



COALITION OF FEDERAL OMBUDSMAN

COFO MONTHLY MEETING MINUTES

Meeting Date/Time: September 14, 2022, 1:30-3:00pm (EST)

Location: Video/telephone

Agenda:

1. Open Co-Coordinator Position – Nominations and election shortly
2. COFO 2022 Annual Conference – Friday October 14th – registration opening soon!
3. Mentoring Committee update
4. New COFO Website is live – [ADR.gov/COFO](https://adr.gov/COFO)
5. Peer Practitioner Network update
6. Ombuds Day 2022 is October 13th
7. Voluntary Leave Transfer Initiative reminder
8. Next Ombuds Supporting Ombuds (OSO) meeting
9. Announcements – Training opportunities, job openings, or really any office and ombudsman happenings you'd like to tell the world about
10. General Questions - Space for new and emerging practitioners and programs to ask questions and get feedback from the COFO community in a short discussion format
 - From a COFO member – “Do any internally-facing ombuds here serve Personal Service Contractors, not to be confused with POVs?” The member is not sure this question applies to anyone but even knowing that will be helpful to them.
 - Your question here!
11. Discussion Topic
 - “Do you have a practice manual? If so, is it worthwhile?” – Discussion on the usefulness of practice manuals as a resource for building and maintaining ombuds programs
 - Your topic here!

Highlights:

- 1. Open Co-Coordinator Position – Nominations and election shortly**
 - As mentioned earlier this year after elections, there will be an election in the near future to fill a vacant Coordinator position.
 - Consider running for that position if interested in joining the Executive Committee. More information and how to nominate yourself will be shared soon.
- 2. COFO 2022 Annual Conference – Friday October 14th – Registration opening soon**
 - Next month, one month from today. It will be an all virtual conference again, even though there were prior discussions about potentially going hybrid but there are a number of reasons that just won't work.
 - Registration will open very shortly. We've just about selected all the presentations and will have an agenda ready shortly after registration has opened.

- Also working to put together a post-conference get together/happy hour for those who are interested.
- No monthly meeting next month, the conference replaces the monthly meeting.
- Questions raised about duration of conference and the platform to be used.
 - Answer provided, an all day conference and most likely 9am to 5pm, and that the platform will be WebEx.

3. Mentoring Committee Update

- Chair of Mentoring Committee shared that a new cohort will begin this coming January, the program would run January through December.
- The committee will be sharing information about applying to be a mentor or mentee most likely in October. Highly encourage people to apply.
- The criteria are not strict, but you do need to be a practicing ombuds to apply.
- Committee Chair will be stepping away from the committee, and others who are at the end of their term, so committee will need additional members. Joining should be a pretty easy transition given what has been established combined with the current members who will be continuing to participate. If interested, let the Committee Chair and/or Executive Committee know.

4. New COFO Website is live – ADR.gov/COFO

- Old site no longer active, change your bookmarks if you haven't already!
- Still working on putting up all of the documents and other information previously on old site. Will also be able to edit the new site, which we weren't able to do ourselves in the past, so this means that information about the annual conference, for instance, or other COFO updates will be updated as soon as they are available.
- If you have recommendations for what should be visible on the website, let us know.

5. Ombuds Day 2022 is October 13th

- Day before the annual conference.
- COFO will be represented in a webinar, and thanks to everyone who volunteered to share their story.
- Not sure which platform will be used, but it is completely virtual and registration is open. ABA usually uses Zoom, but more information about platform will come soon.
- COFO members receive discount to ABA events as a cooperating entity, so if you are interested in attending make sure to mention your COFO affiliation. Should be \$50 for COFO members.

6. Voluntary Leave Transfer Initiative Reminder

- For those approved by agency to enter voluntary leave transfer program but do not want to ask those within agency for leave donations, this program connects ombuds who need leave with other ombuds who are able to donate leave.
- Let anyone on Executive Committee know if you need leave or are interested in donating.

7. Next Ombuds Supporting Ombuds Meeting 9/28 from 2pm-3pm

- Opportunities to connect with other ombuds to discuss things going on each other's lives and support each other outside of ombuds work.

8. Announcements

- CFPB posted an Associate Ombudsman position. The post was sent around to COFO email distribution list earlier today. The post opened today and will be open through 9/22. There are also location flexibilities and potentially 100% telework and/or remote.

9. General Question submitted in advance: Are there any internals with COFO who serve personal service contractors?

- Quite a few people responded no, and there wasn't anyone who responded yes.
- 10. Peer Practitioner Network Update**
- Chair of that network shared that the program has been successful and will be continued in the next fiscal year.
 - There is a form to complete for those who are interested, which will be shared shortly, most likely by the end of this week. Goal is to have new groups identified and meeting by the end of November.
- 11. Discussion Topic: "Do you have a practice manual? If so, is it worthwhile?"** – Discussion on the usefulness of practice manuals as a resource for building and maintaining ombuds programs and, if people have one, what is in it?
- Someone shared that they never had one or even really needed one when they were a solo practitioner, but when their office expanded there would have been value in it, so that the new person/people wouldn't feel like they needed to follow everything the lead ombuds did.
 - This person's concern, meanwhile, is that SOPs can be too restrictive.
 - They do have a document though that is broken out by how they typically conduct intake, review suggested ways of putting someone at ease, and lists some typically helpful questions that serve as a sample for certain situations.
 - Something this person and co-worker have done is to sit down once per year and look at processes, procedures, and allow each other to remind themselves of how things are playing out practically speaking so that this document can be updated if necessary.
 - Someone shared that they left and recently came back to the practice, but have realized the potential value of having a practice manual for transitions to a new ombuds, and particularly who and how to connect with stakeholders.
 - Also included information about doing intake, follow-ups, how the ombuds space should and shouldn't be used.
 - It could also be a really helpful way to educate the organization.
 - Also became a, "here's what to do if you want to do a climate assessment, or run a mediation, etc."
 - Someone shared in the chat:
 - Chuck Howards book, here's what is referenced about practice manuals. Ch. 3 p 298 - documentation practice tips 1-9: "Consistency in practice is easier to defend." This is our practice and how we do it.
 - Someone else shared in chat, "really need to think about target audience for any document."
 - Someone else shared that they had something like this but called it SOP. The person who took over their role had zero ombuds training, so it was sort of a continuity book in the sense that it was all the information the next ombuds in line would need.
 - Also mentioned though that there was a concern among the legal team that, if someone ever requested or somehow got a copy, and the ombuds wasn't following practices according to that manual, there could be issues.
 - Someone else shared that SOP might not mean the same thing to every practitioner in a particular office.
 - To tackle this issue, they looked at IOA SOP, each practitioner in office answered the question about each IOA SOP, "what do each of us do related to ____?" And then the practice manual became a collection of, basically, answers to those questions that flush out how the office operates related to the IOA SOP.

- Also have in the practice manual how they report to whomever they report to.
- Views it as a defense mechanism, if needed. If there are questions about how they are practicing, it is there in writing.
- Question for those who have created this type of document, whether anyone in management wanted to review and approve it.
 - Reason for asking, this person intentionally made it look very informal because didn't want it to resemble a formal document of the agency's.
 - Comments in the chat said no.
 - Someone else shared that generally speaking, ombuds reports and documents should be reviewed by legal and that's it. No other role for management or legal with those documents.
 - Someone shared that it could be important to management and/or legal what you call the document and how it therefore presents itself.
 - Someone else entered into the chat that, "we do have a clearance process and if I had concerns or issues with any comments or concerns, I believe I would have had final say (the comments and concerns were OK with me so I didn't have to challenge)."
 - Someone who shared earlier what went into their practice manual said that there were people who asked if they could rephrase certain things, and the ombuds shared that no one outside ombuds office has editing privileges.
 - Someone in the chat shared, "In the spirit of drafting, I have decided that what I am developing (as yet unnamed) will be reviewed and updated annually to align with actual practice and things learned. I did not consider labeling it perpetually as a draft."
- The originator of this question shared that the initial interest was in establishing consistency, and also transparently sharing within their agency what the ombuds works on and how they work.
 - Someone agreed that consistency in ombuds practice is vitally important to the profession. Ombuds practicing to standards that other ombuds don't know about can cause us as a community some issues.
 - We have a lot of room in those IOA SOP, so further defining how we practice around them would be helpful.
 - Ask was made for everyone to give this some more thought, with the goal of creating some continuity in how and what we do when it comes to practice manuals or "continuity papers."

Attendees:

Last	First	Agency	Call-In
Anderson	Jeff	DOE	1
Baker	Jason	NIH	1
Behr	Virginia	FDA	1
Brown	Andrea	USPTO	1
Davidson	Kimberly	George Mason University	1
Garmon	Felisa	CFPB	1

UNCLASSIFIED

Green	Veronica	State OIG	1
Hartman	Jessie	NARA/ Office of Government Information Services (OGIS)	1
Kamenshine	Wendy	CFPB	1
Katikos	Nicole	?	1
Kinsman	Heather	?	1
Lawrence	Steve	DHS Office of Intelligence & Analysis	1
Levine	Lisa	DOJ / Executive Office of Immigration Review (EOIR)	1
Lewis	Mark	FDA	1
Manderson	Katie	VA	1
Maurer	Bill	Census	1
Miller	Carla	DOJ/ATF	1
Miller	Ellen	IOA	1
Monyei Whaley	Allison	DOD OIG	1
Patno	Arielle	FDA / Center for Tobacco Products	1
Porch	Susanne	Commerce / National Institute of Standards and Technology (NIST)	1
Robinson	Belinda	FBI	1
Rowe	Mary	Massachusetts Institute of Technology (MIT)	1
Schwartz	David	UNLV	1
Skodacek	Ken	FDA	1
Smith	Julie	Census	1
Smith	Tony	Census	1
Sotoudeh	Paul	USPTO	1
Stergio	Marcus	Office of Federal Contract Compliance Programs/DOL	1
Thomson	Ronnie	Sandia National Laboratories	1
Vermillion	Chris	DOE	1
Webb	Robert	?	1
Yuille Banford	Deanna	DOD/Defense Human Resources Activity	1
Zrubeck	Tom	?	1
		Total	34