

Ombuds Consultation Skills Assessment

Ombuds: _____ Completed By: _____ Date: _____

BEHAVIORS EXHIBITED THROUGHOUT THE CONSULTATION	
	Structuring / Process Management
	Welcomes visitor
	Provides overview of process
	Clarifies Ombuds role and limitations
	Clarifies expectations about time
	Invites Visitor to ask questions
	Allows Visitor to discuss what Visitor prioritizes
	Moves to another topic at appropriate time
	Monitors or keeps track of time
	Motivates Visitor towards an action or decision
	Clarifies and refocuses Visitor if Visitor wanders off task
	Uses Visual Aids
	Uses analogies, frameworks, mental models or processes to explain or structure conversations
	Expresses thoughts in a clear succinct manner
	Information Gathering
	Invites Visitor to share story
	Listens with minimal interruptions
	Summarizes content
	Strategically uses silence
	Uses open ended questions to drive story along
	Limits use of closed ended questions and avoids leading questions
	Asks clarifying questions
	Elicits detailed information
	Makes use of timeline
	Takes sufficiently detailed notes
	Rapport Building
	Evidences Rapport and Trust (See box below)
	Expresses genuine interest, concern, and warmth towards visitor
	Exhibits attentive non-verbal body language
	Maintains good eye contact
	Communicates with engaging tone of voice
	Reframes effectively
	Communicates empathy without implying full alignment
	Summarizes and acknowledges feelings
	Challenges without undermining rapport
	Identifies and encourages Visitor strengths and accomplishments
	Empowers Visitor to make own choices
	Demonstrates ease, comfort, and confidence in interacting with Visitor
	Makes effective use of humor. (See box below)

	Issue Spotting
	Identifies multiple issues (See box below)
	Catalogues and disentangles multiple issues
	Identifies relevant policies and procedures
	Pursues multiple issues in an logically organized manner
	Identifying Interests and Setting Goals
	Elicits interests from Visitor
	Identifies unspoken underlying interests
	Probes to uncovers deep level interests
	Invites Visitor to change or adjust interests and goals
	Reframes Avoidance (negative) Goals into (positive) Approach Goals
	Reframes Position-based Goals into Interest-based Goals
	Helps Visitor Prioritizes Goals
	Reality-tests Goals
	Options
	Elicits potential options from Visitor
	Creatively brainstorms multiple options (see box below)
	Generates both formal and informal options
	Identifies relevant campus resources
	Considers options over multiple timeframes from short to long term
	Presents options in a clear, organized, and succinct manner
	Invites Visitor to evaluate options
	Helps Visitor assess options in light of interests
	Engages in reality testing
	Helps Visitor assign appropriate value to options
	Demonstrates knowledge and insight into advantages and potential pitfalls of various options
	Avoids pressuring visitor into pursuing a particular option
	Fleshes out promising options in greater depth
	Concluding
	Summarizes key discussion points
	Develops agreed upon action plan
	Schedules follow up meetings
	Clarifies expectations of confidentiality
	Encourages and Reinforces Visitor's Abilities

Issues Spotted:

Key Questions Asked:

Options Generated:

Resources and Policies / Procedures Identified:

Evidence of Rapport:

Examples of Effective Use of Humor:

Critical/Striking moments:

Strengths:

Development Areas: