



Midpeninsula Regional  
Open Space District

## LEGISLATIVE, FUNDING AND PUBLIC AFFAIRS COMMITTEE

R-16-149

November 8, 2016

### AGENDA ITEM 3

#### AGENDA ITEM

Filling the Volunteer Ombudsperson Position with Pool of Qualified Volunteers

#### GENERAL MANAGER'S RECOMMENDATION

Accept the applications of Lisa Zadek of Half Moon Bay, Kristen Yawitz of Belmont, and Bob Rosenberg of San Jose to serve as a pool of volunteer ombudspersons and forward a recommendation for approval to the Board of Directors.

#### SUMMARY

The District established a volunteer ombudsperson program to facilitate interactions between citizens and the District as required by San Mateo LAFCo during the 2004 annexation of coastal San Mateo County. The Legislative, Funding, and Public Affairs Committee (LFPAC) reviews applicants as vetted by the Public Affairs Manager and forwards those qualified applicants to the Board of Directors for approval. In the past, only one candidate was selected to serve as the volunteer ombudsperson, primarily due to a lack of applicants. The District's most recent volunteer ombudsperson resigned in August 2016 due to other commitments. The Public Affairs Department in conjunction with the Visitor Services Department recruited for a replacement. Three applicants were interviewed and all are highly qualified due to their knowledge of the District and/or their work experience and skills developed from other volunteer positions. In reviewing the District's ombudsperson program, staff is recommending creating a pool of qualified volunteers rather than one individual and moving the applications of three candidates forward for full Board approval.

#### DISCUSSION

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 a District ombudsperson to work as a liaison between District staff and the public to resolve citizen inquiries and concerns. At its May 26, 2004 Board meeting, the District Board of Directors assigned responsibility for the ombudsperson program to the Legislative, Funding and Public Affairs Committee (LFPAC). The LFPAC determined that a volunteer program would best serve the District. Since that time, the District has had three ombudspersons. The agreement with LAFCo allows the District to determine the details of the program, and does not limit the District to only one ombudsperson serving at a time, nor does the agreement limit the program to the use of only volunteers. For instance, the District could use an outside service to manage its ombudsperson program. After reviewing the District's current ombudsperson program,

researching other agency ombudsperson programs, and discussing the program with the Pacific Conflict Resolution Center of San Mateo, staff determined that the District's ombudsperson program is best served in its current state by continuing with a volunteer program as the District's program is one of facilitation and not mediation. A mediation program might be better served by an outside mediation organization. It was also determined that the program would be better served by having a pool of ombudsperson volunteers to fully cover the District's vast network of preserves and to serve as a backup should one ombudsperson be unavailable. Staff will assign ombudsperson requests from the public based on criteria such as geographic location, issue awareness, and availability.

The roles, duties and desired qualification criteria remain the same as adopted by the Board in 2004, and as a reminder, those roles specifically state that the position is to facilitate communication between the public and the District and not to serve as mediators.

Rosemary Field, the District ombudsperson who served from November 2013 to August 2016, resigned due to other commitments. The position was posted for 30 days on volunteer sites and announced to District volunteers and docents through email. The District received three formal applications and all were interviewed by phone by the Public Affairs Manager.

During phone interviews, all three candidates clearly identified their ability to listen and understand conflicts and had the understanding of typical open space issues that could arise as part of the ombudsperson role. All understood that the District ombudsperson serves as a facilitator to improve communication if needed, and they are not to act as a mediator. All were enthusiastic about the position and committed to working in the role of an ombudsperson when requested.

Attached to this memo is the adopted description for roles and duties, desired qualification criteria, and applications from the three candidates: Ms. Zadek, Ms. Yawitz and Mr. Rosenberg.

Staff recommends moving all three applicants forward to the full Board for consideration and thus creating a pool of qualified District ombudsperson volunteers to best serve the public.

### **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.

### **CEQA COMPLIANCE**

This item is not a project subject to the California Environmental Quality Act.

### **NEXT STEPS**

If LFPAC concurs with staff's recommendations, staff would like to move all three applications forward for Board approval at the xx/xx/16 meeting.

Attachment(s)

1. Ombudsperson Program Description
2. Description of Ombudsperson Desired Knowledge/Skills/Abilities
3. Ms. Lisa Zadek's Application
4. Ms. Kristen Yawitz's Application
5. Mr. Bob Rosenberg's Application

Responsible Department Head:  
Shelly Lewis, Public Affairs Manager

Prepared by:  
Shelly Lewis, Public Affairs Manager



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## **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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### Compensation

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

## Application Form - Ombudsperson [#7]

Midpeninsula Regional Open Space District &lt;no-reply@wufoo.com&gt;

Wed 9/28/2016 8:28 AM

To General Information &lt;info@openspace.org&gt;;

## Application Form – Ombudsperson

#7

Name	Lisa Zadek
Residential Voting Address *	[REDACTED] Half Moon Bay, CA 94019 United States
Is mailing address the same as voting address? *	<input checked="" type="radio"/> Yes
Mailing Address *	
Daytime Phone Number *	[REDACTED]
Evening Phone Number *	[REDACTED]
Email *	[REDACTED]

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

I have worked for and volunteered for the District since 1996. I have been receiving the Board meeting agendas and reports and review them to keep updated on the District's activities. I am always recommending the District's preserves to friends, colleagues, and strangers that I meet. I have enjoyed working as a Nature Center Docent for over 10 years and interacting with the public who come through the center. I believe that I can be an knowledgeable Ombudsperson for the District. The role of the Ombudsperson is very important for both the public and the District. I look at the role of Ombudsperson as my continued support and involvement with the District. I am a very good communicator (written and oral) and resourceful in gathering information to make sound decisions, but I will also ask for assistance or direction as warranted. I think I would enjoy working with the public and the District's Board in the role as Ombudsperson. < /p>

Please list applicable training/education. *	I have taken conflict resolution seminars.
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.) *	David C Daniels Nature Center Docent (MROSD) – since approximately 2002 to present Pigeon Point Lighthouse Docent (CA State Parks) – May 2016 to present Deputy District Clerk (MROSD) – 2002 – 2004, plus Board Minutes transcriber on contract 2004–2006 Contract Board Minutes transcriber (Santa Clara Open Space Authority) – 2004–2006

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# Application Form - Ombudsperson [#8]

Wufoo <no-reply@wufoo.com>

Thu 9/29/2016 1:49 PM

To General Information <info@openspace.org>;

Name	Kristen Yawitz
Residential Voting Address *	<div style="background-color: black; width: 100px; height: 15px; margin-bottom: 5px;"></div> Belmont, CA 94002 United States
Is mailing address the same as voting address? *	<input checked="" type="radio"/> Yes
Daytime Phone Number *	<div style="background-color: black; width: 100px; height: 15px;"></div>
Evening Phone Number *	<div style="background-color: black; width: 100px; height: 15px;"></div>
Email *	<div style="background-color: black; width: 100px; height: 15px;"></div>

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

I've lived in the mid-peninsula area since 2002, and I've found the open space preserved in our region to be an essential counterbalance to the growth, time and economic pressures here that continue to increase. As those pressures grow, I have sought positive ways to become involved in our region's efforts to maintain its distinctive character, despite growth and other challenges.

My dream is to work on environmental issues in my community, in a deep way. Serving as Ombudsperson of the Midpeninsula Regional Open Space District would be a wonderful opportunity to listen to community concerns, work to resolve conflicts or tensions, and serve MROSD, which has made so many rich experiences of Nature possible for me!

Please list applicable training/education. \*

I have studied environmental science and policy in a Master's level program.

I have studied Appreciative Inquiry, which focuses on strengths and how to learn from and apply those to an area of conflict.

I am enrolled in Civics 101, a nine-week program that provides participants with an in-depth look at San Mateo County programs, services and finances.

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 serve on the Advisory Board of the Friends of Huddart and Wunderlich Parks.

In the course of my career, I have created community outreach programs; taught critical thinking and communications; facilitated workshops for diverse stakeholders; and worked extensively on project planning, organizational development

and strategic communications.

Since 2013, I've worked as a writing and strategy consultant to Bay Area nonprofits; this role means working independently and objectively, often addressing "pain points" within organizations that staff lack time or resources to fix. I help organizations to assess areas for improvement, and I interface with their clients to obtain first-hand understanding of what's working well or poorly in the organization's current model.

Prior to 2013, I held positions as Director of Strategic Planning and Development, and Director of Communications for GeoHazards International (GHI), as well as Senior Manager of Development at Benetech. My work for GHI required defining strategic priorities and translating priorities into action plans. I moderated international workshops on disaster risk reduction and led outreach communications efforts. At Benetech, I directed fundraising efforts for Miradi, the adaptive management software tool for environmental conservation projects.

I believe that these activities and skills are well suited to meet the demands of the Ombudsperson volunteer position.

## Application Form - Ombudsperson [#6]

Midpeninsula Regional Open Space District &lt;no-reply@wufoo.com&gt;

Wed 9/28/2016 8:28 AM

To General Information &lt;info@openspace.org&gt;;

## Application Form – Ombudsperson

#6

Name	Bob Rosenberg
Residential Voting Address *	[REDACTED] San Jose, CA 95124 United States
Is mailing address the same as voting address? *	<input checked="" type="radio"/> Yes
Mailing Address *	[REDACTED]
Daytime Phone Number *	[REDACTED]
Evening Phone Number *	[REDACTED]
Email *	[REDACTED]
Please indicate why you are interested in serving as Ombudsperson of the Midpeninsula Regional Open Space District. *	I am retired, so have the time to do this. Also, I volunteer for several other agencies, which I feel indicates that I am a proven resource for this kind of position. Finally, I have a unique skill set (see below) which I think you'll find will be applicable as well as very helpful to this position.
Please list applicable training/education. *	I am an MBA with 30 years in the High Tech industry, primarily as a Materials Director. I was responsible for departments that procured and issued all raw materials that our factory needed to build our products. In that role, I was frequently leading very high dollar and very critical negotiations with suppliers. Beyond my degrees and to further my skills in the area, I've read over 15 college level texts on the subject of negotiating – how to make win/win deals. I was also an ice hockey referee (amateur leagues) for 8 years and over 800 games. This required full knowledge of a 300 page rule book, split second determination of whether an action was a foul or not, and the ability to handle highly emotional hockey players.
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.) *	<ol style="list-style-type: none"> <li>1. Thirty years as a high tech executive, managing multiple departments and the issues and conflicts that are often present in fast paced organizations.</li> <li>2. Sworn and badged as a volunteer with the San Mateo County Sheriff's Office of Emergency Services. 10 years.</li> <li>3. Former Unit Leader of the San Mateo County Volunteer Horse Patrol. Led that group for 5 years before passing the role on to a new leader earlier this year. Still an active member</li> </ol>

4. Equine/Rider assessment volunteer for MROSD, evaluating horses and riders as new trail patrol volunteers. 5 years

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