



# COALITION OF FEDERAL OMBUDSMAN

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## MEETING MINUTES

**Meeting Date/Time:** September 12, 2018, 1:30pm – 3:00pm

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

### **Agenda:**

1. Update on COFO listserv/website issues
2. Mentoring Program Update
3. Discussion Topic
4. Announcements

### **Highlights:**

#### **1. Listserv Technical Issues**

- a. Currently the COFO website is functioning at a normal status
- b. Functional issues with the COFO Listserv continue. The Executive Committee is seeking to explore additional options.
  - i. Executive Committee is seeking a non-governmental platform such as Google/Gmail. A Gmail account has been set up and we are seeking members to participate in a test pilot. If you are interested in participating in the pilot, or have concerns regarding the non-governmental platform, please reach out to Paul Sotoudeh, Heather Milner, or Tyler Smith.
- c. If you are not getting COFO emails, or need any assistance sending something to the COFO membership, please reach out to Paul Sotoudeh, Heather Milner, or Tyler Smith.

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

- a. A registration email, including the agenda with topics and speakers was sent on Monday, September 10, 2018. We ask all individuals who are attending the conference to sign up via the registration link. When registering, please indicate name of the organization and method of attendance (in person/online).
  - i. COFO members may distribute the COFO Conference flyer to individuals/entities interested in attending the conference in the ADR field.
- b. The COFO Annual Conference will be held at the US Patent and Trademark Office (Alexandria, VA) on October 12 and will be available via the web. However, not all activities will be available for the online platform. The conference is scheduled to begin at 0800 with networking opportunities. The first presentation will begin at 0830am.
  - i. The committee is seeking volunteers for the day of, if you are interested in attending, please email Bina Patel and Tyler Smith.

- c. COFO members interested in participating or may have questions/concerns, please contact 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)).

### 3. Mentoring Program Update

- i. Mentoring committee has met twice in the past month to tackle four major areas:
  1. Launch Email: A launch email will be sent on Monday, October 1, 2018 notifying mentor/mentee matches. Email preparations are underway.
  2. Email Platform: Applications for mentors/mentees are to be sent to a non-governmental platform. Currently the platform, such as Gmail is being considered.
  3. Mentor/Mentee Selections: Mentors selection and mentee matches will be considered post deadline of applications.
  4. Evaluation Process: committee is exploring a continuous evaluation process once post mentor/mentee selections
- b. If you have any questions and/or interested in becoming a mentor/mentee, 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: Encouraging Proactive Behavior from Stakeholders

- a. How do you encourage proactive behavior from your stakeholders? (Adapted from an element of last month's Courageous Ombudsman discussion)
  - i. In a vigorous conversation, participants commended external ombudsman for their resiliency when working with stakeholders
  - ii. Proactive behavior is encouraged by providing a single point of contact to the stakeholder to help address their concerns regarding a specific issue. The purpose is to prevent beneficiaries/guests from contacting other agents at the organization that may interfere with the process and/or status of the case.
  - iii. Participants advised that an external ombudsman's function can become challenging when beneficiaries/guests seek assistance outside of their point of contact, such as their congressman and/or an agency's leadership chain.
  - iv. Suggestion was made for external ombudsman to meet with their internal components to identify possible resources to help beneficiaries/guests with their concerns, specifically those resources that can be shared publically.
  - v. A suggestion for best practice, include speaking to the beneficiary/guest via phone, with a follow up formal letter or email. The latter permits for recordkeeping and tracking, specifically if the beneficiary/guest responds after a couple of years.
- b. What has to be in place for this to occur?
  - i. Keep all information confidential and not sharing it with internal agents (including returnees).
  - ii. Be cognizant of the communication style: a style that is direct with a soft approach to address difficult topics.
    1. When an external ombudsman cannot help further with the case, it is reasonable to respond to beneficiaries/guests with a message, "all

resources and options have been exhausted. If you have any additional or new concerns, please contact us.”

2. External ombudsman should adhere to their internal policies when working with beneficiaries/guests. Deviances can cause disruptions and loss of control over the case.
- c. Takeaway: When dealing with difficult individuals, it is important to think about your time and availability. As ombudsmen, our emotional/mental states are finite. We cannot help further on this issue, as all options have been exhausted and this takes away from your ability to help others.

**Attendees:**

**In-Person**

Naef, Daya  
Sotoudeh, Paul – United States Patent and Trademark Office  
Webb, Robert, Armed Forces Retirement Home

**Call-In**

Balick, Howard, FDA  
Behr, Virginia – Department of Health and Human Services  
Berg, Mollie -National Geospatial-Intelligence Agency  
Brown, Amy – Federal Deposit Insurance Corporation  
Brown, Andrea - United States Patent and Trademark Office  
Coleman, Jean – US Small Business Administration  
Doyle, Bill- U.S. Secret Service  
Epps, Ayanna – Federal Deposit Insurance Corporation  
Fox, Angela - USDA  
Hill, Gary- National Geospatial-Intelligence Agency  
Kamenshine, Wendy – Consumer Financial and Protection Bureau  
Katherine, Erica- FDA  
Kelly, John-SBA  
Kinnavy, Noreen - International Broadcasting Bureau  
Kith, Sara-National Institute of Health  
Landau, Natalie Landau-U.S State Dept.  
Larkins, Marcia – Department of Health and Human Services  
Lee, Joy - NCUA  
Lewis, Kimberley Day – Department of Homeland Security  
Manderson, Katie- Office of the Attorney General of Texas  
Maurer, Bill – Department of Energy  
McGuire, Carrie – Office of Government Information Services  
Merrix, Celeste – Department of Homeland Security  
Michael, David – Department of Health and Human Services  
Milner, Heather – Consumer Financial Protection Bureau  
Morey, Chauncenette- FBI  
Murphy, Martha – National Archives and Records Administration  
Patel, Bina – National Ground Intelligence Center  
Platt, Meadow – Food and Drug Administration  
Range, Eric – FDIC  
Rippy, Katherine – Department of Health and Human Services  
Rowe, Mary, MIT  
Rudolph, Mary Chavez Rudolph-Department of Interior  
Semo, Alina – National Archives and Records Administration  
Smith, Tyler – Department of Health and Human Services  
Stukes, Jock - National Reconnaissance Organization  
Walker, Don – Department of Defense  
Watson, Michelle – Defense Human Resources Activity (DHRA)

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Weber, Guy - National Geospatial-Intelligence Agency  
Wolfe, Lexi – Small Business Administration  
Wright, Donald – US Department of Agriculture  
Yuille, Deanna – Department of Health and Human Services  
Zeller, Jessica – Department of Health and Human Services  
Zrubek, Tom – Department of Defense

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