



THE OMBUDS REPORT

APRIL - JUNE 2020



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IOA Ombuds

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A MESSAGE FROM THE OMBUDS



It has
been an
interesting
three
months.

THE IOA'S FIRST OMBUDS 2020

It was the best of times and the worst of times: while it was good that the IOA invested in its own Conference / Pilot Ombuds Program, it was unfortunate on many levels that the in-person IOA meeting was cancelled and we all faced the new reality of coping with a global pandemic.

...it's that people are out there dealing with things – experiencing pain and anxiety – and I may not be reaching them...

I was privileged to hear the stories, the worries and the pain some of you were experiencing during this difficult and unprecedented time. One of you made me smile when you said you longed for “precedented” times.

THE PROGRAM

To support its commitment to its mission and its Code of Ethics and Standards of Practice, the IOA decided to provide organizational ombuds services on a pilot program basis from April 1 to June 30 (extended through July 31) 2020 in connection with its response to the COVID-19 pandemic and the cancellation of the 15th Annual Conference. It is in keeping with IOA’s goal to be a professional association that is as supportive, inclusive and accessible as possible for members and ‘would-be’ conference attendees, regardless of gender, sexual orientation, race/ethnicity, religion, employment status or status in the field. In addition, the IOA desires to model the concept of association ombuds and to demonstrate the ability of an organizational ombuds to improve the conduct and climate of a professional association with aggregate data and anonymized feedback on trends and recommendations from the ombuds to association sponsors.

THE VALUE OF AN OMBUDS



...just knowing you were there; someone I could talk to – meant a lot.”

When I provided upward feedback to the IOA leadership, the response was, “This is why it’s great to have an Ombuds.” I was delighted to witness that “aha” moment and to deeply experience the value in a way I hadn’t before in my years as a practicing Ombuds.

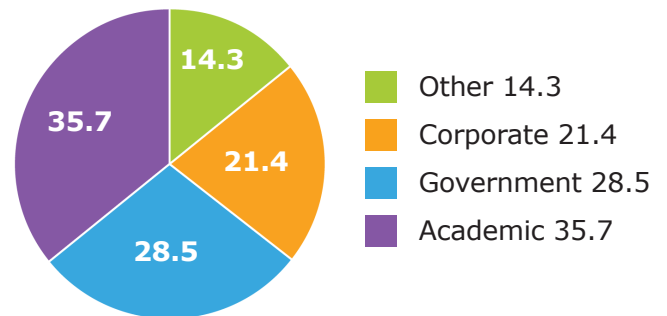
The value of the Ombuds is in the possibility; the potential and the hope that we can do better and that we will do better if we raise issues and work through them together – in constructive dialogue.

THE DATA

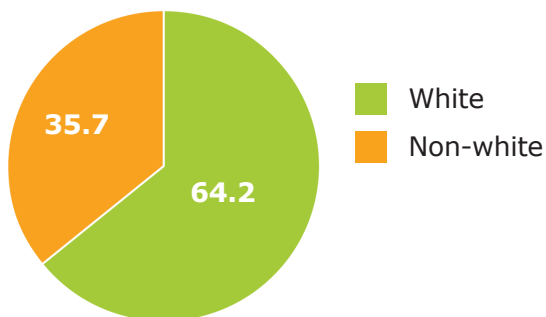
I was honored to have the opportunity to talk with 17 Visitors in the last three months. This represents a little more than 2% of the IOA membership. See below, the details on the mix of Visitors from a variety of sectors and diverse in terms of race, gender, age, and tenure.

Who were the Visitors?

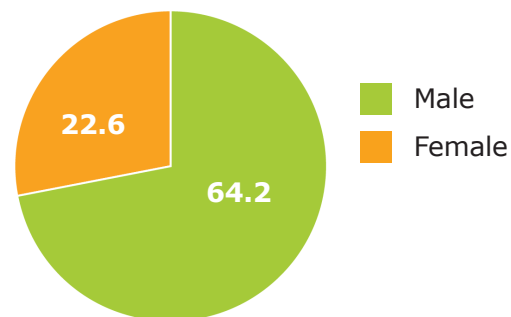
VISITORS BY SECTOR



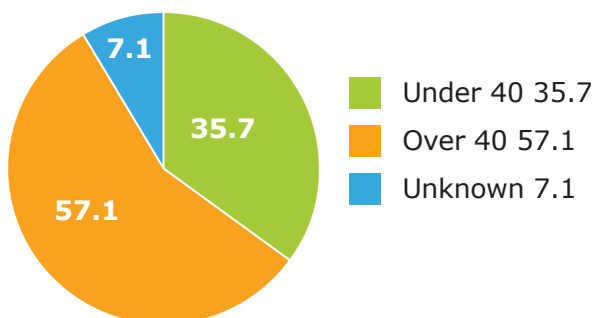
HIGH LEVEL DEMOGRAPHICS



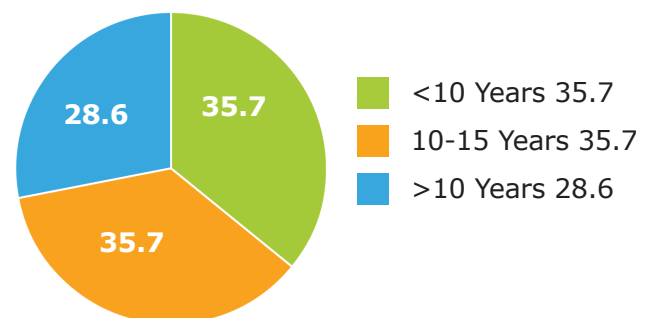
OBSERVED GENDER



OBSERVED AGE



VISITOR TENURE

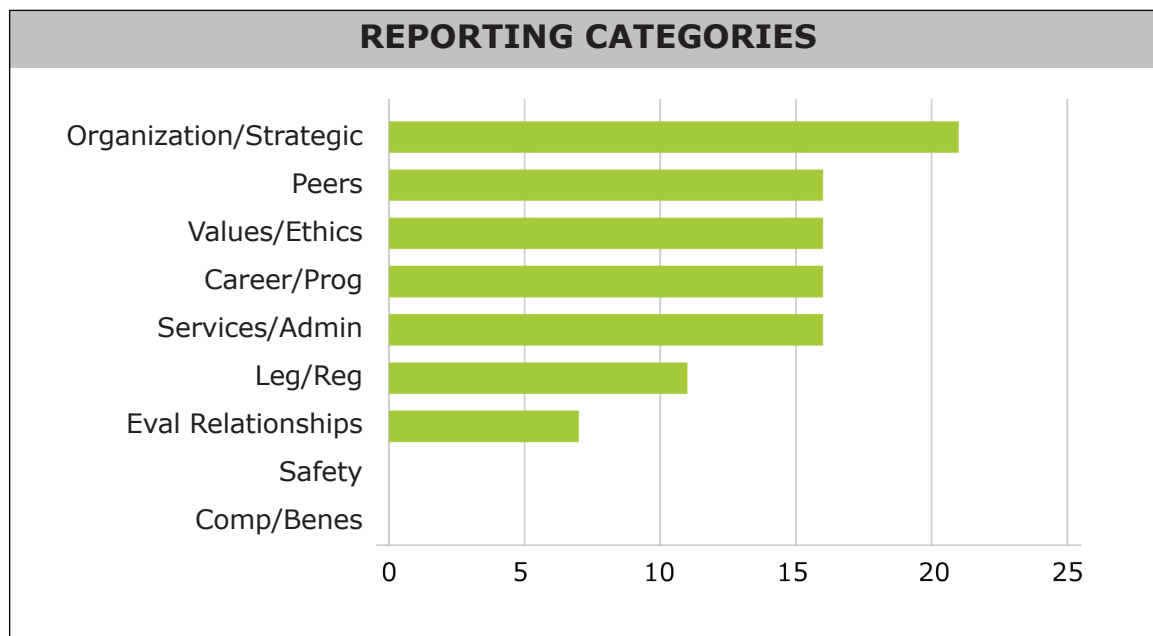


What were the issues?

Using the nine uniform reporting categories, I heard from Visitors about their organizations and Ombuds programs, their peers and supervisors and worries about their career progression. I also heard about the IOA and the important relationships people have with fellow members as colleagues in their work as leaders, influencers and volunteers.

What you see in the chart below represents the distribution of nearly 60 issues raised with me over the course of many discussions.

The most frequent issues raised concerned “Organization, Strategic, and Mission Related” matters including: communication, leadership, management and organizational climate. To be clear, about half the time, Visitors talked with me about the organization in which they serve as Ombuds and half the time, they talked about the IOA, expressing concerns and/or posing questions.



It should be noted that the next four most frequently raised issue categories represent a little more than 15% each of the issues raised.

The next most frequent issue category (at about 15%) was “Peer and Colleague Relationships” and, again, there was a mix of Visitors talking about their peers at work versus their colleagues at the IOA. Approximately 20% of

the Visitors spoke about their peers at work and approximately 80% of the Visitors spoke about their colleagues at the IOA.

Discussion of issues from the “Values, Ethics and Standards” category, with Visitors, also about 15% of the issues, was mainly focused on the policies/procedures and the culture of the IOA although there were some Visitors who wanted to talk about the culture and values of their employer.

Issues related to the “Services/Administrative” category including such things as administrative decision-making and the quality and responsiveness of service and governance relative to the IOA also represented about 15% of the matters discussed with me.

Issues related to “Legal, Regulatory, Financial and Compliance” represented approximately 10% of the issues raised by my Visitors.

Discussions of “Evaluative Relationships” (Leaders and Managers) represented approximately 6% of the issues raised with me.

There were no issues involving “Safety, Health, and Physical Environment” or “Compensation/Benefits” raised with me.

OBSERVATIONS

I begin sharing my observations by offering a quote from Mary Bliss Conger’s recently published dissertation, *The Relationship of Ombudship and Leadership in Complex Organizations* (2019):

“The ombud-leader relationship struck me as an exclusive conduit through which unique information could flow.” (Page 4)

An Ombuds report, like this one, fulfills several functions, I believe. One, the report reminds constituents that there is an Ombuds available to them. Two, the report provides information about the extent to which Visitors are contacting the Ombuds. Three, the report describes at a high level the kinds of people contacting the Ombuds and, very generally, what they are talking about. And, four, the report can be one of the ways leadership begins to sense the value of their Ombuds program and learns more about the systemic issues Visitors are facing and raising.

Is it possible, as Mary Conger seems to assert, that leadership might hear the Ombuds when it doesn’t hear as well from members directly? The notion of the Ombuds-leader relationship as an **exclusive conduit** strikes me as key. It is not that Ombuds and IOA members are not able to raise

issues or articulate their concerns or be the architects of strategies to solve problems. It may be that leadership is uniquely attuned to perspectives, issues and messaging that come from the Ombuds. The Ombuds has had varied, searching, off-the-record conversations with people who care deeply about the profession, the organization and ways they can make a difference. It occurs to me that the possibilities for an IOA Ombuds to play a part in helping the IOA improve systemically are even greater for the simple reason that parties on all sides are passionate, committed and faithful to the idea that Ombuds can say and do what others cannot.

Career Dilemmas

A number of my Visitors talked with me about career challenges. They expressed concerns about their organization's lack of understanding of the value of their role and their Ombuds Program. Others worried about the viability of their program. Some expressed optimism about steps the IOA has taken recently to promote the profession and educate decision-makers about the benefits of supporting an Ombuds function.

Other Visitors talked about their desire to grow their professional skills and impact in their Ombuds practice, but they are feeling as if there are too few opportunities for emerging voices in the Ombuds world. Sometimes the complex structure and inner workings of the IOA decision-making have left potential contributors tired and a little burned-out.

Communication

Having served the IOA in various leadership roles over the years, I know how deeply leadership cares about promoting and protecting the profession and providing services to members. I couldn't help but notice in some of my conversations with Visitors that the care and commitment of leadership may not be felt at the front lines of this heavily volunteer-dependent organization as deeply as needed. Particularly in the areas of strategic planning work, annual conference planning and the financial health of the organization, more clear, simple communication would be appreciated.

Volunteer Development and Encouragement

I heard from Visitors about what it feels like to be a volunteer on a committee or a task force. Our members and fellow Ombuds are truly talented and amazing people and that includes IOA leadership and the Board. Everyone needs "care and feeding" - development and

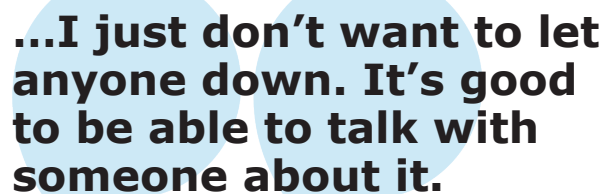
encouragement. Many lead very busy lives and seek to do as much as possible to serve constituents, employers and the IOA (not to mention families and communities). When there are ideas to explore, projects to undertake, misunderstandings to resolve, or new directions to pursue – can the IOA do more to include everyone in thoughtful, constructive dialogue about the way forward?

IOA Governance

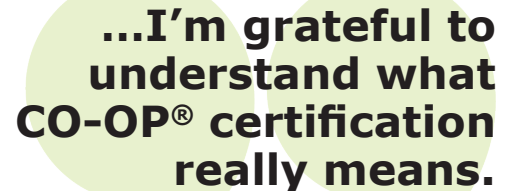
Visitors talked to me about sometimes feeling confused as to how decisions are made by the IOA; about how volunteers are selected; and about how much is expected of volunteers. Knowing how complicated our committee structure can be for new people and even veteran IOA members to understand, perhaps there is a way to simplify, streamline, consolidate and clarify how to get things done in the IOA.

It has been a great experiment and a great experience to be the IOA's first Ombuds. Many thanks for the opportunity and for your kind words along the way.

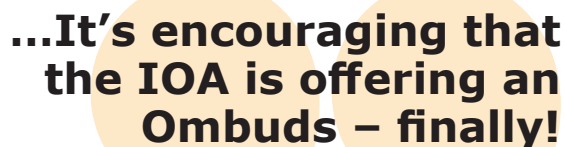
VISITOR FEEDBACK



...I just don't want to let anyone down. It's good to be able to talk with someone about it.



...I'm grateful to understand what CO-OP® certification really means.



...It's encouraging that the IOA is offering an Ombuds – finally!

CONTACT INFORMATION

Elaine will be available by phone at **+1 (512) 766-6455** and via email at **IOA2020ombuds@gmail.com** until July 31, 2020.

Elaine has served as an independent, neutral, off-the-record, and confidential resource for members of the IOA community to discuss anything regarding your practice, the profession, IOA, or other related issues and concerns. She has provided information and a safe, virtual place for people to discuss their concerns in a confidential way to explore options for any further action. She was not and will not be authorized to serve as a place where notice of claims can be given to the IOA. Likewise, she does not and will not have the responsibility or authority to investigate any issues raised.*

*Unless concerns are raised which pose an imminent risk of serious harm.