



COALITION OF FEDERAL OMBUDSMAN

MEETING MINUTES

Meeting Date and Time: September 9, 2020, 1:30 pm – 3:00 pm (EDT)

Location: Teleconference

Agenda:

1. Next Ombuds Supporting Ombuds (OSO) – 09/23/2020
2. COFO Annual Conference Update
3. Ombuds Day Reminder – Ombuds Day is October 8th
4. Charter and Governance Workgroup Update
5. Mentoring Committee Update
6. Training Recap
7. General Questions - Space for newer ombuds and programs (and people looking to set up programs) to ask questions and get feedback. No issue is too big or small so ask away!
8. Discussion Topics:
 - a. Strategies, tips, and tricks for doing virtual communication at a distance with groups – we’ve all had different experiences over the last few months conducting meetings over video or on the phone with groups of people. Are there any lessons learned or best practices that you have developed that you can share with the group? Discuss them here!
 - b. Use of home/personal devices during the pandemic – There are many different platforms for virtual communication, and some are compatible with our “work” devices and some are not. What rules does your agency information technology department have in place? Do they permit you to use your “personal” device in this situation? If not, what are the ethical implications of using your “personal” device on “work” time? Would this make your device subject to a government search? (This does not include if you log on to your “work” VPN through your “personal” device.)
9. Announcements – Training opportunities, job postings, or really any office and ombudsman happenings you'd like to announce.

Highlights:

- 1. Next OSO Meeting – 09/23/2020**
 - a. Guest speaker for next OSO meeting will be Erin Gaudreault.
 - b. Ms. Gaudreault is a psychotherapist who uses emotionally focused therapy, a model based in attachment theory.
 - c. No set agenda for the call and any reflections, whether personal or professional, are welcomed.
 - d. Next Ombuds Supporting Ombuds (OSO) call on Wednesday, September 23, 2020, from 2 – 3 pm EDT.

- 2. COFO Annual Conference Update**
 - a. The COFO Annual Conference will be 100% virtual on October 16, 2020.
 - b. Tracey McNeil and Marcus Stergio are the co-chairs for the conference committee.
 - c. The agenda is almost complete, and the registration site will be up the week of September 14, 2020.

- 3. Ombuds Day Reminder – Ombuds Day is October 8, 2020**
 - a. Thursday, October 8, 2020, is Ombuds Day.
 - b. Ken Skodacek is a COFO member and the chair for the ABA Ombuds Day committee.
 - c. Proclamations will be issued for 40 states for Ombuds Day.
 - d. Join the discussion during the two sessions virtual events by registering at the following website:
https://www.americanbar.org/groups/dispute_resolution/events_cle/ombuds-day/
 - e. Ombuds Day has a Twitter handle, retweet and spread the word.
 - f. “Conversations with Ombuds” is an exciting new way to promote good information about the profession. See an email with an invite sent by Ken to join this recording.

- 4. COFO Charter and Governance Workgroup**
 - a. Bill Maurer<william.maurer@census.gov> is the chair of the Charter and Governance Workgroup.
 - b. Workgroup is tasked with reviewing the COFO Charter and other documents as needed to determine what if any changes are recommended.
 - c. Suggested changes will be submitted to the COFO Executive Committee to determine what recommendations will be voted on for change by the community.
 - d. Workgroup had its first meeting today, 09/09/2020 and the members are Bina Patel, Andrea Brown, Christine Megee, Claire Heffernan, Sarah Trujillo, and Bill Maurer.
 - e. Group will meet again in two weeks and everyone is encouraged to provide any suggested changes to any member of this group or to Paul Sotoudeh <paul.sotoudeh@uspto.gov>.

- **Added topic: COFO Website**
 - a. An updated listing of the current membership will be posted on the COFO website.

- b. Anyone who wants to opt-out of being listed on the public website can do so by responding to an email that will be sent out next week.
- c. Opting out of being listed will in no way affect your COFO membership or standing.

5. Mentoring Committee Update

- a. A presentation will be given at the COFO Annual Conference relating to feedback received from previous mentors and mentees.
- b. Announcement of sign-up for round four (4) of the COFO mentoring cohort is coming soon in mid-September.
- c. Terms of the current mentor committee members end this coming January. Please consider becoming a member of the mentoring committee.
- d. Everyone is encouraged to participate in the next round of mentoring as a mentor or mentee.

6. Training Recap

- a. 70 people attended the eight power hours of basic ombudsman training provided to new internal ombudsmen on August 31 – September 03, 2020.
- b. The basic training was developed by Scott Deyo at DOE along with other COFO colleagues.
- c. Overall very good feedback was received, and comments provided will be sent to all presenters. Thanks, and appreciation to all who participated.
- d. This basic training is not a replacement of any other training available and is intended to be an overview of the role of federal ombudsmen, independence and developing relationships with resource partners, confidentiality and records, remaining neutral, practical strategies, building rapport, and tracking/records maintenance.

7. General Questions

- a. Space for newer ombuds and programs to ask questions and get feedback.
- b. What is a COFO voting member? Quoted from [COFO Charter](#): “The primary governing body of the coalition is the voting membership, which shall be composed of Ombuds working for federal agencies who practice according to the values cited above when performing ombuds duties. If an agency has more than one Ombudsman (i.e. a sub-agency or division by subject matter or agency program), each Ombudsman (such as an associate and an assistant Ombuds) may be members of the voting membership” [Values are seen on [COFO Website](#)].
- c. You do not vote by office, you vote by person. Each person in an office has a single vote. Standards and values are listed on the COFO website.
- d. Does any ombuds have experience with personal service contractors versus regular contract workers? Personal service contractors receive their benefits via the federal government. Do you provide any conflict resolution support for these individuals? At NIH there were some services provided to contractors. Further questions could be followed up with the Ombuds at NIH.

8. Discussion Topics

- a. Strategies, tips, and tricks for doing virtual communication at a distance with groups – we've all had different experiences over the last few months conducting meetings over video or on the phone with groups of people. Are there any lessons learned or best practices that you have developed that you can share with the group? Discuss them here!
 - i. You may need to be more directive when having virtual facilitation conversations, especially sharing ground rules upfront.
 - ii. Also, consider actions such as controlling the muting function to allow people to speak and prevent people talking over each other. This is helpful because the natural cues to speak are not the same in a virtual environment.
 - iii. Consider if you are getting a full range of thoughts or opinions when leading virtual facilitations with a group.
 - iv. This virtual working environment is new for many people so giving people permission upfront to ask for clarifications or the need to repeat any information given is a helpful tool.
 - v. What are good visual options to use that protect the confidentiality of the visitor. Is Zoom or WebEx a good option?
 - vi. WebEx and Microsoft Teams are some options many agencies use. It was stated that Microsoft Teams creates a record of your meeting while not recording the meeting.
 - vii. There may be no system that is double blind and does not create any record of a call or meeting being held.
 - viii. It was stated that phone lines are also open records and there may have been a level of documentation that has existed and been maintained for all electronic systems even prior to the consideration of virtual environments.
 - ix. Records schedules are a good tool to use to ensure calendar invites and other digital trails are destroyed at a certain timeframe.
 - x. As always with any electronic record there still may be records at some level that exist.
 - xi. Using hand raise function or chat function is helpful with large groups.
 - xii. In large groups, to have an operator and speaker is helpful to ensure all technical difficulties are handled and questions sent via chat are addressed.
 - xiii. Ensuring the upfront conversations also includes the level of confidentiality known based on your technical limitations.
 - xiv. Clarity on how video/visual technology will be used. For example, ensure everyone knows that video can or cannot be used based on personal preference.
 - xv. Getting to know your technology and reaching out to your IT department when issues exist can be helpful to ensure your meetings are productive.

- b. **Due to time constraints topic was tabled until the November meeting.** Use of home/personal devices during the pandemic – There are many different platforms for virtual communication, and some are compatible with our “work” devices and some are not. What rules does your agency information technology department have in place? Do they permit you to use your “personal” device in this situation? If not, what are the ethical implications of using your “personal” device on “work” time? Would this make your device subject to a government search? (This does not include if you log on to your “work” VPN through your “personal” device.)

9. Announcements

- a. If you are an organizational Ombuds an email was sent with a request from Chuck Howard to provide examples of inquiries and successes. Chuck is writing another book and the information you provide will be entirely confidential.
- b. If you need to see the email again, please contact Paul Sotoudeh <paul.sotoudeh@uspto.gov>.
- c. **Virtual Annual Conference: Friday, October 16, 2020**
- d. Ombuds Supporting Ombuds (OSO) call on Wednesday, September 23, 2020, from 2 – 3 pm EDT.

Attendance 09/09/2020

Last	First	Agency	Call-In
Anderson	Jeff	DOE	1
Balick	Howard	FDA	1
Berg	Mollie	DOD / National Geospatial-Intelligence Agency (NGA)	1
Bloch	Brian	DOI	1
Caetano	Fernando	DOI	1
Cameron	Bob	CFPB	1
Carmouche	Colette	TSA	1
Coleman	Jean	SBA	1
Cecil	Tina	FBI	1
Deyo	Scott	DOE	1
Doty	Brenda	Federal Maritime Commission	1
Doyle	Bill	US Secret Service	1
Enriquez	Elisa	Los Alamos Laboratory (DOE)	1
Epps	Ayanna	FDIC	1
Foster	Cindy	FINRA	1
Frazier	Veronica	DOD / DIA	1
Garmon	Felisa	CFPB	1
Gordon	Laurel	US Marshals Service	1
Gnatt	Sheldon	NSA	1
Hartman	Jessie	NARA/ Office of Government Information Services (OGIS)	1
Heffernan	Claire	TSA	1
Hurley	Nathan	FDA / Center for Tobacco Products	1
Katherine	Erica	FDA	1
Kinnavy	Noreen	Broadcasting Board of Governors	1
Kurokawa	Nancy	Naval Criminal Investigative Service	1
Levine	Lisa	DOJ / Executive Office of Immigration Review (EOIR)	1
Lloyd	Brenda	FLETC	1
Mattice	Steve		1
Maurer	Bill	Census	1

UNCLASSIFIED

Last	First	Agency	Call-In
McGuire	Carrie	NARA / OGIS	1
McNeil	Tracey	SEC	1
Megee	Christine	DOD Education Activity	1
Mesbahi	Mohammad	IRS	1
Michael	David	NIH	1
Miller	Carla	DOJ / ATF	1
Miller Sander	Dawn	Conflict Transformation Associations	1
Milner	Heather	CFPB	1
Patno	Arielle	FDA / Center for Tobacco Products	1
Piziali	Jamie	EPA	1
Porch	Susanne	Commerce / National Institute of Standards and Technology (NIST)	1
Reed	Janay	DOD / DIA	1
Reilly	Kevin	NASA	1
Rojas	Nick	DOD / DIA	1
Rowe	Mary	Massachusetts Institute of Technology (MIT)	1
Skodacek	Ken	FDA	1
Small	Elizabeth	DOL	1
Sotoudeh	Paul	USPTO	1
Stergio	Marcus	Office of Federal Contract Compliance Programs / DOL	1
Sutch	Zina	SBA	1
Vermillion	Chris	TSA	1
Villafane	Jacqueline	American Red Cross	1
Voloshin	Victor	EEOC	1
Walker	Don	DOD / Army Medical Readiness Assistance Program	1
Weber	Guy	DOD / NGA	1
White	Karen	DOD / National Guard Bureau	1
Whittington	Fred (Whitt)	DOL OIG	1
Wolfe	Lexi	DOE	1
Yuille Banford	Deanna	DOD / Defense Human Resources Activity	1
		Total	58