



CX Discovery: Member of the Public Consent Form

THANK YOU FOR SPEAKING WITH US!

1. Who are you and what is the project about?

We're a team of people from across the Federal government - led by a team member from the Office of Management and Budget (OMB). OMB is an office in the White House that coordinates initiatives across the whole of Federal government, including on things like how Federal agencies spend money and how they better work together for people. Today we are working with non-profit research partners as well to help us capture stories from people about what it's like to have an unexpected cost, and if you have, what it's been like trying to get help.

2. What will you be asked to do today?

We will ask you to speak honestly about your experiences. You may be asked about your experience approaching retirement. We may also ask about what it's been like to apply for different government programs. Our session will take about **30 to 60 minutes**, but you can stop at any time.

3. Do you have to talk to us?

No, you don't. Your participation is voluntary. The information you agree to share is up to you. Your application, eligibility, or continued receipt of government benefits (for example, food stamps, Medicaid, and WIC) will not be affected, whether you choose to talk to us or not.

4. Will we keep your participation totally confidential?

Here's how we'll protect your confidentiality:

- We will generate anonymous codes so that our research notes are not tied to your name.
- We will avoid including identifying information in our publicly shared materials.
- We will combine information from different research participants. Usually, no single person is the obvious source of the information we share.
- We will never use your name or likeness without your permission.
- We will never retrieve your Individual responses by the anonymous code.

Still, there is a small possibility that someone who knows you might recognize you from things you tell us. Because of this, we can't promise you total confidentiality.

5. What happens with the information you share with us?

We will use what we learn from you, and from other people we speak with, to make reports and materials for our project partners so that they can improve their services. We may also talk about this project on the Internet or at conferences or presentations. If you'd like to see an example of what this looks like, you can go to <https://performance.gov/projects> to see how we've shared what we learned from other peoples' stories.



6. How will you store and protect my information during and after the project?

Only members of our project team will have access to any personal data you share with us and the notes from this interview. We will use what we learn from you, and from other people we speak with, to make reports and materials for our project partners so that they can improve their services. We may also talk about this project on the Internet or at conferences or presentations.

7. What are the risks of sharing my information with you?

We will ask you to speak honestly about your experiences. A risk is that you could feel uncomfortable answering our questions. If you ever feel uncomfortable, you do not have to answer. If we get information during our research that makes us think you or someone else is in danger, we may offer assistance to you or get assistance for you, including referrals to appropriate agencies.

8. What are the benefits of sharing my information with you?

Depending on the length of the interview you will be given a gift card for either **\$25** or **\$50** to thank you for your time. We also hope that the information you share with us will help improve how people access, receive and maintain their government benefits, and provide clear and supportive information for when people approach retirement.

9. What if I change my mind about sharing my information with you?

You can stop participating at any time, for any reason. You can tell us at any time during our conversation if you don't want us to use the information you have already given us.

11. What if I have questions or concerns?

For questions or concerns you can contact **Amira Boland** at Amira.C.Boland@omb.eop.gov. You can also call and leave a message at 202-881-8694.

You can also go to the OMB website to learn more about the project:
<https://www.performance.gov/cx/projects/approaching-retirement/>



Resources

If you or someone you know would like help accessing or receiving public benefits, child care or other children's support services, here are some resources you might find helpful.

TBD, USA

Benefits access website: tk+

Benefits access helpline: tk+

Childcare/ Support for children and families:

- tk+

Community based organizations that can provide support:

- tk+



CONSENT QUESTIONS

Please circle your answers.

Capturing Your Story

May we take notes while we talk?

Yes / No

May we audio-record our conversation for note-taking purposes?

Yes / No

Describing You

What pronouns should we use to describe you?

He / She / They / Other:

Statement of Consent

I have read all the information in this form and received answers to any questions I have asked. I consent to take part in this interview and to have any information I provide be used in the manner described.

I understand that I can withdraw my consent at any time by contacting Amira Boland at (Amira.C.Boland@omb.eop.gov).

Your Signature

Your Name (printed)

Date



POST INTERVIEW CHECKLIST

- ☐ Review previous consent answers. Is there anything you want to now change?
- ☐ Fill out optional personal questions below.
- ☐ Make sure you received your compensation!

PERSONAL CHARACTERISTICS

We ask the questions below to ensure we collect information from people who represent the diversity of the cities we conduct research in. All of these questions are optional. You do not need to answer any question that you feel uncomfortable answering.

Age

- ☐ 18 to 24
- ☐ 25 to 34
- ☐ 35 to 44
- ☐ 45 to 54
- ☐ 55 to 64
- ☐ 65 to 74
- ☐ Over 75

Gender

- ☐ Female
- ☐ Male

Household Income

- ☐ Under \$12,400
- ☐ \$12,401 to \$20,000
- ☐ \$20,001 to \$30,000

- ☐ \$30,001 to \$40,000
- ☐ \$40,001 to \$50,000
- ☐ Over \$50,000

Race/Ethnicity (select all that apply)

- ☐ Asian
- ☐ American Indian or Alaska Native
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Hispanic or Latino
- ☐ White

Education Completed

- ☐ Junior high school
- ☐ High school (or equivalent)
- ☐ Associate/technical degree
- ☐ Bachelor's degree
- ☐ Graduate degree



PUBLIC BURDEN STATEMENT

We estimate completing this collection takes an average 60 minutes. Email comments regarding our estimate or any other aspect of this survey, including suggestions for reducing completion time, to the Office of Management and Budget, Customer Experience Team at MBX.OMB.CX@omb.eop.gov (RE: 3206-0276). The OMB Number, 3206-0276, is currently valid. OMB may not collect information, unless this number is displayed.

PRIVACY NOTICE

OMB is authorized to collect the information by Executive Order 12862, "Setting Customer Service Standards" and Executive Order 14058, "Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government", which discuss the principal purpose in collecting this information. The principal purpose in collecting this information is to understand the life experience of people approaching retirement, including the moments that matter most, the most significant pain points, and the supports and services that work for them. Only staff involved in collecting or preparing this information for analysis will have access to your responses. The information you provide will be used to improve federal service design and delivery, focusing on the life experience of approaching retirement. Your response to this survey is voluntary and there is no penalty for not responding. However, maximum participation is encouraged so that the data will be complete and representative.