

# The Research Agenda for the Organizational Ombuds Profession: A Living Document

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## ABSTRACT

The Research and Assessment Committee of the International Ombudsman Association (IOA) was charged by the Board of Directors to create a research agenda for the ombuds field. The agenda is intended to serve as a guide for future initiatives within the IOA related to research, outline the research priorities of the IOA for outside entities, and establish research as a fundamental value to the field of ombuds work. A Research Agenda Subcommittee formed to take on this project and develop a qualitative survey to identify the research interests of IOA members. The subcommittee distributed the survey to all current members, and eighty-five of them completed it. Analysis of the data resulted in eight major research goals supported by 42 specific research areas. This article establishes the importance of the research agenda for the IOA, explains the methodology used to create it, explores areas of inquiry underpinning each of the eight research goals, and discusses implications for the advancement of research on organizational ombuds.

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## KEYWORDS

Agenda, Ombuds, Ombudsman, Practice, Profession, Research

*\*The views in this article represent those of the authors and do not necessarily represent the views of the institutions with which they are affiliated.*

## THE RESEARCH AGENDA FOR THE ORGANIZATIONAL OMBUDS PROFESSION: A LIVING DOCUMENT

When the International Ombudsman Association (IOA) Research and Assessment Committee formed in 2014, its Terms of Reference listed a number of goals and duties to accomplish for the Organizational Ombuds (OO) profession. The purpose of the committee centered on enhancing:

*...our practice through filling the research and assessment gap. The committee will also support research and assessment to promote excellence in OO professional development, to study ombuds practices with the intent not only to understand what ombuds do, but also over time to improve practice (knowledge and skills) of experienced and new ombudspersons based on research findings (IOA, 2015, 1).*

The committee was also assigned eleven goals to achieve in moving forward in these purposes, one of which was to create a research agenda for the field (IOA, 2015, 1). The creation of a research agenda for ombuds work is particularly important for a number of reasons: to guide future initiatives within the organization related to research; to outline the research priorities of the members of the organization for outside entities; and to establish research as a fundamental value to the organizational ombuds field. For a field that remains somewhat unclear to those outside of it due to its standard of confidentiality, the research agenda opens up an opportunity for practicing ombuds and other interested individuals to collaborate on expanding a knowledge base in an under-researched area of study.

IOA is not the first organization to pursue the development of a research agenda, even though there is no agreed-upon definition of a research agenda at either the organizational or individual level. Generally, a research agenda is an outline to guide future inquiry and build toward achieving particular research goals over time. A research agenda determines areas of study that require more knowledge in the short and long term. Essentially, it identifies gaps in the knowledge-base and advises individuals to conduct research to fill those gaps, especially in relation to the larger research picture. In setting a research agenda, the IOA invites all interested parties to conduct research that will advance and develop the ombuds profession. Research agendas such as this one are dynamic, living documents that organizations may revisit and revise as time progresses.

The Research and Assessment Committee organized the research agenda within three major categories that were identified by ombuds colleagues nearly a decade ago: the Ombuds Profession, Ombuds Practices, and the Ombuds Professional (Lincoln, Rowe, and Sebok, 2009). Within these categories, the committee identified eight broad research goals:

### The Ombuds Profession:

1. To Examine How Ombuds Demonstrate and Communicate Value
2. To Better Understand the IOA Standards of Practice (SOP) and Code of Ethics (COE)
3. To Assess the Development and Health of the Ombuds Profession

### Ombuds Practices:

4. To Explain How Ombuds Carry Out Their Work
5. To Describe How Ombuds Gather, Use and Report Data
6. To Determine How Ombuds Build Collaborative Relationships in Their Organizations and Profession

### The Ombuds Professional:

7. To Explore the Development, Identity, Characteristics, and Skills of Ombuds
8. To Examine the Nature and Scope of the Ombuds Role and Position

Supporting the eight goals, the research agenda highlights a number of research areas about which many ombuds have questions (detailed under *Results*). This agenda serves as an invitation for individuals to engage in research on the ombuds field from multiple perspectives using a variety of qualitative and quantitative methods. The remainder of this article describes how the agenda was developed, shares the agenda in detail, and suggests what it means and how it might be used by researchers. The article concludes with a vision of the role and value of the research agenda for IOA and the Ombuds profession.

## METHODOLOGY

Gathering and analyzing data for this project was a collaborative venture. In autumn of 2015, the Research Agenda subcommittee set out to ask IOA members about their research interests related to the organizational ombuds role and profession. After considering a range of options for data-gathering, the subcommittee decided distributing an online survey would be the most efficient way to reach IOA members.

The survey development process was what one might expect when a group of scarcely affiliated professionals from multiple generations, different regions of the world, a range of academic backgrounds and perspectives, and with very busy schedules engage in long-distance collaboration. The subcommittee had a series of interactions over a period of many months via conference calls, email exchanges, and an online document-sharing platform as they deliberated and discussed the merits and drawbacks of options such as using quantitative versus qualitative research methodologies as well as the focus, phrasing, and format of each question proposed for inclusion in the survey.

Ultimately the subcommittee decided to create a qualitative survey using open-ended questions that would give respondents a wide scope to respond in whatever way they perceived as appropriate. The subcommittee used this approach to avoid imposing their own assumptions about which research areas would emerge as most important. The survey comprised four questions that were phrased to correspond with the three major categories of research identified in IOA's previous research agenda (Lincoln, Rowe, and Seabok, 2009). The survey questions were: (1) "What would you like to know about the ombuds professional?" (2) "What would you like to know about the ombuds profession?" (3) "What would you like to know about ombuds practices?" and (4) "What other ombuds-related issues and topics would you like to know more about?" The subcommittee added demographic questions to assess the professional diversity of the respondents. These questions asked about IOA membership status, years as a practicing ombuds, level of education, field of study, ombuds sector, and ombuds office location.

The survey was distributed to all current IOA members (approximately 600) via Survey Monkey in September 2016 and remained open for 16 days; 87 respondents answered at least some of the demographic questions and 85 provided research ideas in response to the primary survey questions. Although the response was smaller than expected, that did not diminish the value of the data received. The purpose of the qualitative survey was not to generalize about the research ideas of all IOA members, but rather to identify the interests of members who were willing, and inspired by the opportunity, to share them. The demographic characteristics of the sample are provided in Table 1.

**Table 1: Demographic Information**

| <i>Practicing Organizational Ombudsman?</i> | Count     | Percentage    |
|---|-----------|---------------|
| Yes   | 71        | 81.6%         |
| No  | 9         | 10.3%         |
| No Response                                 | 7         | 8.0%          |
|   | <b>87</b> | <b>100.0%</b> |

| <i>Years of Ombuds Practice</i> | Count     | Percentage    |
|---------------------------------|-----------|---------------|
| 0 - 3 Years                     | 35        | 40.2%         |
| 4 - 6 Years                     | 19        | 21.8%         |
| 7 - 10 Years                    | 11        | 12.6%         |
| 11 - 15 Years                   | 6         | 6.9%          |
| 21 or more Years                | 5         | 5.7%          |
| 16 - 20 Years                   | 3         | 3.4%          |
| No Response                     | 8         | 9.2%          |
|                                 | <b>87</b> | <b>100.0%</b> |

| <i>Education (highest level)</i>      | Count     | Percentage    |
|---------------------------------------|-----------|---------------|
| Master's Degree                       | 29        | 33.3%         |
| Doctoral Degree                       | 22        | 25.3%         |
| Law Degree                            | 13        | 14.9%         |
| Bachelor's Degree                     | 6         | 6.9%          |
| Bachelor's Degree with some grad work | 4         | 4.6%          |
| High School (or Equivalent)           | 1         | 1.1%          |
| Associate's Degree                    | 1         | 1.1%          |
| Other                                 | 4         | 4.6%          |
| No Response                           | 7         | 8.0%          |
|                                       | <b>87</b> | <b>100.0%</b> |

Table 1: Demographic Information, continued

| <i>Field of Study (highest degree)</i> | Count     | Percentage    |
|--|-----------|---------------|
| Business/Management /Finance           | 15        | 17.2%         |
| Law                                    | 11        | 12.6%         |
| Education                              | 11        | 12.6%         |
| Psychology                             | 10        | 11.5%         |
| Conflict Resolution                    | 8         | 9.2%          |
| Sociology                              | 6         | 6.9%          |
| Public Administration /Policy          | 4         | 4.6%          |
| Other                                  | 9         | 10.3%         |
| No Response                            | 13        | 14.9%         |
|  | <b>87</b> | <b>100.0%</b> |

| <i>Ombuds Sector</i>                     | Count     | Percentage    |
|--|-----------|---------------|
| Academic (Higher Education)              | 45        | 51.7%         |
| Corporate                                | 9         | 10.3%         |
| Government                               | 9         | 10.3%         |
| Education (K-12)                         | 3         | 3.4%          |
| International/Multinational Organization | 3         | 3.4%          |
| Consultant or Contract Ombudsman         | 2         | 2.3%          |
| Nonprofit                                | 1         | 1.1%          |
| Quasigovernment                          | 1         | 1.1%          |
| Other                                    | 5         | 5.7%          |
| No Response                              | 9         | 10.3%         |
|  | <b>87</b> | <b>100.0%</b> |

| <i>Primary Office Location</i> | Count     | Percentage    |
|--------------------------------|-----------|---------------|
| Southeast U.S.                 | 26        | 29.9%         |
| Northeast U.S.                 | 18        | 20.7%         |
| North/North Central U.S.       | 11        | 12.6%         |
| Western U.S.                   | 11        | 12.6%         |
| South Central U.S.             | 6         | 6.9%          |
| Canada                         | 4         | 4.6%          |
| Asia                           | 1         | 1.1%          |
| Australia/New Zealand          | 1         | 1.1%          |
| Western Europe                 | 1         | 1.1%          |
| No Response                    | 8         | 9.2%          |
|                                | <b>87</b> | <b>100.0%</b> |

The majority of the participants responded to at least three of the open-ended survey questions, producing a total of 262 responses. Since many of these responses offered multiple research ideas, a subcommittee member read through them to identify each idea that could stand alone. This process resulted in a total of 525 individual research ideas that were entered into a spreadsheet for further analysis.

Analyzing the data was a rigorous and painstaking process involving multiple committee members as coders of the data and several rounds of analysis. The process was more organic, complex, and at times more daunting than can be described in this brief article. The subcommittee was guided by Auerbach and Silverstein's (2003) procedures for coding and analyzing qualitative data. First, four subcommittee volunteers coded the research ideas offered in response to one of the survey questions, and other committee members provided feedback. This process identified the "repeating ideas" in the data – ideas for research that were the same or very similar to each other. The 525 research ideas were grouped into 49 themes which were each given a meaningful label. Next, two subcommittee members coded the 49 themes, grouping them into higher order master-themes or "buckets," and labeled them according to their common meaning. Finally, one subcommittee member reexamined all of the research ideas and themes, looking for patterns within and across the buckets. This involved moving research ideas between themes and buckets, collapsing and pulling apart some of the themes, and relabeling. The process resulted in a set of major themes that were reframed as "research goals," each with a number of supporting themes that represented more specific areas or objectives for research.

In the last stage of analysis, the subcommittee produced a document that organized the goals and themes within the categories of the ombuds profession, ombuds practices, and the ombuds professional. The subcommittee shared the document with members of the Research and Assessment Committee at large, who provided detailed feedback and suggestions. The subcommittee then met several more times to digest, discuss, and apply the new input. They diligently rearranged, modified, relabeled, and added information until they reached consensus on a final document consisting of eight research goals, supported by 42 specific research areas. As in most successful collaborations, the final product was more valuable and inclusive of multiple perspectives than any one researcher could have produced alone.

## **RESULTS: THE IOA RESEARCH AGENDA**

The IOA Research Agenda includes eight critical research goals supported by 42 specific research areas and positioned within the domains of the Ombuds Profession, Ombuds Practices, and the Ombuds Professional. These goals are IOA research priorities; their order is not intended to signify their importance.

### **THE OMBUDS PROFESSION**

#### ***RESEARCH GOAL 1: TO EXAMINE HOW OMBUDS DEMONSTRATE AND COMMUNICATE VALUE***

- Evidence of ombuds office value/benefits/impact/effectiveness
- Communicating about and marketing ombuds office value
- Perceptions and expectations of the ombuds office
- Why organizations adopt and maintain an ombuds office (or not)
- Functions of the ombuds within a conflict management system
- Hiring and performance appraisal methods of ombuds

*RESEARCH GOAL 2: TO BETTER UNDERSTAND THE IOA STANDARDS OF PRACTICE (SOP) AND CODE OF ETHICS (COE)*

- How ombuds adhere to and deviate from the SOP
- How ombuds balance inherent tensions within the SOP
- The meaning and functions of the SOP within and across different sectors
- How use of the SOP and COE is supported and enforced

*RESEARCH GOAL 3: TO ASSESS THE DEVELOPMENT AND HEALTH OF THE OMBUDS PROFESSION*

- Development, growth, and durability of the profession
- IOA's role and influence
- Prevalence of ombuds positions and offices
- Impact of laws and policies
- The global ombuds profession

**OMBUDS PRACTICES**

*RESEARCH GOAL 4: TO EXPLAIN HOW OMBUDS CARRY OUT THEIR WORK*

- Specific practices with visitors and other parties
- Providing upward feedback
- Working with systemic issues and initiatives
- Dealing with challenging cases
- Managing dual roles
- Navigating legal and policy challenges
- Working with principles of fairness, justice, advocacy, and activism
- Variations in practices around the world

*RESEARCH GOAL 5: TO DESCRIBE HOW OMBUDS GATHER, USE AND REPORT DATA*

- Record keeping practices
- Practices in tracking issues and other case information
- Use of data to identify issues new to the organization, patterns and trends
- Preparing and distributing reports

*RESEARCH GOAL 6: TO DETERMINE HOW OMBUDS BUILD COLLABORATIVE RELATIONSHIPS IN THEIR ORGANIZATIONS AND PROFESSION*

- Ombuds supporting and connecting with each other
- Collaborating with other roles, professions and resources
- Interacting and collaborating with organizational leadership

**THE OMBUDS PROFESSIONAL**

*RESEARCH GOAL 7: TO EXPLORE THE DEVELOPMENT, IDENTITY, CHARACTERISTICS, AND SKILLS OF OMBUDS*

- Educational preparation, training, and professional background
- Continuing education and professional development
- Identity and characteristics of ombuds
- Skills and abilities of successful ombuds



- How ombuds perceive themselves and evaluate their own work
- Resilience and self-care methods
- How and why people enter and exit the ombuds profession

*RESEARCH GOAL 8: TO EXAMINE THE NATURE AND SCOPE OF THE OMBUDS ROLE AND POSITION*

- Issues ombuds help address
- Ombuds role in the organizational system
- Role variations in different organizational contexts
- Caseload and workload
- Functions and services provided

## DISCUSSION

The research agenda that emerged from this study outlines topics and priorities for new research. Because the agenda reflects the expressed interests of IOA members, researchers can consult it with assurance that delving into the suggested areas of inquiry is a valued endeavor. In this section, we discuss the research agenda as a tool that can be used to focus and guide future research. We elaborate on the meaning of the agenda's eight research goals and how researchers might pursue them, and then forecast implications of their use.

### **USING THE IOA RESEARCH AGENDA**

**The ombuds profession.** The first section of the research agenda includes goals that identify research interests related to "The Ombuds Profession." These goals focus on demonstrating and communicating value, understanding the IOA standards of practice and code of ethics, and assessing the development and health of the profession.

**Research goal 1: Examine how ombuds demonstrate and communicate value.** This goal speaks to an ongoing discussion in the ombuds field. Recent ombuds conference agendas, publications and regional-group meeting agendas reflect a growing interest in understanding how ombuds offices can demonstrate and effectively communicate the value of their role and work. Everything from the use of quantitative data to demonstrate cost savings to the use of powerful narratives about challenges and successful cases has been discussed. This goal encourages researchers to explore questions that can reveal methods, approaches, strategies, and understandings that strengthen the case for the development, continuation and support of individual offices and the overall field.

**Research goal 2: Better understand the IOA Standards of Practice (SOP) and Code of Ethics (COE).** This goal seeks to understand fundamental knowledge about the IOA SOP and COE. Themes that emerged in the survey data suggest that ombuds across the world, spanning various sectors, want to know more about the meaning, effectiveness, application and challenges associated with the SOP and COE set forth by the IOA. Recent IOA conference plenary sessions, which have received a lot of attention and generated valuable discussion and disagreement (such as "Exploring Our Guiding Principles" in 2016 and "The Role of Confidentiality and Testimonial Privilege for Today's Organizational Ombudsperson" in 2017) underscore the importance of this interest.

**Research goal 3: Assess the development and health of the ombuds profession.** The survey data demonstrate an acceptance that the organizational ombuds field is still new and has much room to grow. IOA conference keynote addresses (such as "A Look Back, Where We Are Now, and A Look Forward" in 2017 and "Reimagining the Role of the Organizational Ombuds" in



2016 as well as JIOA articles like Chuck Howard's "*Observations of an 'Inside Outsider' on the Future and Challenges Facing IOA and the Organizational Ombudsman Profession*" in 2015) emphasize this research goal. They demonstrate that IOA members have an interest and need to know more about the current standing and future of the ombuds profession, including the multitude of factors that will influence it. For instance, how will new organizational policies, societal norms and laws around sexual harassment in the workplace impact expectations of the ombuds role and function? How will the field manage those changes?

**Ombuds practices.** The second section of the Research Agenda includes goals that identify research interests regarding "Ombuds Practices." These goals include explaining how ombuds carry out their work; how ombuds gather, use and report data; and how ombuds build collaborative relationships in their organizations and profession.

**Research goal 4: Explain how ombuds carry out their work.** Longtime ombudsman Howard Gadlin once said "we don't know what ombudsmen do, we only know what they say they do" (Gadlin, personal communication, 2018). This research goal seeks to address this predicament (and others) by understanding exactly how ombudsmen do what they say they do. Additionally, beyond the standards of practice, how do ombuds demonstrate or uphold core values like fairness and justice? How do they deal with complicated and challenging situations? What works well in specific circumstances and what doesn't? From working with individuals to working with groups and the entire organizational system, the survey respondents expressed a strong interest in conducting research that will lead to a better understanding of methods, approaches, skills and strategies that enhance new and seasoned ombuds' practices and improve their effectiveness.

**Research goal 5: Describe how ombuds gather, use and report data.** Our results suggest that ombuds, and those closely associated with the field, are interested in knowing how to gather and use data in the most effective ways. Similar to demonstrating value, the intersection between ombuds work and data has received much attention over the last several years. These days, a get-together of ombuds to discuss their practices will almost always raise questions like "How do you track your cases? What data do you collect? How do you use it?" This goal encourages researchers to explore critical questions that will advance ombuds practices around the use of data and increase understanding of important practices like records management. How can data support the demonstration of ombuds value? How, if at all, do ombuds use their data to support issue identification and explore options for resolution? What are the challenges associated with collecting visitor/case data? Have ombuds found ways to address those challenges?

**Research goal 6: To determine how ombuds build collaborative relationships in their organizations and profession.** As embedded organizational neutrals, ombuds are often faced with deciding whether to collaborate or partner with other organizational stakeholders to raise and address issues affecting individuals and their organizations at large. Each sector and organization has a unique set of stakeholders. Common stakeholders might include senior leadership, human resources, employee relations offices, employee assistance and counseling programs, legal counsel, or formal complaint/grievance offices. The survey results establish an interest in further understanding these collaborations; including their appropriateness, effectiveness, and any best practices that could improve their establishment and functioning. This goal also encourages researchers to explore the concept of ombuds-to-ombuds collaboration. What do we need to understand about the efficacy of ombuds-colleague support? What experiences or needs do solo ombuds practitioners have that are similar to or different from the "ombuds team"?

**The ombuds professional.** The final section of the research agenda addresses goals that identify research interests associated with "The Ombuds Professional." These goals include

exploring the development, identity, characteristics, and skills of ombuds, and examining the nature and scope of the ombuds role and position.

**Research goal 7: To explore the development, identity, characteristics, and skills of ombuds.** As the organizational ombuds profession continues to develop, our survey results tell us that people are interested in understanding “What makes a (good) ombuds? Who are ombuds? Where do they come from? What makes people decide to be an ombuds? What have ombuds done personally and professionally in order to equip themselves with the education, knowledge, skills and understanding to become effective in their work? How do ombuds know they are effective? What are the best tools and methods ombuds use to determine or evaluate their effectiveness?” At the same time, survey respondents expressed interest in knowing how ombuds “take care of themselves.” Topics like self-care and resilience, as they relate to ombuds work, need further exploration. What can other service-oriented professions (such as counseling, social work, and psychology) teach ombuds about managing themselves when dealing with people in difficult situations and conflict?

**Research goal 8: To examine the nature and scope of the ombuds role and position.** The organizational ombuds role has evolved over the years. Chances are, it will continue to evolve. Our survey results demonstrate interest in understanding different ways the ombuds role within organizations has, and will, evolve as well as variations in the ombuds role (such as in scope of practice, issues addressed, constituents served, caseload, office size, resources, and methods) from organization to organization or sector to sector. A common phrase people use in the ombuds community is “ombuds where you are.” In other words, while many individual ombuds adhere to the IOA SOP, the way they perceive their role and perform their work, within their own organizations, can and must be different. Among other things, research under this goal could help ombuds understand what it means to “ombuds where you are,” including any accompanying challenges or drawbacks.

## **IMPLICATIONS**

The IOA Research Agenda, as a data-driven summary of research priorities, has potential to shape the future of ombuds research, and consequently the profession, in four primary ways.

First, because the Research Agenda delineates new topics for research, it is likely to increase the number of individuals who study organizational ombuds and thus the amount of research that is conducted. Many prospective researchers who consider studying ombuds work may ask themselves very basic questions, such as “What is it about the ombuds role that needs to be understood?” or “How can I make a contribution to the literature that will be useful to ombuds or valued by the organizations in which they serve?” The Research Agenda offers answers to these questions, and consequently, has potential to inspire both novice and experienced researchers by helping them choose a focus and direction for investigation. With the Agenda as a guide, individual scholars and practitioners can develop programs of research designed to probe into and build knowledge within particular areas of inquiry that are important to ombuds, IOA, and the profession.

Second, the IOA Research Agenda has potential to foster partnerships among those with common research interests. If the Agenda is disseminated within the profession and widely shared with relevant disciplines in academic institutions and professional associations across the United States and around the world, it will help researchers who are seeking collaboration to more easily identify one another and begin to form professional research teams and networks. The Research Agenda can become a widely known, fundamental source of guidance for pursuing ombuds research and create opportunities for within-discipline and cross-disciplinary research

collaborations. It also can enable comparisons to other fields closely related to the ombuds profession such as mediation, coaching, facilitation, and organizational development.

Third, because the Research Agenda provides an organizing scheme for research, it can help make the body of knowledge about organizational ombuds more cohesive and coherent, and IOA can more readily track the progression of research and be recognized for doing so. As more academic and applied researchers are inspired to investigate the areas identified in the IOA Research Agenda, the published literature on the organizational ombuds will expand, and our knowledge of who we are and what we do will become richer, deeper, and more credible. With the Research Agenda at the center, IOA can play a prominent role in structuring the literature as it grows, making it more accessible and usable for ombuds and the organizations they serve.

Finally, the Research Agenda signals to organizations, other professional associations, higher education institutions, and the general public that IOA is now focusing on research and interested in developing a body of literature about the ombuds role and profession. The Agenda communicates openness to scrutiny and assessment by researchers, and a commitment to developing evidence that can inform ombuds practices.

## **CONCLUSION**

Developing a research agenda is no small task, especially for a field that envelops many different types of organizations and sectors, as well as practitioners with a wide range of philosophies and backgrounds. While one shared definition of a research agenda does not wholly exist in broader society, the Research and Assessment Committee hopes the Research Agenda for the International Ombudsman Association described in this article serves as a starting point for many new conversations exploring the nature and condition of the ombuds profession, the ways in which ombuds practice, and who serves in the ombuds capacity. The Committee additionally hopes people within and outside the ombuds profession continue to reflect upon, refer to, and adjust this research agenda, that it will guide research and evaluation efforts throughout IOA, and that it will help steer individuals in ways that enable them to contribute more fully to the field. The IOA Research Agenda is a living document that is likely to evolve as the knowledge-base continues to grow.

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