

Transfer of IOA Membership Guidelines and Process

NOTE: IOA Membership is held by an individual. Transfer of membership will be made on a case by case basis and limited to the individual membership transferring within a membership year.

Guidelines and Process for Transfer of Individual Membership:

1. Request from the individual member to have his/her membership inactivated.

- The request must come via email (or letter) from the person who is leaving/retiring or has already retired/left. If the replacement ombuds is in place, that person should be copied on the email/letter.
- The email expresses their desire to transfer their membership for the duration of their membership year.
- While a manager may initiate the discussion, the actual member **MUST** be the one to email the IOA administrator so as to not have a miscommunication about retaining membership after leaving a position.
- Note: If someone is terminated from the organization and does not send a transfer request, the company/org does not have the authority to transfer the membership.
- If a new Ombudsperson for the organization has not yet been identified prior to the departing member leaving, the individual requesting transfer of his/her membership can inform the IOA administrator the new Ombuds will contact the IOA once hired. The IOA administrator does not change the individual membership until the new Ombuds—with the same organization as the departing Ombuds—confirms that they are the transferee.
- The membership is only valid for the remainder of the departing ombudsman's membership year.

2. Creation of a new member record and keeping the old record.

- IOA administrator creates the new member record while simultaneously inactivating the old membership but retaining that person's information (for tracking purposes).

3. Membership transfer fee.

- The person receiving the transferred membership pays the \$25 Member Transfer Fee to IOA up receipt of the member transfer.

4. Number of transfers per year.

- No more than one transfer per membership year per individual membership.
- In the rare instance an organization has two separate members leave the position at different times and who would like those memberships transferred, those separate individual requests may be accommodated.

Guidelines created by Membership Committee
Approved by Board: 8.18.19