



Letter of Inquiry for NEFE Funded Research

Project Title

Character limit: 100

Amount Requested

Character limit: 8

Duration of the Project in Months

Please note that NEFE's preferred project duration is about 18 months. Some variation is permissible, and timelines should be realistic and appropriately scaled to the project's scope.

Character limit: 2

Project Summary

Provide a one-paragraph description of the project that summarizes the main research question(s), their importance to the field of financial education, and the method(s) of data collection and analysis the project will employ.

Character limit: 600

Principle Investigator (PI) and team

Please list the principal investigator, any key team members, their role in the project, and any expertise related to the project. For each member, attach a CV or resume and ensure that all qualifications and relevant experiences have been included.

Character limit: 500

IRB Review

Indicate whether this project has already gone through IRB review at your institution (or has been deemed exempt). If the project has not yet undergone IRB review, indicate your best estimate of whether

it will qualify for exemption, expedited review, or full review— as well as the anticipated timeline at your institution.

Character limit: 500

Prior Literature

Describe how the proposed research fits into, expands, or fills a gap in the existing academic literature related to financial education. This is not meant to be a full literature review, rather the high-level strands or themes. Indicate whether this is a new line of inquiry or a continuation of prior work.

Character limit: 600

Project Methodology

Describe the existing data set the project intends to use and/or the new data that will be collected, including collection methodology. Expand upon the main research question(s) and methodology referenced in the project summary.

Character limit: 1000

Strategic Impact

Identify how the proposed research aligns with at least one of NEFE’s [research funding priorities](#) (access, quality, and/or impact) including at least one systems level consideration (K-12 or post-secondary), the level of incorporation, and is grounded in our [Personal Finance Ecosystem](#).*

**Levels of Incorporation: K-12 and/or Postsecondary Systems*

Level	Type of Incorporation	Activities Involved
Level 1	Basic, outcomes-focused	System-level considerations are embedded into the practical application and recommendations sections, and as a deliverable
Level 2	More integrated, with multiple levels of inquiry	Individualistic variables are coupled with systems-level inquiry, affecting the research question(s), literature review, recruitment, data collection and analyses, etc.
Level 3	Highly focused, dedicated to systems level inquiry	Affects every aspect of the research proposed, including all deliverables

Postsecondary includes traditional and nontraditional aspects of education, including four-year public/private universities, two-year colleges, liberal arts colleges, vocational/technical or trade schools, graduate/professional schools, professional certifications, micro-credentials, apprenticeships and internships, bootcamps, online learning programs, continuing/executive education, etc.

Character limit: 1500

Anticipated Outputs

Please list the anticipated deliverables of the project (examples include manuscripts, reports, policy briefs, power point presentations etc.). Describe any plans for publication or other dissemination activities to further the researcher's impact.

Character limit: 600

Appendix

Citations (required)

CV or resume (required)

Up to 2 visual aids that may be used to further explain your study, such as figures, tables, charts etc. (optional)