



COALITION OF FEDERAL OMBUDSMAN

COFO MONTHLY MEETING MINUTES

Meeting Date/Time: March 13, 2024, 1:30-2:58pm (EST)

Location: Video/telephone

Agenda:

1. New and outgoing COFO Executive Committee members
2. COFO Co-Coordinator position
3. COFO Annual Conference date – Friday, October 25, 2024 in Alexandria, VA/virtual
4. IOA Annual Conference – March 18-20 in Indianapolis
5. ABA Dispute Resolution Section Spring Conference – April 10-13 in San Diego
6. Committee Updates: Mentoring, Peer Practitioner, Social Media
7. Voluntary Leave Transfer Initiative reminder
8. Next Ombuds Supporting Ombuds (OSO) meeting 3/27
9. Announcements – Training opportunities, job openings, or really any office and ombuds happenings you'd like to tell the world about.
10. 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.
11. Discussion Topic
 - o How do you walk the line between empowering your inquirers (which is OK) and advocating for them (which isn't)? What is doing too much (and not enough), and how do you make that call? And how have you handled your stakeholders' expectations when they want you to step over our professional boundaries – for example when an inquirer asks you to advocate for them with the agency, or the agency asks you to parrot agency positions or talking points to your inquirers? Let's discuss and share ideas and best practices.

Highlights:

- 1. New and outgoing COFO ExComm members**
 - o Welcome to two new members, and a brief hello/introduction from both.
 - o Huge thanks to the three ExComm members who finished their terms and/or are no longer able to serve on the ExComm. Their contributions have been enormous and COFO is incredibly grateful to all three!
- 2. COFO Co-Coordinator position**
 - o As of now, the next ExComm will only have one Coordinator because only one person ran in the recent election.

- It is important for there to be two Coordinators. Co-Coordinators are involved in the day-to-day operations of COFO including email communications, announcements, and membership information administration.
 - For anyone interested in partnering with the current Coordinator, please reach out to the ExComm or the current Coordinator to express interest.
3. **COFO Annual Conference**
 - Will be held Friday, October 25 at USPTO in Alexandria, VA as well as virtually.
 - A bit later in October than we normally hold it, but we chose a date that would avoid holidays earlier in the month.
 - Conference Committee will soon be convened for those interested in participating.
 4. **IOA Annual Conference**
 - This year's IOA Annual Conference will be held in Indianapolis next week, March 18-20.
 - Still time to register if you haven't yet.
 5. **ABA Dispute Resolution Section Spring Conference**
 - This year the ABA conference will be in San Diego.
 - It's a great conference to attend if interested in broader ADR work.
 6. **Committee Updates**
 - Peer Practitioner Network
 - There will be a peer practitioner group for external ombuds due to new interest received. That will be convened shortly.
 7. **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.
 8. **Next Ombuds Supporting Ombuds (OSO) Meeting – 3/27**
 - Scheduled for 2-3pm.
 - This is a safe space to discuss personal and professional topics that impact us.
 9. **Announcements - Training opportunities, job openings, or really any office and ombuds happenings you'd like to tell the world about**
 - DOE just welcomed a new member to their team. She was previously a federal ombuds, went to the World Bank, and is now back with the federal government.
 - NIH is looking for a full-time associate contract ombuds with a focus on groupwork. A vacancy will be posted soon and is expected to be equivalent to a GS-14 or 15.
 - DOD OIG is hiring an ombuds and the job post opened on Monday.
 - VA ombuds position is open to only federal employees and closes today.
 10. **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.**
 - Do other agencies have task order and delivery order ombuds? If so, is it part of another existing, traditional ombuds office or part of a different procurement ombuds office?
 - Someone mentioned there's a procurement bill that indicates their agency should have a person who adjudicates procurement matters outside of the normal chain of command, and unfortunately the language uses the term ombudsman. This particular procurement ombuds works very specifically on procurement issues only and is separate and apart from this agency's more traditional ombuds office.

- Someone else mentioned that in the 1980s, procurement ombuds had a powerful and important role in government and particularly the DOD but may have faded over the course of time due to political issues.
- Has anyone set up an embedded conflict resolution process for major organizational projects? For instance, multiple entities in the organization all working together on an internal project and perhaps the organization has a history of these entities not working harmoniously, which could potentially cause some friction between them in the near future. Has anyone become involved in situations like this with the goal of proactively providing entities/groups conflict prevention tools?
 - Someone mentioned they haven't, that in their experience it is more typical for leadership to engage the ombuds when a conflict has presented itself as opposed to proactively and preventatively.
 - Someone else mentioned they do a lot of conflict prevention work.
 - Someone else suggested this ombuds be in touch with Harvard PON, because awhile back they ran a project using "proactive neutrals" and may have some insight to provide, a model that can be used, or ideas about related conflict management systems design.
 - Someone else shared that in a prior life as an academic ombuds they saw situations between heads of research labs working together on large and important projects, people who typically worked independently but were suddenly forced to collaborate and have difficult interactions. This ombuds was approached a few times when people didn't have great experiences prior. It always made this ombuds feel awkward because the future conflicts might not look like prior conflicts, but they were instead able to help the parties come to agreements about how they would handle future conflicts, if they came about.
 - Someone else shared that project charters have been helpful for groups they have worked with.
 - Someone wrote in the chat that their ombuds office has "done some work on this - proactively - with scientists who are setting up scientific collaborations. I imagine some of the same concepts could be applied to different organizational entities who need to work together to successfully complete a large initiative - especially if there is a history that indicates conflicts could arise."
 - Someone else mentioned in the chat, "Some practices done in response to issues could be helpful up front as well, like facilitating the development of group agreements on how they'll work together, perhaps paired with some training on communication/collaboration/conflict resolution skills tailored to their context."
- Someone has been grappling with changing their office from the Office of the Ombudsman to the Office of the Ombuds. Does anyone have experience with this issue and/or advice?
 - Someone mentioned that COFO and IOA recently changed their names, so there is a lot of recent precedent among organizational ombuds.
- Someone asked what other ombuds consider to be the most effective marketing practices aimed at properly explaining the role of the ombuds?
 - Someone shared that emails can be good, but not everyone will read them. They also join other large meetings being held like new employee orientations just to give a 10-minute presentation, but doing so at events like those need to

be constant because the employee base changes all the time. There is also value in setting up regular meetings with senior leaders of the organization.

- Someone else shared that videos can be an effective tool, even if it's an animated video modeling what a visit to the ombuds office might look like. They can be helpful to make people feel comfortable with the idea of contacting the ombuds and create expectations for what they might achieve.

11. **Discussion Topic:** How do you walk the line between empowering your inquirers (which is OK) and advocating for them (which isn't)? What is doing too much (and not enough), and how do you make that call? And how have you handled your stakeholders' expectations when they want you to step over our professional boundaries – for example when an inquirer asks you to advocate for them with the agency, or the agency asks you to parrot agency positions or talking points to your inquirers? Let's discuss and share ideas and best practices.
- Someone shared that they experience this often, people wanting the ombuds to advocate for them. The ombuds reminds them they are impartial and informal, might suggest they can facilitate a conversation between the inquirer and the person they are in conflict with, but cannot advocate for the inquirer.
 - Someone added that when ombuds work in collective bargaining environments, the ombuds might suggest the union as an advocate, and if an ombuds is not working in a collective bargaining environment or is an externally facing ombuds, they might still consider referring the inquirer to a different person/office who might be able to serve as an advocate.
 - Someone mentioned their office is revisiting their charter and considering language that might proactively articulate the inability to advocate. This person also agrees with others that if presented with a request to advocate they might point people in a different direction.
 - Someone raised the ability to help people consider all potential options and alternatives they have, and that they make clear they are not telling them what to do or giving them advice because they can't do either, but just helping them think through what they might do and how to handle.
 - Two other people both shared that in their experiences it is most likely to be senior leaders who want that type of advocacy or directed guidance.
 - One of the two mentioned that, particularly during mediations, they make the distinction between legal advice and legal information. They might provide hypotheticals that people find helpful for informational purposes without crossing a line of inappropriately counseling them.
 - Someone shared that they usually like to ask what the person's intent is so that the conversation can focus on their goals and then explore options and available resources.
 - Someone added that after making clear what the ombuds isn't able to do for them, they ask the person what they, the inquirer, want to do about the situation as an indirect way of clarifying that the action lies with them, they are making the call as opposed to the ombuds. There was support for this idea in the chat from others mentioning the importance of visitor/inquirer self-determination.
 - Someone else suggested exploring why the person needs an advocate and what they are hoping to achieve by having one. They as ombuds would still not accommodate the request for advocacy, but this line of questioning might help the inquirer to fully explore their options, those that they can pursue independently in addition to with the help of others, and then most importantly whether or not they even need advocacy.

Attendees:

Last	First	Agency	Call-In
Anderson	Jeff	DOE	1
Asar	Sharon	CFPB	1
Bedrossian	Leona	DOD/NGA	1
Berg	Mollie	DOD/NGA	1
Bookstein	Monique	Prince William County Public Schools	1
Braden	Lara	DeCA	1
Broughton	Kim	FDIC	1
Brown	Andrea	USPTO	1
N/A	Deirdre	N/A	1
Claxton	James	United Nations Funds and Programmes	1
Coffman	Cherina	DOD/NGA	1
Coleman	Jean	SBA	1
Davis	Ashley	University of Washington	1
Denise	Elizabeth	DOD/OIG	1
Enriquez	Elisa	NIH	1
Felton	Felicia	Census	1
Fields	John	CFPB	1
Garmon	Felisa	CFPB	1
Garner	Stephanie	DOE	1
Ginn	Bradley	Argonne National Laboratory	1
Harley	Jasmine	National Credit Union Administration	1
Harshbarger	Blayne	USDA	1
Hartman	Jessie	NARA/Office of Government Information Services (OGIS)	1
Hawkins	Toni	NIH	1
Hendrickson	Caitlan	FEMA	1
Hopkins	Emilee	NGA	1
Hurley	Nathan	FDA/Center for Tobacco Products	1
Jackson	Anthony	Forest Service	1
Jackson Davidson	Kimberly	George Mason University	1
Katherine	Erica	FDA	1
Kinnavy	Noreen	USAGM	1
Kiraithe-Muchene	Irene	HJF/DOD	1

UNCLASSIFIED

Lawrence	Steven	DHS I&A	1
Lenkel	Laurie	FDA	1
Lennox	Jill	FDIC	1
Levine	Lisa	DOJ/EOIR	1
Lunder	Erika	GAO	1
Mackinnon	Kathryn	DOD	1
Malone	Marcus	US Marshals Service	1
Manderson	Katie	VA	1
Maurer	Bill	Census	1
McGuire	Carrie	OGIS	1
Miller	Carla	DOJ/ATF	1
Patno	Arielle	FDA/Center for Tobacco Products	1
Porch	Susanne	Commerce/National Institute of Standards and Technology (NIST)	1
Rowe	Mary	MIT	1
Smith	Julie	Census	1
Smith	Tyler	NIH	1
Sotoudeh	Paul	USPTO	1
Stergio	Marcus	Office of Federal Contract Compliance Programs/DOL	1
Thomson	Ronnie	Sandia National Laboratories	1
Trujillo	Sarah	USDA/APHIS	1
Vermillion	Chris	Census	1
Villafane	Jacqueline	Outsourced ombuds	1
Voloshin	Victor	NIH	1
Wolfe	Lexi	DOE	1
White	Karen	National Guard Bureau	1
Younger-Banks	Tiffany	SBA	1
Yuille Banford	Deanna	FDA	1
Ziolkowski	Olivia	FDA/Center for Biologics and Research	1
		Total	60