

Introduction to a Resource Repository on Operationally Useful Data about the Value and Effectiveness of Organizational Ombuds

A Resource Repository of Working Papers for Comment

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The purpose of the Repository is to support identifying—and helping to quantify—the value of an Organizational Ombuds (OO). We need metrics:

- at a time when keeping confidential data requires foresight and great care, and
- at a time when many employers and organizational members have little idea about the work of an OO—and welcome metrics and stories with operationally useful information, and
- at a time where some organizations are looking to AI to perform human services, and, therefore, ombuds would like to highlight services where ombuds excel and AI is limited.¹

All drafts here are meant for discussion by organizational ombuds. AI was used extensively for several topics; pages where AI was used are marked in red. **AI itself often notes that “AI responses to queries may be inadequate, incorrect or offensive.”** Please always verify anything from AI.

Organizational Ombuds exist to support all their constituents—and the systems that support the mission of an organization. OOs help their visitors and their organization in discernment. They help others to discern the meaning of what is happening, and the resources available. OOs can help to develop innovative and efficient options for addressing concerns and good ideas in the given context.² OOs consider issues and good ideas, complexities, risks felt by visitors and potential risks for the organization—and think daily about the skills and functions they can offer.

Because Ombuds can offer a nearly risk-free opportunity for visitors to discuss both concerns and good ideas—and because the OO “catchment” map of the organization is so broad—ombuds often receive concerning—and beneficial—information available to no one else in the organization. Thereafter Ombuds can find ways completely consonant with the International Ombuds Association (IOA) Standards of Practice to help the organization to manage its own risks, while protecting the confidentiality of their sources. This capability is especially helpful to both visitors and the organization because ombuds regularly receive information that can both mitigate real and potential costs, and also enhance potential benefits.

OOs collect data to communicate with constituents including the organization, to help themselves understand what is going well and to discern how to do better. *And* to help guide and build the OO profession.

How can we do this? In planning to respond to the interests of all our constituents, OOs can begin with the mission of the organization and our Terms of Reference or Charter, and listen to leadership, affinity

¹ For example, see: Isabella Loaiza and Roberto Rigobon, “The EPOCH of AI: Human-Machine Complementarities at Work,” (November 21, 2024). MIT Sloan Research Paper No. 7236-24, showing five areas where humans excel and AI is limited. Available at SSRN: <https://ssrn.com/abstract=5028371> or <http://dx.doi.org/10.2139/ssrn.5028371> See also the AI-related papers in this Resources Collection.

² See the power of “elegant solutions” in Mary Rowe, [“Organizational Ombuds’ Sources of Power and Influence.”](#) *Journal of the International Ombuds Association* Vol. 16, No 2 (Mary Rowe special issue, 2023-2024).

groups, and visitors, to identify *their* interests.³ We can look for topics relevant to the mission, and that respond to constituent interests—and are *easy to talk about without impinging on confidentiality and OO independence*.

As examples, we can talk about *issues* that come to us and their degrees of *complexity*. We can communicate about the *risks* felt by visitors. We can talk about how addressing *the visitors' risks*, by providing a safe place,⁴ can lead to helping our organization to manage *risks to the organization*. We can communicate the gravity of our Most Serious Cases. We can describe the *functions* we provide each week and the *options* we help to develop for visitors. We can collect and communicate data that show how effectively we are linked to the Conflict Management System of our organization—and the breadth of our service to the organization.

We have discovered many ways to collect and communicate quantitative and qualitative information about the value and effectiveness of OOs. Collecting data can be via an office database; a “Friday Checklist” and/or a “Whenever an Outcome Checklist”; results from organizational climate surveys that include the ombuds and ad hoc ombuds surveys; analyzing website use; recording numbers of people attending OO training and specialty presentations (and their evaluations); recording notes and thankyou notes that come to the OO office from visitors and conflict management system offices; and performance evaluations, awards or citations from the organization, units and affinity groups. Some OOs do careful and detailed self-evaluations.⁵

Many of the *collection* methods also serve as *communications* methods. Additional communications methods include all the ombuds outreach activities,⁶ quarterly and annual reports, ad hoc reports to managers and affinity groups, office posters, use of anonymized cases in writing and training, training programs, and casual conversations on the phone and in the hall. A few ombuds have written songs and poems, or used painting, weaving, role-playing and other arts to illustrate the value of ombuds.

And...finally, a reminder:

All digitized data that are online—theoretically—can be accessed and recorded in transit. (And of course your database also could be subpoenaed even if offline.) While no method is entirely foolproof, two reasonable approaches to collecting, using, and keeping data without endangering the International Ombuds Association (IOA) Standards of Practice are: 1) Keep it “air-gapped”—i.e., entirely offline—and routinely delete or shred it, or 2) collect and use and keep only those data that both illuminate Ombuds value and effectiveness *and* are IOA Standards of Practice compliant.

See if the papers in the Resource Repository help to *identify* and *quantify* operationally useful data and help you to communicate how often you deal with various issues each week. Some of the papers here, like the Friday Checklist, are meant to be templates—or ideas to consider—for organizational ombuds to revise or use in ways that fit each practice.

[Visit the Resource Repository Landing Page and Index.](#)

³ See Schenck, A., & Zinsser, J. W. (2014). Prepared to be Valuable: Positioning Ombuds programs to assure their worth. *Journal of the International Ombudsman Association*, 7(1), 7–17.

⁴ See Lara Khalife-Dagher, “Informality: The Hidden Treasure In Conflict Resolution,” Untoday.org, March 2023, <https://untoday.org/resolving-conflict-through-the-secret-weapon-of-informality/>.

⁵ See Adam Barak Kleinberger (2017) *How Do Organizational Ombuds Help to Manage Risk?* (Self-evaluation) ECOG

⁶ See Keys to Opening and Maintaining an Ombuds Office Presented by Ronnie Thomson and Reese Ramos International Ombuds Association Annual Conference April 2023 **50 Outreach and Marketing Ideas when Launching and Maintaining an Ombuds Program**