Hi [names],

Thanks so much for taking the time yesterday out of your busy schedules.

As requested, here is a detailed breakdown of all activities and actions we want to complete before our onsite at the end of [Date]. There’s a lot here (apologies that this email is so long!) but it includes everything we will need. Hopefully this format works, but if you’d like to sync to review please let us know.  
  
Before we are onsite in [State], USDS will want to have accomplished the following:

* A full team kickoff to align and set expectations for our engagement
* Logistics set and ready for the onsite, such that all meetings, invitations, room reservations, etc. are reserved and ready for us
* Understanding of current challenges and opportunities facing [State] around SNAP timeliness. We have two approaches we use to do this, which are outlined in more detail below.

**To achieve the above, our priority items are:**

* Connections to data and technical SMEs by **[Date]**
* Connections to eligibility workers, fee agents, and call center workers by **[Date]**
* Onsite meeting invites sent by **[Date]**
* Support USDS team getting access to logins/Teams **ASAP**
* Inform USDS where the onsite will take place so the USDS team can start booking travel **ASAP**

If there are specific people we can work with on getting these items completed, please feel free to send them our way! More details are below for you to use as they are helpful.

--------------------------------------------------------------------

**Planning Details**

**Activities: USDS takes a two-pronged approach**

**Approach #1: Data collection and analysis**

**Goal(s)**: To understand the current situation of timeliness within [State] by reviewing and understanding data from the eligibility system  
  
Activities:

* “Data pulls” around key areas
* Analysis of data (either by USDS, the state/vendor, or together)

**Action needed - Connect USDS with:**

* State eligibility system technical leads
* State data experts
* Vendor product and technical leads

**Due date**: Please connect USDS with the above people by [Date]

**Approach #2: Staff collaboration and shadowing**

**Goal(s)**: To understand the current situation of timeliness within [State] as experienced and understood by state staff  
  
Activities:

* Semi-structured interviews with staff, 1 hour each
* Shadowing sessions (e.g. observing what workers do so we can understand their process), 1 hour each

**Action needed - Connect USDS with:**

* 4-6 eligibility workers who we can shadow as they do their job.
* 2-3 fee agents we can have conversations with
* 2-3 call center workers we can shadow/have conversations with

**Due date**: Please connect USDS with the above people by [Date]

**Logistics: Scheduling, organizing, and running the USDS onsite**

We’re attaching a general onsite calendar that we tend to follow during our engagements for your reference. However, the below are the exact calendar invites we will need.  
  
People needed at the onsite:

* All week:
  + SNAP leadership team: [names]
  + SNAP policy and operations leads
  + State technical leads
  + Call center leads
  + Eligibility supervisor(s)
  + At least 1 state data expert
  + Vendor product and technical leads
* For the collaborative workshop, all the above plus:
  + 6-8 eligibility workers
  + 2-3 call center workers

**Actions needed:**

* Identify where the onsite will take place and let USDS know ASAP
  + *This location should be where the majority of [State] staff are and where EWs can easily attend/access*
* Reserve a room for the onsite that will hold 30+ people — this reservation should be for the whole week!
* Calendar invites for the following times (all in [timezone]):
  + Every day Monday through Wednesday: 45m leadership check in anytime after 3:30PM
    - *Attendees: State leadership team*
  + Monday [Date] - 90m block after 1PM
    - *Attendees: those under “all week”*
  + Tuesday [Date] - 5 hour block from 10AM until 3PM
    - *Attendees: All mentioned above*
  + Wednesday [Date] - 90m block at 10AM
    - *Attendees: those under “all week”*
  + Wednesday [Date] - 90m block at 1PM
    - *Attendees: those under “all week”*
  + Thursday [Date] - 90m block at 10AM
    - *Attendees: those under “all week”*
  + Thursday [Date] - 90m block at 1PM
    - *Attendees: those under “all week”*
  + Friday [Date] 30 - 60m block at 10AM
    - *Attendees: [Agency] commissioner; Division director; SNAP policy lead; other leadership as requested by [State]; Vendor product and technical leads*