

The Rationale for Keeping a “Friday Checklist with Dates Masked” to Augment the Organizational Ombuds (OO) Database

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Q: Why do we suggest that an OO might keep a ~fifteen-minute checklist every Friday as well as keeping a database? Why do we suggest that the dates of entry are *masked*?”

A#1: For quantification of operationally useful OO value: Each item on the checklist is *measurable* for communicating about your value. Each item is operationally useful to visitors and affinity groups, leadership, the OO, and the OO profession.

A#2: Items on the list do not betray visitor identities. Aggregating a year’s worth of Friday Checklists (FCLs) provides a summary of useful information about OO work, anytime anyone asks. But the data for any *specific* week should not be recoverable by subpoena or on demand. *Masking the Dates of Input* means that the record for each week, when posted, either has no date, or is assigned a random date from the preceding 51 weeks. On any date the OO can get a summary of the preceding 52 weeks, thus providing a basis for up-to-date reports any time the OO wishes to communicate about their work and value.

Operationally Useful Data. As one example of being “operationally useful,” think of the OO function of [Generic Options](#). If you take an anonymous issue to management and there is a systems response,
- the issue gets addressed (in whole or in part), and one or more constituents may benefit.
- the visitor’s identity is unknown and protected.
- the organization gets to fix a situation instead of responding to complaints (or the situation getting worse.)
- management knows how you have helped, thus illuminating your service.
- you will have recorded undertaking a Generic Option that week, quantifying that service to your organization and its mission. And illuminating this kind of option for visitors.

Issue Clumps. We chose four groups of issues that likely have *operational significance* to the organization as well as to visitors. Check off all the issues you dealt with that week. (And, if needed, change this list for an issues list that works for you.)

Complexities, aka “multi-multi cases.” OOs are often thought to deal just with A vs B cases. Two ways OOs bring additional value is that we also deal with “one-party” cases, and, also, multi-party cases. Many compliance offices (appropriately) focus mainly on one issue or one group or one unit. OOs often have cases with multiple issues, multiple parties, and multiple cohorts. OO service is especially important where there are *multiple norms and rules, and multiple units* involved in a concern. That OOs frequently deal with complex cases is a major source of value in this complex world. Check off all the complexities that came in, during the week.

Functions. A list of services you are providing, each given week, helps to illuminate the breadth of skills you use—in addition to your describing multiple formal options and offering informal options. Each of the Functions on the checklist tracks value that is easy to understand. (Please feel free to recreate the Friday checklist in a format that works for you.)

Generic Options. If an anonymous visitor gives permission for you to take an anonymous issue to management and there is a systems response to address it, you have helped in several ways as noted above.

Systemic Reviews, Listening Circles, Specialty Services and Trainings. Systemic reviews, circles and training sessions help to show your support to the whole organization, in dealing with strategic issues. Check off each week if you contributed any special-expertise service. (Add in any other specialty service of your own, such as helping would-be collaborators to outline their work together, regular informal facilitation of leadership groups, or assisting people who have been laid off.)

Risks faced by your visitors and the organization. We want to communicate an important risk management value of an OO office: the International Ombuds Association (IOA) Standards of Practice (SOP) provide a safe place for people to come who might not bring their ideas and concerns anywhere else.

We want to highlight the fact that the SOP help the organization to manage its own risks. Because ombuds help visitors to manage *their* risks, by providing a safe place to discuss concerns and good ideas, the ombuds receives a great deal of information from around the organization. Ombuds then may be able to find ways—completely protective of visitor confidentiality, and of IOA Standards of Practice—to help the organization in its own risk management. Ombuds also help both visitors and the organization to manage *two kinds of risks*: the risks posed by present and potential costs, and also risks of “missing out,” that is of losing benefits from good ideas. Check all the risks of concern to your visitors each week and all the potential risks to the organization. (If your Risk Manager uses a different list, of course you may wish to use their specific list.)

Next steps. Your catalog of the options chosen by your visitors shows the breadth of options you offer, and your support to visitors who wish to learn how to handle an issue on their own. It can help to show your understanding of and support to the integration of your entire Conflict Management System (CMS)—that is....to help your CMS to become an Integrated Conflict Management System (ICMS).... and help to keep it coordinated.

First Learned/Referred by. Data about how issues first come to you, and how visitors come to your office illuminates the breadth of your outreach—and the depth of trust in the OO Office. If “no one referred” some visitors, that may also be useful information about your outreach.

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More Detailed Lists? We have been told that some OOs would like to make detailed checklists on one or more of these subjects—to think about as they work, and to collect more detail for their databases. We have written one-pagers about many of these points and offer additional lists in the Resource Repository for your consideration.

This Friday Checklist is just a TEMPLATE... Desiderata for a Friday Checklist App that Fits your OO Practice

- The checklist should fit your own Practice and the needs of your own organization.
- The checklist, for many OOs, should not take more than 20 minutes at the outside... fifteen is better.
- The data should not betray visitors' identities. And, ideally, the data are kept on a dedicated computer offline.
- Dates of entry should be absent or seriously masked.
- The data are **operationally useful to all constituents, visitors, the organization and its leadership.**
- If many OOs use the checklist in one organization, they can easily be easily combined with data from other OOs in the organization (*via hand-carried thumb drives or other secure method if possible*) —to provide an organization-wide glance at the work of OOs. This point suggests that it probably would be useful to have the same list of categories within an organization, even though the items within categories might change.

-A Friday Checklist is NOT a substitute for each office having an OO database—except perhaps for OOs with few cases.

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.