



COALITION OF FEDERAL OMBUDSMAN

MEETING MINUTES

Meeting Date/Time: May 10, 2017 1:30pm – 3:00pm

Location: Consumer Financial Protection Bureau, 1275 First Street NE Washington, DC 20002

Agenda:

1. COFO Standards Update: Discussion of the Three Core Standards (Independence, Confidentiality, and Impartiality) and the Three Common Characteristics (Informality, Commitment to Fairness, and Credible Process).
2. Conference Update: Quick update on the annual COFO Conference.
3. Reflections on IOA Conference: Do you have any key takeaways, please share your experience with the group.
4. Customer Service and Unconscious Bias Training: Has your organization provided training in these areas? What was the experience? Any recommendations to an organization looking to provide this type of training?
5. Additional topics raised by Members (please include suggested topics or Ombuds Challenges with your RSVP)

Highlights:

1. COFO Standards Update: Discussion of the Three Core Standards (Independence, Confidentiality, and Impartiality) and the Three Common Characteristics (Informality, Commitment to Fairness, and Credible Process).
 - Paul sent to the committee on 5/10 for review and comment
 - Invitation to provide questions/comments
2. Conference Update: Quick update on the annual COFO Conference.
 - Save the date will be sent soon and registration will open in June, 2017.
 - This is a FREE conference! October
 - Please send your “must haves” or “must keeps” to the Executive Committee.
3. Reflections on IOA Conference: Do you have any key takeaways, please share your experience with the group.
 - Gary (NGA) – First IOA conference, summary of his first impressions.
 - Lisa (DOJ) – Usefulness of the self-care session. The A-Z Self Care Handbook, Mindy Eave.

- Wendy (CFPB) - Two observations 1) helpful to understand the broad application/spectrum of the Ombudsman profession and application in the university setting. 2) importance of the different Ombuds groups working together (USOA, IOA, ABA).
 - Riley – acknowledgement of the federal Ombuds for speaking at IOA. Some new board members at IOA. New Government and Policy committee.
4. Customer Service and Unconscious Bias Training: Has your organization provided training in these areas? What was the experience? Any recommendations to an organization looking to provide this type of training?
- Guy (NGA) – has experience working with a group on this type of training; good training but difficult to sustain. Lessons learned would be to 1) pilot the training first to ensure audience appropriateness and 2) build in a follow-up. See Guy for more info about who he’s used.
 - Andrea (USPTO) - As a trainer, be sure to make the training interactive.
 - DOS – having participated in multiple ABA Unconscious Bias training sessions, the one that focused on group work and strategies was much more interesting. Email Jeff for training material.
5. Additional topics raised by Members (please include suggested topics or Ombuds Challenges with your RSVP).
- a. In a brief discussion of ways to encourage implementation of the ACUS recommendation on federal agency use of ombuds, David Pritzker, the ACUS staff member responsible for their ombuds project, reported that the recommendation was sent in January to the heads of federal agencies, with a copy to those ACUS members representing federal agencies. A list of government members of ACUS is available at <https://www.acus.gov/directory/government-member>. Several additional members are included among the “liaison representatives” at <https://www.acus.gov/directory/liaison-representative>. David also said that if COFO members need any further information about ACUS, the recommendation, or any agency’s ACUS member, please contact him at dpritzker@acus.gov.

Attendees:

In-Person

Anderson, Jeffrey – Department of State
Barrar, Riley – Customer Financial Protection Bureau
Donnelly, Wanda – Department of State
Kamenshine, Wendy - Customer Financial Protection Bureau
Levine, Lisa – Department of Justice
McNeil, Tracey – U.S. Securities and Exchange Commission
Maurer, Bill – Department of Energy
Prtizker, David – Administrative Conference of the United States
Sotoudeh, Paul – U.S. Patent and Trademark Office
Thomson, Patricia – Ombudsman Program Office for Children and Youth Dept. of Behavioral Health

Phone

Berg, Mollie – Department of Homeland Security
Bloch, Brian – Department of the Interior
Brown, Andrea - U.S. Patent and Trademark Office
Callahan, Rita – Department of Health and Human Services
Claybom, Samuel – General Services Administration
Dodson, Shireen – Department of State
Fleming, Tasha – Department of Justice
Gartlan, Jennifer – Federal Maritime Commission
Harris, Robert – Federal Deposit Insurance Commission
Johnson, Fatima – National Aerospace and Space Administration
Kapoor, Vic – Department of Homeland Security
King, Donna – Department of Health and Human Services
Kith, Sarah – Library of Congress
Larkins, Marcia - Department of Health and Human Services
Major, Katie – Department of Defense
Maderon, Katie – Department of State
McGuire, Carrie – Office of Government Information Services
Mitchell, Kristen - Office of Government Information Services
Roman, Michael – National Ocean and Atmospheric Agency
Merrix, Celeste – Department of Homeland Security
Patel, Bina –NGIC
Roberts, Sara – Department of Homeland Security
Weber, Guy – Department of Defense
King, Donna - Department of Health and Human Services
Zeller, Jessica – Health and Human Services