



## IOA STRATEGIC PLAN FOUNDATION

*The guiding principle is for every major organization to have an Organizational Ombudsman office.*

### VALUES

- Integrity:** IOA conducts all activities responsibly with equity and accountability to its membership and profession.
- Service:** IOA supports its membership by providing innovative and high quality services.
- Respect:** IOA embraces a range of differences of people and viewpoints in building a robust organization.
- Collaboration:** IOA promotes interaction among ombudsman practitioners and engages with other organizations to advance the profession.

### VISION

IOA leads the global Organizational Ombudsman profession by setting the standard for excellence in practice and demonstrating the effectiveness of the Organizational Ombudsman role to organizational leaders, policy makers, other professions and associations, and the public.

### MISSION

The mission of the International Ombudsman Association is to support and advance the global Organizational Ombudsman profession and ensure that practitioners work to the highest professional standards by:

- Setting standards of practice, regulatory platform and code of ethics for the Organizational Ombudsman profession;
- Assisting in the establishment of Organizational Ombudsman offices;
- Providing excellent professional development resources, research and information;
- Increasing awareness and understanding of Organizational Ombudsman value among key stakeholders and the general public;
- Creating strategic alliances or direct communications with other key organizations and professionals involved in dispute resolution, governance, ethics and risk mitigation.

### GOALS

#### **Goal 1: Further IOA's Vision, Mission and Values**

Continue, enhance and advance the IOA's capacity and capability to carry out its mission and vision and deliver high quality services that relate to the organization's shared purpose to support Organizational Ombuds.

#### **Goal 2: Assess and Improve IOA Operational Effectiveness**

Assess and improve the impact and effectiveness of IOA to ensure that the organization is operating in a capacity to deliver effective, consistent, and leading edge services to the membership and effectively fulfilling the mission of the organization.

#### **Goal 3: Ensure Financial Sustainability and Growth of IOA**

Ensure IOA has the financial means to accomplish its goals through revenue generation and judicious use of resources.

#### **Goal 4: Develop Stronger Presence and Outreach for IOA**

Conduct an outreach program to promote the understanding, visibility and development of Organizational Ombudsman roles and offices.

#### **Goal 5: Influence Policy Making**

Utilize the strength, knowledge and contacts of the members to inform and encourage policy making.



## IOA STRATEGIC PLAN FIVE-YEAR PLANNING HORIZON: 2013-2017

**Goal 1: Further IOA's Vision, Mission and Values:** Continue, enhance and advance the IOA's capacity and capability to carry out its mission and vision and deliver high quality services that relate to the organization's shared purpose to support Organizational Ombuds.

### Key Objectives:

1. Enhance the delivery of high quality Organizational Ombuds training programs that incorporate and utilize the state of the art delivery models.
2. Conduct a high quality annual IOA Conference each year.
3. Explore options for holding an IOA conference outside of North America within the next five years.
4. Expand the opportunities and state of the art means/ resources for members to network with each other and provide mutual support, especially those who are geographically dispersed or isolated from professional colleagues.
5. Continue to support, promote and reinforce the Standards of Practice, Code of Ethics and best practices; provide tools to support Organizational Ombudsman practitioners in their daily practice.
6. Support the Board of Certified Organizational Ombudsman Practitioners (CO-OP) certification process and efforts to become accredited by the National Commission for Certifying Agencies (NCCA).
7. Evaluate potential for an organizational ombudsman office accreditation program.
8. Develop a strategy at the Board and Committee levels to ensure coordination for the global advancement of IOA's Mission and Vision.

**Goal 2: Assess and Improve IOA Operational Effectiveness:** Assess and improve the impact and effectiveness of IOA to ensure that the organization is operating in a capacity to deliver effective, consistent, and leading edge services to the membership and effectively fulfilling the mission of the organization.

### Key Objectives:

1. Improve management and administrative support services for the organization.
2. Evaluate and make recommendations regarding Board structure and need for an Executive Director.
3. Enhance IOA leaders' (Directors, Representatives, and Committee Chairs) leadership skills and strengthen IOA governance.
4. Enhance and develop the pool of volunteers who can contribute to the IOA in various roles; assist CO-OP in doing the same.
  - a. Articulate pathways to volunteer opportunities within IOA;
  - b. Identify meaningful incentives for volunteer participation;
  - c. Acknowledge and reward current leaders within the organization.

**Goal 3: Ensure Financial Sustainability and Growth of IOA:** Ensure IOA has the financial means to accomplish its goals through revenue generation and judicious use of resources.

### Key Objectives:

1. Consider the implications of providing broader course offerings and partnerships:

- a. Evaluate and make a recommendation on possible partnerships with other organizations globally and determine criteria for such partnership arrangements, including demand-driven training requests that result from outreach efforts;
  - b. Determine whether there is a benefit/need/ for additional venues;
  - c. Determine whether there is an opportunity for additional audiences;
  - d. Assess the financial needs and benefits of conferences and trainings outside of North America.
2. Explore the possibility and feasibility of IOA offering additional revenue-generating fee-based services, above and beyond the professional development, conferences and COOP.
  3. Evaluate the structure of fees, services and benefits for IOA members.
  4. Improve membership recruitment and retention globally in order to promote the growth of the Organizational Ombudsman profession.
  5. Evaluate global opportunities, sustainable development and growth of Organizational Ombudsman offices.
  6. Create and implement a comprehensive revenue generating campaign.

**Goal 4: Develop Stronger Presence and Outreach for IOA:** Conduct an outreach program to promote the understanding, visibility and development of Organizational Ombudsman roles and offices.

**Key Objectives:**

1. Continue to assess needs of different geographic regions; define the strategy for supporting development and strengthening of Organizational Ombudsman programs in regions around the world; and, make use of the available knowledge of other Ombudsman associations around the world.
2. Be the premier source for information and professional development on Organizational Ombudsman matters globally.
3. Promote existing and new research regarding the Organizational Ombuds field.
4. Support learning, exchange and collaboration with other disciplines that impact the work of Organizational Ombuds leading to cross-disciplinary growth and opportunities.
5. Develop a global marketing and public relations strategy.
6. Build relationships with external audiences and organizations; foster an understanding of the role and value of the Organizational Ombudsman among key stakeholders, including professional associations, regulatory bodies, organizational decision makers, and the general public.
7. Review the possibility of adding a standing committee or a sub-committee to strengthen the IOA's external relations capability and encourage synergy between the existing Committees in their external relations efforts.

**Goal 5: Influence Policy Making:** Utilize the strength, knowledge and contacts of the members to inform and encourage policy-making.

**Key Objectives:**

1. Support statutory protections for Organizational Ombuds.
2. Track developments in the ADR field in different regions of the world.
3. Determine the role of the Legal and Legislative Affairs Committee (LLAC) evaluating the current structure and purpose.
4. Encourage and educate organizations, partners and other stakeholders to advocate on behalf of the Organizational Ombudsman profession.
5. Assess research needed to support and influence policy-making.