



Standards as Strategic Assets Guide

Created for IOA 2026 Presentation by Ellen Miller and Mark Patterson

Participant Mapping Template and 60-Second Value Statement Builder

Purpose. Use this worksheet to translate IOA standards into practical strategic value for leaders and stakeholders. The aim is not to soften the standards, but to show how proper application of the standards helps the organization manage risk, preserve trust, surface concerns early, and respond more effectively.

How to use this handout

- Identify the pressure, demand, or fear driving the request.
- Clarify the leader's legitimate organizational interest.
- Match the request to the standard that most needs to be protected.
- Offer an ombuds-appropriate alternative that still advances the organization's aims.
- Convert that analysis into a short verbal response.

Part 1. Preliminary Assessment: Reading the "Organizational Room"

Read the Landscape	What internal political, economic, and cultural issues impact the org now? What has it survived? Are there obvious crises, covert issues, or unspoken tensions?
Response to Pressure	Is the org cautious/conservative or bold? Do they want to use the ombuds to "show" something? Do they resist, embrace, or slowly consensus-build through change?
Evolution of Your Office	Is the office new or established with leverage? Was it born from a crisis or a specific mandate? Shift the perception from "complaint handler" to strategic partner.
Navigating Landmines	Recognize that politics will influence success every time. Stay neutral, but understand environmental sensitivities and step cautiously.
Mindset Check	Avoid hiding behind SOPs as a shield from organizational priorities. Address pressure points

	directly using organizational language instead of ombuds jargon.
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Part 2. Context scan: what is really happening here?

Triggering request or pressure	What is being asked of the ombuds? What decision, restriction, clearance step, reporting demand, or alignment expectation is in play?
What SOP do I want to hold up?	It is important to ID your gut reaction so you don't default to it.
Immediate organizational context	Check all that apply: compliance scrutiny; litigation risk; budget pressure; reputational risk; leadership transition; restructuring; labor tension; safety concern; political/public pressure; merger/acquisition; grant/funder pressure; event operations.
Stakeholder's underlying interest	What is the leader actually trying to achieve or avoid? For example: reduce risk, move faster, reassure the board, demonstrate control, show responsiveness, contain cost, preserve message discipline, protect patients/clients, avoid disruption.
What makes the request problematic	Which part of the request would compromise confidentiality, independence, informality, impartiality, role clarity, or trust?
Standard(s) most implicated	Circle or note the primary standard first, then any secondary standards: Confidentiality, Independence, Informality, Impartiality, Role Clarity / Non-Notice, Neutral Upward Feedback.
Ombuds-appropriate alternative	What can you offer instead? Examples: de-identified trend reporting, options coaching, facilitated conversation, systems feedback, process consultation, conflict capacity training, referral pathways, pattern analysis. Rather than saying I can't, or no, what can you offer?

Part 3. Sector prompts: common pressures and strategic openings

Sector	Common leadership pressure or ask	Standards often under stress	Strategic value you can emphasize
Higher Education	Message review, student conduct alignment, Title IX / compliance visibility, pressure during	Independence; Confidentiality; Role Clarity	Trusted access point for students, staff, and faculty; early warning on climate and process failures; credible upward

Sector	Common leadership pressure or ask	Standards often under stress	Strategic value you can emphasize
	leadership turnover or campus controversy		feedback outside formal channels
Government Agency	Demands for records, case detail, chain-of-command control, inspector general or legal coordination, politically sensitive matters	Confidentiality; Independence; Impartiality	Surfacing risk before formal complaint escalation; preserving employee trust in speaking up; identifying systemic friction without creating a shadow investigation
Corporate	Requests for dashboards tied to named employees, HR/legal integration, speed, ROI, manager accountability, merger change management	Informality; Confidentiality; Independence	Faster low-cost resolution; retention and engagement benefits; de-identified intelligence on cultural or managerial hotspots
NGO	Mission urgency, donor/funder expectations, founder influence, lean staffing, blurred roles, safeguarding concerns	Impartiality; Independence; Informality	Helps mission-driven organizations address conflict without factionalizing; protects trust across values-driven teams and dispersed operations
Healthcare	Patient safety, accreditation, peer review sensitivity, disruptive behavior, multidisciplinary conflict, burnout	Confidentiality; Informality; Impartiality	Allows concerns to surface early across hierarchy; supports speaking-up culture; reduces friction that can affect safety, teamwork, and retention
Short-term event / conference	Sponsor sensitivity, volunteer management, code-of-conduct enforcement, rapid response, reputational containment, temporary structures	Role Clarity; Impartiality; Informality	Provides credible, rapid, fair conflict support in a compressed environment; helps organizers manage issues without over-formalizing every concern

Part 4. Strategic mapping worksheet

Sector / setting	
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Leader or stakeholder	
Problematic request	
Underlying organizational need	
Primary standard to protect	
What I can offer instead	
Strategic value to emphasize	

Useful strategic value language

- early warning of systemic risk
- credible access point for people who will not use formal channels
- lower-cost, lower-friction conflict management
- better information for leadership without compromising trust
- fairness and neutrality that protect legitimacy
- problem-solving capacity during transition or crisis

Part 5. 60-second value statement builder

A. Hook	I understand the organization is trying to ...
B. Boundary + alternative	This is what I can say based on what I have heard.
C. Standard	That depends on ensuring
D. Strategic asset	When we operate that way, the office can....

E. Outcome	That helps the organization....
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Speaker test. Can you say the whole statement in a calm, natural voice without sounding defensive, legalistic, or abstract? Revise until it sounds collaborative and concrete.

Part 6. Before you say yes or no

- Does my response protect the standard without overstating it?
- Does my response take into consideration the interests of the org?
- Am I addressing the leader's real concern, not just the literal request?
- Have I offered a specific, lawful, ombuds-appropriate alternative?
- Can I explain how the standard creates value for the organization without using the words independence, impartial, confidential?
- Would this response preserve trust with visitors *and* with leadership?