



118TH CONGRESS STRATEGIC PLAN



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The 118th Congress Strategic Plan for the Office of the Whistleblower Ombuds was authored by Shanna Devine, Director; Rebecca Jones, Deputy Director; and John Whitty, Deputy Director of Operations. The Office of Employee Assistance served as facilitator for the strategic planning process



OVERVIEW

The House of Representatives took an important step to support House offices as they work with whistleblowers from the public and private sectors by codifying the independent, nonpartisan Office of the Whistleblower Ombuds (hereinafter “Office”) in the 117th Congress. In accordance with the House Rules, under the policy direction and oversight of the Committee on House Administration, the Office has two main responsibilities: ¹

1. Promulgate best practices for whistleblower intake for offices of the House.
2. Provide training for offices of the House on whistleblower intake, including establishing an effective reporting system for whistleblowers, maintaining whistleblower confidentiality, advising staff of relevant laws and policies, and protecting information provided by whistleblowers.

In December 2022 and January 2023, the Office conducted its strategic planning process for the 118th Congress. It continued to utilize an impact-based framework in support of the Office's vision to institutionalize effective, safe, and consistent practices throughout the House for working with whistleblowers, whether they be constituents or oversight sources. Its planning process was also informed by stakeholder input and lessons learned from its strategic plan for the 117th Congress. ^{2,3}

The Office's strategic goals for the 118th Congress include:

1. *Visibility of Office and its role/value throughout the House community (annual)*
2. *Providing valuable education for every House office, including District Offices and Committees (annual)*
3. *Upholding confidentiality while providing transparency around Office's operations (annual)*
4. *House-wide understanding of the value in safely working with whistleblowers to conduct its oversight responsibilities and support constituents (completion by 2024)*
5. *Every House office has a best practice intake process (completion by 2024)*

These five outcome-oriented goals are accompanied by strategic actions and performance metrics, as well as a strategy narrative – a general explanation of how the Office intends to pursue those goals.



MISSION

The Office restructured and honed its mission statement to lead with its intended impact and to highlight the confidential and customized nature of its services. It now reads:

Assist the House in protecting its sources and constituents while conducting its oversight function. We achieve this by providing nonpartisan education and confidential coaching for effectively working with whistleblowers from the public and private sectors.

VISION

The Office amended its vision to help clarify its role, by specifying that whistleblowers may come forward as constituents or oversight sources. It now reads:

To be a valuable, nonpartisan resource for every House office, by institutionalizing safe, effective, and consistent practices for working with whistleblowers, whether they are constituents or oversight sources.

OFFICE CULTURE

We value and practice:

- *Respect, integrity, transparency, overall balance, empathy, effective communication and collaboration, diversity, equity, inclusion, and belonging*

We embrace:

- *Our nonpartisan and independent identity*
- *Narrative as an educational tool*

We are committed to:

- *Meeting people where they are, in order to provide customized, professional, and valuable services*
- *Using our strategy narrative as a guiding light toward realizing our vision*

We strive to:

- *Be an office that challenges itself and engages in continuous reflection in order to improve*
- *Foster an environment of mutual trust where we feel empowered, personally and as team members*
- *Be thoughtful members of the House community and consider all who may be impacted by our work, including whistleblowers*



STRATEGY NARRATIVE

The Office developed the following strategy narrative to guide its performance throughout the 118th Congress:

We will expand our visibility and communicate our role and value throughout the House community by using strategic, branded outreach, leveraging new and established opportunities and champions for engagement, and providing customized services.

We will provide valuable education for every House office and support every House office in its development of a best practice intake process by maintaining and strategically amplifying current and accessible educational materials and model resources. We will meet offices where they are through customized support to facilitate implementation of best practices.

We will uphold confidentiality while providing transparency around the Office's operations. We will accomplish this through responsible public disclosure of the Office's operations and resources. We will leverage our champions and branding to amplify our commitment to confidentiality.

We will measure our success through comprehensive tracking tools and by seeking regular input from the House community and stakeholders, while addressing the inherent difficulties of measuring value.

Our identity as an independent and nonpartisan support office with a focused mandate reinforces our ability to accomplish these actions. Further, to address any capacity issues, we will build from our existing foundation and leverage branding, resources, personnel, and champions to accomplish our strategic plan.

This process will yield House-wide understanding of the value of safely working with whistleblowers to conduct its oversight responsibilities and support constituents, resulting in the House's institutionalization of safe, effective, and consistent practices for working with whistleblowers, whether they be constituents or oversight sources.



SWOT ANALYSIS

The Office, through stakeholder input and its own analysis, identified its top strengths, weaknesses, opportunities, and threats (SWOTs). SWOT interactions informed its goal setting and strategic actions, with a focus on *leveraging* strengths, *fortifying* weaknesses, *seizing* opportunities, and *blocking* threats.

STRENGTHS

- Accessible staff expertise
- Dependable delivery of valuable nonpartisan and confidential services and resources
- Proven commitment to meet offices and staff where they are
- Strategic, effective outreach throughout the House community
- High levels of voluntary engagement with the Office's services
- Strong bipartisan and nonpartisan support network

WEAKNESSES

- Lack of visibility throughout the House
- Office's name creates confusion around its role
- Small staff size contributes to limited bandwidth for fulfilling a large mission
- Voluntary compliance with Office's best practices guidelines

OPPORTUNITIES

- Renewed congressional oversight inherent with the new Congress
- New staff and Members of Congress to engage
- Strong infrastructure to increase engagement (marketing, programmatic)
- Strong foundation of champions and users
- Renewed emphasis on in-person engagements to increase visibility

THREATS

- Cultural misrepresentation of the role of whistleblowers could undermine Office's mandate
- Large number of offices, high staff turnover and their limited bandwidth inhibit institutionalizing new practices
- Stigmatization of whistleblowing
- Potential for Office budget lapses due to congressional budget volatility
- Misunderstandings around the Office's role

GOAL SETTING

The Office developed outcome-based stretch goals to help it achieve its mission and advance toward its vision. The Office identified its primary services (trainings, intake process development, confidential case consultations, and technical legislative expertise) to inform its goal setting. The goals encompass each service and are designated as year one (annual) or year two (completed by 2024) goals. Given the reinforcing nature of the Office's services and in effect goals, the respective strategic actions and performance metrics are iterative by design.

YEAR ONE GOALS

Goal 1: Visibility of Office and its role/value throughout the House community

STRATEGIC ACTIONS

- Expand and leverage testimonials and feedback from those who have engaged with Office
- Leverage current events to promote services
- Regular House-wide communication via administrative eDear Colleagues and physical mailings
- Routine customized outreach with unique resources
- Expand and leverage strong relationships to increase reach throughout the House
- Seize strong institutional infrastructure (marketing, programmatic)
- Actively participate in congressionally oriented events (in-person and virtual)
- Engage majority and minority leadership, including committees, for visibility and value messaging
- Refresh branding to clarify role, services, and commitment to confidentiality
- Expand and engage Office's student network⁴
- Utilize and maintain tracking system

PERFORMANCE METRICS

- Number of testimonials leveraged monthly
- Monthly and quarterly eDear Colleagues informed by current events and testimonials, and track open rate
- Quarterly physical mailings to each office, including district offices and committees
- Two customized outreach communications monthly, informed by current events and testimonials
- Semiannual individualized committee outreach
- Semiannual individualized chief of staff outreach
- Receive 10 features per month by other entities
- Participate in three events per month, at least one of which is in-person
- Monthly unique committee leadership actions that increase visibility
- Quarterly unique party leadership actions that increase visibility
- Two resources rebranded/refreshed monthly
- Biweekly updated staff signature lines
- Monthly follow-up actions and success average with student network

- Monthly number of Working with Whistleblowers Learning Path playlist new followers
- Increase website visits and downloads by 50 percent in year one, and track quarterly
- Monthly maintenance of office and staff contacts lists
- Monthly tracking of office and staff engagements, including use of services

Goal 2: Providing valuable education for every House office, including District Offices and Committees

STRATEGIC ACTIONS

- Develop and refresh resources (including trainings) based on stakeholder and user input, and current events
- Amplify and increase accessibility of resources
- Leverage resources and tailored outreach House-wide
- Engage majority and minority leadership, including committees
- Develop House-wide engagement with Working with Whistleblowers Curriculum
- Expand and engage Office's student network
- Internal streamlining of private training process
- Internal streamlining of case consult process
- Utilize and maintain tracking system

PERFORMANCE METRICS

- Two new resources quarterly
- Two resources rebranded/refreshed monthly
- Update foundational training and manual biannually

- Quarterly reviews of training polling and evaluation result
- Hold Quarterly stakeholder meetings
- Increase website visits and downloads by 50 percent in year one, and track quarterly
- Refine website at least annually
- Two customized outreach communications monthly, informed by current events and testimonials
- Monthly and quarterly eDear Colleagues informed by current events and testimonials, and track open rate
- Quarterly physical mailings to each office, including district offices and committees
- Semiannual individualized committee outreach
- Semiannual individualized chief of staff outreach
- Monthly unique committee leadership engagements
- Quarterly unique party leadership engagements
- Annually, at least one staff member in 50 percent of offices completes curriculum
- Monthly follow-up actions and success average with student network
- The number of offices that contact the Office for additional support after taking a training
- Percentage of staff that found a training valuable and would recommend it, through survey tools
- Percentage of staff that indicated an impact after engaging with the Office, through survey tools
- Biannual review of private training process
- Biannual review of case consult process
- Monthly tracking of office and staff
- Monthly maintenance of office and staff contact lists

Goal 3: Upholding confidentiality while providing transparency around Office's operations

STRATEGIC ACTIONS

- Release an annual report with an overview of general operations and key metrics
- Provide regular updates with metrics for stakeholders
- Amplify and increase accessibility of resources
- Integrate commitment to confidentiality into branding
- Leverage champions to amplify commitment to confidentiality
- Utilize and maintain tracking system

PERFORMANCE METRICS

- Publicly release the Office's annual report
- Hold quarterly stakeholder meetings
- Provide monthly updates to stakeholders
- Receive 10 features per month by other entities
- Increase website visits and downloads by 50 percent in year one, and track quarterly
- Refine website at least annually
- Number of new branding initiatives that reflect commitment to confidentiality
- Leverage monthly testimonials related to confidentiality
- Monthly maintenance of office and staff contacts lists
- Monthly tracking of office and staff engagements, including use of services



YEAR TWO GOALS

Goal 4: House-wide understanding of the value in safely working with whistleblowers to conduct its oversight responsibilities and support constituents

STRATEGIC ACTIONS

- Routine customized outreach with unique resources
- Leverage diversity of champions and testimonials to reinforce value messaging
- Leverage current events and House events to reinforce value messaging
- Foster House-wide engagement with services and resources, including Working with Whistleblowers Curriculum
- Solicit routine feedback from House community, including student network
- Seize strong institutional infrastructure (marketing, programmatic)
- Utilize and maintain tracking system

PERFORMANCE METRICS

- Quarterly physical mailings to each office, including district offices and committees
- Two customized outreach communications monthly, informed by current events and testimonials Semiannual individualized committee outreach
- Semiannual individualized chief of staff outreach
- Monthly unique committee leadership engagements
- Quarterly unique party leadership engagements
- Leverage one testimonial monthly around the value of working with whistleblowers
- Annually, at least one staff member in 50 percent of offices completes curriculum

- Include related question(s) in annual survey with staff who have engaged the Office
- Incorporate live polls at the beginning and end of each foundational training to gauge impact
- Percentage of staff that found a training valuable and would recommend it, through survey tools
- Percentage of staff that indicated an impact after engaging with the Office, through survey tools
- Measure the number of annual survey respondents who are making use of model resources
- Increase website visits and downloads by 50 percent in year one, and track quarterly
- Participate in three events per month, at least one of which is in-person
- Monthly and quarterly eDear Colleagues informed by current events and testimonials, and track open rate
- Receive 10 features per month by other entities
- Monthly maintenance of office and staff contacts lists
- Monthly tracking of office and staff engagements, including use of services

Goal 5: Every House office has a best practice intake process

STRATEGIC ACTIONS

- Leverage model resources and testimonials to facilitate adoption of intake process best practices
- Individualized outreach to each office twice per year with model intake process resources, including question around implementation of intake process

- Foster House-wide engagement with services and resources, including Working with Whistleblowers Curriculum
- Engage committees as pioneers to incorporate best practice intake processes
- Internal streamlining of intake development consults process
- Utilize and maintain tracking system

PERFORMANCE METRICS

- Two new resources quarterly
- Two resources rebranded/refreshed monthly
- Number of testimonials leveraged monthly
- Semiannual individualized committee outreach
- Semiannual individualized chief of staff outreach
- Percentage of offices that indicate they have best practice intake process or have used a related service

- Two customized outreach communications monthly, informed by current events and testimonials
- Monthly and quarterly eDear Colleagues featuring intake guidance and testimonials
- Quarterly physical mailings to each office, including district offices and committees
- Quarterly unique party leadership engagements
- Annually, at least one staff member in 50 percent of offices completes curriculum
- One committee per quarter takes action to pioneer and/or model best practice intake processes
- Biannual review of intake development consults process
- Monthly maintenance of office and staff contacts lists
- Monthly tracking of office and staff engagements, including use of services



ENDNOTES

- 1 H.R. Res. 5, 118th Cong. (2023) (enacted).
- 2 Stakeholders included majority and minority staff contacts on key committees of jurisdiction, House staff who have utilized the Office's services and resources, and nongovernmental organizations that work with whistleblowers.
- 3 Office of the Whistleblower Ombuds, 2022 Annual Report, available at https://whistleblower.house.gov/sites/whistleblower.house.gov/files/2022_Whistleblower_Ombuds_Annual_Report.pdf.
- 4 The Office's "student network" is comprised of all House staff who have engaged with the Office's trainings.

Office of the Whistleblower Ombuds
House of Representatives
6130 O'Neill House Office Building
Washington, DC 20024
Phone: (202) 226-6638
Website: <https://whistleblower.house.gov>