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Through: Tomakie Washington
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From: Sherrette Funn
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Date: April 17, 2024

Subject: IC Revision request for the ACL Generic Clearance for the Collection of
     Qualitative Research and Assessment

The Administration for Community Living (ACL) requests a revision to the ACL Generic Clearance for the Collection of Qualitative Research and Assessment Data OMB Control Number 0985-0080.

Background
Attached for your review is a revision request correcting an administrative error in the ROCIS record for the ACL Generic Clearance for the Collection of Qualitative Research and Assessment Data under OMB Control Number 0985-0080. This generic information collection type is for the purpose of conducting qualitative research to gain a better understanding of emerging issues related to ACL's grantees, service providers, and programs; develop future intramural and extramural research projects; and to ensure HHS and ACL leadership, programs, and staff can obtain timely and relevant data and information. In May 2023 ACL submitted a new request to collect generic qualitative research and assessment data without selecting the new IC as a "Generic". This omission indicating the IC as a generic prevents the system function to properly add and drawdown annual burden for any individual IC under the umbrella OMB control number 0985-0080. ACL requests this revision with your pre-approval to re-enter the 2023 citations, update supporting statement part A and provide a supplementary memo detailing the specific revision actions required.

This collection of information is necessary to enable ACL to receive feedback in an efficient, timely manner, in accordance with our mission to maximize the independence, well-being, and health of older adults, people with disabilities, and their families and caregivers.

Qualitative research, evaluation, and assessment are the main objectives of the activities included in this IC. The goal of developing these activities is to identify emerging issues and research gaps to ensure the successful implementation of ACL programs.

Correcting this record will allow ACL to continue its support of the broader effort coordinated by the Office of Management & Budget (OMB) to assess customer life experiences and conduct qualitative research to identify areas for improvement to the Approaching Retirement project. This project includes two key elements: Approaching Retirement Federal Resource Guide (FRG) and a supporting Federal Forum on Serving Older Adults ("Federal Forum").

On December 13th, 2021, President Biden signed E.O. 14058, Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government, which charges members of the President's Management Council (PMC) to form interagency teams, coordinated by OMB, to designate and assess cross-agency customer life experiences, work to develop measurable improvements for such customer life experiences that involve multiple agencies, develop prospective plans to rigorously test what works, and share lessons learned across the Federal Government.

The FRG developed by the OMB-led interagency team is intended to help older adults, particularly those with lower incomes or who continue to work into older age to cover their expenses, understand and navigate the interconnections between retirement benefits options, their financial situations, and their health outlooks. ACL has been designated as the agency with primary responsibility for piloting and evaluating the FRG prototype. As such, ACL has initiated a pilot program with community-based organizations (CBOs) who provide counseling and outreach to older people in their communities.

In addition, ACL will host four Federal Forum meetings over the next year to bring together staff from CBOs to learn from federal agencies about a broad range of topics that matter to low-income older adults and those that serve them including: finances, taxes, food, healthcare, housing, transportation, working, and more. The workshops will be facilitated jointly by federal benefit experts from agencies such as the Social Security Administration (SSA), Centers for Medicare & Medicaid Services (CMS), Department of Housing & Urban Development (HUD), Consumer Financial Protection Bureau (CFPB) and more. ACL will also evaluate the effectiveness of these sessions.

The data collection associated with this pilot program aims to collect feedback from both CBO staff as well as older people receiving counseling (clients). Specifically, ACL will collect data on the impact of the FRG on clients' decisions, the effectiveness of the FRG, the efficiencies gained using the FRG, the impact of the FRG on counselee sentiment and staff morale, as well as feedback on the "look and feel" and content of the FRG. The data collection will employ the following qualitative research methods:
- Focus Groups: Focus groups will be held with CBO staff before and after each pilot period. The focus groups will be conducted virtually.
- Client Questionnaire: Questionnaires will be provided to clients following their interaction with the FRG to collect their feedback on the Guide.
- Observations: CBO staff will observe each other's counseling sessions using an observation checklist.

- Client Interviews: The questionnaire to clients will ask if they are willing to make themselves available for a follow-up interview. These interviews will be conducted virtually with those who volunteer.

The findings of the qualitative research will be made available on performance.gov in accordance with the other products and documentation resulting from the interagency Approaching Retirement effort.
All limitations on the collected data will be disclosed in the posted report. The information gathered through this data collection will not influence any public policy decisions.