



COALITION OF FEDERAL OMBUDSMAN

MEETING MINUTES

Meeting Date/Time: December 11, 2019 1:30pm – 3:00pm (EST)

Location: American Red Cross

Agenda:

1. COFO Email/Google Group Update
2. COFO Mentoring Committee Update
3. COFO Elections
4. COFO Winter Social Gathering
5. Discussion Topic: Absence Planning
6. General Questions
7. Announcements

Highlights:

1. COFO Email/Google Group Update

- a. We are continuing our testing and apologize for duplicate emails. If you have accepted an invite from our Google group but have not received an invite for the monthly meetings, please email Paul Sotoudeh: Paul.Sotoudeh@USPTO.gov

2. COFO Elections

- a. COFO Executive Committee ends 1 March 2020. We are seeking volunteers for the nominating committee and seeking practicing ombuds to run for the individual committee roles. Roles include: Chair, (2 positions for the following): Vice Chairs, Secretaries, and Coordinators. Position descriptions can be found at: <https://federalombuds.ed.gov/s/charter>
- b. Requirements & Eligibility
 - i. Nominating Committee: seeking practicing ombuds and/or ADR/CR Specialists to assist with elections
 - ii. COFO Executive Committee Candidates: current practicing federal Ombuds, who practice to the values enumerated in the COFO Charter (see Voting members below for a full description) and cannot be members of the election committee.
 - iii. Voting Members: Ombuds working for federal agencies who practice according to the following values enumerated in the COFO Charter:

“We believe Ombuds to be independent , neutral, and impartial, and confidential. We strive for objectivity and fairness when assisting those involved with and impacted by federal government agencies.

We strive toward a leadership style based on cross-agency collaboration and interdisciplinary experience. We recognize and honor the widely divergent constituents we serve, practices we use, and people we are. This breadth of activity and experience provide for valuable exchanges.

3. COFO Mentoring Committee Update

- a. COFO Mentoring committee is getting ready to launch orientation sessions for its third round of mentor/mentees. YTD the group has successfully recruited new mentors and mentees, totaling to 46 individuals; 23 pairs. The program is designed to provide an opportunity of growth for both mentors and mentees. The third round will include 9 mentors total (6 internal/3 external) and 9 mentees. The program is suitable for internal and external ombuds. If you have any questions, please contact COFOMentoring@nih.gov

4. Discussion Topic

- a. Discussion Topic: Absence Planning – How do federal ombuds plan for circumstances, such as succession or long-term absence, where expected workflow processes are upended? How do ombuds offices, especially small or solo offices, make sure the work gets done when someone is leaving or has to be out of the office for an extended period of time? Is it possible for ombuds offices to create work redundancies for themselves? If so, how?
 - i. Participants began the discussion with addressing extended absences. With the assistance of technological tools such as cell phones, video-tele conferencing, and email, ombuds practitioners rely ensure they are reachable should assistance be needed due to an extended absence. Use of a Chaplain, EAP or another entity who has similar standards of practice in terms of confidentiality and neutrality are utilized to serve the workforce. For example, an out of office message may state, “If it is urgent, you might want to consider if EAP services are an option” – practitioners stated their need to ensure there was continuous coverage despite absences.
 - ii. A participant stressed the importance of language we use, including putting “confidentiality” without keeping records and not really applying “confidentiality” as other components would do (i.e. Human Resources).
 - iii. Participants discussed the types of absences: depending on long- or short-time absences, practitioners are able to work faster/longer, hire an ombuds assistant (i.e. contractor or internal), and/or triage the work based on priority. The long-term approach would rely upon strategic planning.
 - iv. Succession planning: should a practicing ombuds retire, federal agencies may offer phase retirement, or allowing the current practitioner to work part time, while training the individual who may back fill the position.

5. General Questions

- a. Question: What are considerations to set up a new service?

- i. Logistics: setting up a new office entails timelines and milestones to set up an office (i.e. flyers, an office space, etc.). Setting up an office space away from senior leadership of an organization is necessary to maintain independence and autonomy.
- ii. Standards: establishing an office based on IOA standards is vital to the success of an organizational ombuds office. Participants discussed the element of respect by the agency, such as senior level buy in, high level reporting are necessary to make the office relevant.
 1. Establishing a charter or terms of reference should be in writing.
 2. Stakeholder process to build consensus with stakeholders and leader buy in via negotiation. The Japanese term, introduced by Ms. Mary Rowe, MIT Ombuds, “Nemawashi” was referenced as a synonym to illustrate the importance of setting up an ombuds office in accordance to IOA standards. The term is defined as “an informal process of quietly laying the foundation for some proposed change or project, by talking to the people concerned, gathering support and feedback, and so forth.”¹
 3. Providing training to the workforce and prepare to explain yourself and services continuously!

6. Announcements

- a. Next COFO Monthly Meeting will be held at the American Red Cross.
- b. IOA Conference is scheduled from 30 March to 3rd April. A reminder to book your hotel rooms early as the blocked rooms fill up quickly.
- c. COFO Holiday Winter Gathering/Happy Hour 13 December at Astro Beer Hall, 1306 G Street NW.

¹ Kopp, R. (2019). Articles of Interest. Retrieved from, <https://www.japanintercultural.com/en/news/default.aspx?newsID=234>

UNCLASSIFIED

**COFO Attendance List
11 December 2019**

Last	First	Department	Agency	In-Person
Colsky	Andrew	Department of Homeland Security	Transportation Security Administration	1
Hill	Gary	Department of Defense	National Geospatial-Intelligence Agency	1
Kinnavy	Noreen		Int'l Broadcasting Bureau Voice of America and Office of Cuba Broadcasting	1
Sotoudeh	Paul	United States Patent and Trademark Office		1
Villafañe	Jacqueline		American Red Cross National Headquarters	1
			Total	5
Last	First	Department	Agency	Call-In
Balick	Howard	Department of Health and Human Services	Food and Drug Administration	1
Berg	Mollie	Department of Defense	National Geospatial-Intelligence Agency	1
Brown	Andrea	United States Patent and Trademark Office		1
Cameron	Bob		CFBP Private Education Loan Ombudsman	1
Epps	Ayanna	Federal Deposit Insurance Corporation	Office of the Internal Ombudsman	1
Fox	Angela	United States Department of Agriculture		1
Gnatt	Sheldon	Department of Defense	National Security Agency	1
Gordon	Laurel	Department of Justice	US Marshals Service	1
Heffernan	Claire	Department of Homeland Security	Transportation Security Administration	1
Katherine	Erica		Food and Drug Administration	1
Lee	Joy	NCUA		1
Leone	Joseph	Department of Defense	National Security Agency	
Levine	Lisa	Department of Justice		1
Maurer	Bill	U.S. Census Bureau		1
McGuire	Carrie	Office of Government Information Services	NARA	1

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McNeil	Tracey	U.S. Securities and Exchange Commission		1
Merrix	Celeste	FLETC		1
Mesbahi	Mohammad	Internal Revenue Service		1
Michael	David	Department of Health and Human Services	National Institutes of Health	1
Morey	Chauncenette	Department of Justice	Federal Bureau of Investigation	1
Patel	Bina	Department of Homeland Security	Federal Emergency Management Agency	1
Porch	Susanne	NIST		1
Rowe	Mary			1
Shakur	Jerry		U.S. Army Medical Command	1
Vermillion	Chris		Transportation Security Administration	1
Weber	Guy	Department of Defense	National Geospatial-Intelligence Agency	1
Whyte	Jean	Federal Reserve Board		1
Wolfe	Lexi	Department of Energy		1
			Total	1
				28