



# COALITION OF FEDERAL OMBUDSMAN

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## COFO MONTHLY MEETING MINUTES

**Meeting Date/Time:** December 13, 2023, 1:30-2:58pm (EST)

**Location:** Video/telephone

**Agenda:**

1. Proposed COFO Charter and Executive Committee Charter – it’s voting time!
2. Upcoming Executive Committee Elections
3. Committee Updates: Mentoring, Peer Practitioner, Social Media
4. Voluntary Leave Transfer Initiative reminder
5. Next Ombuds Supporting Ombuds (OSO) meeting 12/27
6. Announcements – Training opportunities, job openings, or really any office and ombuds happenings you'd like to tell the world about
7. 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
8. Discussion Topic
  - Let’s talk about surfacing issues confidentially, without identifying the individuals or organizations who raised the concern. Whether you’re internally or externally facing, what are some best practices for doing so? What pitfalls do you have to be cognizant of?

**Highlights:**

- 1. Proposed COFO Charter and Executive Committee Charter**
  - Thank you to everyone who provided comments on the two charters and contributed to past membership meeting discussions about the charters.
  - Kudos also to the Charter and Governance Workgroup and the Executive Committee for their work to create and edit those documents.
  - Next step is a vote on the charters, which will be happening soon. The EC is currently updating the voting member slate, more to come soon.
- 2. Upcoming Executive Committee Elections**
  - The nomination process has begun. Federal ombuds are welcome to nominate themselves, and anyone can nominate another federal ombuds who they believe is qualified to be on the next EC.
  - This is a two-year commitment and there is one Chair position, two Vice Chair positions, two Secretary positions, and two Coordinator positions.
  - Nominations must be received by Wednesday, January 10, 2024, and a vote will be held once a final slate of nominees has been put together.
  - Send an email to the Elections Committee to submit a nomination.

### 3. Committee Updates

- Peer Practitioner Network
  - Last month we announced that we were seeking more ombuds interested in participating, and fortunately we've heard from a few more.
  - We were able to create a few groups for internally facing ombuds but haven't yet been able to create groups of externally facing ombuds. If you are external facing and would like to join a peer practitioner group, please let us know.
  - This is different than the list of externally facing ombuds that SBA is currently putting together.
- Social Media Committee
  - Thank you to all of the SMC members who have been supporting the SMC and making the LinkedIn group a community that shares information.
  - We have updated the criteria for joining the LinkedIn group. No longer necessary to be a voting member or a federal ombuds, people can just simply be interested in ombuds work and agree to the code of conduct statement.
  - We have our next quarterly meeting on January 18 at 2:30pm. We encourage people to join us in discussing how we can expand and continue bringing great content to the COFO LinkedIn group.

### 4. Voluntary Leave Transfer Initiative reminder

- Connects ombuds who need leave with ombuds from around the federal government who have leave to donate. Helps to avoid awkward scenario where ombuds ask for or donate leave to others in their agency.
- Contact COFO if you've qualified for leave transfer and would like to get leave from other ombuds.

### 5. Next Ombuds Supporting Ombuds (OSO) Meeting – 12/27

- Scheduled for 2-3pm.
- This is a safe space to discuss personal and professional topics that impact us.
- There isn't a discussion topic yet for this month, but the meeting will be held despite the holidays and all are encouraged to join if around and interested.

### 6. Announcements - Training opportunities, job openings, or really any office and ombuds happenings you'd like to tell the world about

- USOA federal chapter will be meeting on December 19 and will include updates and announcements about USOA, groups people can participate in, and a monthly discussion topic that this month will be related to burnout.
- FEMA is hiring an Associate Ombuds. Current ombuds is accepting applications directly, there is no USA Jobs post. It is a two-year position that may be extended.
- The US Marshal Service ombuds office will be hosting a practice circle later today about whether ombuds should be involved with DEIA. Right after today's COFO call.

### 7. 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.

- How many of us provide written reports about our work to management and/or our supervisors? Any kind of written reports that include inquiry data, graphs and charts, or other information you might normally report verbally to senior officials.
  - Someone shared that they only do it annually but could see people in larger organizations and larger constituencies doing something more regularly, but also this person only includes IOA reporting categories.
  - Someone added that IOA reporting categories seem more aligned with other types of non-federal ombuds, and this person therefore uses a different set of

reporting categories. They will also update, add, and/or subtract categories based on the inquiries that they received for that year.

- An external ombuds added that it might also depend on whether an ombuds is internal or external, because their office for instance produces only an annual report. Two benefits:
    - Holds the ombuds office accountable and shows the external stakeholder community that the ombuds has actually acted on their concerns or issues presented.
    - Can also serve as a helpful resource for the ombuds office itself to look back and reference that report.
  - Someone else mentioned that they meet regularly with senior leadership to verbally share statistics and information, but not written reports. They are an internal and that might be part of the reason. Internals who produce reports produce primarily pure statistics, not examples of cases for instance.
  - Someone else shared that many internal ombuds don't like the word itself and feel like if they are "reporting" they are breaking the SOP. They might instead suggest that the necessary piece is regularly talking to leadership about the concerns that come up in their area of the organization.
    - Perhaps not using the word report but using the word communications is the best way to address that concern from those internal ombuds.
  - Someone else shared that, for an external writing an annual report, it can be helpful to do the "hats exercise" and read it once through from the perspective of several different stakeholders to make sure the report should be published as is, and if not edit accordingly before publishing.
8. **Discussion Topic:** Let's talk about surfacing issues confidentially, without identifying the individuals or organizations who raised the concern. Whether you're internally or externally facing, what are some best practices for doing so? What pitfalls do you have to be cognizant of?
- Someone shared that there is a working paper and guidance on generic cautions that they will make sure gets distributed to the group.
  - An external shared that considerations are different for externals. For instance, if there is a workplace conflict that many people are discussing with the internal ombuds, it is likely related to a particular group the inquirers belong to. However, many of the people contacting an external ombuds might not be aware that others are experiencing the same issue.
  - What someone else does when surfacing something, they connect with the people who have been vocal about it to let them know they are surfacing it so that they can express concerns, add to what they've already said, or more generally and at the very least just be aware it is being surfaced.
  - Someone mentioned that one concern with surfacing issues is that not all of the people who have contributed statements or thoughts about them would agree on what the issues actually are.
    - An external mentioned they don't have the ability to know or check in with people about whether they agree on what the issues are, if they want something surfaced, and/or if they agree with how something is presented.
  - Another person's concern is what does or doesn't constitute a critical mass, and particularly in a smaller agency or in an ombuds office with a smaller constituency, because a critical mass might not ever be reached. Or, what is the correct thing to do

when people you are talking to are really concerned about the story being leaked and the potential repercussions.

- Someone shared that they believe, in some circumstances, one is enough because they can see that there are signs there of something being pervasive. Other times though, five or six people might share something similar but it still isn't appropriate to share upward.
  - Also need to keep in mind that no matter how frustrating, if someone doesn't want it shared you don't share it.
- An external mentioned that they focus on risk as opposed to how many people have raised something. Less about number and more about risk.
    - Someone agreed because they think most important is how risky it is that someone is revealed, or how the organization is perceived, if it becomes known outside the agency that something was raised with leadership.
    - Someone else shared that it might not impact the public immediately but the organization is concerned that even if raised without identifiers, the nature of the details might give too much away, which is particularly harmful if those people are involved with regulatory or legal action. So, it is also about timing.
  - Something else to consider is that there is an element of human nature that people (namely leadership) sometimes try to figure out the person or people that initially surfaced something instead of focusing on what the underlying issues are, or what their responses to them should be.
    - Someone responded that they typically call out leaders who do that, but necessary in order to call them out is a strong relationship and understanding about the ombuds role as well as why the ombuds is surfacing something.

**Attendees:**

Last	First	Agency	Call-In
Anderson	Jeff	DOE	1
Bedrossian	Leona	ATF	1
Behr	Virginia	FDA	1
Berg	Mollie	DOD/NGA	1
Bookstein	Monique	Prince William County Public Schools	1
Braden	Lara	Defense Commissary Agency	1
Brown	Andrea	USPTO	1
Caetano	Fernando	NIH	1
Coffman	Cherina	DOD/NGA	1
Davis	Ashley	University of Washington	1
DeBerry	Marcella	NSA	1
Delaney	James	CVM's ombuds detailee	1
Enriquez	Elisa	NIH	1
Gordon	Laurel	US Marshals Service	1

## UNCLASSIFIED

Harley	Jasmine	National Credit Union Administration	1
Harshbarger	Blayne	USDA	
Hartman	Jessie	OGIS	1
Hawkins	Toni	NIH	1
Hebron	Eric	DOJ	1
Hopkins	Emilee	NGA	1
Jackson	Anthony	Forest Service	1
Kamenshine	Wendy	CFPB	1
Katherine	Erica	FDA	1
Kinnavy	Noreen	USAGM	1
Lawrence	Steven	DHS I&A	1
Lenkel	Laurie	FDA	1
Levine	Lisa	DOJ/EOIR	1
Lopez Johnson	Jennifer	US Forest Service	1
Maurer	Bill	Census	1
Megee	Christine	DOD	1
Merrix	Celeste	FLETC	1
Miller	Carla	DOJ/ATF	1
Miller	Ellen	IOA	1
Milner	Heather	CFPB	1
Patel	Bina	USPTO	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	MIT	1
Skodacek	Ken	FDA	1
Smith	Julie	Census Bureau	1
Smith	Tyler	NIH	1
Sotoudeh	Paul	USPTO	1
Stergio	Marcus	Office of Federal Contract Compliance Programs/DOL	1
Vermillion	Chris	Census	1
Villafane	Jacqueline	Outsourced Ombuds – Organizational Psychologist	1
Voloshin	Victor	NIH	1
Walker	Olivia	DOD/Army Medical Readiness Assistance Program	1

## UNCLASSIFIED

Weber	Guy	DOD/NGA	1
White	Karen	National Guard Bureau	1
Wolfe	Lexi	DOE	1
Younger-Banks	Tiffany	SBA	1
Yuille Banford	Deanna	DOD/Defense Human Resources Activity	1
Ziolkowski	Olivia	FDA/Center for Biologics and Research	1
		<b>Total</b>	<b>54</b>