



COALITION OF FEDERAL OMBUDSMAN

MEETING MINUTES

Date/Time: March 11, 2015, 1:30pm – 2:30pm

Location: Environmental Protection Agency (EPA), William Jefferson Clinton Building North, Conference Room 6013

Agenda:

1. Guest speakers provided an overview of their ombudsman organizations and shared information on upcoming conferences:
Robin Matsunaga, President, United States Ombudsman Association (USOA)
Kristie Hirschman, Director of Conferences & Training (USOA)
Lisa Witzler, Vice President, International Ombudsman Association (IOA)
2. Annual COFO conference planning
3. Ethical Dilemma

Highlights:

1. United States Ombudsman Association:

Mr. Robin Matsunaga is the Ombudsman for the state of Hawaii and President of USOA. Ms. Kristie Hirschman is Senior Assistant Ombudsman for the state of Iowa and serves on the USOA executive board as Director of Conferences & Training. Mr. Matsunaga provided an overview of USOA, the oldest ombudsman organization in North America with a focus on the traditional, classical ombudsman model. External ombudsmen in the federal government may find this organization particularly helpful.

The 36th annual USOA conference will be October 14-16, 2015 in Scottsdale, AZ. Ms. Hirschman provided information to members about submitting proposals for presentations at the USOA Annual Conference; for details or for more information contact Kristie at:

kristie.hirschman@legis.iowa.gov . For information on the USOA Annual Conference see: <http://www.usombudsman.org/usoa-events/annual-conference/>

The discussion with COFO participants focused on strategies for dealing with difficult complainants. Some suggestions included the following:

- Establish, maintain and respectfully convey boundaries to the visitor/complainant, e.g., time or duration of meetings, physical space and office safety considerations.
- Use communication skills to diffuse a situation, conveying respect for the individual and following up as appropriate.
- Utilize local resources that can provide information of use to ombudsman practitioners, such as crisis intervention and law enforcement teams and mental health alliances and organizations.
- Additional resources:

- Chris Wheeler from New South Wales wrote an article about working with unreasonable complainant conduct: <http://www.socap.org.au/files/FIZW04L2OS/Chris%20Wheeler.pdf>
- The Ombudsman of New South Wales also provides training on working with unreasonable complainant conduct: <https://www.ombo.nsw.gov.au/training-workshops-and-events/our-workshops/all-workshops/managing-unreasonable-complainant-conduct>
- National Alliance on Mental Illness – local D.C. chapter -- provides newsletter, trainings, upcoming events: <http://www.namidc.org/>

International Organization of Ombudsman (IOA)

Ms. Lisa Witzler is an Associate Ombudsman for the National Institutes of Health (NIH) and Vice President of IOA. She provided an overview of IOA – the largest professional association for ombudsman worldwide with a focus on the organizational ombudsman model. Among the offerings provided, they are best known for professional training and educational programs (i.e. standards of practice and code of ethics, and the course *Foundations of Organizational Ombudsman Practice*), a professional journal *JIOA*, and a certification program. For information see: <http://www.ombudsassociation.org/Home.aspx>

Ms. Witzler, shared information regarding the IOA Annual Conference to take place on April 19 – 22 in Atlanta, GA.

For conference highlights, keynote speakers and events please see:

<http://www.ombudsassociation.org/Conferences-Professional-Development/Annual-Conference/2015-Annual-Conference.aspx>

In addition to the conference, IOA has a variety of new developments such as forming committees to focus on the following areas: Research and Assessment; Professional Standards and Ethics; and Title IV. Also, the *JIOA* a peer review academic journal welcomes submissions and suggestions from the ombudsman community. Please contact Lisa to share your ideas with her.

2. Annual COFO Conference Planning

COFO participants discussed possible topics to include in the upcoming conference. One recommendation was to survey COFO membership for additional ideas. The following members volunteered to assist with the conference, Tracy McNeil – SEC; Joan Roger – EPA; Ella Yargon – FDA; Tony Ohe – DHS; Kahlill Palmer – USPS.

Suggested Topics for COFO Annual Conference 2015:

- Conflict Coaching: Tools for daily practice – not formal coaching related
- New Ombudsman: A separate session for new ombuds to interact with more experienced ombuds – reflections, challenges, questions, etc.
- Mental Health Challenges: Training, advice, guidance, wisdom, protocols, safety, security, confidentiality

- Helping People Help Themselves: Educating/teaching clients to manage up and down the chain of command
 - How to Better Communicate/Market the Ombuds Role to Leaders and Managers: Ombuds not a substitute for supervision
 - The Don'ts: What an Ombuds should not do or handle
 - How to Say "NO": When a visitor is persistent/passionate after all that can be done, has been done
 - Legal Updates: Recent court cases
 - Victim Support: Working with complainants/visitors who have undergone a traumatic event – (PTSD).
3. An "Ethical Dilemma" was posed to COFO participants. The discussion revolved around related policies, ombudsman's role and obligation to report or disclose information, and potential legal ramifications.

Attendees: (in person)

Jeff Anderson, Equal Employment Opportunity Commission

Riley Barrar, Department of Defense, AF

Andrea Brown, Department of State

Dallas Brown, Department of Homeland Security, National Protection and Programs Directorate

Tracey McNeil, U.S. Securities and Exchange Commission

William Maurer, Department of Energy

Tony Ohe, Department of Homeland Security, National Protection and Programs Directorate

Kahlill Palmer, ANNI Group*

Victor Voloshin, Equal Employment Opportunity Commission

Attendees: (by phone)

Emily Albertson, Federal Reserve Board

Karen Asaro, Department of Homeland Security, FEMA

Cathy Barchi, Department of Energy

Virginia Behr, Department of Health and Human Services, FDA

Mollie Berg, Department of Defense, NGA

Joanne Dea, USDA

Debbie Duncan, Department of Homeland Security, TSA

Ayanna Epps, Federal Deposit Insurance Corporation

Tasha Fleming, Department of Justice, BOP

Harriet Gerber, Department of Health and Human Services, FDA
Claire Heffernan, Department of Homeland Security, TSA
Kristie Hirschman, State of Iowa
Wendy Kamenshine, Consumer Financial Protection Bureau
Noreen Kinnavy, International Broadcasting Bureau, Voice of America and Office of Cuba Broadcasting
Marcia, Larkins, Department of Health and Human Services, FDA
Kristina Lauritsen, Department of Health and Human Services, FDA
Joy Lee, National Credit Union Administration
Karen Leichtnam, D.C. Superior Court
Robin Matsunaga, State of Hawaii
Celeste Merrix, Department of Homeland Security, FLETC
Heather Milner, Consumer Financial Protection Bureau
Pamela Pontillo, Department of Energy, Office of Conflict Prevention and Resolution
Sara Roberts, Department of Homeland Security, TSA
Joanne Rogers, Environmental Protection Agency
Tonya Sibley, Department of Homeland Security, TSA
Julie Smith, Department of State
King Stablein, U.S. Nuclear Regulatory Commission
Jeri Walker, National Credit Union Administration
Guy Weber, Department of Defense, NGA
Lisa Witzler, Department of Health and Human Services, NIH
EllaYeargin, Department of Health and Human Services, Center for Tobacco Products