

Summary of Changes

Final Round of Member Input

1. Code of Ethics:

- Reformatting the Code of Ethics in response to a comment that received significant support from others, so that the “Core Values” are listed first, and the “Fundamental Principles” follow. A number of members felt that this approach allowed the Principles to flow from the values.
- Adding “dignity” and “accessibility” as core values and consciously evaluating their placement as it could affect how they are interpreted and applied.
- Adding a clarification to the “Confidentiality” provision to tighten and narrow the language articulating an exception to confidentiality, when release of some information is justified to enable the ombuds and the program to defend against a charge of improper activity.

2. Standards of Practice:

- Moving the footnoted reference to our use of the term “ombuds” to its very first reference in the draft.
- Adding more precise language regarding how the Standards of Practice relate to the Code of Ethics and how an ombuds may apply them.
- Adding precision to the wording of paragraph 2.2 in response to member suggestions about potential misapplication.
- Thoroughly reviewing and consciously evaluating member preferences and implications to the use of “fairly” in paragraph 3.3 and determining, consistent with previous member input as well as Task Force benchmarking data, that there is a strong majority preference to add the term subject to the limitations inherent to remaining impartial as to individual situations.
- Adding more precise language in paragraph 4.6 governing confidential information in response to member input identifying potential misapplication in light of certain public records laws.
- Adding more precision to the definition of “confidential information” in the opening paragraph, (5.1) of the Confidentiality section.
- Tightening and narrowing the language and, hence, the potential application of paragraph 5.6 creating to an exception to confidentiality in the event that an ombuds must disclose information to defend themselves from a claim of professional misconduct, by specifying that the information released must relate to the specific matter and may only be released in the event of a “formal” complaint.

BJM

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