

Approaching Retirement Federal Resource Guide Pilot: Client Interview Guide

Introduction:

- Thank you for offering to further discuss your responses to the client questionnaire you completed about the *Approaching Retirement Federal Resource Guide*.
- We will spend 15 minutes discussing your responses to the questionnaire and offering you an opportunity to provide additional feedback about the *Approaching Retirement Federal Resource Guide*.
- We will be capturing the responses to the questions throughout the interview. These responses will then be analyzed to identify key themes. We will not attribute any response to a specific individual and all responses will be kept confidential.
- 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.
 - Would you like to participate in this survey?
 - Yes (go to next question)
 - No (end the survey)
 - Do you have any questions for me before we begin the interview?

Questions:

1. On your questionnaire, you noted the following as strengths of the *Federal Resource Guide*: [Insert positive responses from questionnaire]. Can you tell us what you liked about the *Federal Resource Guide*?
2. On your questionnaire, you noted the following as weaknesses of the *Federal Resource Guide*: [Insert negative responses from questionnaire]. Can you tell us what you would like to see improved in the *Federal Resource Guide*?
3. Do you have any additional feedback on the *Federal Resource Guide* that we have not yet covered?

4. What actions have you taken or what decisions have you made about your financial and healthcare situation since receiving the *Federal Resource Guide*?
5. What actions do you plan to take or what decisions do you plan to make about your financial and healthcare situation as a result of the *Federal Resource Guide*?