Ombuds Services for Teams

"You can't empower people. You can provide a process where people can find their power."¹

Ombuds Services for Teams is such a process.

A few of the reasons teams come to Ombuds:
- To improve communication
- To build collaboration
- To prepare for strategic planning or retreats
- To manage a crisis
- To improve morale
- To navigate change

PROCESS OUTLINE

1. **Leadership meets with Ombuds Services to:**
   - Discuss goals, clarify the process and its limitations, and set a timeline for the process.
   - Decide what questions visitors should focus on during their 1:1 visit to Ombuds. The questions relate to specific goals the group is working towards.
   - Determine date of Ombuds presentation to team.

2. **Leadership sends Ombuds Services a draft of the e-mail which will be sent to the team explaining this initiative**
   - Leadership sends Ombuds Services a copy of the draft announcement for review before the e-mail announcing the initiative is sent to the team members.
   - See last page of this document for talking points and a sample.

3. **Ombuds recommends changes to draft e-mail or confirms it’s good-to-go**

4. **Ombuds Services makes a presentation to the group**
   - Presentation includes: what a visit to Ombuds will look like, how a visit might be helpful to the individual and group, Ombuds confidentiality, limitations of the process, next steps, Q&A.

5. **Leadership sends out e-mail to team announcing initiative**

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¹ Dr. Laura Parajon, Executive Director for the Office for Community Health UNM HSC; Strategy Officer for Global and Community Health AMOS Health and Hope
6. **Individual visits to Ombuds**
   - Each individual comes to Ombuds Services for a confidential 1:1 visit.
   - What is a visit?
     - A visit starts with reviewing a *Privacy Agreement* which explains that Ombuds Services will not reveal the identity of any individual contacting the office, nor what was said during a visit without the express permission of the individual.
     - The ombuds then invites the visitor to think out loud about the workplace situation from the visitor's perspective. The ombuds listens, ask clarifying questions, and offers neutral, constructive acknowledgement.
     - The ombuds gives input about available resources: services Ombuds for Staff offers (such as facilitated conversations), UNM policies that offer guidance, and other resources available to UNM staff and their co-workers
     - The ombuds explores with the visitor how they might approach the situation to improve communication and collaboration.

7. **After the 1:1 visits**
   - After the visits, leadership is encouraged to listen for and to staff concerns and ideas, respond constructively, and generally notice if or how the team dynamics shift.
   - The group leader meets with Ombuds Services again within 3 weeks after the individuals have completed their visits to think through next steps.
     - If desired and/or appropriate, Ombuds Services may make a presentation/educational workshop to the whole group.
     - If desired and/or appropriate, Ombuds Services may facilitate a conversation among all who were invited to have a visit. The focus of the conversation is usually based on the questions the leadership asked the visitors to focus on during their visits.
Consider including in your announcement of this initiative:

• Purpose of the initiative.
• Purpose of visits. Include the specific question(s) you’d like the visitor to explore during their visit.
• Date of Ombuds presentation to team to answer any questions they may have.
• That Ombuds Services is confidential, independent, neutral and informal.
• To complete individual visit by XXX date.
• Specific name of Ombuds to ask for, if appropriate.
• Ombuds website for more information http://ombudsforstaff.unm.edu/index.html

Sample Language

Ombuds Services offers a confidential, informal, neutral and independent process to build workplace communication and collaboration. Ombuds Services is providing a process to our team members to facilitate communication about workplace concerns and how to improve things.

To begin this process, please reach out Ombuds Services to schedule a confidential visit. Ombuds will not report who came in, nor the details of any visit. That visit is your opportunity to think out loud, off the record and with a neutral listener about:

• ____________ (your group’s question(s) here)
• ____________ (your group’s question(s) here)
• ____________ (your group’s question(s) here)

This process of exploring the questions and our situation in a confidential setting with a neutral listener can prepare each of us for moving forward constructively.

To that end, you are invited to email Ombuds Services (JoEllen Ransom Jransom@unm.edu or Anne Lightsey at alight01@unm.edu) to schedule a confidential, informal visit with Ombuds Services. Please complete your visit by ________ (date). Plan for the visit to be between 1- 2.5 hours. This is considered University business and so may be done on work time (University Policy 3300).

Here’s a link from their website on their principles and what you can expect: http://ombudsforstaff.unm.edu/our-principles.html