

Approaching Retirement Federal Resource Guide Pilot: Observation Guide

Instructions:

- You will be observing a counseling session in which the *Approaching Retirement Federal Resource Guide* is being used with the client. Your role is to observe the session and use the checklist below to note how the Federal Resource Guide is used.
- Use the checklist below to identify how the Federal Resource Guide was used in the session you observed. You can also make notes to the right of the checklist item or in the open text field at the bottom of the checklist to further elaborate on your response.
- Paperwork Reduction Act Public Burden Statement:

According to the Paperwork Reduction Act of 1995 5 CFR § 1320.8(b)(3), no persons are required to respond to a collection of information unless such collection displays a valid OMB control number (OMB 0985-0080). Public reporting burden for this collection of information is estimated to average 30 minutes per response, including time for gathering, maintaining the data needed, completing, and reviewing the collection of information. The obligation to respond to this collection is voluntary under the statutory authority E.O. 14058, Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government. Information collected is planned for use by ACL to: be used internally to ACL to inform the next version of the *Approaching Retirement Federal Resource Guide (FRG)* and the *Federal Forum*. The information will not influence any public policy decisions. ACL uses information collected to improve the content and format of the FRG and the *Federal Forum*. Data will be kept private to the extent allowed by law. There are no assurances of confidentiality.

 - To client: Are you comfortable with me observing the counseling session today in support of this data collection?
 - To counselor: Are you comfortable with me observing the counseling session today in support of this data collection?
 - Do you have any questions for me before we begin the session?

Checklist:

Checklist Item	Notes
• The counselor used the <i>Federal Resource Guide</i> with the client in this session.	
• The counselor was able to meet the needs of the client using the <i>Federal Resource Guide</i> .	
• The following modules of the <i>Federal Resource Guide</i> were used in the session:	

[list modules]

- The *Federal Resource Guide* was written in the appropriate language for the client.
 - The *Federal Resource Guide* helped the client leave the session with clear next steps.
 - There was a missed opportunity for the counselor to use the *Federal Resource Guide* for these topics: _____
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Key Takeaways / Additional Notes:
