

Approaching Retirement Federal Resource Guide Pilot: Focus Group Guide

Pre-Focus Group:

Instructions:

- You have recently been trained on the upcoming pilot of the *Approaching Retirement Federal Resource Guide*. Today we are going to ask you a set of questions to explore how you think the Federal Resource Guide might impact your and your clients' experience. We will also hold a second focus group after the first pilot period to assess your actual experience with the *Federal Resource Guide*.
- We will ask each question and then use a round robin approach to hear each person's answer to the question. If you prefer not to answer a specific question, please feel free to say "pass".
- We will be capturing the responses to the questions throughout the focus group. 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.

 - Is there anyone here who would not like to continue with the focus group?
 - Do you have any questions for me before we begin the focus group?

Questions:

1. What resources and tools do you currently use to provide your clients with information about federal healthcare and financial benefits related to retirement?
2. How do you anticipate the *Approaching Retirement Federal Resource Guide* will improve your clients' counseling experience?
3. How do you anticipate the *Approaching Retirement Federal Resource Guide* will improve your clients' ability to find relevant information?

4. How do you anticipate the *Approaching Retirement Federal Resource Guide* will help meet the full range of your clients' needs?
5. How do you anticipate the *Federal Resource Guide* may impact your experience with clients?
6. How do you anticipate the *Federal Resource Guide* might clarify your clients' understanding of the appropriate next steps to take?
7. What barriers do you anticipate your clients might have using the *Federal Resource Guide*?
8. What concerns, if any, do you have about using the *Federal Resource Guide*?
9. What other opportunities or risks do you anticipate the *Federal Resource Guide* might create?

Post-Focus Group:

Instructions:

- You have recently had the opportunity to try out the *Approaching Retirement Federal Resource Guide* with your clients. Today we are going to ask you a set of questions to explore how the *Federal Resource Guide* impacted your and your clients' experience.
- We will ask each question and then use a round robin approach to hear each person's answer to the question. If you prefer not to answer a specific question, please feel free to say "pass".
- We will be capturing the responses to the questions throughout the focus group. 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.
- This data collection has been approved by the Office of Management and Budget (OMB). The OMB Control Number for this survey is XXX. If you would like to comment on this data collection or confirm that this is a valid collection, please contact Maggie Flowers at ACL at 202-795-7315.
 - Is there anyone here who would not like to continue with the focus group?
 - Do you have any questions for me before we begin the focus group?

Questions:

1. How did the *Approaching Retirement Federal Resource Guide* improve your clients' counseling experience?
2. How did the *Approaching Retirement Federal Resource Guide* improve your clients' ability to find relevant information?
3. How did the *Approaching Retirement Federal Resource Guide* help meet the full range of your clients' needs?
4. How did the *Federal Resource Guide* impact your experience with clients?
5. How did the *Federal Resource Guide* clarify your clients' understanding of the appropriate next steps to take?
6. To what extent did your clients receive the *Federal Resource Guide* at an appropriate time in their decision-making process?
7. What barriers, if any, did your clients have using the *Federal Resource Guide*?
8. To what extent did the *Federal Resource Guide* reduce the time needed to find information about federal resources?
9. What, if any, issues arose in using the *Federal Resource Guide*?
10. What content, if any, was missing from the *Federal Resource Guide* that would be helpful to your clients?
11. Which modules in the *Federal Resource Guide* were most helpful to you and your clients? [list modules]
12. Were there counseling sessions in which you intended to use the *Federal Resource Guide*, but didn't? Why?
13. What other opportunities or risks did the *Federal Resource Guide* create?