

Friday Checklist Template with “Date-Masking”

2026 Rowe and Hedeem

**Organizational Ombuds (OO) activities occurring *in any case* this past week.
Check ALL that apply for your work this past week**

In using/modifying this template:

- Set the application to apply no date, or a randomized date.
- Consider keeping the Friday Checklist on a *dedicated computer offline*.
- Collect data that will be operationally useful to you and your constituents.
- Collect data that could not easily identify any case, constituent or your organization.
- See the additional Resource Lists in the Repository for possible additions.
- Try to keep your work on the weekly checklist under 30 minutes, at most.

• Issues involved (in any case) **

- Values, Ethics, Illegalities (incl. safety) Yes
- How people treat each other Yes
- New Issues/Resurfaced Issues/Good Ideas Yes
- Organizational Systems Issues Yes

• Complexities (in any case)

- Highest number of issues in a single case this week: (# _____)
- No specific respondent (just situational/system issues) Yes
- Many people, groups, roles, visitors, respondents (i.e., alleged offenders) and those affected Yes
- Visitor and Respondent in different units Yes
- Visitor and Respondent of different demographics Yes
- Visitor and Respondent from different cohorts (job, rank, role) Yes
- Many people, groups, or roles as Responders (i.e., resource people who respond to the incident) Yes
- Many rules, or norms (may) apply Yes

• Risks faced by Visitor(s) (in any case) **

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|--|-----|--------|------|
| -loss of relationships (family and work) | Low | Medium | High |
| -retaliation/career damage/fear | Low | Medium | High |
| -loss of privacy, loss of face | Low | Medium | High |

-possible benefits missed or lost	Low	Medium	High
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• Risks likely faced by the organization (in any case) **

-Financial	Low	Medium	High
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-Operational	Low	Medium	High
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-Reputational	Low	Medium	High
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-Strategic (e.g., loss of good ideas)	Low	Medium	High
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OO Functions performed this week (in any case) **

-Helped visitor(s) to get, and/or offered, needed information	Yes
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-Helped to develop an unusual/unique/complex option	Yes
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-Discussed formal and informal options (# _____ of options)	Yes
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-Appropriately helped organization to get needed information	Yes
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-Helped the visitor(s) who chose to act directly	Yes
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-Acted as a facilitator/mediator/shuttle diplomat/coach	Yes
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-Undertook, with permission, generic option(s)	Yes
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-Inspired/supported/instigated systemic change	Yes
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• Systemic Review	Yes
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• Training (e.g. Talking Circle, Restorative Justice or Your OO Practice Specialty)	Yes
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• “NEXT” Options chosen by Visitor(s), if no action by the OO

-Visitor will “wait and see” and perhaps keep notes	Yes
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-On the record (formal) complaint	Yes
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- Direct approach about the issue in person or in writing Yes
- Discussion with another manager, office, or resource Yes

• **How/Why did Visitor(s) choose the OO Office**

- Referred by another office or resource Yes
- Suggested by supervisor Yes
- Suggested by bystander or peer Yes
- New issue from the same visitor earlier Yes
- Heard, met, saw the OO in training or other public discussion Yes
- Referred by someone in the same unit Yes
- Referred by other party in discussions of the same concern Yes
- Read about the office online Yes

• **Visitor's Roles in the concern(s), *if not a party***

- Supervisor Yes
- Peer or bystander Yes
- Bystander of a Bystander Yes
- Other Yes

**See the relevant Resource List explanation about RISK and a longer list of Issues.

Note: This article draft is part of a Resource Repository designed to support identifying—and helping to quantify—the value of an Organizational Ombuds (OO). This Resource Repository is a work in progress. It is open to improvements, additions, deletions, critique, revision and random commentary. If any page in the repository is helpful, or needs revision, please let us know. Please contact [Mary Rowe](#) or other co-authors, if you can help to improve these pages or have another page to offer.