

**Strategic Planning Process
IOA Annual Conference, Miami
April, 2013
Membership Feedback on Draft SP**

TASK-ORIENTED FEEDBACK ON OVERALL SP, GOALS, INITIATIVES AND WHAT'S MISSING

GOAL 1

Initiative:

#1. Foundations class: Necessary initiative ... but format might have to be reviewed, given that some people came in with some field experience, and others have little experience. We found that the Foundations course offered lots of overview, but that the interactive part is not as engaging. Some portions lost attention of audience. However, the small break-out groups, (role-playing) was a good experience as it kept everyone actively participating.

#2. Annual conference: We think it would be helpful for the board to set a mission for the conference itself. Ask: why are we holding this conference? Is it for Ombudsmen looking for new information? (Pushing the envelope on theory) Networking? Professional camaraderie? Hearing from people in other fields but who share philosophies? Welcoming newcomers -- both experience-wise and the introduction of international brethren? Better define the purpose of a conference.

#1 and #2: ""High quality" we use that phrase in initiatives #1 and 2 in this goal, but it is not measurable."

"Initiatives: need more specific language for items #1 and 2--high quality is not measurable or descriptive. Perhaps set some parameters for the conference such as "at least one concurrent session per conference on each SOP"; each conference will include a legal update from LLAC for US, Canada, Europe, etc."

#3. Outside-of-U.S. conferences: Cost differential would be high, could we do a virtual conference, where global attendees could join in conversation? Other ways to make it more accessible, perhaps through YouTube, might be able to make it possible. Through university settings, more inclusion can be possible with technology already made available to students.

#5. Standards of Practice. As an organization the IOA's unique value is in the Code of Ethics. This profession is growing globally, and it will grow on its own if we don't stay on top of all the newcomers and current practitioners. The COE is THE product of the IOA, and we must do more to aggressively expand outreach efforts around the world to explain both the profession and its Code of Ethics as well as why they are necessary. It is our belief that the IOA should be actively sending people to mediator conferences, HR conferences, etc. We should have a table at those conferences, spreading the word. We must ensure we have a clear vision: where do we want to be five or even 10 years from now? How are we working towards reaching that goal? Solidify ourselves as the Gold Standard across the industry and around the world.

#6 and 7. Supporting CO-OP's efforts / possible accreditation: Clarify how this will be done / what type of support on the part of the IOA. What is the actual commitment? The overarching philosophy? What is meant by "support"? Financial support? Advertising and promotion? Board member on COOP Board?"

Generally: "Missing--consider an ethics group (group to call, a calling tree) for members who need immediate assistance/colleagues to talk to; this could be a service to members."

Other: Establish a direct contact / formal communication process (unclear what this means)

GOAL 2

#1 (b). Executive Director: Input received asking that experience in working with/managing international organizations be articulated as a desired quality for ED.

#2. Leadership skills: Input received recommending core leadership competencies be identified and training be instituted for all IOA leaders

#3 (a). ID pathways to volunteering: using new member orientation and the Mentoring Program

GOAL 3

Suggestions from tables:

#2. Additional revenue-generation: such as consulting opportunities, and support services

#3. Evaluate membership and training: appropriate levels for membership dues and fees structure; professional training fees, structure of fees and offerings; services and benefits.

Other that need to be sorted per initiative:

(1) More structured approach to IOA courses to obtain CO-OP or certification;

(2) 3 minimum courses for foundation, then collaboration with other education groups for marketing and revenue sharing;

(3) Increase membership category opportunities for revenue;

a. e.g., multi-year membership break;

b. allow for membership transition for Ombuds from the same institution so that for example when an Ombuds retires, his or her successor would continue the membership until the expiration date.

(4) Increase fees for membership fees for membership, training, etc.;

(5) IOA brand needs to be established more broadly (eg, ABA) for leverage;

(6) Exec Director vs. volunteer driven

(7) Offer to present at more meetings, leaders under 40, fortune 500 – will help with many aspects of these goals

- (8) Offer further interaction, possibly through courses
- (9) Increase and maintain membership levels by:
 - a. Offering more IOA courses tailored to our profession (eg, Mediation for the Ombudsman, Conflict Theory for the Ombudsman)
 - b. Offering new turnkey solutions/products for members (eg, how to make the case for your office's sustainability to your institution, also, packet to help make the case that the ombuds does not threaten HR – IOA should have a tool to distribute, and make it very clear that it is not a competition, there value in both)
- (10) Seek (royalties for publications?); webinars; other resources
- (11) Leverage increasing population and interest in internships by developing courses and services to suit their needs
- (12) Perhaps develop textbooks for the field that can be used for courses
- (13) Consider conference outside of the US every few years, even if we do an annual conference within the US during same year. Due diligence and careful planning needed before taking on conference outside of U.S., especially if not sufficient participation.
- (14) Possibly offer “concierge insurance type benefits” to offer a la carte Ombuds services
- (15) Develop a budgeting process and policies that are transparent, builds in financial accountability, and aligns expenditures with strategic priorities.

General: Need specificity on how to be financially stable and grow; Be careful not to engage in too many small revenue-generating activities. Focus the revenue we receive on strategic priorities.

GOAL 4:

#1. Assess global needs and define strategy:

- a. Create chapters per continent.
- b. IOA reach out to other Ombuds organizations throughout the world.
- c. Fill the gaps where there are no other Ombuds organizations.
- d. Support local initiative. Speaker's Bureau - have a list of able and willing OOs local offices/groups may reach out to when arranging workshops or mini conferences within one's organization.

#2. Premier source:

- a. Put FAQs, standards of practice, ethics, etc. in website in six UN languages.
- b. Survey International members. What do they want/need?

#3. Promoting research:

- a. Promote research – consider offering grants. Even just a few thousand dollars. Use corporate sponsorship for grants.
- b. Internal research - how long have places had ombuds, what systemic things are going on, why did a program fail.
- c. ABO has carried out 2 or 3 studies that would be of interest to other ombudsmen – they have a tool to gather data. They suggested putting a link on the IOA website to the ABO website and vice-versa so that more people get access to this data.

#6. Build relationships...:

- a. get a list of all associations of ombudsmen that exist around the world (UN apparently has that)
- b. Target professions that are aligned with Ombuds work – attorneys, mediators, HR, counselors, psychologists, etc.
- c. Write articles for newsletters/journals, make presentations, do workshops/trainings/attend other conferences. Teach in schools.

#7. External relations: Goal #4 initiative #7 is crucial! Please consider making a clear statement about intent to strengthen external relations, etc. "review the possibility of a standing committee or sub-committee" is a tactic--one way this initiative might be approached. Would like to add a statement to description of Goal #4 about building presence locally.

GOAL 5:

#1. Statutory protections: Statutory support is essential but it is a challenge as we work in various settings and countries. One standard is not applicable across our different settings. The certification test is English oriented and does not meet the needs of Spanish, French or other languages. Also association implies uniformity – maybe change name to Federation of International Ombuds.

Other that need to be sorted per initiative:

- (1) Communicate real time status of legal initiatives domestically and internationally, along with feedback loop to get input on these initiatives (LLAC?)
- (2) Political action committee for IOA? Lobbyist?
- (3) Identify partners with whom there is natural friction (eg, trial lawyers) and work to determine areas for collaboration / mutual gain. Focus should be both on encouraging supporters to advocate as well as turning those who are skeptical / unsure into supporters
- (4) Regarding Initiative #2, IOA could have a committee with international members to work on policies, discuss particular policy-related issues. Perhaps the LLAC could do this in collaboration with the IC and regional committees.

- (5) If we can't develop new statutory protections, research the utilization of existing statutes, such as the Uniform Mediation Act that protects conversations for mediation purposes.
 - (6) Develop resources or training to help Ombuds who might be asked to testify or be deposed. Achieve consistency in messages, independent counsel, etc.
 - (7) Discuss with associate members regarding how lack of privilege harms practice, put together statement or position paper that could be used to change policy or convince management.
 - (8) For future IOA conference sessions, invite legal counsel, for CEOs, could be for continuing ed credits, informing them about role of Ombuds and its benefits, the benefit of privilege, etc. IOA could also attend their conferences, with table, booths.
-