

## Email for Virtual Site Visit Interview

*After completing the phone interview, the virtual site visit team will contact the E&T program director or manager to set up a call.*

Dear [E&T Director],

The Office of Planning, Research, and Evaluation (OPRE) within the Administration for Children and Families (ACF) in the U.S. Department of Health and Human Services has contracted with MEF Associates and its partner, the Urban Institute, to conduct a study called Integrating Financial Capability and Employment Services (InFin). MEF Associates and Urban Institute are social policy research organizations located in the Washington, DC area. The study seeks to learn about the extent of financial capability interventions in E&T programs, key features of such programs and the factors that have led to their inclusion. You can find more information about the research study on the ACF website, [here](#).

We are excited to let you know that, in coordination with ACF & OPRE, we selected [SITE NAME] as one of four E&T providers with which we would like to conduct a “virtual site visit” as part of the study. These efforts will provide valuable information to E&T programs who are interested in delivering Financial Capability services throughout the country, and we look forward to the opportunity to gain a deeper understanding of your program through the interview. The goal of our virtual site visit is to learn in more depth how your organization serves clients through your financial capability services and your employment and training program. During the visit, our team hopes to conduct video call interviews with managers, administrators, and staff from your program, as well as your partner organizations that deliver or are involved with the financial capability services. Together, these interviews will provide valuable information to support other E&T providers and others seeking to address economic wellbeing of low-income communities.

We would like to arrange a call with you to answer any questions you may have and to discuss more about what the site visit would involve and your interest in being a part of it. The call would also be an opportunity to discuss what staff would be appropriate for the interviews. We believe there is minimal risk to you and your partners in participating in this conversation because of the care we take in keeping your information private and because we will aggregate your thoughts with others participating in calls. The information you share will contribute to the evidence policymakers and practitioners have about financial capability interventions delivered in Employment and Training program contexts, and how they may be helpful for adults with low incomes, but you may not experience any direct benefits from participating in the study. We will share information gathered from these conversations in publicly available research reports, blog posts, and presentations.

We recognize that you have many demands on your time, and we appreciate your support. **We have suggested some times during which we are available. If none of these work for you, please let us know and we will look for additional times.**

[TIME SLOTS]

We look forward to discussing the virtual site visit with you further and hope you will reach out with any questions.

Best,

[Site Visit Lead]

## Email for Virtual Site Interview with Partner Agencies

*The study team will contact partner agencies. We will customize this email as appropriate for the partner agency and their relationship with the E&T program.*

Dear [site contact],

I am contacting you regarding a study to learn about financial capability interventions in employment and training programs. We recently spoke with [E&T Program Contact], who recommended we reach out to your organization. The Integrating Financial Capability and Employment Services (InFin) study is being conducted by MEF Associates and its partner, the Urban Institute. MEF Associates and Urban Institute are social policy research organizations located in the Washington, DC area. It is funded by the Office of Planning, Research, and Evaluation (OPRE) within the Administration for Children and Families (ACF) in the U.S. Department of Health and Human Services. You can find information about the study on the ACF website, [here](#).

We will be conducting interviews with managers and staff at [E&T Program], and our team would also like to interview [managers/staff] from your [program/organization] to learn about how your [program/organization] delivers financial capability services to clients from [E&T Program name]. [Customize this paragraph with specific services, if known]

We believe there is minimal risk to you in participating in this conversation because of the care we take in keeping your information private and because we will aggregate your thoughts with others participating in calls. The information you share will contribute to the evidence policymakers and practitioners have about financial capability interventions delivered in Employment and Training program contexts, and how they may be helpful for adults with low incomes, but you may not experience any direct benefits from participating in the study. We will share information gathered from these conversations in publicly available research reports, blog posts, and presentations.

Would staff from your organization be willing to speak with our team? We would be happy to schedule a conversation to answer any questions and to provide more information about the study and the interviews.

We look forward to discussing our project and the interview with you further. Please feel free to reach out with any questions.

Best,

[Virtual Site Visit Lead]