



Navigating the Revised IOA Standards of Practice: Seven Significant Revisions: Cheat Sheet

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The following revised SOP introduced seven significant changes, each with profound implications:

Independence:

- 2.3 The Ombuds holds no other position that compromises, or could be reasonably perceived as compromising, the Ombuds' independence. If the Ombuds has non-ombuds duties, those duties must not interfere with their ombuds duties. The Ombuds must clearly communicate when they are and are not acting as the Ombuds.
- 2.4 The Ombuds has the authority to select Ombuds program staff and to manage the Ombuds program budget and operations without undue external influence or limitations. However, the Ombuds has no formal policymaking, enforcement, or disciplinary role except internally within the Ombuds program.

Informality:

- 4.4 Consistent with these standards, consulting with the Ombuds is completely voluntary. People who use the services of the Ombuds are understood to have agreed to abide by the terms, conditions, and principles under which the program was created and not call the Ombuds to testify or disclose confidential information in any formal, legal, or other matter.

Confidentiality:

- 5.1 The identity of those seeking assistance from the Ombuds, as well as all communications and information specifically relating to them is confidential information.
- 5.4 The Ombuds shall oppose disclosing confidential information in any formal, administrative, or legal matter external to the organization, unless an appropriate judicial or regulatory authority determines that disclosure is necessary to prevent a manifest injustice or that disclosure is required because the interests served by disclosure clearly outweigh the interests served by Ombuds confidentiality.
- 5.6 The Ombuds may disclose confidential information as necessary to defend themselves against a claim of professional misconduct.
- 5.8 The Ombuds may provide non-confidential information about the Ombuds program in any appropriate forum. The Ombuds shares data, trends, or reports in a manner that protects confidential information.