



# COALITION OF FEDERAL OMBUDSMAN

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## MEETING MINUTES

**Meeting Date and Time:** November 10, 2021, 1:30-3:00 pm (ET)

**Location:** WebEx

**Agenda:**

1. 2021 COFO Annual Conference Recap
2. COFO Social Media Committee Update
3. 2022 COFO Executive Committee Elections
4. COFO Email List Status, Updates and Plans
5. COFO Mentoring Committee
6. COFO Voluntary Leave Transfer Initiative
7. Reminder – COFO website needs a new home
8. USOA Federal Government Chapter Meeting 11/17/2021
9. Next Ombuds Supporting Ombuds (OSO) meeting 01/26/2022
10. Announcements
11. General Questions
12. Discussion Topic

**Highlights:**

- 1. 2021 COFO Annual Conference Recap**
  - a. Conference was held on 10/15/2021
  - b. The 2021 COFO Annual Conference had 263 registrants which is the highest number recorded for a COFO conference
  - c. Pure total for attendance for overall attendance at conference was 225 – 235
  - d. If you were a registrant, the link to the conference video will be made available to you Friday morning
  - e. Thanks to the conference committee: Marcus Stergio (Chairperson), Bina Patel, Sandi Moore, and Sarah Trujillo
  - f. Thanks also to everyone on the COFO Executive Committee who helped and special thanks to Erica Katherine for the conference brochure
  
- 2. COFO Social Media Committee Update**
  - a. LinkedIn Group is live and ready for your participation

- b. This is completely voluntary for anyone who a member of COFO or interested in becoming a member of COFO
- c. To ensure that the group is closed to only those who fit membership criteria are added to the group, you will be asked to complete a five-question survey
- d. You need a LinkedIn Profile to join, and it is easy to create one if you don't have one already
- e. Your posts will be reviewed by the group Admin to ensure ombuds related information only is added to the group
- f. ABA Ombuds Link is another LinkedIn group that ombuds can join

### **3. 2022 COFO Executive Committee Elections**

- a. The current Executive Committee term ends on March 1
- b. An election committee needs to be empaneled to run the 2022 – 2024 elections
- c. The election committee is a good way to be involved without the 2-year commitment to the Executive Committee
- d. If you are interested in being nominated and elected as an Executive Committee member you must be a voting member of COFO
- e. A voting member of COFO is an ombuds working for a Federal agency who practices according to the values cited in the COFO Charter when performing ombuds duties
- f. All positions except Chair are held by 2 people
- g. Positions are Chair, Vice Chair, Secretary, and Coordinator
- h. The Chair shall convene and preside over meetings; oversee the administrative and business functions of the Coalition
- i. The Vice Chair shall assist the Chair in carrying out the functions of the Coalition and act in the absence of the Chair and may perform any other specific functions assigned by the Executive Committee
- j. The Secretary shall be responsible for preparing minutes of all COFO meetings; maintain the official records of the Coalition, including minutes; and tally votes not cast by the showing of hands, including secret ballots and any electronic votes
- k. The Coordinator shall serve to assist the Coalition members and officers on a day-to-day basis; maintain and update membership lists; conduct appropriate outreach to members, potential members, and agencies interested in starting an ombuds program; provide official notice to membership as required; and provide documentation to the secretary
- l. If you are interested in any of these positions or the day-to-day of the function, please reach out to any of the current Executive Committee members

### **4. COFO Email List Status, Update and Plans**

- a. The last two years, COFO membership has received duplicate emails from the Outlook distribution list and from the Google group

- b. The purpose of this was to attempt to have an automated distribution list that would cut down on the work of adding and deleting people individually from these lists
- c. The consensus now is that the Google group list is not working as intended and the Outlook email distribution will now be the only list that will be maintained
- d. Please let Laurel or Heather know if you are receiving emails from the Google group only as it will go away, and the Outlook email distribution list will be the method of communication from COFO

**5. COFO Mentoring Committee**

- a. The application period for the 5<sup>th</sup> Cohort has been extended to 11/17/2022
- b. Applications for mentors and mentees are attached to the email received yesterday
- c. Previous mentees or mentors can submit applications and previous mentors need not submit a new application if no changes
- d. The mentor program is different from peer practitioner network in that the mentor program is a one-on-one experience with an experienced ombuds to help deepen your understanding of ombuds work and the peer practitioner program consists of small groups of ombuds similar to case review

**6. Voluntary Leave Transfer Initiative reminder**

- a. Reminder that the Voluntary Leave Transfer Initiative is a way to help connect ombuds with ombuds who have been approved by their Federal agency for voluntary leave transfer
- b. Because of the ombuds role and concerns about independence and impartiality, concerns are raised about ombuds asking stakeholders to donate, so this initiative was created to avoid such issues
- c. If you have questions, reach out to Wendy Kamenshine, Heather Milner, or Susanne Porch

**7. COFO Website Move to New Host**

- a. COFO will move from the hosted site by the Department of Education to a new host
- b. Hosting means there is space to have the COFO website on their serving using the host organization's URL and assisting COFO to update the site with new information at some regular time interval
- c. The current COFO website is built on the Salesforce platform
- d. If your agency is available to host the COFO website on their server or you have ideas, please contact Paul Sotoudeh [Paul.Sotoudeh@USPTO.GOV](mailto:Paul.Sotoudeh@USPTO.GOV)

**8. USOA Federal Government Chapter**

- a. Federal Government (Fed Gov) Chapter of USOA will be restarting
- b. Syretta Jarrett is Chapter Chair and Erica Katherine is Co-Chair
- c. USOA Fed Gov Chapter meeting on Wednesday, 11/17/2021 at 1 – 2:30 pm EDT via WebEx

- d. Officers to be elected during the first meeting are secretary, communications officer, training officer and membership officer
- e. Meeting will be held quarterly and be 1.5 hours
- f. Contact Syretta Jarret, [Syreeta.Jarrett@dodiis.mil](mailto:Syreeta.Jarrett@dodiis.mil) or Erica Katherine [Erica.Katherine@fda.hhs.gov](mailto:Erica.Katherine@fda.hhs.gov) for questions or additional information

**9. Next Ombuds Supporting Ombuds (OSO) Meeting, 01/26/2022**

- a. Due to holidays, no meeting in November or December
- b. OSO meetings were started at the being of the pandemic to help ombuds support each other and discuss current topics of concern
- c. Next meeting of Ombuds Supporting Ombuds (OSO) will be 01/26/2022, 2-3 pm EDT

**10. Announcements**

- a. none

**11. General Questions**

- a. None

**12. Discussion Topic: "Who Owns the Story?" follow-up conversation – By popular demand, we're holding space this month for active member discussion of the questions raised by this session on group and systemic work from the COFO Annual Conference. The topic raises so many great queries about matters such as impartiality, optics, expectation setting, storytelling, empowerment, and issue "ownership" in systemic work for both internals and externals, and while we certainly won't get to all of them this month. We'll try to open some of the conversations that the topic deserves.**

- a. For those who may not have seen the presentation there were questions that were meant to move the conversation forward to determine what experiences others had with group work as an ombuds
- b. Can I remain neutral or impartial while conveying the emotional power of people's story? Can I be a good storyteller for one more subgroup? Can I do both or would I be perceived as an advocate for that group?
- c. One ombuds stated had a similar situation with an individual visitor who wanted the ombuds to convey a message anonymously
- d. The ombuds stated to the visitor that their approach with the information will be neutral and the stronger message may come from their direct message to the person
- e. Another ombuds stated we should consider in individual and group work the matter of access and that individuals come to us because they may not feel they have access to the individuals that can create change on the topic of concern
- f. In the chat some ombuds stated it should be expressed to the visitor that there may be trade-offs with having the ombuds convey an issue

- g. The question of whether it is possible to guard against being perceived as an advocate was discussed and the struggle was, how does the ombuds keep the story in play when shared with management and it is immediately discounted?
- h. Does this type of action make the ombuds an advocate?
- i. Sometime being truly neutral is not very persuasive and it may seem like it is not as effective
- j. It is important to honor the effort that the visitor is putting forth yet maintain impartiality
- k. One ombuds stated to continue to maintain neutrality you may take pre-persuasive posture by “preparing the ground” and making sure the person who is hearing the information for the first time knows this is the process and focusing any systematic problems or issues that may be related to the story
- l. Another ombuds asked if others had ideas on how you can help managers or those who have the authority to make change over a situation hear the story or at least help the visitor open the door for change
- m. One ombuds office put together a document that demonstrates best practices for systematic or group work and one crucial element for success is to have leader buy-in
- n. How do you get the leader or manager buy-in?
- o. Organizational capacity for managing conflict resolution can be evaluated to see where the blind spots are and what keeps the visitor from using their own voice, and whether it is access or fear should be considered
- p. Maybe consider keeping the personal story while eliminating the details that would reveal the individual, if possible
- q. One ombuds stated the coaching field has some tools that may help when dealing with groups such as deep democracy processing where someone speaks for the voice of the system (generic individual story) that helps surface voice and involves setting the container for the conversation with a definite rule set used in mediation
- r. Question in the web chat asked if it is the ombuds’ role to get the story to the finish line, or what is that finish line
- s. One ombuds stated the finish line will be different depending on the perspective of the visitor (group) versus leadership
- t. It is import for the ombuds to prepare both groups to consider that the ending point will be different and an understanding that resolution may include viewpoints from both perspectives
- u. One ombuds noted that if both sides of the conversation do not have equal footing, then it is almost impossible to have conflict competency leading to resolution

**Additional Input on Privacy Act:** One ombuds engaged with their agency’s general counsel to determine what was records needed the privacy act statement. It was stated this was a complicated process and the ombuds encouraged all ombuds on the call to contact their agency’s general counsel to be sure their program is compliant.

**Attendance 11/10/2021**

<b>Last</b>	<b>First</b>	<b>Agency</b>	<b>Call-In</b>
??	Charlotte	Navy?	1
Anderson	Jeff	DOE	1
Bedlivy	Dawn	NSA	1
Behr	Virginia	FDA	1
Berg	Mollie	DOD / National Geospatial-Intelligence Agency (NGA)	1
Chavez Rudolph	Mary	DOI	1
Chevalier	Steven		1
Coffman	Cherina	NGA	1
Coleman	Jean	SBA	1
Davenport Dayes	Nicky	FEMA	1
Dean	Karen	FMCS	1
Elison	Kayla		1
Epps	Ayanna	FDIC	1
Fleming	Tasha	BOP	1
Footman	Aaron	USPTO	1
Gordon	Laurel	DOJ / U. S. Marshals Service (USMS)	1
Harley	Jasmine	National Credit Union Administration	1
Hartman	Jessie	NARA/ Office of Government Information Services (OGIS)	1
Heffernan	Claire	TSA	1
Hopkins	Emilee	NGA	1
Jarrett	Syreeta	DIA	1
Kamenshine	Wendy	CFPB	1
Katherine	Erica	FDA	1
Kelly	John	SBA	1
Lawrence	Steve	DHS Office of Intelligence & Analysis	1
Lee	Philip	Federal Maritime Commission	1
Lenkel	Laurie	FDA	1
Levine	Lisa	DOJ / Executive Office of Immigration Review (EOIR)	1
Lewis	Mark D.	FDA	1
Lloyd	Brenda	FLETC	1

## UNCLASSIFIED

<b>Last</b>	<b>First</b>	<b>Agency</b>	<b>Call-In</b>
Mahony	Jennifer	Boston Childrens Hospital	1
Maurer	Bill	Census	1
McGuire	Carrie	NARA / OGIS	1
McNeil	Tracey	SEC	1
Megee	Christine	DOD Education Activity	1
Miller	Carla	DOJ / ATF	1
Mills	Laurel	DOJ / USMS	1
Milner	Heather	CFPB	1
Omomhundro	BJ		1
Patel	Bina	USPTO	1
Porch	Susanne	Commerce / National Institute of Standards and Technology (NIST)	1
Rojas	Nick	DOD / DIA	1
Rowe	Mary	Massachusetts Institute of Technology (MIT)	1
Sherman	Charlotte	Office of Naval Intelligence	1
Skodacek	Ken	FDA	1
Smith	Julie	Census	1
Sotoudeh	Paul	USPTO	1
Stergio	Marcus	Office of Federal Contract Compliance Programs / DOL	1
Swann	Benita	FDIC	1
Taylor	Lelar	VA	1
Thomson	Ronnie	Sandia National Laboratories	1
Vermillion	Chris	TSA	1
Villafane	Jacqueline	American Red Cross	1
Walker	Olivia	DOD / Army Medical Readiness Assistance Program	1
Weber	Guy	DOD / NGA	1
White	Karen	DOD / National Guard Bureau	1
Wolfe	Lexi	DOE	1
Yuille Banford	Deanna	DOD / Defense Human Resources Activity	1
		<b>Total</b>	<b>58</b>