Striving to Effectively Communicate Ombuds Value: Lessons Learned by an Ombuds working with Data

LISA C. YAMAGATA-LYNCH

ABSTRACT

The goal of this article is to share lessons learned by the author as an organizational ombuds working with data while striving to effectively communicate the value of ombuds work. The article begins with a presentation of how the author transitioned from a faculty researcher to an ombuds working with data with the goal to demystify ombuds work and create opportunities for visitor voices to be heard. This discussion includes both quantitative and qualitative data. The author shares strategies implemented, and decisions made as an ombuds to operationalize data collection, analysis, and reporting. The article ends with final thoughts for organizational ombuds to consider while reflecting on their professional practice with data

KEYWORDS

ombuds, standards, quantitative data, qualitative data, annual report

GOALS AND PURPOSE

The goal of this article is to share lessons I learned as an organizational ombuds working with data while striving to effectively communicate the value of ombuds work to stakeholders and visitors. By spending considerable time reflecting on this goal, I reflected on my: (a) ontology: how I make sense of the world, (b) epistemology: what I consider trustworthy sources of knowledge, (c) visitor experiences: how I come to understand visitor experiences and (d) presentation of new meanings: how I share visitor voices as an impartial trusted person with integrity. My reflections took place at first as a solo ombuds practitioner, when I was hired in 2019, to serve graduate students, staff, and faculty with approximately 16,500 constituents, and continued over the years as our office gradually increased staff.

HOW THIS ARTICLE CAME TO EXISTENCE

The core ideas in this article are a direct result of my discussions about data with other ombuds and my facilitation of ombuds professional development. I engaged in several discussions about data collection and analysis with my International Ombuds Association (IOA) mentor Ruthy Rosenberg who encouraged me to present my ideas at conferences. At the 2021 IOA Annual Meeting, I presented a concurrent session on communicating the value of an ombuds office to visitors and stakeholders with data and systemic trends. This virtual session was attended by more than 100 participants, which then led to an invitation from Tim Hedeen during the same year to facilitate a workshop for Kennesaw State University Center for Conflict Management Summer Institute in Conflict Management. At the summer institute, I facilitated a 3-hour virtual workshop for ombuds to demystify their work to organizational leaders and stakeholders through data. In this expanded version of the previous presentation, I added more content related to what can be considered ombuds data.

Since these two events, I started to receive general questions and requests for meetings with other ombuds regarding data collection, analysis, and reporting. I was invited by the IOA Professional Development Committee (PDC) to join a team of ombuds developing a core course on Understand and Communicate Ombuds Value. I eventually became one of the PDC co-chairs, and for the course development I worked with Susan Cassino and Chinyere Ukabiala. I also had several meetings with Victor Voloshin and his team and Dawn Osborn-Adams regarding data. I received several encouragements from Mary Rowe to move forward with this article through Ombuds in Small Liberal Arts Colleges (OSLAC). She was kind enough to review some of my old messy drafts and send me questions that helped me continue develop my ideas and more importantly develop a momentum to keep writing this article. Finally, as our office added new staff, we had many in-depth conversations about data with Brooke Wichmann our Associate Ombudsperson and Duren Thompson our Educational Program Coordinator.

HOW I MAKE MEANING OF THE WORLD

I was a tenure track faculty for 18 years at three different Colleges of Education in US higher education intuitions. I was tenured and held the rank of professor, and my research and teaching expertise were in instructional design and technology and educational psychology with an occasional interest in Human Computer Interaction (HCI). In my doctoral studies I was trained in quantitative research, but since my dissertation I shifted my focus to qualitative research. I was heavily influenced by works of Barbara Rogoff, especially her work related to participatory appropriations on the three planes of analysis (Rogoff, 1995) and Jean Lave's work in everyday cognition in practice (Lave, 1998). Both of their works provided in-depth discussions about how to reconceptualize research about human interactions in natural settings by moving away from experiments that took place in laboratory settings.

I found qualitative research as a space where I can be open and celebrate the pluralistic nature of reality, diversity in beliefs, approaches, and methodology (Frost et al., 2010). Once I embraced qualitative methodologies I relied on interviews as primary source of data to examine my dialogue with participants as narratives that bring shape and form to our ongoing development of shared meaning (Bruner, 2002). The goal of much of my scholarly work was to provide a voice to research participants by uncovering themes present in their experiences that may not be seen by others. I wanted their voices expressed through my words to lead to data-driven systemic change initiatives within the field of education.

WICKED PROBLEMS FOR OMBUDS WORKING WITH DATA

As I thought further about how to work with data in conversation with other ombuds I realized that I could not engage in the same research practices as I did as a scholar. I realized this because I ran into several challenges, that reminded me of wicked problems (Rittle & Webber, 1973). Wicked problems are grounded in practical activities with contradictions and resource constraints that need to be addressed while considering equity within a large social system. I started to unpack the challenges summarized in Table 1.

Table 1. Wicked Problems for Ombuds working with Data

Contradictions	Resource Constraints	Challenges for Equity
Creating a trusted space while upholding commitment to confidentiality and impartiality and at the same time communicate value of ombuds operations and visitor experiences	Identify, collect, and analyze data while relying on prior knowledge in research and software skills	Share visitor voices through data and findings in a meaningful manner while being keenly aware of the power an ombuds possess as the author of the narrative

The challenges I listed in Table 1, guided my continued reflections and conversations with other ombuds about data collection, analysis, and reporting.

RESPONSE TO QUESTIONS FROM OTHER OMBUDS

1. HOW CAN OMBUDS CREATE A TRUSTED SPACE TO COLLECT DATA WHILE MAINTAINING CONFIDENTIALITY?

The more I thought about how to work with data as an ombuds, I realized that I had to do things differently. As a faculty I followed the Institutional Review Board (IRB) requirements for engaging in human subjects' research. I was committed to the IRB protocols to create space for research participants to: (a) remain anonymous, (b) not be taken advantage of, (c) not be deceived, and (d) be provided with information about the study in which they were voluntarily participating.
I realized that the promises I made about participant anonymity through the informed consent process was no longer sufficient as a standard for upholding confidentiality. In fact, in IRB trainings they typically mention how researchers can promise anonymity but cannot promise confidentiality. I had to reframe the way I approached data collection and analysis. While strategizing how to maintain confidentiality especially in data collection, I realized that my curiosity as a researcher for potential discovery of new knowledge could not drive the way I work with data as an ombuds.

I became interested in how an ombuds can be honest and transparent about office operations and visitor experiences, while promising confidentiality. I wanted to demystify ombuds work and create opportunities for visitor voices to be heard through data for visitors and stakeholders to assess what benefits an ombuds can bring to them and the organization. As I interrogated myself through reflection, I identified the following questions in Figure 1 to guide my ombuds data practices.

1. As an ombuds when working with data what should I do with the trust I gain form visitors while upholding IOA ethical codes and standards of practices?
2. As an ombuds when working with data what should I do with the trust I gain from my organization while upholding IOA ethical codes and standards of practices?
3. As an ombuds how can I avoid compromising confidentiality, impartiality, and trust when working with data?

Figure 1. Reflective Questions to Guide how Ombuds can Work with Data

Reflecting on the above questions, led me to identify data related strategies shown in Figure 2.

1. All visitor personal identification will be stripped from data at data entry with no pseudonym or code assignments.
2. Quantitative data associated to specific visitor situations will not be tracked through multiple months because without visitor identification, data cannot be tracked over time accurately.
3. Quantitative data about visitor situations and office operations will be limited to presentation of raw data that is descriptive in nature.
4. Qualitative data will be recorded with minimal detail regarding visitor experiences limited to two sentences just enough for coding from memory.
5. Qualitative analysis results will be presented as a composite narrative of common visitor experiences with no details that can be traced back to individuals.
6. Analysis will be focused on uncovering particularities (Stake, 1995) of visitor experiences rather than discovering generalizable claims, and
7. Annual reports will be written in an impartial voice as a trusted person with integrity to provide readers opportunity to assess whether what they read is trustworthy and relevant to them.
8. Annual report findings will be written so that organizational leaders and ombuds can engage in data-driven decision-making about ombuds office new hire proposals, ombuds staff professional development, and ombuds office educational programming for constituents.

Figure 2. Strategies for working with Data as an Ombuds

Strategies 1 to 5 were related to efforts in maintaining confidentiality. Strategy 6 was aligned to my beliefs of how I make meaning of the world and what I consider as knowledge based on my qualitative research background. Strategy 7 was a commitment. Strategies 8 was aligned to who I was as a faculty researcher and educator. I wanted to see our ombuds practical research efforts to have impact on our practice and organizational systemic change. While change may be in micro steps, I believed that data-based micro-steps were likely to lead to new practical discoveries that ultimately served our constituents and the organization. I wanted findings from our data collection and analysis to take a critical role in the evolution of our office services for our organization.

Strategies 2 and 3 were the hardest for me to come to terms with. It was difficult because I had to prioritize my commitment to visitor confidentiality over my curiosity for uncovering new knowledge. I had to make a commitment to use quantitative data for descriptive purposes only, and not for making generalizable claims about office operations, visitors, constituents, or the organization. Even so, it was easy to slip into old habits. I paused and examined my data collection practices several times to ensure that I was prioritizing confidentiality. I found that Strategy 7 was challenging because I did not have experience writing in an impartial voice as a trusted person with integrity.

2. WHAT RESOURCES CAN OMBUDS USE FOR DATA COLLECTION AND ANALYSIS?

As our staffing transitioned from a solo practitioner to a multi-ombuds office, we had to change our data collection and analysis tools several times to meet new operational needs. Through this transition, I have learned to start simple and gradually expand as office needs can be matched with resources. As a solo practitioner, the primary resource constraint was my time to serve visitors and engage in outreach to raise constituent awareness about our office existence. I was already familiar with several research software packages available at my organization, and while they may have not been the most obvious tools working with ombuds data, I decided that it was worth my time exploring them.

I decided to keep it simple and use tools that were easily accessible such as Microsoft Excel for collecting both quantitative and qualitative data. I learned how to use pivot tables in Excel for quantitative data analysis and I used QSR NVivo for qualitative data. I learned that as an ombuds I ended up collecting hundreds of data points about visitor experiences. The sheer number of datapoints made it necessary for me to export some parts of the qualitative data as numerical summaries of how often themes were associated to visitor experiences then use pivot tables in Excel to map out holistic meanings.

Both Excel and NVivo were great tools as a solo practitioner but they became challenging to manage for two ombuds. At one point we used a database I created with Google Forms and Sheets, which then led me to spend too much time managing the backend of the database. We eventually moved to AirTable, which is an online database platform that was recommended to me by Dawn Osborne-Adams, and it has enabled us to create a database not only for visitor traffic, but also for our education outreach efforts, ombuds staff professional development, and keeping CO-OP recertification records. For qualitative data entry and analysis, we moved from NVivo to Dedoose, which supports collaborative coding, and analysis. Both AirTable and Dedoose are tools that we are unable to obtain technical support from our institution, but we have been able to find resources online and participate in webinars to engage in professional development.

3. WHAT QUANTITATIVE DATA SHOULD OMBUDS COLLECT?

When operationalizing the difference between quantitative and qualitative data as an ombuds, I relied on Stake's (2010) definition of statistical way of knowing and clinical way of knowing. Stake refers to statistical way of knowing as observable behaviors and/or events expressed in numbers and clinical way of knowing as interpretations of observable behaviors based on professional experiences. While identifying quantitative data I looked for metrics other ombuds relied on in their annual reports. I found several ombuds annual reports that included descriptive data on visitor demographics and yearly visitor traffic. I decided to collect similar data, but I also started to wonder whether there were other data that would help communicate how much our office was serving our organization. I decided to identify my own quantitative metrics while reflecting on what it meant to demystify ombuds work in our organization.

While identifying observable human behaviors that can be represented as statistical data, I considered the ethical implications of how I associate meaning to constructs could have impact on my constituents and organization. This decision was heavily influenced by what I read in graduate school about test validity in Messick (1989) and more recently by Fendler (2016) regarding the ethical implications of validity and reliability. As an ombuds working with data, I defined validity and reliability in relation to metrics as follows:

- Metrics are valid when visitors, stakeholders, and other ombuds can see how metrics and definitions are represented in observable behavioral terms in regards to constructs they represent.
- Metrics are reliable when definitions of metrics in observable behavioral terms are mutually exclusive from one another to facilitate accurate data collection across multiple instances.

As I reflected further, I identified the following initial metrics for our office: new visitor for the month, repeat visitor, ongoing visitor, and touchpoints. Definition and purpose for each metric is summarized in in Table 2.

Table 2 Quantitative Metrics for Ombuds Data

	New Visitor for the Month	Repeat Visitor	Ongoing Visitor	Touchpoints	New Visitor for the Year
Definition	How many visitors come see the ombuds each month. A new visitor for the month is tallied as one visitor no matter how frequently they visit in a month.	Visitors who come see the ombuds more than once in a month. A visitor is tallied as repeat visitor starting from their second visit to the office in a month.	The number of visitors who come see the ombuds across multiple months. If there are multiple new visitors for the year in one meeting, one visitor is counted as not ongoing, and the rest are tallied as ongoing.	How many people other than visitors the ombuds meet in a month regarding a visitor situation and/or systemic feedback.	The number of new visitors to the office for the first time in a year. If there are multiple new visitors for the year in one meeting, all are tallied as new visitor for the year.
Purpose	Showcase how often the ombuds is serving the organization.	New visitor for the month frequency alone cannot show the time spent as well as complexities involved in each visitor situation. These metrics collectively demonstrate complexities involved and the degree to which the ombuds office is serving the organization.			

As staffing grew in our office, I had several conversations about office work rate data with Brooke and Duren. This conversation kept coming up because other ombuds had asked me whether I was inflating visitor data by counting new visitors each month. At first, I was not sure where the concept of inflating was coming from; however, while reviewing the key terms in the IOA 2021 Practice Survey Report (Rowe, Hedeen, Schneider, and Escalante, 2022) I found the following definition for visitors:

> An individual who first contacts the ombudsman office. In some practices, a visitor might be called an inquirer or first contact. For our purposes, the visitor could be a single individual or a group of individuals contacting the ombuds together or individually, but knowingly as part of a group, with the same issue or issues (p.3).

I originally identified new visitor for the month to obtain information as accurately and consistently as possible about our monthly office work rate. Then, while reflecting on the above definition with Brooke and Duren, we found that it had an emphasis on “first contact;” and we decided to add new visitor for the year as a data point to capture the number of first contact in a year to be more aligned with the practice survey. Duren also reminded us that, adding new for the year as data would help her identify impact of our outreach efforts.

Other discussions in our office led to the decision to refine the definition for touchpoints. During our office strategic visioning meeting in spring 2023, Brooke pointed out to us that our metrics are overly focused on how we serve visitors not on how we provide systemic feedback to leaders. My initial response was “I do it all the time,” which led us to realize that we were not capturing this observable behavior. We decided to add individual feedback and/or systemic feedback as an attribute to our touchpoint data.

I also recognized that our office did not have a metric that defined a case in a manner that was aligned with the definition listed in the key terms in the practice report as:

> A case occurs when a new visitor or group, or a previous visitor or group, presents a new problem or issue to the ombudsman that results in a discussion where the ombudsman helps to develop, discuss, and offer options. A case may or may not require multiple appointments with the visitor and/or other parties (Rowe et al., 2022; p. 3).

When I started our office, I collected data on new cases and ongoing cases, but after Brooke joined our office, we found that we could not define what a case was based on observable behavior. This made it challenging for us to maintain consistency in our data collection of cases. We made the decision to move away from cases, and instead just record data on ongoing visitors.

Part of what made it difficult to define a case was my insistence that cases are bounded systems with their own unique characteristics (Stake, 1985). A bounded system is defined by an investigator as an independent unit that holds together a group of people, events, location, and time. An investigator identifies a set of criteria to determine what is included as well as excluded from a case. Through multiple discussions with Brooke, I realized that as ombuds we could not encounter cases as a bounded system because we do not engage in investigations. If we are unable to see the boundaries of a case it becomes very difficult to determine whether one visitor situation is a new case, or part of another case. “Case” as a construct to me is something more than just the people involved, and while trying to define it with Brooke we could not find a way to make it work. Once Brooke and I decided to switch our focus from collecting data about cases to collecting data on ongoing visitors, we were able to operationalize it without hesitation because ongoing visitors is based on visitor behavior that is observable to us.

4. WHAT QUALITATIVE DATA SHOULD OMBUDS COLLECT?

For qualitative data I decided to first work with the IOA Uniform Reporting Categories (Dale, Ganci, Miller, & Sebok, 2008) then look for emerging themes in visitor experiences. I entered all categories and subcategories and their definition from the Uniform Reporting Categories into NVivo as a priori codes. After each data entry, I coded all categories that applied to visitor experiences. Once we switched to using Dedoose, we decided to continue this coding practice. Additionally, going back to my goal for ensuring visitor voices to be heard, I decided to engage in thematic analyses of visitor narratives following the constant comparative methodology (Charmaz, 2014; Corbin & Strauss, 2014). I decided to treat each visitor experience as a unique narrative that the visitor and I collaboratively made sense of through dialogue (Bruner, 1990).

When I first started to work with data as an ombuds, I had to wait for themes to emerge from visitor narratives before I could identify thematic categories, codes, and definition. During this first year the following broad themes emerged: (a) visitor experiences, (b) ombuds services provided to visitors, (c) ombuds session activities with visitors, and (d) knowledge in the literature that help understand visitor experiences and systemic trends. The definition and purpose for all thematic categories are summarized in Table 3.

Table 3 Qualitative Thematic Categories that Emerged

	Unform Reporting Categories	Visitor Experiences	Services Provided	Session Activities	Themes from the Literature
Definition	Visitor experiences that fit the themes in the in IOA Uniform Reporting Categories.	Visitor experiences summarized without compromising identity.	Services provided by the ombuds to visitors.	Activities visitors engage with the ombuds.	Visitor experiences and systemic trends that can be explained by existing knowledge in the literature.
Purpose	Demonstrate how ombuds are following professional practice by identifying visitor experiences common across the ombuds field.	Ensure visitor voices are heard by capturing the essence of their experiences.	Demonstrate how the ombuds can serve visitors and be of value to the organization.		Demonstrate ombuds observations and practical knowledge gained are aligned to professional conversations in the literature.

Including themes from the literature helped normalize visitor experiences by providing a term to what they were experiencing and help them recognize that they were not alone. I have met with visitors who shared with me that they came to see the ombuds because of what they learned in our annual report that referred to relevant literature and now they have a name for what they were experiencing. Connections between our findings and the literature have led to our office identify: (a) systemic growth areas for our organization, (b) our office hiring decisions, and (c) our office education and outreach mission. Examples of these connections from our fiscal year 2021 annual report include:

- Crucial conversations (Grenny, Patterson, McMillan, Switzler, & Gregory, 2021) and psychological safety (Edmondson 1999; 2019) help explain how communication challenges that visitors experience bring strain to their evaluative relationships.
- Dignity (Hicks, 2011, 2018) and positionality (Dy, 2020; Anthias, 2008; 2011) help understand the harm that visitors experience from damaged evaluative relationships.

As a result of further discussions about what we observed in visitor experiences and connections to existing literature, one of the most significant educational event our office gained support from campus leadership was to invite Dr. Donna Hicks in 2021 to facilitate several workshops on Dignity. Additionally, all staff in our office are now certified Crucial Conversations for Mastering Dialogue organizational trainers from Crucial Learning, and we regularly provide Crucial Conversations training to members of our organization.

5. HOW CAN OMBUDS COMMUNICATE VALUE OF THEIR WORK?

To address this question, I went back to reflecting on my purpose as an ombuds working with data and strategies 6, 7, and 8 in Figure 2. As an author of our annual report, I wanted to communicate value of our office by: (a) finding an impartial trusted voice that demonstrated integrity, (b) providing readers the essence of visitor experiences, and (c) engaging readers in data-driven decision-making for themselves and the organization. Once I identified what I wanted from our annual report it seemed that I had an agenda as the author.

I spent some time struggling with the realization that I had to find a new writing voice. I started to spend a lot of time reading about message design and data storytelling. I found that stories as a whole make sense to readers when there is a clear sense of beginning, middle, and an end (Eisner, 2008), and I had to find a way to bring this structure without a research question. I became very curious about the value of visual data presentation, and how that could lead to new meaning making for the reader (Yau, 2011). I wanted to engage in data storytelling that could help the reader gain a better understanding of visitor experiences (Knaflic, 2015). I learned from reading about data storytelling that telling a story through data rather than just showing data, can move people to feel and act (Duarte, 2019). Thus, I concluded that data storytelling can communicate value of ombuds work.

Once I decided to engage in storytelling of visitor experiences through data, I realized that to maintain confidentiality I had to exercise my power as an ombuds to intentionally withhold information from the reader of our annual reports. This realization made me reflect on the inequitable access to information between myself and readers that I had to create and maintain. As a researcher, once data was presented based on observations, I was able to present my thoughts to build and defend an argument. This assumed I provide an exhaustive summary of the data to the reader for them to assess the integrity of my findings. I realized that as an ombuds I had to intentionally take away some of the readers ability to assess what I present to them.

I decided to bring beginning middle and an end to the annual report structure and incorporate data storytelling where appropriate. I started the report with educational content for the reader including office mission statement, standards of practice, staff professional affiliation, and a brief information on how the report was prepared. Then I introduced the three main areas for data presentation, which included office operational activities, visitor traffic trends, and visitor experiences. Visual as well as narrative storytelling were incorporated throughout these two sections. I ended the narrative of the report with findings and recommendations. Finally, I added a section about data collection and analysis and a list of references at the end.

FINAL THOUGHTS

In summary, there is not necessarily a universal approach for ombuds to work with data while striving to effectively communicate ombuds value. For ombuds to engage in purposeful and confident work with data they need to engage in reflective practice to discover how they make sense of the world, what they consider to be trustworthy knowledge, how they come to understand visitor experiences, and how they choose to use their voice as an impartial trusted person with integrity. In this article I introduced lessons I learned as an ombuds while making decisions to help identify how to work with data. I will end the article with questions that may help other ombuds engage in reflection about how they could work with data while communicating the value of their work:

- How are ombuds interrogating themselves in terms of how they see the world, and what they consider as trustworthy knowledge?
- How are ombuds leaning into their previous experiences, knowledge, and skills related to data collection and analysis?
- How are ombuds defining quantitative and qualitative data?
- How are ombuds engaging in data storytelling of visitor experiences as an impartial trusted person with integrity to communicate value of their work?
- How are ombuds navigating the power inequity they possess as an impartial trusted person with integrity who purposefully withhold information when they present data to protect visitor confidentiality?

REFERENCES

Anthias, F. (2008). Thinking through the lens of translocational positionality: An intersectionality frame for understanding identity and belonging. *Translocations: Migration and Social Change,* 4(11), 5–20.

Anthias, F. (2011). Intersections and translocations: New paradigms for thinking about cultural diversity and social identities. *European Educational Research Journal*, 10(2), 204–217. https://doi.org/10.2304/eerj.2011.10.2.204

Bruner, J. (1990). *Acts of meaning*. Harvard University Press.

Bruner, J. (2002). *Making stories: Law, literature, life*. Cambridge. University Press.

Dale, B., Ganci, J., Miller, D., & Sebok, T. (2008). Comparing apples to apples: Development of the IOA Uniform Reporting Categories. *Journal of the International Ombudsman Association, 1(1), 8–22.*

Duarte, N. (2019). *DataStory: Explain data and inspire action through stor*y. Ideapress Publishing.

Dy, A. M. (2020). Not all entrepreneurship is created equal: Theorising entrepreneurial disadvantage through social positionality. *European Management Review*, 17(3), 687–699. https://doi.org/10.1111/emre.12390

Charmaz, K. (2014). *Constructing grounded theor*y (2nd edition). SAGE Publications Ltd.

Corbin, J. M., & Strauss, A. (2014). *Basics of qualitative research: Techniques and procedures for developing grounded theory* (4th edition). SAGE Publications, Inc.

Edmondson, A. (1999). Psychological safety and learning behavior in work teams. *Administrative Science Quarterly*, 44(2), 350–383. https://doi.org/10.2307/2666999

Edmondson, A. (2019). *The fearless organization*. Wiley.

Eisner, W. (2008). *Graphic storytelling and visual narrative*. W. W. Norton & Company.

Fendler, L. (2016). Ethical implications of validity-vs.-reliability trade-offs in educational research. *Ethics and Education*, 11(2), 214–229. https://doi.org/10.1080/17449642.2016.1179837

Frost, N., Nolas, S. M., Brooks-Gordon, B., Esin, C., Hol,t A., Mehdizadeh, L., Shinebourne ,P. (2010).
Pluralism in qualitative research: The impact of different researchers and qualitative approaches on the analysis of qualitative data. *Qualitative Research*, 10, 441-460.

Grenny, J., Patterson, K., McMillan, R., Switzler, A., & Gregory, E. (2021). *Crucial conversations: Tools for talking when stakes are high*., (3rd edition). McGraw Hill.

Hicks, D. (2011). *Dignity: Its essential role in resolving conflict*. Yale University Press.

Hicks, D. (2018). *Leading with dignity: How to create a culture that brings out the best in people*. Yale University Press.

Knaflic, C. N. (2015). *Storytelling with data: A data visualization guide for business professionals*. Wiley.

Lave, J. (1988). *Cognition in Practice*. Cambridge University Press.

Lincoln, Y. S., & Guba, E. G. (1985). Naturalistic Inquiry. Sage Publications.

Messick, S. (1989). Meaning and Values in Test Validation: The Science and Ethics of Assessment. *Educational Researcher*, 18(2), 4–30. https://doi.org/10.3102/0013189X018002005

Rittel, H. W. J., & Webber, M. M. (1973). Dilemmas in a general theory of planning. *Policy Sciences*, 4(2), 155–169. https://doi.org/10.1007/BF01405730

Rogoff, B. (1995). Observing sociocultural activity on three planes: Participatory appropriation, guided participation, and apprenticeship. In J. V. Wertsch, P. Del Rio, & A. Alvarez (Eds.), *Sociocultural Studies of Mind* (pp. 139–164). New York: Cambridge University Press.

Rowe, M., Hedeen, T., Schneider, J., & Escalante, H. (October, 2022). *International Ombuds Association survey of ombuds practice 2021*. International Ombuds Association. https://ioa.memberclicks.net/assets/Practice_Compensation_Survey/2022_IOA_Practice_Report_FINAL.pdf

Stake, R. E. (1995). *The Art of Case Study Research*. Sage Publications, Inc.

Stake, R. E. (2010). *Qualitative Research: Studying How Things Work*. The Guilford Press.

Yau, N. (2011). *Visualize This: The FlowingData Guide to Design, Visualization, and Statistics.* Wiley.

‘

AUTHOR BIO

Lisa Yamagata-Lynch is the Director for the Office of Ombuds Services at the University of Tennessee (UT), Knoxville and serves faculty, staff, and graduate students. Lisa founded the office in May 2019, when she was appointed as the University Ombudsperson after an internal search process. During the first couple years since becoming an ombuds, Lisa cultivated positive and sustained collaborative relationships with the Provost's Office, Human Resources, General Counsel, and other university leaders. Lisa was promoted to Director in 2021, when the Chancellor's Office approved expanding the office and hiring a second ombuds. Lisa now supervises an associate ombudsperson, educational program coordinator, and a graduate research assistant. Lisa is a Certified Organizational Ombudsman Practitioner® (CO-OP®). She is also a certified trainer in Crucial Conversations Mastering Dialogue and Crucial Accountability. She served as a co-chair and chair of the IOA Professional Development Committee and is a recipient of the 2024 IOA President's Award. Lisa was a tenured professor at UT prior to becoming an ombuds. As a faculty she engaged in research and published over 30 peer-reviewed journal articles. Lisa taught courses related to systemic change, qualitative research, and design thinking. She received her doctoral degree from Indiana University in Educational Psychology as well as Instructional Systems Technology. Lisa has served in several leadership roles in universities as a program coordinator, director of graduate studies, academic department associate head, as well as leading program accreditation processes.((lisayl@utk.edu)