



## MEETING MINUTES

**Meeting Date/Time:** May 09, 2018, 1:30pm – 3:00pm

**Location:** USDA, 1400 Independence Ave, SW, 1st Floor, Room 1052(c) and Dial-in

### **Agenda:**

1. IOA Recap
2. COFO Conference Update
3. Agency Outreach
4. Mentoring Program Update
5. Discussion Topics
6. Announcements

### **Highlights:**

#### **1. IOA Recap**

- a. Government Sector Networking Session Recap
  - i. The 2018 International Ombudsman Association Conference, held on April 23-25 in Richmond, VA, included a number of concurrent sector-specific meetings, including one focused on government ombuds. The meeting was held from 9:30 – 10:30am on Tuesday, April 24.
  - ii. Small group of COFO members, Patrick Holman, Lisa Levine and Joanne Dea and Laurel Gordon designed and led the framework for the government sector discussion around the theme “Tools in Times of Change”.
  - iii. Session participants separated into small groups focused on one of four sub-topics: Addressing Systemic Issues, Keeping above the Fray, Serving as a Courageous Ombudsman, and Building Relationship with the New Team.
  - iv. Group discussions encouraged participants to ask questions and share best practices and lessons learned, while networking with fellow government sector ombuds.
  - v. Positive feedback from COFO members indicated interest in ongoing discussions of the sub-topics at future COFO monthly meetings.
- b. Popcorn Session Resource Document
  - i. The round table discussion was held from 3:00 – 4:30pm on Tuesday, April 24 and resulted in a positive show of support by the government sector.
  - ii. Participants and panelists engaged in a lively discussion on enhancing the ombuds practice with new and current resources. Panelists shared experiences and resources, including book lists and trainings on compassion and fatigue with participants.

- iii. Heather Milner will seek approval to share these resources with COFO members from IOA. If you have any questions, please contact Heather Milner ([Heather.Milner@cfpb.gov](mailto:Heather.Milner@cfpb.gov)).
  - c. Your IOA-related discussion topic here!
    - i. Plenary Un-Debate: Ombuds Neutrality in a Politically Charged Era: Time for a Reexamination was held at the International Ombudsman Association Conference, from 10:15am to 11:45am on Wednesday, April 25.
    - ii. The discussion focused on the application of neutrality and the birth of IOA's standards. IOA standards were the result of a merger between TOA (corporate ombuds org) and UCOA (university and college ombuds org) in 2004, including the provision on neutrality. The plenary discussion stimulated new thought on the utilization of neutrality.
    - iii. Positive feedback from COFO members indicated a strong interest in ongoing discussions on applying neutrality in grey zones at future COFO monthly meetings.

## **2. COFO Annual Conference Update**

- a. The COFO Annual Conference is tentatively planned to be held at the US Patent and Trademark Office (Alexandria, VA) on Friday, October 12, 2018.
- b. A conference planning volunteer group is being put together to assist in generating ideas for topic areas and speakers. Volunteers are also sought for logistical support on the day of the conference.
- c. Expect a message via the COFO listserv on the COFO conference. COFO members interested in joining are asked to identify themselves to Bina Patel ([Bina.M.Patel.Civ@mail.mil](mailto:Bina.M.Patel.Civ@mail.mil)) and Tyler Smith ([Tyler.Smith@nih.gov](mailto:Tyler.Smith@nih.gov)) by May 11.

## **3. Mentoring Program Update**

- a. The purpose of the program is to promote best practices and encourage cross-fertilization amongst COFO members and their organizations.
- b. Program design is complete and has been shared with a small group of reviewers before submission to the Executive Committee.
- c. The tentative launch date of the program is June 01, 2018. Once the mentoring committee is established, mentors and mentees will be matched.
- d. Some key parameters –
  - i. Mentors should have three years' experience as practicing ombuds; Mentees should be practicing ombuds
  - ii. Applicants to both positions will apply to a mentoring committee for acceptance; the committee will match mentors with mentees based on function and other parameters. There will be 2 matching rounds per year (January and June)
  - iii. Generally speaking, designers are looking at 2 hour/month commitments for 6-12 months of both mentors and mentees.
- e. Expect a message via the COFO listserv on the mentoring program. If you have any questions, please contact Wendy Kamenshine ([Wendy.Kamenshine@cfpb.gov](mailto:Wendy.Kamenshine@cfpb.gov)) and David Michael ([David.Michael@nih.gov](mailto:David.Michael@nih.gov)).

## **4. Discussion Topic:**

a. **How do ombuds manage assistance to a deployed or distributed workforce? Do offices deploy employees themselves? Travel out to the field or work locations? Do offices have a travel budget? How do they work with the management in the field/location from the ombuds location in DC?**

- i. FEMA has Ombuds in the field who are deployed during times of emergency. A field Ombuds is a new function for FEMA.
- ii. Suggestions/Recommendations from COFO members:
  1. Increase use of technology and communication platforms to offset the cost of face-to-face sessions (VTC, Skype, and Teleconference).
  2. Emphasize the importance of the ombuds function to the chain of command to obtain a set travel budget to major locations where the majority of the staff is located.
  3. Explain the importance of the Ombuds in the field to the chain of command. Ombuds in the field is vital to the overall morale of the individuals who are deployed. Having an ombuds in the field to meet face-to-face may help with resolving issues quickly and in real time.

b. **Maintaining a visitor's confidentiality when addressing concerns of retaliation for using ombuds services.**

- i. Case in point: an employee experienced retaliation for visiting the Ombuds' office and received subsequent adverse action by the supervisor. How do ombuds balance neutrality and maintain confidentiality of a visitor?
- ii. Suggestions/Recommendations from COFO members:
  1. Reach out to the supervisor's manager regarding the retaliatory behavior and ask about "how" the retaliation was conducted.
  2. Ombuds should involve other offices with the ongoing issues and potential investigations (i.e. Human Resources, DoD IG).
  3. Attend organizational town halls/speaking engagements to discuss on the ombuds function and role.
  4. Hold a dialogue session on risks associated with retaliation for visiting the ombuds office at town halls and speaking engagements.

**5. Announcements**

- a. Congratulations to Mollie Berg on earning a Master's in Conflict Resolution from George Mason University.

**Attendees:**

**In-Person**

Berg, Mollie -National Geospatial-Intelligence Agency  
Hill, Gary - National Geospatial-Intelligence Agency  
Maurer, Bill – Department of Energy  
Pritzker, David – Consumer Financial Protection Bureau  
Sotoudeh, Paul – United States Patent and Trademark Office  
Wolfe, Lexi – Small Business Administration

**Call-In**

Balick, Howard – Department of Health and Human Services  
Behr, Virginia - Department of Health and Human Services  
Block, Brian - Department of Interior  
Daramola, Tangita – Department of Health and Human Services  
Fleming, Tasha – Department of Justice  
Garmon, Felisa – Consumer Financial Protection Bureau  
Gartlan, Jennifer – Federal Maritime Commission  
Holman, Patrick -- Department of Energy  
Hurley, Nathan - Department of Health and Human Services  
Kamenshine, Wendy – Consumer Financial Protection Bureau  
Kinnavy, Noreen, International Broadcasting Bureau Voice of America and Office of Cuba Broadcasting  
Lenkel, Laurie – Department of Health and Human Services  
Levine, Lisa – Department of Justice  
Lewis, Kimberley Day – Department of Homeland Security  
McNeil, Tracey – U.S. Securities and Exchange Commission  
McGuire, Carrie – Office of Government Information Services  
McNeil, Tracey – U.S. Securities and Exchange Commission  
Merrix, Celeste – Department of Homeland Security  
Michael, David – Department of Health and Human Services  
Milner, Heather – Consumer Financial Protection Bureau  
Mitchel, Kirsten- Office of Government Information Service  
Patel, Bina – National Ground Intelligence Center  
Plonk, Maureen - Department of Homeland Security  
Raines, Eric – Federal Deposit Insurance Corporation  
Rapier, Holly – Department of Health and Human Services  
Raymond, Xaivian – NASA Headquarters  
Reed, Janay - Defense Intelligence Agency  
Smith, Tyler – Department of Health and Human Services  
Stukes, Jock - National Reconnaissance Organization  
Walker, Don – Department of Defense  
Weber, Guy - National Geospatial-Intelligence Agency  
Wright, Donald – US Department of Agriculture  
Wynder, Rea – Department of Homeland Security  
Zeller, Jessica – Department of Health and Human Services  
Zrubek, Tom – Department of Defense