

# CO-OP Annual Report

## April 2012 – March 2013

### Purpose of Certification

- To promote, examine and maintain standards for the advancement of Organizational Ombudsman;
- To identify -- for organizational ombudsman practitioners, their organizations, and the public -- those organizational ombudsmen who have voluntarily sought and obtained certification;
- To increase visibility for Certified Organizational Ombudsman Practitioners;
- To acknowledge that there is a body of knowledge and experience required to be an organizational ombudsman practitioner, and that certification demonstrates that an individual has that knowledge and experience;
- To ensure consistent adherence to the key ethical values and Standards of Practice of the organizational ombudsman as defined by IOA; and
- To enhance the status and credibility of the profession and present a reliable image to the public.

### CO-OP Highlights from 2012-2013

- The CO-OP Board updated the CO-OP Policy Manual, increasing the number of resource documents in the manual from five to 27.
- Two new Board members were elected in September 2012, including filling the seat of a non-IOA member representative.
- New Chairs were selected for the Eligibility Committee, the Appeals Committee, and the Accreditation Taskforce.
- The CO-OP examination was offered during two testing windows in 2012: in Spring 2012, 16 individuals took the examination, and in Fall 2012, 15 individuals took the examination.
- To date, 170 individuals have taken the certification examination, with an overall pass rate of 94%.
- To date, we have 100 certified ombudsmen, 15 of whom became certified in the past year.
- Of those 100, we have certified 18 ombudsmen who practice in 12 countries outside of the US, including:
  - Australia
  - Brazil
  - Canada
  - Chile
  - China
  - France
  - India
  - Japan
  - Netherlands
  - Switzerland
  - Thailand
  - United Kingdom

### 2012 Financial Update & 2013 Financial Outlook

- In 2012, CO-OP finished the year with a surplus of approximately \$8,400, making this the second year where CO-OP has made a profit for IOA; CO-OP generated a profit of \$3,646 in 2011.
- The 2012 surplus was primarily due to reduced and postponed expenditures, since income—derived primarily from examination and application processing fees—dropped by about one-third compared to 2011. The reduction in income reflected a slight reduction in the number of certification exam takers and a reduction in the number of applicants for certification, probably due to some leveling off in demand as the backlog of Ombuds seeking certification has been addressed.
- Expenses declined more sharply than income. The reasons were several. One-off costs required to establish the program, such as certain legal fees, came to an end. A number of cost-saving measures were introduced, including substitution of hourly charges for our management company's previous flat rate, as well as reductions in the cost of blast emails and conference calls. The expenses for creating the next version of the certification exam were postponed to 2013. Finally, reimbursement of the certification management fee for overpayment in 2011 resulted in a one-time reduction.
- For the future, the CO-OP Board expects to break even on the average, but with special expenditures on the order of \$8,000 to \$10,000 every 2 to 3 years in order to keep the exam updated. We hope to maintain or increase the level of exam takers by marketing to ADR and other graduates. Should further drop-off in demand occur, however, it will be possible to find additional expenditure reduction (i.e., by reducing the number of exam administrations) in order to maintain, on the average, a break-even position.

## **Goals for 2013-2014**

- **Begin re-certification process, for those individuals who were certified during the first year of the program;**
- **Shape the process to begin accreditation of office programs;**
- **Implement additional marketing efforts to increase the number of individuals who take the CO-OP examination, and the number of individuals who become certified.**

## **Committees, Subcommittees and Taskforces of CO-OP**

Accreditation Taskforce

Appeals Committee

Communications Committee

Eligibility Committee

Finance Committee

Nominating Committee

Professional Practices Committee

Recertification Subcommittee

## **Thank you to all of the CO-OP committee members and task force members:**

Bernard Anderson

Evan Arrowsmith (Incoming Chair, Eligibility Committee)

Jim Augustine

Thomas Barnette (Outgoing Chair, Appeals Committee)

Constance Bernard (Chair, Finance Committee, CO-OP Board Member, Treasurer)

Wayne Blair

Robert Bordone (Outgoing CO-OP Board Member, Public Member)

Ilene Butensky Brehm

Carol Breslin (CO-OP Board Member)

Victoria Brown

Mary Chavez-Rudolph (Chair, Professional Practices Committee)

Katja De Groot

Scott Deyo

Wendy Friede (CO-OP Board Member, Secretary)

Mimmo Gaetano

Delores Gomez-Moran

George Michael Kilpatrick (Chair, Recertification Sub-Committee, Chair, Accreditation Taskforce)

Catherine Langlois

Sharon Lanier

Patti Lynch

Jennifer Moumneh (CO-OP Board Member, President)

Amanda Pace (Incoming Chair, Appeals Committee)

Patricia Ponce

David Richardson

Janis Schonauer

Judi Segall

Indumati Sen

Carol Stewart

Albin Swenson (Outgoing Chair, Eligibility Committee, Outgoing CO-OP Board Member)

Gordon Talbot (CO-OP Board Member, Non-IOA Member Director)

Marsha Wagner (Chair Nominating Committee, CO-OP Board Member)

Nancy Welsh (Incoming CO-OP Board Member, Public Member)

Marcy Wilkov

Jim Wohl (Chair, Communications Committee)

Welcome our newly certified members, as of March 31, 2013

<b>Bruce Auerbach</b>	<b>University of North Carolina, Charlotte</b>
<b>Brian Bloch</b>	<b>Department of the Interior</b>
<b>Terry Boudreau</b>	<b>Eaton Corporation</b>
<b>Karen Campbell</b>	<b>American Express</b>
<b>Linda Falkson</b>	<b>Cornell University</b>
<b>Cynthia Joyce</b>	<b>University of Iowa</b>
<b>Adam Kleinberger</b>	<b>Cornell University</b>
<b>Andrew Larratt-Smith</b>	<b>University of California, Riverside</b>
<b>Sana Manjeshwar</b>	<b>Alliance Bernstein</b>
<b>Reto Meister</b>	<b>International Committee of the Red Cross</b>
<b>Wokie Nwabueze</b>	<b>Princeton University</b>
<b>Dawn Osborne-Adams</b>	<b>Binghamton University</b>
<b>Shreya Trivedi</b>	<b>University of Central Florida</b>
<b>Guy Weber</b>	<b>Transportation Security Administration</b>
<b>Patricia Wynegar</b>	<b>Federal Deposit Insurance Corporation</b>

And, thank you to our full list of continuing Certified Ombudsman:

### Directory of Certified Organizational Ombudsman Practitioners

<u>Practitioner</u>	<u>Organization</u>		
Kelley Alexander	Georgia State University	Mimmo Domenic Gaetano	Mars, Inc.
Bernard Anderson	Kennesaw State University	Sylvia L. Powlis Garvin	Career Concepts, Inc.
Evan R. Arrowsmith	Eaton Corporation	Dolores Gomez-Moran	George Mason University
Kirsi Ahmavaara Aulin	University of California Santa Barbara	D.A. Graham	DNA Consulting, INC.
Thomas W. Barnette	American Express	Dorothy Graham	Kennesaw State University
Frank R. Baskind	Virginia Commonwealth University	Kellie S Harmon	University of Kansas
Constance Bernard	The World Bank	Latryce Gathing-Harris	The Coca-Cola Company
Wayne Blair	University of North Carolina	George Michael Kilpatrick	Fiat Lux/Ombuds Service Group, LLC
Lauren Bloom	The University of Texas at Austin	Willem Kweens	Mars, Inc.
Carol Breslin	Chevron Corporation	Catherine Langlois	Georgetown University
R. Kenneth Brown	Royal Bank of Canada	Sharon Lanier	Munroe Regional Medical Center
Victoria Brown	University of Central Florida	Danielle Fischer-LeBailly	Mars, Inc
Ilene Butensky Brehm	Eaton Corporation	Daryl Lynn Maitland	Federal Deposit Insurance Corporation
Helmut Buss	UNDP, UNFPA, UNICEF, UNOPS	Jose Martinez-Aragon	United Nations Regional Ombudsman
Kevin S. Casey	Texas Department of Public Safety	Phoebe Morgan	Northern Arizona University
J. Michael Chennault	University of California Irvine	Jennifer Mounneh	University of California Irvine
Melissa Connell	University of Colorado Denver	Bathabile K. S. Mthombeni	Columbia University
Beatriz Dale	American Express	Marvin Neal	The Coca-Cola Company
Maria Helena Darcy de Oliveira	ICATU Hartford	Lisa M. Neale	University of Colorado Denver
Nancy Deering	Newark Public Schools	Pierre Niedlispacher	Coca-Cola Enterprises
Katja De Groot	County of Santa Clara	Amanda Pace	The Coca-Cola Company
Dennis DiPlacito	University of California Irvine	Susan Kee-Young Park	UTMD Anderson Cancer Center
Scott M. Deyo	U.S. Department of Defense	Laurie Patterson	Akron General Health System
Diane Dorion	Royal Bank of Canada	Lois Petzold	International Monetary Fund
Joan Elaine Engel	Career Concepts, Inc.	Patricia Ponce	Cal Poly San Luis Obispo
Wendy Friede	Friede Consulting Services	Theresa Prator	Los Angeles World Airports
		Sophia Qiao	Eaton Corporation

Mauricio Ramos	Sandia National Laboratories
David Rasch	Stanford University
David Richardson	Kaiser Permanente
Mary Rowe	Massachusetts Institute of Technology
Mary Chavez Rudolph	University of Colorado Denver
Janis Schonauer	AllianceBernstein
Thomas D. Sebok	University of Colorado at Boulder
Judi Segall	Stony Brook University
Indumati Sen	International Baccalaureate
Justine Sentenne	Hydro-Quebec
John A. Simonetti	Eaton Corporation
Jennifer Graf Sims	University of Texas, Austin
Devyani Singh	Eaton Corporation
Suzy Rosen Singleton	Gallaudet University
Mary Beth Stevens	Los Alamos National Laboratory
Carol Stewart	Mount Holyoke College
Albin W. Swenson	Chevron Corporation
Noriko Tada	GUIDEA
David Talbot	The World Bank
Gordon Talbot	Federal Deposit Insurance Corporation
Lisette Thibault	Department of Canadian Heritage
Charmaine Tomczyk	Coastal Carolina University
Lee Twyman	Rochester Institute of Technology
Sue Vandittelli	Canadian Franchise Association
Marc Vaucher	United Nations
Marsha Wagner	Columbia University
Richard G. Wall	Chevron Corporation
Marcy Wilkov	American Express
Theodore R. Williamson III	The Coca-Cola Company
Jim Wohl	University of Connecticut
Gary Yamashita	Chevron Corporation
Thomas Zgambo	World Bank Group

