

Intro Email

Subject: *You're invited: a survey of innovative organizations providing financial education, coaching, or counseling*

Dear [Respondent Name],

We are pleased to let you know that [Program Name] has been recommended to be surveyed as part of the Integrating Financial Capability and Employment Services Project! The goal of the project is to better understand how local organizations are integrating financial education, coaching, or counseling services into their programming. We are conducting this research along with our subcontractor, the Urban Institute, and the support of the Office of Planning, Research, and Evaluation (OPRE) in the Administration for Children and Families (ACF). (For more info on our project, you can read about it [here](#).)

You were [recommended to be surveyed by *Expert Name*/identified through rigorous reviews of existing research].

Participation in this survey is completely voluntary, and your responses are important to the provider community. We estimate that the survey will take around 20 minutes to complete. It will include questions about topics such as the services your organization provides, the populations served, and how services to increase clients' financial capability are integrated. *If you think that someone else in your organization may be better suited to take the survey, please forward them the link!*

Your personalized link: [link]

Deadline: Month XXth, 2022

As researchers, we rely on input from programs like yours to learn about new and promising strategies for providing much-needed financial education, coaching, or counseling to individuals in need. Please contribute to these important efforts if you are able!

We appreciate your time and encourage you to reach out if you have any questions.

Best,

[sender]

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Reminder Email 1 - Week 2

Subject: *[Reminder!] You're invited: a survey of innovative organizations providing financial capability services*

Dear [Respondent Name],

We are reaching out with a friendly reminder to complete the survey of organizations integrating financial capability services. We have already received many responses from other organizations providing similar services, but it is important for us to capture information from a variety of providers.

Your voice is important! Please visit the link below to take the survey, or share it with another staff person in your organization who may be better able to answer questions on the services your organization provides, populations served, and how services to increase clients' financial capability are integrated.

Personalized link: [link]

With your help, we can share helpful and actionable information with the national community of financial capability and employment and training organizations.

Best,

[sender]

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Reminder Email 2 - Week 4

Subject: *[Reminder!] You're invited: a survey of innovative organizations providing financial capability services*

Hi [Respondent name],

A few weeks ago, we sent you an invitation to take a survey as part our research study on organizations integrating financial capabilities services.

Your program was recommended to us by experts *[name if we can]* who thought that [Program name] can share valuable information with the field. Your responses can help inform efforts to improve, research, and fund programs providing financial capabilities services!

Personalized link: [link]

Thank you for your time!

Best,

[sender]

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Reminder Email 3 - Week 6

Subject: *Deadline approaching! Survey of organizations providing financial capability services*

Hi [Respondent name],

There is still time to contribute information to this important project! We are eager to learn how organizations like [Program Name] are providing financial capability services to individuals with low-incomes.

If you are able, we would deeply appreciate a few minutes of your time to take the project survey.

Personalized link: [link]

DEADLINE: Month XXth

Thank you for your time!

Best,

[sender]

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Reminder Email 4 - Week 7

Subject: *[One week left!] Survey of organizations providing financial capability services*

Hi [Respondent name],

The survey window is open for one more week. Please seize this opportunity to share your strategies with peers, funders, and researchers! We are eager to collect and share information to further national efforts to support individuals with low incomes with financial capacity building.

Personalized link: [link]

DEADLINE: Month XXth

Best,

[sender]

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Reminder Email 5 - Week 8

Subject: *Last chance! Survey of organizations providing financial capability services*

Hello [Respondent name],

This is your final reminder to take the survey as part of the Integrating Financial Capability and Employment Services [project](#). Your responses are important to us! Please visit the survey through the link below.

Personalized link: [link]

DEADLINE: Month XXth

Thank you,

[sender]

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