

# Reimagining the Role of the Organizational Ombuds

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## ABSTRACT

This article expands the 2016 IOA Annual Conference's Mary Rowe Honorary Keynote Address, "Reimagining the Role of the Organizational Ombuds." It asserts that ombuds should be thought of as transformational leaders. Using a real case example, it contends that making connections and understanding consequences from the ombuds' unique vantage point is a form of risk assessment and change management that should be integral to our work.

The article also argues for an activist interpretation of the ombuds role and its potential to shift individual ombuds and the profession at large from a transactional to a transformational orientation.

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## KEYWORDS

Ombuds, ombudsman, leadership, transformational leadership, activist ombuds, risk management, change management

## INTRODUCTION

I was honored to be invited to deliver the Mary Rowe Honorary Keynote Address at the 2016 Annual Conference of the International Ombudsman Association (IOA). I was also challenged—challenged to combine my training, my experience, and my perspective into some coherent statement of my ideas about our profession while keeping true to the goal whereby “this keynote address will critique an area in the ombuds profession that warrants discussion, debate, and exploration.”

I wanted to create a statement that would be both engaging and helpful and that would lead to future discussions. After a lot of self-doubt and reflection I settled on the theme of “Reimagining the Role of the Organizational Ombuds.”

To say I was surprised by the response to the keynote would be an understatement. It was more gratifying than I could have predicted. My perspective and experiences resonated with many other ombuds who embraced my ideas. Others believed I had stretched the role of an ombuds too far. Some found my ideas disconcerting or contrary to IOA’s Standards of Practice (SOP), a position I reject. Still others had a visceral reaction and worried it would create “a dangerous precedent” in the profession because my views were simply too radical and risky to implement in their institutions. Taken together, the various positive and negative reactions told me my goal of provoking introspection and discussion had been met.

What follows is not a transcript of my address. Instead it is a refashioning that I hope will be useful whether or not someone reading this was present to hear my remarks. First, I briefly discuss the case I used as an example in the keynote. Then, I share my personal experience of being an ombuds, as it has shaped my current ideas about the role. Next, I provide a more detailed explanation of how our ombuds office approached the case in question. Finally, I explore the difference between being a transactional leader and a transformational leader and its relevance to the ombuds role.

As a way of introducing my ideas, let me offer a brief overview of the case I presented in the keynote. It involved widespread and decades-old problems with staff in a large unit on our campus. First-level supervisors and departmental leadership were responsible for sexual harassment, sexual assault, and extortion. Those who were the survivors and victims were vulnerable on a number of counts and were, initially and understandably, unwilling to speak to anyone in authority about the situation. Ultimately, these practices were revealed, stopped, and those responsible were held accountable.

I wondered if the sensational facts of the case and its feel-good conclusion might distract from my larger message, but I used this case because it served as a practical example that emphasized many of the ideas I wanted to share in reimagining our roles as organizational ombuds. It was a framework illustrating how I wanted to shift the profession’s approach to the work that we do.

A colleague remarked after the keynote, "...that case helped me realize how important and meaningful my work can truly be. For the first time, it really made me feel good about being a part of this profession." That is certainly a heart-warming statement, but it unfortunately confirmed my concern that the underlying factors that guided the ombuds office's decisions and actions towards the case's conclusion and resolution had likely been overlooked. What I wanted to convey most was that our office had shifted the paradigm in our practice from transactional to transformational and in the process embraced our roles as transformational leaders in our organization.

Subsequent post-keynote conversations convinced me that not everyone fully understood the efforts that went into the resolution of the case. These efforts included the patient gathering of information through one-on-one and group meetings; the careful analysis of trends and patterns; the thoughtful development of goals and action plans and their strategic implementation; and the collaboration between victims, allies, administrators, and other decision makers. The ombuds office often guided these efforts from behind the scenes, unknown to many involved.

We were able to help bring about this change by developing a systematic approach of working with groups and individuals to manage their particular situation through focused training sessions. These gave victims and their allies the tools to resist and the confidence to hope. We educated people on how best to utilize formal and informal processes. Working with decision makers, we shared information about the shortfall of relevant policies and procedures and suggested appropriate changes. We facilitated meetings with key administrators while gently urging them to collaborate and problem solve as the complexity and scope of the issue unfolded. In addition, we strategically placed the institution on notice through a series of carefully orchestrated steps. All of these actions (and many more) in concert brought about much-needed change for the individuals involved, the department, the institution, and the organizational culture.

Everyone can agree that change is a certainty for individual ombuds. We can control some changes; others we cannot control. What matters is how we respond to change. A rigid and static interpretation of our guiding principles may prevent us from making a truly meaningful contribution to our organizations, may erect unnecessary barriers to assisting people who come to us for help, and may limit our satisfaction in our work. Any of these results will have significant consequences for the profession.

Change is also a certainty for our profession. As I write, IOA has an Ethics and Professional Standards Task Force in place that "will review and propose to the Board updates to IOA's Standards of Practice (SOP) and Code of Ethics (COE) to assure that they are consistent with legal and professional development, IOA Bylaws and member criteria" (The International Ombudsman Association, 2017). Ombuds must grapple with change to remain relevant.

Let me now turn to explaining what led me to become an ombuds who seeks to be a transformational leader. By that I mean someone who works to bring about meaningful change.

## MY PERSONAL EXPERIENCE

About fourteen years ago, several people encouraged me to apply for the newly-created position of Associate University Ombuds Officer at Columbia University. They told me that I would be good at it and taking the position would be a good fit for me and for the university. One mentor said I would be particularly effective in the role because I possessed the ability to relate well to people at all levels in the institution and had excellent problem-solving skills and crisis management experience.

I honestly did not know whether this was true. I had little appreciation for what the position of ombuds entailed, how the office functioned, and its place in the culture and structure of the university. I went ahead and applied, and Marsha Wagner took a chance and brought me into the profession.

I had a wonderful teacher in Marsha Wagner and will always be grateful to her and other role models in the profession. I became a certified mediator, I participated in training courses through The Ombudsman Association and later IOA and took advantage of many opportunities to learn informally from more experienced ombuds. I embraced the profession and committed to practicing according to the IOA's standards and principles.

At the same time, I began to have private doubts. The more I met with people who came to me for help, the more I listened and offered options to help them untangle complicated situations and develop strategies for next steps, the more I interacted with the formal leaders of the organization, the more I began to feel some uneasiness about how we practiced. Conversations with practicing ombuds throughout the years lead me to believe that most, if not all ombuds at some point struggle with staying neutral, but my doubts were even more fundamental.

At first, I thought perhaps it was the result of the to-be-expected divide between the theoretical (taught in training sessions) and the practical application of my new skills. I wondered how much my personal style, natural tendencies, and experiences contributed to my uncertainty. I expected at some point soon to reconcile these tensions and find a comfortable sense of "rightness" or balance, if you will, in my work. Alas, such was not the case.

I soon realized that as an ombuds I saw the organization with greater clarity but in a different light than when I was an employee in other capacities. It was as if someone had cleaned the grimy lens of a pair of much-needed glasses. I was now privy to sensitive information acquired from confidential conversations. I now had a broader and deeper knowledge of an organizational culture that at times rewarded poor behavior and at times penalized those making a positive contribution. Systemic problems were left unaddressed. It was easy to go along and avoid difficult conversations and decisions. Bureaucratic snafus and inconsistent implementation of policies and practices often created a perception of an uncaring institution in which unfair outcomes were readily

tolerated. (Of course, I also knew of many wonderful achievements done by wonderful people, but as ombuds we hear much more negative than positive information.)<sup>1</sup>

All of this became a challenge for me, and I felt trapped in a position of inactivity for fear of making a mistake and violating our SOP and COE. I did not want to become jaded and cynical and allow that perspective to prevent me from developing options and far-reaching solutions while managing the urge to right what I saw as wrong.

Increasingly I felt that the work I was doing was little more than an effort in futility, a true professional dilemma. I heard complicated issues with profound implications for the organization. I dutifully provided “upward feedback” to the appropriate decision makers with suggestions for addressing the concerns. Often, they listened politely and did nothing whether from inertia, disagreement, fear, or some other reason that was not explained. This way of passing on information is the embodiment of a transactional role. It is bureaucratic, benign, and in the long-run less effective than is desirable.

Ombuds rarely encounter simple problems with simple solutions. Whenever an issue affects an individual or group, it has an impact on the organization as well. Ombuds are in a unique position and have a special opportunity to make connections and see the implications for all concerned. We have the information to do trend analysis and find patterns where others might not. In many ways, this is threat and risk assessment. Imagine the single pebble that rolls down the side of a hill that creates a rock slide that results in an avalanche that does significant damage to the hill or even destroys it.

Making connections and understanding consequences from our unique vantage point is a form of risk assessment that should be integral to our work. Interestingly, whenever I have asked ombuds if they do risk assessment, most say they do not. However, if we deconstruct the process into gathering data and information, analyzing the trends and patterns that become evident, and seeing the likely consequences, we see we do engage in a form of risk assessment. It is a practice we need to integrate into our work with individuals, groups of people who come to us for help, and on the organizational level.

It is taking the next step of deciding how, when, where, why, and with whom we share what we have learned that some ombuds apparently find disconcerting or even inappropriate. Developing goals, objectives, and action plans carefully structured to address specific problems and concerns in the organization may be difficult, but it must be done if we are to be truly successful as ombuds. This part of our work has the greatest potential for helping other leaders make transformative changes.

The SOP and COE offer little guidance for this aspect of our work. They tell us what we should and should not do but not how to do it. In IOA’s professional development

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<sup>1</sup> The University of North Carolina at Chapel Hill may have the only ombuds program that invites people to share good news with us. We also invite suggestions about how to improve Carolina. This is stated in our brochure and we routinely include it in presentations.

courses greater attention is paid to what we should or cannot do with less focus on how to do what we appropriately want to do.

It is not uncommon for some participants to leave IOA's foundational course with a wealth of information, a great experience, and with new friends and contacts, but without sufficient useful practical information. Some seem nearly paralyzed when faced with circumstances they have not encountered or heard discussed. Fear of making a mistake may lead to indecisiveness. I know because I've been there myself, wondering whether avoiding some issues would make me irrelevant and unable to make the impact I had hoped to make.

This hesitation to move forward on systemic issues was contrary to my natural instincts and left me uncomfortable. I would have benefitted from more direction from IOA and other ombuds. I know some other ombuds have had the same experience; I know because now many of these ombuds contact me to talk about their frustrations and fears.

While struggling with these professional dilemmas, I moved to North Carolina in 2005 to develop and launch the University Ombuds Office at the University of North Carolina at Chapel Hill. I was determined to create an office that approached our work in a way that took these concerns into account.

#### **“THE CASE”**

Not long after I arrived, I worked on a case that was a perfect opportunity to do so. It challenged me to think about our work differently. I learned that a department on campus had a common practice where some managers offered temporary and permanent positions to women in exchange for sex and to both men and women in exchange for money. Sadly, the practice was generations old. The habits that helped sustain this behavior over time became a part of the organizational culture in this one unit and became accepted as “that’s the way it is here.” Most people felt nothing could be done and resistance was pointless because previous attempts to address the matter had been ruthlessly suppressed. People needed their jobs and had legitimate fear of losing them or of suffering some other form of retribution if they spoke up.

Nothing about bringing an end to these practices happened quickly. It took time before individuals in the department would speak openly and honestly to me. It took time to collect their experiences and the effect they had on each person. I needed to show my empathy and sorrow as well as my assurance that something could be done. It took time to understand the people, history, and culture of the department—their concerns and interests. They learned to trust me because I spoke a language they could understand and appreciate. To be clear, this was not a language based on different ethnic and cultural groups, but it was a language that fostered cross-cultural communication. It is the universal language of empathy, honesty, and humanity.

It also took time to learn the diverse perspectives of people outside the department who shared responsibility for what happened. It took time to develop trust across the



university community so I would be listened to. It took time to connect the dots, to see how some seemingly unrelated issues were all relevant, and to plan a strategy for how and when to involve others.

After a significant period of time gathering information, I identified the visitors' goals and considered where they overlapped with the institution's goals and where there was space between them. It took a lot of strategic thinking and planning to move forward. I worked hard to foster collaboration between those who had been wronged, their allies, and those who had the authority to initiate and oversee change. The outcome, most of which became public, was beneficial to everyone involved with the exception of those who lost their jobs because their wrongdoing had been exposed.

This outcome was transformational in many ways. First, a significant set of employees was no longer subject to the unacceptable and likely illegal actions of their supervisors. These beleaguered employees could come to work without fear of being subject to the demands and whims of their supervisors. Changes in structure and policy as well as in personnel were implemented. Formal support systems were put in place. Administrators were praised for the direct way they dealt with the problem. The ombuds office was praised for bringing the problem to light and for offering options for responding. Our perspective was actively promoted and sought. Particularly when oversight groups struggled with a dichotomy between "fairness," which was often policy and procedurally driven and "doing the right thing," which was human rights and justice driven.

Second, many people across the campus became aware of the ombuds office and the important role it filled on campus. Conversations and consultations by decision makers and those who felt powerless concluded that we could be trusted and that we could help get things done. The office strengthened its already positive relationships with the human resources professionals and the attorneys representing the university.

The case solidified my belief that a more active and participatory ombuds program was more meaningful for individuals who came to us for help and for the organization. Essentially, I embraced an activist ombuds philosophy (Gadlin, 2014). (If such a thing exists.) The ombuds office evolved from a transactional way of doing business and embraced a more transformational leadership role. We were intentional and strategic in managing this change.

Significant change occurred, transformational change occurred, and I applaud the former chancellor who not only supported but insisted on change once he understood the scope of the problem. What did I do? Starting with one person who came to me for help with a different matter, I was able to encourage and ultimately convince many others to come talk with me. I had to reassure them over and over that the ombuds office was a safe place and that we kept our word with regard to confidentiality.<sup>2</sup>

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<sup>2</sup> This case occurred before the 2011 Title IX Letter to Colleagues. We are not currently Title IX "responsible employees" who are obligated to report allegations of sexual harassment and assault. If we had been, this case could not have unfolded as it did. It would have ended when I explained our confidentiality and reporting requirements to the first visitor.

It is easy to attribute our success to the egregious facts in this case, but that conclusion misses my point. I did not select it because of its sensational nature or because many details were already public. Rather, this case elegantly illustrates my message that there is a role for the ombuds beyond the transactional. It demonstrates that as ombuds we can use these same strategies and opportunities for positive change even when the situation is one that does not cause jaws to drop. A willingness to act may require reimagining the role of the ombuds and a commitment to professional self-awareness and growth. Individual ombuds and the profession as a whole are always maturing and evolving in response to new knowledge, changing work environments, external events we do not control, our own developing abilities, and application of IOA's ethical standards in cases of first impression.

Sticking my nose in and sticking my neck out took me into uncharted territory, and I admit I did a lot of risk assessment for the ombuds office before moving forward. It paid off in the results for the department, in better alignment between university values and policies and its practices, and in new respect and increased stature for the ombuds office. Our work was recognized and our reputation enhanced across campus. The office was publicly praised for its role in this situation.

Was I neutral? I think I was, if ombuds truly mean it when we say we believe in and can advocate for "fairness." I am not confident I fully understand what this means since fairness is in the eyes of the beholder.<sup>3</sup> Unlike in most situations, I had specific outcomes in mind: to eradicate these practices and, if possible, to hold wrongdoers accountable. I thought fairness demanded both of these.

The ombuds office navigated this process without compromising the spirit of the SOP and COE. However, we were not shy about sharing our views, thoughts, and opinions. Final decisions were not ours, but by design we intentionally influenced many of the outcomes.

Do I have any conclusions from this experience that might be useful to other ombuds? I certainly hope so:

- Learn all you can learn. Learn from visitors, from what they say and don't say, and from their nonverbal cues. Learn by listening and watching when leaders and those whom they lead speak.
- Learn the history of your organization and its values and traditions.
- Look for gaps between espoused values and actual practices.

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<sup>3</sup> Consider the lawsuits filed by accuser and accused in Title IX sexual misconduct cases about the fairness of a process adopted by a college or university after review by attorneys and input from experts. See "Expelled for sex assault, young men are filing more lawsuits to clear their names" The Washington Post, April 28, 2017, [www.washingtonpost.com/local/education/expelled-for-sex-assault-young-men-are-filing-more-lawsuits-to-clear-their-names](http://www.washingtonpost.com/local/education/expelled-for-sex-assault-young-men-are-filing-more-lawsuits-to-clear-their-names).



- Never compromise your integrity or fundamental operating principles. One instance of doing so can destroy your credibility.
- Choosing not to act when you see a clear need to act will diminish you in your own eyes and, if known, in the eyes of others who believe in fair treatment for all members of your community.
- Get to know others at all levels of your organization. I believe it is acceptable to eat lunch or have coffee with others who are part of the community. I believe it is acceptable to serve as a consultant (not a member) to committees or task forces when asked and if you believe you can be useful. Your office can develop allies and partners who can support you.
- Let others make decisions, but help them by providing reliable information and the unique perspective that an ombuds has.
- Going from transactional to transformative serves your institution and your visitors. It also feels great.

I now wish to share some observations about how we as ombuds practice. Please note that my observations do not apply to all ombuds or to any ombuds at all times.

#### **THE TRANSACTIONAL OMBUDS**

We too often approach our work from a position of feeling inadequate, isolated, and powerless. At times, we think we do not deserve a place at the table. I believe these feelings stem primarily from two sources:

First, our confidentiality, which is an essential part of our value, limits us. Ombuds are unable to tell anyone the details of our work. We can make only vague statements of our contributions to the well-being of visitors and our organizations. We cannot prove a negative—that it was our efforts that averted a grievance, a lawsuit, withdrawal from school, bad publicity, losing a valued employee, or some other negative result. We cannot disclose when our ideas have improved policies or when they have made sure funds were managed properly. We cannot calculate the intangible benefits of making our institutions better places.

Second, ombuds are too often professionally insecure. Many people in our organizations do not understand our work or appreciate our roles. They may assume we are duplicating the work of others or are trying to invade their turf. We have to explain ourselves over and over. Many of us do not have meaningful job security; we have all seen ombuds offices dismantled or kept open with reduced responsibilities and resources. We are underpaid in many instances and have few opportunities to move to new positions. We envy the benefits of other professions, most notably the privilege held by lawyers. Our insecurity results in our not being our own best advocates.

Our professional insecurity is a distraction. We want to be something we are not. We fixate on the need to have legal privilege. While this is very important, we expend a

great deal of energy and effort trying to persuade the appropriate decision-makers in our organizations to allow us this benefit. However, clumsy attempts to secure “privilege” for ombuds have backfired because of our confusion between privilege and confidentiality. Some in our organizations view us as naïve and overreaching when the fact remains that ombuds in the United States simply do not have privilege because it has not been granted by any court or legislature here.

In our efforts to advocate for legal privilege in our organizations, we fail to appreciate the uniqueness of our roles and its potential for innovation and progressiveness.

The concept I hope we will all discuss is that of the “activist” ombuds (Gadlin, 2014). By that I mean we need to do more than be reactive or stay in our comfort zone. Of course, we must work with the visitors who seek us out, but we must not give in to the temptation to isolate ourselves in our offices. It is far too easy and safe to do so. To be honest, for many of us, this suits our personal inclinations. This is the part of our work in which we have more control and we see an immediate impact on the individual who came to us for help.

We must guard against self-imposed marginalization as we mute our voices even when we have something to say. We run the risk of becoming irrelevant if we avoid engaging with the organization on a larger comprehensive level. Throughout the years, interactions with colleagues in the profession have helped me to realize that most of us are modest people which is usually a good quality, but it can prevent speaking out in ways that draw appropriate attention to ourselves.

We must engage on a macro level. If we do, our impact will be more significant, appreciation for our work will increase, and we may well find new professional satisfaction. We serve the organization when we assist individuals, and we serve individuals when we assist the organization.

We must become better advocates for ourselves and our profession. We have a valuable role to play in our organizations and are in a special position to improve them. Even when an ombuds program has been created as a quick fix after some specific problem or embarrassment, the ombuds has an opportunity to prove their worth.

## **THE LEADERSHIP OF THE OMBUDS IN TRANSFORMATIONAL CHANGE**

Dispute resolution and conflict management are essential elements of our identity and practice. Our identity and practice can also include transformational leadership if we are willing to include it. Ombuds may need to take a more active and more assertive participatory role in our organizations. In short, we may need to become activist ombuds.

Rigid interpretations of the SOP may restrict ombuds from taking on the responsibilities of an activist ombuds. The purist perspective, which is one valid way to conceive of our role, held by some ombuds reinforces this limitation. To some it may seem that ombuds cannot appropriately engage in activities not explicitly approved in the SOP. To others holding another valid perspective, the SOP allow plenty of room for the use of good

judgment in setting boundaries in the ways we deal with the realities of the organizations in which we practice. No one wants to commit or appear to commit any form of ombuds “malpractice.”<sup>4</sup> But always playing it safe reduces the possibilities for making the maximum contributions to organizations and visitors alike. If we stand silent when we see troubling policies or practices that persist because of avoidance by senior leadership, we miss significant opportunities to be a catalyst for positive change.

In my view, the SOP allow for direct action in many circumstances. Our informality allows us a great deal of flexibility in helping people help themselves and in helping the organization. We can say and do things that those who oversee and implement formal processes cannot. Our flexibility is enhanced by being off-the-record and not serving as an office of notice. In some cases, informal and formal processes can complement each other and even collaborate to respond to a dispute. Some ombuds step out as soon as someone who comes to us for help initiates a formal process. I prefer to make that decision on a case-by-case basis.

Although not in the SOP or COE, ombuds are taught that we can move information and concerns to decision makers through “upward feedback.” We can do so either with permission from a visitor or if we can devise a way to protect the visitor’s identity while passing along our thoughts. For example, many times a suggestion that a department review the policy on conflict of interest or alcohol use does not indicate why the suggestion is being made or a call to the auditor to suggest that a particular unit be moved up on the priority list for auditing does not reveal to anyone who brought information to the ombuds.

The term “upward feedback” is insufficient to describe the range of what ombuds can, and sometimes should, do. “Upward” suggest an audience of one or a small group. It implies that ombuds do not engage with all levels of the organization. A better term might be “outward feedback.” An ombuds needs to engage a variety of people at all levels over time even if they do not come directly to us for help or advice.

“Feedback” seems passive, suggesting a response given by someone who has received information or observed some action. Yes, but the ombuds can do more than merely pass on information to someone else. We can collect, analyze, and interpret what we are told and what we observe from our unique vantage point. No one else in the organization has access to the same information.

It is not enough for an ombuds to provide information and then step back and observe decisions makers from afar when we may well have useful ideas about how to respond to the information we provide. We will often have to be part of ongoing conversations in order to advance transformational change. We can help others develop goals, objectives, and action plans to manage change. We need to take full advantage of our role.

Still, decision makers may choose to do nothing even with the information. We need to ask ourselves what is our responsibility to the organization at that point?

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<sup>4</sup> Until 2016, IOA membership categories were dependent on one’s practicing according to the SOP, and even now only those ombuds who do are eligible to become CO-OP® certified.

Organizational ombuds routinely say we have no power. While technically true, the message others hear is that the ombuds has good intentions but is actually irrelevant and inconsequential when it comes to actually having an impact. However, a strong ombuds has plenty of influence, which is a form of referent power (French & Raven, 1959). If we have built relationships, established mutual trust, and contributed to thoughtful conversations with those who hold power, then our ideas will be sought and given meaningful consideration. Yes, it is complicated to use influence and stay neutral, but it is possible if we are careful and explain why we say what we say. I encourage you not to tiptoe or run in the opposite direction when we see opportunities or when we are invited to give our perspective, and, yes, to use our influence.

A 2015 trip to South Africa for IOA as part of a five-member instructor team of organizational ombuds truly deepened my appreciation of the value of influence and affirmed my belief that ombuds can be transformational leaders. The South African government has mandated all public colleges and universities to implement ombuds programs similar to one that was operating at the University of Cape Town. IOA was invited to provide training for those taking on the ombuds role, a role that was new to them and to their institutions. Participants in the class included individuals from other organizations and sectors ranging from the military to municipality and community programs.

It is important to note that the post-apartheid South African Constitution is regarded as one of the most progressive in the world. I mention this because I noted how frequently class participants kept using the word “transformation.” At the social event the night before class began, one man said to me “I am looking forward to learning some transformational practices.” I learned that transformation is constitutionally mandated for public institutions.

On the first day of training we explained the four principles of the organizational ombuds profession. Participants had a negative reaction. The consensus of the class was that the role as we described it was too passive for the needs of post-apartheid South Africa. We heard that informality “lacks teeth” and that we were merely “tinkering with power” instead of possessing or using it for the greater good. People wondered how an ombuds could contribute to much-needed change in South Africa if we were not more active in leading or at least participating in it.

In response, our team revised the curriculum; we would have lost the group had we not. We addressed their concerns by acknowledging them and respected them by not taking a defensive position or tone. We openly discussed the concerns, clarified points where necessary, and pushed back when appropriate. It was only after we explained the flexibility we have and the range of actions we can take because of our informality that participants began to understand the value of an organizational ombuds.

This experience in South Africa helped me realize that organizational ombuds have the potential to become transformational leaders in our organizations. We can use our influence to promote fairness and help organizations align their policies and practices with their stated values. I hope we will use our skills at trend analysis and development

of goals and action plans and then continue to be available to those responsible for decisions and those affected by them. If we do, we will improve our organizations, enhance respect for the ombuds role, create additional opportunities, and increase our own personal job satisfaction.

## CONCLUSION

Ours is a young profession that is still in an early developmental stage. We will always be evolving and adapting as people, issues, cultural norms, and environments change. We can approach this reality with fear or with confidence. If we do not actively engage with the tough issues in our organizations, we risk a decline in the understanding of and support for our work as well as a professional life that is very likely less satisfying than it could be.

I am pleased that IOA is reexamining our SOP. It's time. We must ask whether they impede the growth and development of our profession, whether they strain professional relationships, whether they contribute to unnecessary tensions in the IOA, and most importantly, whether they stand in the way of a more fully realized profession.

We must move beyond the rigid interpretation of our SOP and COE and dispel the many misperceptions about how we should or should not practice. It contributes to our limiting ourselves.

The organizational ombuds profession needs to incorporate a more progressive, proactive, and assertive way of doing its work by embracing the role of transformational leadership. This approach entails the thoughtful and deliberate shift in the profession from a transactional way of doing business to a transformational leadership role. Transformation is more practical and meaningful for the individuals who come to us for help, for the organization we serve, and for ourselves.

Responsibility goes hand-in-hand with opportunities for leadership. We enjoy a level of independence and autonomy that most in our organizations do not have. We must hold ourselves accountable every day for our work. Transformative leadership without personal accountability is unhealthy and potentially harmful. We must always be honest with ourselves and question the rationale for our choices. If we are not satisfied with, even proud of, that rationale, then we must rethink our choices.

Every ombuds has the opportunity to shape their role and stay open to new opportunities. My message here can be distilled to encouraging you to embrace and enjoy that freedom and to use it responsibly.

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## AUTHOR BIO

**Wayne Blair** is the University Ombuds at the University of North Carolina at Chapel Hill. In 2005, he led the creation of Carolina's ombuds office, which is now widely regarded as one of the nation's most successful programs. The office serves all members of the campus community and adheres strictly to the principles of confidentiality, neutrality, informality, and independence. In addition to serving visitors to the office, Wayne helps senior administrators and other decision makers by alerting them to trends and potential problems and by responding to their requests for assistance.

Wayne's activities extend beyond the campus. He has consulted with many colleges and universities and other organizations and mentored many individuals on the responsibilities, benefits, and limitations of an ombuds program. He developed and briefly led the ombuds program for the Town of Chapel Hill.

Wayne has co-taught courses on the foundations of organizational ombuds for the International Ombudsman Association (IOA). He is a regular presenter at IOA's annual conference and recently presented at the American Bar Association's Dispute Resolution annual conference. Wayne has also taken on leadership roles in the IOA, serving as a member of the board of directors and treasurer.

Before coming to Chapel Hill, Wayne served as the Associate University Ombuds Officer at Columbia University in New York. He is originally from Jamaica. ([wblair@email.unc.edu](mailto:wblair@email.unc.edu))