on?
- How comfortable are you in front of an audience?
- How comfortable are you in small-scale, mentoring-type conversations?
- Are there skills (e.g., in teaching) you're hoping to continue to develop through your outreach?
- Do you have undergraduates, graduate students, or postdocs you would like to involve in your outreach?
- What part of your research and scholarly work do you enjoy the most?
- Why is outreach important to you? What are you hoping that public audiences or students will gain from

- interacting with you?
- What is your budget for your BI activities?

Step 2: Develop an individualized BI menu for each PI

Based on the responses elicited during the background information gathering phase, review your institution's full BI Menu for options that might be a good fit for each PI's interests and abilities. If necessary, check with individual program owners to ensure availability of program options.
Ideally, individual activities or options will be starting points for a BID team discussion.

Step 3: Review proposed options with the BID team

Get feedback on the proposed options from the rest of the BID team. Depending on the structure and predetermined workflow of your BID team, the individuals involved in this process will vary. Questions for different BID team members might include:

- PI: Which of these opportunities best fit your interests and most aligns with your BI Identity work? Are there any options that are definitely not feasible within your budget?
- Research supports professional (e.g., staff member in the office of sponsored projects): Which of these options most align with the HEI's community engagement goals and strategies?
- (Optional) Learning sciences researcher: What learning outcomes do you see in the proposed options? Are there specific options that will be of highest impact for the target audience? What recommendations do you have for optimizing the approach of any of these options?
- Community connection: Are the proposed options appropriate for your community? Will they add value to your community?

Step 4: Finalize options for inclusion in the PI's personal BI menu and for the specific proposal being developed

Based on the feedback gathered in Step 3, revise the PI's individualized BI menu. Include additional information as needed to make sure that all members of the team clearly understand the goals and commitments of each option.

Step 5: Ensure ongoing maintenance and communication

Establish a process to make sure that BID team members are notified of proposal progress. For example:

- Which options were ultimately included in the proposal?
- When the proposal was submitted
- When the PI is notified

This step may involve other BID tools (e.g., a MOU).

Make sure to communicate to other members of the BID team about how the individualized menu should and should not be used following the submission of each specific proposal. For example, if the ISE wants the PI to go through the process described above for each new proposal, make sure that both the PI and the Research Support Professional know this. If the PI can use the same options but should check with the ISE member of the BID team to confirm continued availability of each option, make that clear.