



# COALITION OF FEDERAL OMBUDSMAN

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## MEETING MINUTES

**Meeting Date/Time:** July 11, 2018, 1:30pm – 3:00pm

**Location:** USDA, 1400 Independence Ave, SW, 1st Floor, Room 1052(c) and Dial-in

### **Agenda:**

1. Update on COFO Listserv Issues
2. COFO Conference Update
3. Mentoring Committee Update
4. USOA Conference/Federal Practice Sector
5. NARA Records Schedule Discussions Update
6. ABA Ombudsman Committee Update
7. Announcements
8. Discussion Topic: Keeping Above the Fray

### **Highlights:**

#### **1. Update on COFO Listserv Issues**

- a. Functional issues with the COFO Listserv are worsening; the Executive Committee is working with the Department of Education to resolve.
- b. Presently the Executive Committee is employing a workaround that involves simple distribution list for COFO members.
- c. RSVPs to COFO monthly meetings should include full participant information to ensure that the distribution list is complete.
- d. If you are not getting COFO emails, or if you need any assistance sending something to the COFO membership, please reach out to Paul Sotoudeh, Heather Milner, or Tyler Smith.

#### **2. COFO Conference Update**

- a. The 2018 COFO conference will be held on Friday, October 12. On July 3<sup>rd</sup> the Conference Committee met to discuss logistics and content.
- b. A survey will be sent out with a save-the-date and registration survey to solicit ideas about topics. In addition, a webcast link is being explored.
- c. If you have any questions, or may be available to assist in logistics on the conference day, please reach out to Bina Patel or Tyler Smith.

#### **3. Mentoring Committee Update – Congrats to the Selected Members!**

- a. Congratulations to the members selected for the mentoring committee: Virginia Behr, Felicia Bunns, Laurel Gordon, Wendy Kamenshine, and David Michael.

- b. The membership will serve for two years and are presently at work selecting a chair/co-chair; the COFO Executive Committee will identify an ex officio member to maintain communication with the Mentorship Committee.
- c. Applications will subsequently be solicited from prospective mentors and mentees and assignments will be made in the near term. Thanks to all for the continued interest.

#### **4. USOA Conference/Federal Practice Sector**

- a. The USOA annual meeting will be held in Portland, OR on September 26-28, 2018. The Federal Practice Sector will hold its chapter meeting on September 26 from 3:15 – 5:00pm.
- b. Tangita Daramola is the acting Chair of the Federal Practice Sector and is working to infuse new life into the chapter. She and Yolanda Swift are conducting interviews and soliciting ideas for panel engagements.
- c. In addition, the discussion will follow up on the “Tools in Times of Change” topic discussed at the Government Sector Meeting at IOA 2018.
- d. It is the opinion of past participants that, while USOA is focused on external ombuds, the conference is also useful for internal Ombuds.

#### **5. NARA Records Schedule Discussions Update**

- a. Thank you to the Department of Energy for its work in pulling together a compendium of existing records schedules.
- b. Please let us know if there are any missing schedules from the following list: CFPB, CIS Ombudsman, Energy (2, one each for the program and database), EPA, NGA, NSA, OPM, and proposed schedules actively going through the NARA process (TSA and USPTO).

#### **6. ABA Ombudsman Committee Report**

- a. The ABA Dispute Resolution Section is coordinating activities for Ombuds Day, to be held Thursday, October 11.
  - i. There will be an evening reception at ABA’s Washington, DC offices; this event will include a speaker TBD and a World Café-style engagement focused on learning about the different types of Ombuds.
  - ii. Volunteers are solicited for a variety of activities, including representing a type of Ombuds, coordinating logistics, and bringing colleagues to learn more about Ombuds.
  - iii. In addition, volunteers are pulling together a toolkit with useful information on Ombuds and a branding logo for Ombuds Day that can be used for on-site observations.
  - iv. Please contact Lauren Marx or Wendy Kamenshine to volunteer or to ask any questions.
- b. The September issue of the ABA Dispute Resolution Section’s newsletter (Just Resolutions) will focus on Ombuds programs.
- c. The Section is also working on a Model Ombuds Act focused on internal ombuds, which could be used to establish Ombuds in academia, corporate, and federal spaces.

## 7. Announcements

- a. **Department of Energy Associate Ombudsman** – DOE Associate Ombudsman Patrick Holman announced that he will be leaving the DOE at the end of July. It is anticipated that the Department will post this position in the very near future at the GS-14/15 level.
- b. **NIH Scientist Ombuds Fellowship** – In the next 2-3 weeks, NIH will announce the availability of a fellowship focused on apprenticing post-graduate scientists into the Ombuds profession. This will be a term-limited fellowship at the GS-11 level.

## 8. Discussion Topic: Keeping Above the Fray

- a. Continuing from the 2018 IOA Government Sector Networking session, COFO monthly meetings will periodically examine topics associated with the “Tools in Times of Change” theme.
- b. The goal is to share lessons learned and also offer a forum for asking questions of fellow Ombuds.
- c. This week, the topic was on Keeping Above the Fray, which focused on how we can avoid getting mired in agency culture, take care of ourselves, and continue to be the best ombuds for our visitors.
- d. The discussion touched on many areas, including –
  - i. How Ombuds helps new leadership and staff understand agency culture as a driver for organizational behaviors, providing useful context from an independent and neutral resource.
  - ii. How Ombuds market their program through proactive outreach to leadership, management, and staff, reminding organizational members that “we’re your Ombuds team – we’re here to help”.
  - iii. How Ombuds act as “canaries in the coal mine”, seeing struggles in real time and identifying systemic issues and how the culture pushes and pulls behavior in specific ways, and working with senior leaders to bridge their gaps in understanding.
  - iv. How Ombuds strive to understand their own circumstances, including the need to match service delivery to available resources, and to think strategically about how programs may best serve as mission enablers in specific organizational contexts.
  - v. How Ombuds may constructively engage with too-hot-to-handle issues that organizations may not be willing or capable of recognizing or addressing. In those times, Ombuds may work to capture/preserve these issues, their contexts, and potential drivers for the future in order to help us focus on where we can make a difference today - similar to the efforts of monks in the Middle Ages.

**Attendees:****In-Person**

Sean Colligan, Department of Energy  
Gary Hill, Department of Defense  
Patrick Holman, Department of Energy  
Noreen Kinnavy, International Broadcasting Bureau  
Bill Maurer, Department of Energy  
Paul Sotoudeh, US Patent and Trademark Office  
Robert Webb, Armed Forces Retirement Home  
Lexi Wolfe, Department of Homeland Security

**Call-In**

Howard Balick, Department of Health and Human Services  
Michael Barrera, Small Business Administration  
Dawn Bedlivy, National Security Agency  
Virginia Behr, Department of Health and Human Services  
Tangita Daramola, Department of Health and Human Services  
Kimberley Day-Lewis, Department of Homeland Security  
Ayanna Epps, Federal Deposit Insurance Corporation  
Brenna Fisher, NARA  
Angela Fox, United States Department of Agriculture  
Laurel Gordon, Department of Justice  
Claire Heffernan, Department of Homeland Security  
Erica Katherine, Food and Drug Administration  
Wendy Kamenshine, Consumer Financial Protection Bureau  
Natalie Landau, Department of State  
Marcia Larkins, Department of Health and Human Services  
Laurie Lenkel, Department of Health and Human Services  
Stephanie Luckam, Department of Homeland Security  
Sarah Majdiak, Community Relations Service  
Lauren Marx, Chi Associates  
Carrie McGuire, Office of Government Information Services  
Celeste Merrix, Department of Homeland Security  
David Michael, Department of Health and Human Services  
Heather Milner, Consumer Financial Protection Bureau  
Kirsten Mitchell, Office of Government Information Services  
Bina Patel, NGIC  
Eric Raines, Federal Deposit Insurance Corporation  
Rafael Roman, National Ocean and Atmospheric Agency  
Mary Rowe, Chi Associates  
Alina Semo, National Archives and Records Administration  
Tyler Smith, Department of Health and Human Services  
Jock Stukes, National Reconnaissance Organization  
Benita Swann, Federal Deposit Insurance Corporation  
Roberta Valdez, Federal Deposit Insurance Corporation  
Don Walker, Department of Defense

Guy Weber, Department of Defense  
Karen White, National Guard Bureau  
Rea Wynder, Department of Homeland Security