



Midpeninsula Regional
Open Space District

LEGISLATIVE, FUNDING AND PUBLIC AFFAIRS COMMITTEE

R-13-94
October 8, 2013

AGENDA ITEM 2

AGENDA ITEM

Filling the Volunteer Ombudsperson Position

GENERAL MANAGER'S RECOMMENDATION

Accept the application of Rosemary Field for the District Ombudsperson position and forward a recommendation for approval to the Board of Directors.

SUMMARY

The San Mateo County Local Agency Formation Commission's (LAFCo) conditions of approval for District annexation of the San Mateo Coast in 2004 included appointment of an ombudsperson to work as a liaison between District staff and the public to resolve citizen inquiries and concerns. The Board appointed its first volunteer ombudsperson in October 2004. That individual served through May 2011 when she resigned due to an out of state relocation. In August 2011, the Board appointed another volunteer who served for one year and chose not to continue. The ombudsperson is appointed for one year with the opportunity to extend their service by request and Board approval. Due to staff vacancies and reorganization within the Public Affairs Department in 2012-13, recruitment for the ombudsperson was delayed until July 2013. The position was posted for 30 days on volunteer sites and announced to District volunteers and docents through email. The District received one application from Rosemary Field of Belmont, California for the ombudsperson volunteer position. The ombudsperson position has been vacant since August 2012.

DISCUSSION

At its May 26, 2004 Board meeting (see Report R-04-57), the Board adopted Resolution No. 04-13 establishing an appointment process for the District Ombudsperson in conformity with LAFCO's conditions of approval. District Resolution No. 04-13 assigned responsibility for developing the recommendations for a selection and recruitment process to the Legislative, Funding and Public Affairs Committee (LFPAC). The adopted description for roles and duties, desired qualification criteria, and application are attached. The term is for one year with the opportunity for the Board to grant an extension. LFPAC is directed to screen applicants and select top candidates for Board interviews and appointment at an upcoming Board meeting. The ombudsperson workload has been fairly light. Attached to this memo are several documents

including Ms. Rosemary Field's application and background, as well as response procedures and recommended skill set.

Ms. Rosemary Field has over 25 years experience as a public works inspector and owner's representative within the public sector, successfully partnering with contractors, utility companies, and the public. Upon retirement she has been active in volunteer activities with the public. With her application, Ms. Field included a copy of a quality service award and proclamation in her honor. Her answers to the application questions demonstrate her ability to listen and understand conflicts and her understanding of typical open space issues that could arise as part of the ombudsperson role. Staff recommends moving Ms. Field's application forward to the full Board for consideration.

FISCAL IMPACT

There are no fiscal impacts to the District associated with this item.

PUBLIC NOTICE

Public notice was provided as required by the Brown Act.

NEXT STEPS

If LFPAC concurs with staff's recommendations, staff would like to invite Ms. Rosemary Field to a future Board Meeting for Board questions and potential appointment.

Attachment(s)

1. Ombudsperson Program Description
2. Description of Ombudsperson Desired Knowledge/Skills/Abilities
3. Ombudsperson Recruitment Flyer
4. Ombudsperson Response Procedures
5. Ms. Rosemary Field's Ombudsperson Application

Responsible Department Head:
Shelly Lewis, Public Affairs Manager

Prepared by:
Shelly Lewis, Public Affairs Manager



Midpeninsula Regional
Open Space District

OMBUDSPERSON PROGRAM

Role of Ombudsperson

The Ombudsperson is an appointee of the Board of Directors who follows up on resident or neighbor inquiries or complaints for the purpose of attempting to resolve misunderstandings or conflicts that have not been resolved satisfactorily by District staff. The Ombudsperson works independently and objectively to assist in maintaining positive relations with District residents and neighbors.

Duties of Ombudsperson

- ❖ Listens to resident concerns
- ❖ Opens avenues of communication between residents and neighbors and the District
- ❖ Gathers information and educates residents on District policies or procedures and their purpose or effect
- ❖ Facilitates conflict resolution
- ❖ Finds other resources to meet resident needs, if applicable
- ❖ Provides a written summary of citizen concerns as requested by the Board of Directors

Scope of Duties

The Ombudsperson would assist residents in their interactions with the District and facilitate conflict resolution when needed. The Ombudsperson would not handle issues that are privileged or confidential, or which involve personnel, labor relations, legal matters, or Board decisions. The Ombudsperson would present facts that may lead the Board or staff to improve operations or better address citizen needs, as opposed to advocating either for or against a resident, staff or Board policy. The Ombudsperson would not establish or recommend District policy, or affect or make fiscal or budgetary decisions.

Assignment and Reporting Responsibilities

If the initial contact from a citizen is the Ombudsperson, the Ombudsperson will contact the General Manager before taking further action. If the General Manager is not able to resolve the concern/complaint to the citizen's satisfaction, the Ombudsperson will follow up with the citizen for further resolution efforts. If the initial contact from a citizen were a Board Member, the Board Member would immediately contact the General Manager. If the General Manager is not able to resolve the concern/complaint to the citizen's satisfaction, the General Manager shall inform the citizen of the District's Ombudsperson process and shall request the Ombudsperson contact the complainant to offer further assistance.

After completing inquiry and resolution efforts the Ombudsperson would then report back to the General Manager and provide a written summary report for the Board at least quarterly.

Ombudsperson Knowledge/Skills/Abilities

To be effective in this role, the Ombudsperson should demonstrate the following knowledge/skills/abilities:

- Facilitation and conflict resolution skills
- Ability to listen, understand and validate others' points of view
- Familiarity with the District's mission and purpose and how the District programs fit into the greater region
- Knowledge of local government functions and operations and land and property use issues
- Interviewing skills
- Customer service skills
- Public speaking skills
- Analytic and evaluative skills
- Writing skills- the ability to express clearly and concisely complex issues and positions in writing
- Objectivity and good judgment
- Create credibility as an independent evaluator capable of independent conclusions
- Sense of humor
- Professional demeanor and appearance

Training, education and/or experience in public administration, management, psychology, public relations, customer relations, investigations, counseling, consulting, teaching, human resources, risk management, related field or as an elected official would likely provide the required knowledge, skills and abilities.

Compensation and Terms of Appointment

Volunteer status (unpaid), with full reimbursement for Board authorized expenses incurred (per contract). One-year term with the possibility of reappointment annually.



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Training, education and/or experience in public administration, management, psychology, public relations, customer relations, investigations, counseling, consulting, teaching, human resources, risk management, related field or as an elected official would likely provide the required knowledge, skills and abilities.

Compensation

Volunteer status (unpaid), with full reimbursement for Board authorized expenses incurred (per contract).



Ombudsperson
Midpeninsula Regional Open Space District
Apply by 8/22/13

The Board of Directors is seeking to fill a highly placed volunteer position to assist in maintaining and strengthening positive relations with constituents and neighbors. The ombudsperson will follow up on inquiries or complaints to address misunderstandings or conflicts that have not been resolved by District staff.

Responsibilities: Listen to constituent concerns; facilitate conflict resolution; gather information and educate concerned constituents on District policies or procedures and their purpose.

Qualifications: Demonstrated successful facilitation and conflict resolution skills; familiarity with the District's mission and purpose.

To Apply: Please submit District application materials along with a resume and letter of interest. Application materials may be obtained by calling 650.691.1200 or by visiting www.openspace.org. Apply to MROSD at 330 Distel Circle, Los Altos, CA 94022 or send your application to:

info@openspace.org

Ombudsperson Response Procedures

Scope of Duties

The Ombudsperson assists residents in their interactions with the District and facilitates conflict resolution when needed. The Ombudsperson does not handle issues that are privileged or confidential, or which involve personnel, labor relations, legal matters, or Board decisions. The Ombudsperson presents facts that may lead the Board or staff to improve operations or better address citizen needs, as opposed to advocating either for or against a resident, staff or Board policy. The Ombudsperson does not establish or recommend District policy, or affect or make fiscal or budgetary decisions.

Assignment and Reporting Responsibilities

If the initial contact from a citizen is the Ombudsperson, the Ombudsperson will contact the General Manager before taking further action. If the General Manager is not able to resolve the concern/complaint to the citizen's satisfaction, the Ombudsperson will follow up with the citizen for further resolution efforts. If the initial contact from a citizen were a Board Member, the Board Member would immediately contact the General Manager. If the General Manager is not able to resolve the concern/complaint to the citizen's satisfaction, the General Manager shall inform the citizen of the District's Ombudsperson process and shall request the Ombudsperson contact the complainant to offer further assistance.

1. Receive notice of new concern/complaint via phone call from the Public Affairs Administrative Assistant that an email message has been sent to:
ombudsperson@openspace.org
2. To view email, log in to: <https://mail.openspace.org>
Username: ombudsperson
Password: u%b5A
3. Review concern/complaint.
4. Contact the General Manager at (650) 691-1200 to inform the District about the concern/complaint.
5. If the General Manager is not able to resolve the concern/complaint, follow up with the citizen for further resolution efforts.

**Midpeninsula Regional
Open Space District**

APPLICATION FOR OMBUDSPERSON POSITION

Name Rosemary A. Field

Residential Voting Address 1513 Winding Way, Belmont, CA. 94002-1943

Mailing Address same as above

Daytime Telephone 650 654-9966 Evening Telephone 650 740 -9760

Fax 650 654-9966 Email rosemary2939@comcast.net

1) Please indicate why you are interested in serving as Ombudsperson of the Midpeninsula Regional Open Space District.

I feel that I would be effective in the role of Ombudsperson. I have had many years in Public Service and find enjoyment in helping to preserve open spaces. I appreciate the concerns of the public along with the understanding of local government functions and operations.

I would like to use my facilitation and conflict resolution skills to follow up on conflicts or concerns so that Midpeninsula Regional Open Spaces District continues to have positive relations with constituents and neighbors.

2) Please list applicable training/education.

College Classes: Introduction to Psychology, Principles of Real Estate, Introduction to Counseling and Interviewing, Group Dynamics and Co-Active Coaching.

Workshops: Transformational learning, Conflict resolution, and Non Violent Communication.

3) Please describe your community activities and/or work experience you feel would be pertinent/applicable to this position. (Include organizations and your role and time period in which you functioned in that role.)

I worked as a Public Works Inspector/Owner's Representative for City of Irvine for 12 years and the City Of Belmont for 14 years. I used to say my office "has no windows or doors"; I enjoyed working outside. Partnering with contractors, utility companies and the public, many Public Works projects were completed.

I volunteer as a Nami (National Alliance for Mental Illness) Family to Family teacher once a year, 2007 , 2009 ,2010 , and 2012 and as a Nami Group Facilitator once a month from August, 2011 to present.

I volunteer at SFO at the Travelers Information Desk every Thursday 12:00 p.m. to 4:00 p.m. starting November of 2011.

Rosemary A. Field

Signature of Applicant

August 18, 2013

Date of Application

Rosemary Field

Midpeninsula Regional Open Space District

Ombudsperson Supplemental Questionnaire

1) Please describe a situation in which you resolved a conflict. What specific techniques did you use that lead to resolution.

The situation was that a property owner was blocking another property owner from driveway access claiming it was his property. The techniques I used were, first to calm the parties by letting them know I would listen to their concerns, gather facts, and research records. Second, I presented my results, documented the laws and ordinances that needed to be upheld. Lastly I placed the information in an address file so that the clarification of the subject property would be known to all. The finding was that the property was owned by the party blocking the other property owner, but an easement was granted for ingress and egress in a recorded Parcel map.

2) Please describe your most challenging customer service type complaint. How did you succeed in satisfying the customer without violating policies or regulations while maintaining equity in the treatment of citizens?

The most challenging customer service type complaint is regarding trees. It goes both to the protection or the removal of a tree.

My success in satisfying the customer regarding either the removal or protection of the tree was with education and by taking responsibility to answer their concerns appropriately. I worked with our city tree trimming crews, and tree specialists to find solutions when the trees were in city right of way or property. When the trees were on private property, the solution was to educate neighbors regarding the ordinances and regulations of the city.

3) What do you anticipate to be the most challenging aspect of an ombudsperson's job for a public open space agency?

I would think the most challenging aspect would be the neighbors who may feel that the open space should be theirs to control. With education and listening to each other I believe that neighbors and public open space agencies can be partners in preserving public open space.

4) What Additional information would you like to include for our consideration?

attached

City of Belmont Quality Service Award 2000

City of Belmont Office of the Mayor Proclamation 2010



Quality Service Award

presented to

ROSEMARY FIELD

Rosemary Field undertook the very difficult task of spokesperson for the City in a neighborhood that was very perplexed by the City's efforts to improve their roadway. Rosemary used her exceptional interpersonal skills, her communication expertise and kept accurate records of events during the construction. She enabled the City to be positioned well to get the project satisfactorily completed. Rosemary is a natural choice for a Year 2000 Quality Service Award.


CITY MANAGER

December 8, 2000

DATE



P r o c l a m a t i o n

IN APPRECIATION FOR 14 YEARS OF OUTSTANDING PUBLIC SERVICE BY ROSEMARY FIELD, CONSTRUCTION INSPECTOR

WHEREAS, Rosemary Field was hired as Construction Inspector in the Department of Public Works for the City of Belmont on April 30, 1996 and has served in this capacity through August 20, 2010; and,

WHEREAS, Rosemary, also known as the "Department's Historian", has exhibited dedication and perseverance researching City files and County records for necessary information regarding the history of previous projects, right-of-ways, and property ownership issues; and,

WHEREAS, Rosemary has demonstrated excellent customer service capabilities and mastered construction inspection and management skills exceptionally well; and,

WHEREAS, Rosemary spent countless hours and worked diligently on Capital Improvement Projects as Project Manager for the 1000 El Camino Real ground water investigation project, Construction Manager and Inspector for Ralston Avenue retaining wall repair, Lyall Way sewer installation, pavement reconstruction projects, and numerous other storm and sewer rehabilitation projects; and,

WHEREAS, Rosemary was awarded the Outstanding Service Award four times, 1999, 2000, 2003 and 2009 during her tenure with the Public Works Department; and,

WHEREAS, Rosemary has consistently understood and proactively responded to the concerns of Belmont residents and has made a substantial contribution to the welfare of the community.

NOW, THEREFORE, BE IT RESOLVED, that I, Christine Wozniak, Mayor of the City of Belmont on behalf of the City Council and the citizens of this City, do hereby express sincere gratitude to **Rosemary Field** for 14 years of outstanding public service for the City of Belmont, and wish her health and happiness in her retirement.



SIGNED AND AFFIXED WITH THE OFFICIAL SEAL OF THE CITY OF BELMONT, ON THIS TWELFTH DAY OF AUGUST TWO THOUSAND AND TEN.

Christine Wozniak

MAYOR of the City of Belmont

ATTEST:
Lori Cook

CLERK of the City of Belmont