



5th Annual Conference April 7-10, 2010
The Marriott New Orleans
New Orleans, Louisiana

IOA & *New Orleans*

Rebirth



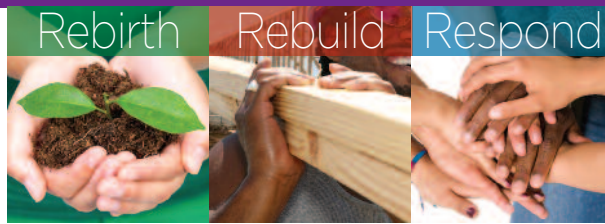
Rebuild



Respond



IOA & New Orleans



The Marriott New Orleans • New Orleans, Louisiana

Agenda at a Glance

Wednesday, April 7, 2010

Pre-Conference Courses only, separate registration fee required and Welcome Reception for all

- 7:30 am – 8:30 am** Breakfast for Pre-Conference Participants
- 8:30 am – 5:00 pm** Full Day Course #1 “Dynamic Governance: Addressing Conflicts Inherent in Organizational Structure”
Full Day Course #2 “Developing Your Facilitation Mindset and Skill Set”
- 8:30 am – 12:00 pm** AM Half Day Course #1 “IOA Standards of Practice and Code of Ethics: Understanding the Core Principles of an Organizational Ombudsman Practice”
AM Half Day Course #2 “Talking About Fairness in the Workplace: Making Fairness Explicit in Training, Coaching, and Policy Discussions”
- 12:00 pm – 1:00 pm** Lunch for Pre-Conference Participants
- 1:30 pm – 5:00 pm** PM Half Day Course #1 “Therapeutic Skills for the Ombuds: A Family Systems Approach”
PM Half Day Course #2 “Change Agent: Ombudsmen’s Contribution to Organizational Value”
- 6:00 pm – 8:00 pm** Conference Welcome Reception

Thursday, April 8, 2010

FIRST DAY OF GENERAL CONFERENCE

Rebirth - Where are We Now? What’s the Current Global View? Our Rich History.

- 7:00 am – 9:00 am** Certification Examination*
*Separate fee applies. Please refer to the Certification Website at <http://www.ombudsassociation.org/boc/> for detailed information.
- 8:00 am – 9:00 am** Breakfast for All Conference Attendees
- 9:00 am – 9:30 am** Conference Opening and Welcome Remarks
Dr. Michael Martin, Chancellor of Louisiana State University
- 9:30 am – 10:30 am** Keynote Speaker
André Marin, Ombudsman of Ontario, Past President of the Forum of Canadian Ombudsman, and North American Regional Vice-President of the International Ombudsman Institute.
- 10:30 am – 11:00 am** Networking Break
- 11:00 am – 12:00 pm** General Session
Chuck L. Howard, Attorney, Partner, Shipman & Goodwin LLP
- 12:00 pm – 2:00 pm** Luncheon for All Conference Attendees and IOA Annual Business Meeting
- 2:00 pm – 3:30 pm** Concurrent Sessions
1. “Litigious Times in Higher Education: Ombudsmen Between Mediation and Reconciliation. Transnational Comparisons between Mexico and Europe”
 2. “The Role of the University Ombudsperson in Partnership with General Counsel, the Compliance Officer, and the EEO/ADA Director”
 3. “The External or (Contract) Ombuds-A Viable Option”
 4. “An Exploration of Hidden Bias in the Workplace and How Managing It Can Reduce Conflicts”
 5. “Twitter as a Tool of Moral Suasion”
 6. “Journal of the IOA Authors’ Panel Discussion on Effectiveness”
- 3:30 pm – 4:00 pm** Networking Break
- 4:00 pm – 5:30 pm** Concurrent Sessions
7. “Running a Global Ombuds Office”
 8. “You Can Be Plugged In—Strategies for Using Electronic Communication and Remaining Confidential”
 9. “Sustaining Community and Preventing Violence: A Campus Approach to Dealing with Intimidation, Threats of Violence, and Acts of Violence”
 10. “How to Talk So Your Visitor Will Listen & Listen So Your Visitor Will Talk”
 11. “Creating Conflict Resolution Training that Sticks”
 12. “An Exploration of Hidden Bias in the Workplace and How Managing It Can Reduce Conflicts” (Repeat of Session #4)
- 5:30 pm – 6:30 pm** Conversations with the IOA Board, Part 1
- 6:30 pm** Conclusion of Day One



INTERNATIONAL
OMBUDSMAN
ASSOCIATION

Agenda at a Glance *continued*

Friday, April 9, 2010 **SECOND DAY OF GENERAL CONFERENCE**
Rebuild - Where do We Want to Go? What do We Want the Future to Look Like? Rebuild a Fresh Landscape

- 7:30 am – 9:00 am** Breakfast for All Conference Attendees and Recognition of Volunteers
- 9:00 am – 10:00 am** Keynote Speaker
Sandra Stokes, PhD, MA, BA, Professor, University of Wisconsin-Green Bay
- 10:00 am – 10:30 am** Networking Break
- 10:30 am – 12:00 pm** General Session: The Crystal Ball
- 12:00 pm – 1:00 pm** Lunch for All Conference Attendees
- 12:00 pm – 1:00 pm** Lunch for Ombudsmen New to the Profession / First-Time Attendees
- 1:00 pm – 2:00 pm** Conversations with the IOA Board, Part 2
- 2:00 pm – 2:30 pm** Networking Break and Dessert Served from Lunch
- 2:30 pm – 4:00 pm** Concurrent Sessions
13. “Online Dispute Resolution for Ombudsman Offices”
 14. “Perspectives from the Field: A Panel Discussion with Senior, Mid-level and Entry-level Ombudspersons”
 15. “The Ombuds and Post-Conflict Departmental Rebuilding”
 16. “Maintaining A Strong Practice through times of Organizational Change”
 17. “The Ombudsman of the Portuguese Electric Utility: Innovation and Performance”
 18. “The Art of Dialogue: New Possibilities for Managing Polarizing Conflicts”
- 4:00 pm – 4:15 pm** Networking Break
- 4:15 pm – 5:45 pm** Concurrent Sessions
19. “Reflective Practice and the New Ombudsman: Getting from ‘There’ to ‘Here’”
 20. “Mind-hack: The Eye of the Storm”
 21. “Notice: Definitions, Strategies, and Recent Developments”
 22. “The Role of the Ombuds in Organizational Politics and Justice”
 23. “Ombudsman Support 2.0”
 24. “Ombuds Becoming Solution- Focused in Brief Sessions”
- 5:45 pm – 6:45 pm** Sector Dialogs
 These will be structured and facilitated opportunities to discuss issues of importance to the individual forums, as well as begin mapping future plans and directions for the profession.
1. Academic Forum
 2. Corporate Forum
 3. Governmental Forum
 4. International Forum
 5. Consultant – Contract Ombudsman Practitioners Forum
 6. Healthcare Forum
- 6:45 pm** Conclusion of Day Two

Saturday, April 10, 2010 **THIRD DAY OF GENERAL CONFERENCE AND CONCLUSION**
Respond- How Do We Get From Here to There? How Can We optimize Individual and Professional Growth? Respond to Challenges.

- 8:00 am – 9:00 am** Breakfast for All Conference Attendees
- 9:00 am – 10:00 am** Keynote Speaker
Robert C. Bordone, AB, JD, Thaddeus R. Beal Clinical Professor of Law; Director, Harvard Negotiation and Mediation Clinical Program
- 10:00 am – 10:30 am** Networking Break
- 10:30 am – 12:00 pm** Concurrent Sessions
25. “International Town Hall Meeting”
 26. “Pros and Cons of Ombudsman Privilege of Confidentiality”
 27. “Academic Civility: Achieving Real Results Through Strategy Mapping”
 28. “Conversations with Pioneers of the Ombudsman Profession”
 29. “Ombudsman Across the World”
 30. “Vaccinating your Organization: Preventive Medicine as a Metaphor for Proactive Ombuds Practice”
- 12:00 pm** Conclusion of Day Three. Conference is Adjourned.



Session Abstracts

In an effort to keep conference costs reasonable for all attendees, printing costs are being minimized by condensing the final printed program book. In the past, session abstracts have been included in both the registration brochure and final program book distributed at the conference. This year all conference attendees are asked to please bring this registration brochure to refer to session abstracts while at the conference as these will not be included in the program book. Although you may use the registration brochure for reference for session abstracts, please be aware that there may be schedule changes between the time the registration brochure is printed and the actual conference. The program book distributed at the conference will contain the final schedule.

Moderators of each session will help match number of attendees to seating and space available for each presentation format. We apologize that these limitations may not allow everyone to attend every session desired, however we believe it facilitates a more effective presenting and learning environment. We appreciate your understanding and patience in honoring these limitations.

Terminology

Although “ombudsman” is used throughout this brochure, the term ombudsman is used to communicate to the widest possible community and is not intended to discourage others from using alternatives. IOA respectfully acknowledges that many practitioners use alternative forms of this word.

Ethics and Standards of Practice

The organizational ombudsman is mindful of the standard of practice, and the element of the IOA Code of Ethics, which states: An ombudsman should not use the names of individuals or mention their employers without express permission. The ombudsman, as a designated neutral, has the responsibility of maintaining strict confidentiality concerning matters that are brought to his/her attention unless given permission to do otherwise. The ombudsman holds all communications with those seeking assistance in strict confidence except in the presence of an imminent threat of serious harm. We hold these principles to be essential in all professional discussions including those at the conference.

Speaker Presentations

Since you can't possibly attend all the wonderful programs we have planned for the Annual Conference, included in the cost of your registration will be access to all available speaker presentations on-line. All available speaker presentations will be posted on-line prior to the conference for attendees to access. (These will be keynote, plenary and concurrent sessions only not pre-conference courses) Note, since attendees will be able to print the presentations from the website we will not ask speakers to supply photo copies of their presentations onsite unless their presentation is not posted at least one week prior to the conference. Conference attendees will need a pass code to access the posted presentations. This pass code will be sent via email to attendees who have registered and mailed to attendees along with their name badge. Presentations should be available about three weeks prior to the conference. Emails will be sent weekly to remind attendees to download presentations and highlight any new presentations that have been added. By giving attendees access to all presentations prior to the conference you will have a chance to review materials and feel comfortable with the sessions you plan to attend.

Consent to Use of Photographic Images

Registration and attendance at, or participation in, International Ombudsman Association's Annual Conference, and other activities constitutes an agreement by the registrant to IOA's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such events and activities.

While these programs are designed to provide accurate information regarding the subject matter covered, the views, opinions and recommendations expressed are those of the authors and speakers, not the Association. By producing publications and sponsorship of this event, the Society does not guarantee the accuracy of the information disseminated and is not engaged in rendering professional advice; if such advice is desired, you should seek the services of a competent professional.

Antitrust Compliance

It is the undeviating policy of IOA to comply strictly with the letter and spirit of all Federal, State, and applicable international trade regulations and antitrust laws. Any activities of IOA or IOA-related actions of its officers, Executive Committee Members, or members that violate these regulations and laws are detrimental to the interests of IOA and are unequivocally contrary to IOA policy.

Intellectual Property Rights

All content on the IOA web site, such as presentations, algorithms, program code, text, graphics, logos, button icons, images, audio clips, digital downloads, data compilations and software, is the property of the Speaker or its suppliers and is not to be used for personal gain, publication, and cannot be used without referencing the Speaker and the source of the information. As property of the Speaker or its suppliers, it also cannot be used by others to obtain a patent or claim royalties.



The Marriott New Orleans • New Orleans, Louisiana

Wednesday, April 7, 2010

Pre-Conference Courses only,
separate registration fee required and Welcome Reception for all

7:30 am – 7:00 pm General Registration for Conference Attendees

7:30 am – 8:30 am Breakfast for Pre-Conference Attendees

8:30 am – 5:00 pm
Full Day Course #1

“Dynamic Governance: Addressing Conflicts Inherent in Organizational Structure”

MAXIMUM ENROLLMENT: 29 PARTICIPANTS LEVEL OF PRESENTATION: BEGINNER

Speakers: *John Buck, GovernanceAlive LLC,*

According to systems theory, 85% of conflicts are inherent to the structure within which they occur. Thus, individuals have control over only 15% of the conflicts, unless structural problems are addressed. Dynamic governance is a cutting edge methodology for addressing organizational structure and decision making related problems.

Full Day Course #2

“Developing Your Facilitation Mindset and Skill Set”

MAXIMUM ENROLLMENT: 50 PARTICIPANTS LEVEL OF PRESENTATION: INTERMEDIATE

Speakers: *Roger Schwarz, Roger Schwarz & Associates*

This key point of this session is that how you think is how you facilitate. In other words, your mindset creates your behaviors, which generates results. This session will introduce the Skilled Facilitator mindset, which includes the core values of transparency, curiosity, accountability, informed choice, and compassion. Participants will learn how the way they think determines the way they facilitate (or serve as an ombuds) and the results they get. Methodology will include brief lectures combined with role plays and small group discussion.

8:30 am – 12:00 pm
AM Half Day
Course #1

IOA Standards of Practice and Code of Ethics: Understanding the Core Principles of an Organizational Ombudsman Practice”

MAXIMUM ENROLLMENT: 50 PARTICIPANTS LEVEL OF PRESENTATION: BEGINNER

Speakers: *David Talbot, Ombudsman, Coca-Cola Enterprises, Inc.*
Tim Griffin, Ombudsman, Northern Illinois University
Toni Robinson, Massachusetts Institute of Technology

Organizational ombudspersons strive to operate in a manner that is consistent with a core set of ethical principles and standards of practice. These principles and standards are the foundation of IOA organizational ombuds practice and distinguish our positions and professional approaches from those of other ombudspersons and dispute resolution practitioners. This course is designed as both a review for practicing ombudspersons and an introduction for those new to the concept of an Organizational Ombudspersons. This pre-conference study of IOA ethics and standards will provide participants with an understanding of crucial concepts and guidelines that will be discussed and referred to extensively throughout the remainder of the conference, helping to maximize the learning and benefit received from your time spent in New Orleans.

AM Half Day
Course #2

“Talking About Fairness in the Workplace: Making Fairness Explicit in Training, Coaching, and Policy Discussions”

MAXIMUM ENROLLMENT: 50 PARTICIPANTS LEVEL OF PRESENTATION: INTERMEDIATE

Speakers: *Kerry Egdorf, Marquette University*

Through a combination of lecture and small group discussion, this program will include the theoretical underpinnings of organizational justice (distributive, procedural, and interactional justice) and how making these fairness concepts explicit in discussions about workplace conflict, in training programs on hiring interviews and performance appraisals, and in discussions about policies and procedures, ombuds can have a significant impact on the climate and culture of their organizations.

Wednesday, April 7, 2010 *continued*Pre-Conference Courses only,
separate registration fee required and Welcome Reception for all**12:00 noon – 1:30 pm** Lunch for Pre-Conference Participants taking the full day course or those taking a combination of 1 AM and 1 PM Course**1:30 pm – 5:00 pm**PM Half Day
Course #1**“Therapeutic Skills for the Ombuds: A Family Systems Approach”**

MAXIMUM ENROLLMENT: 50 PARTICIPANTS LEVEL OF PRESENTATION: INTERMEDIATE

Speakers: *Lauren Bloom, The University of Texas at Austin*

Fresh perspectives help Ombuds work with visitors' concerns and effectively address systemic problems in their organizations. Using several relevant theoretical perspectives from different disciplines to understand relational dynamics, participants in this workshop will develop tools to connect with visitors on deeper levels. There will be lecture, interactive exercises, and discussion relevant to Ombuds who work with employees, students, or other constituents. Techniques covered may be borrowed from family systems theory including solution-focused, Bowen, existential, cognitive-behavioral, narrative, as well as empathetic listening skills.

PM Half Day
Course #2**“Change Agent: Ombudsmen's Contribution to Organizational Value”**

MAXIMUM ENROLLMENT: 50 PARTICIPANTS LEVEL OF PRESENTATION: INTERMEDIATE

Speakers: *Nancy D. Erbe, California State University*
Carolyn Noorbakhsh, National Renewable Energy Laboratory
Brian Bloch, ISKCONResolve
Danielle A. Fischer-Lebailly, Mars, Inc
Marsha Wagner, Columbia University

A brief lecture presenting findings from most recent survey of IOA members as well as intriguing patterns emerging from both surveys. Nancy Erbe investigated how OO contribute to organizational responsiveness to constituencies' priority concerns. Interesting contrast has appeared between OO who seem relatively low profile and focused on receiving visitor complaints and OO who describe themselves as more proactive change agents, actively working with senior leadership, scanning and reporting systemic trends and helping with organizational change. Participants will be asked to do an experiential reflection on their own approaches. Carolyn Noorbakhsh and a diverse panel of seasoned OO will share and discuss their thoughts and experience with being effective change agents and demonstrating organizational value—particularly essential during challenging economic times.

6:00 pm – 8:00 pm**WELCOME RECEPTION FOR ALL CONFERENCE ATTENDEES**

Join us for light refreshments and networking. A place where colleagues know what you do for a living and understand, a place where they want to hear how you handled a situation, and a place where you can ask their opinion. This is a great atmosphere to catch up with old friends, meet new friends, share stories, and discuss with others the conference sessions you plan to attend. Light refreshments will be served as well as coffee, tea and soft drinks, and a cash bar will be available. Then venture out on the town for dinner with your new friends where you can continue the conversations.



Rebirth

Where are We Now?
What's the Current Global View?
Our Rich History.

Thursday, April 8, 2010

FIRST DAY OF GENERAL CONFERENCE

- 7:00 am – 9:00 am** **Certification Examination***
*Separate fee applies. Please refer to the Certification Website at <http://www.ombudsassociation.org/boc/> for detailed information.
- 8:00 am – 9:00 am** **Breakfast for All Attendees**
- 9:00 am – 9:30 am** **Conference Opening and Welcome Remarks**
Dr. Michael Martin, Chancellor, Louisiana State University, Baton Rouge, LA
- 9:30 am – 10:30 am** **Keynote Speaker**
André Marin, Ombudsman of Ontario, Past President of the Forum of Canadian Ombudsman, and North American Regional Vice-President of the International Ombudsman Institute.
“When the Levee Breaks; Ombudsmanship in Troubled Times”
In today’s climate of natural disaster and economic crisis, Ombuds offices face increasing challenges not only to their operational effectiveness, but to their own continued existence. What strategies are available to Ombuds to cope? How can they evolve and adapt in times of crisis? André Marin will speak from his own experience, including in his role as Ontario’s Ombudsman and formerly as Canada’s first Military Ombudsman, about survival of Ombuds offices under pressure.
- 10:30 am – 11:00 am** **Networking Break**
- 11:00 am – 12:00 pm** **General Session**
Chuck L. Howard, Attorney, Partner, Shipman & Goodwin LLP, Hartford, CT
Mr. Howard will offer observations from his experience in researching and writing *The Organizational Ombudsman* book. His presentation will include comments on the importance of the history of the development of organizational ombudsman programs and the need for better communications on the role and effectiveness of ombudsman programs to various elements of an organization, including in-house counsel, compliance, HR, and management or administration. He will comment on the need for a greater understanding of some of the legal issues that impact organizational ombudsman offices and related challenges for the future of the organizational ombudsman profession.
- 12:30 pm – 2:00 pm** **Luncheon for All Conference Attendees and IOA Annual Business Meeting**
All conference attendees are included in the annual business meeting. This is a great opportunity to learn what the association has done over the past year, hear about plans for the future, learn how IOA has impacted the profession and how you can contribute to the association and profession.



Rebirth

Where are We Now?
What's the Current Global View?
Our Rich History.

Thursday, April 8, 2010 continued

FIRST DAY OF GENERAL CONFERENCE

2:00 pm – 3:30 pm

CONCURRENT SESSIONS

1 “Litigious Times in Higher Education: Ombudsmen Between Mediation and Reconciliation. Transnational Comparisons between Mexico and Europe”

Chair: *Dolores Gomez-Moran, George Mason University*

Speakers: *Claudia Patricia, Begne Ruiz Esparza, Universidad de Guanajuato*

Claire Oldfield, Assistant Adjudicator, Office of the Independent Adjudicator for Higher Education

Josef Leidenfrost, Office of the Austrian Student Ombudsman

Several countries in Europe and more and more countries like Mexico and other nations in Central and Latin America have been or are currently introducing the figure of the higher education ombudsman. Ways of setting up such offices, their institutional implementation into the framework of universities and colleges as well as their modus operandi may differ, but their mission is identical: serving as an independent agent for individuals exposed to maladministration or grievances. Whereas in “soft cases” conflict management tools or mediation might help other more difficult cases brought forward to ombudsmen might also come close to litigation or could lead to the courts. How ombudsmen in different cultural settings are deal with this situation will be described in country studies from Mexico, Austria and England. The audience will be invited to share their experiences.

2 “The Role of the University Ombudsperson in Partnership with General Counsel, the Compliance Officer, and the EEO/ADA Director”

Frank R. Baskind, PhD, Virginia Commonwealth University

Rhonda L. Bishop, CCEP, MBA, Virginia Commonwealth University

Velma Jackson-Williams is the Assistant Vice Provost

This presentation explores the nature of the reciprocal role relationships fulfilled by a university Ombudsperson in interactions with Compliance and EEO/ADA representatives. Case scenarios will be presented to engage participants in problem solving and role clarification within the context of the IOA Standards of Practice with a focus on confidentiality and independence.

3 “The External or (Contract) Ombuds-A Viable Option”

Wendy Friede, Friede Consulting Services

Sue Vandittelli, AWR Inc.- Alternative Workplace Resolutions

In this session we will share our experiences and gather input from attendees around the potential benefits, opportunities and challenges associated with providing external/contract Ombuds service. We will discuss some of the pros and cons of the external option, where this model is most effective, how to find and market the role, how to set up the business and some of the skills and competencies needed to be a successful external/contract Ombuds. Come ready to hear from others and share your own experience.

4 “An Exploration of Hidden Bias in the Workplace and How Managing It Can Reduce Conflicts”

Freada Kapor Klein and Jacqueline Switzer, Level Playing Field Institute

As companies and organizations strive to recover from the economic downturn, there is no better time to refresh and adopt cutting-edge approaches to reducing conflict in the workplace. The Level Playing Field Institute’s Corporate Leavers Survey found that often the more subtle, hidden forms of bias result in inequitable workplaces, employee disengagement, and eventually lead to unwanted turnover. Ombuds are in a unique position to understand how hidden biases manipulate employee relations at every level and how they can be managed to effectively resolve conflicts.

Dr. Freada Kapor Klein, founder of the Level Playing Field Institute, will:

- Introduce the emerging science of hidden bias and present interactive exercises illustrating how our brains make errors ;
- Provide examples of how hidden biases become hidden barriers in workplaces;
- Offer actions ombuds, employees, managers, and companies can take;
- Present projects that mitigate bias and offer exciting opportunities for participation and collaboration in new research!

The session will debut a brand new series of “machinima”—animated videos shot in the virtual world Second Life using avatars—that will display several workplace related scenarios in which subtle bias and conflict may arise. Come get a first look at the animated videos, vote on, and engage in discussion about where instances of bias, stereotyping, and overreacting occurred. This is an effective exercise for ombuds and managers to examine what constitutes hidden bias versus hypersensitivity within the context of workplace fairness, while helping to understand the differences and address disputes that may arise in organizations.



Rebirth

Where are We Now?
What's the Current Global View?
Our Rich History.

Thursday, April 8, 2010 *continued*

FIRST DAY OF GENERAL CONFERENCE

2:00 pm – 3:30 pm

CONCURRENT SESSIONS *continued*

5 “Twitter as a Tool of Moral Suasion”

André Marin, Ombudsman of Ontario, Past President of the Forum of Canadian Ombudsman, and North American Regional Vice-President of the International Ombudsman Institute.

The Ombudsman’s work has always relied on interaction with the public and the effective use of moral suasion. Social media provides ideal new ways to do this – particularly Twitter. Through real-life examples and first-hand experience, Ontario Ombudsman André Marin will demonstrate how Twitter is a must-use tool for any ombudsman wishing to connect directly with the public, raise awareness and increase the effectiveness of his or her office. He will share his top five reasons for using Twitter and offer tips on how to make it work for you.

6 “Journal of the IOA Authors’ Panel Discussion on Effectiveness”

Moderator: *Tom D. Sebok, University of Colorado at Boulder*

Tom D. Sebok, University of Colorado at Boulder

Panelists will be selected from those authors whose articles are selected for publication in the next edition of the Journal

This will be a panel discussion including a number of authors who have contributed articles to the Journal of the IOA issue focusing on “Effectiveness.”

3 :30 pm – 4 :00 pm

Networking Break

continued on next page



Rebirth

Where are We Now?
What's the Current Global View?
Our Rich History.

Thursday, April 8, 2010 continued

FIRST DAY OF GENERAL CONFERENCE

4:00 pm – 5:30 pm

CONCURRENT SESSIONS

7 “Running a Global Ombuds Office”

Ilene Butensky, Director, Ombuds Office, Eaton Corporation
Evan Arrowsmith, Field Ombuds, Eaton Corporation
Sophia Qiao, Regional Ombuds, Eaton Corporation
Gennette Tripari, Regional Ombuds, Eaton Corporation

This presentation gives an overview for running a Global Ombuds Office. It includes practical considerations such as office location, language translations, cultural acceptance, and budget issues. The presentation also covers the strategic planning process and country specific considerations, such as works councils in Europe and privacy legislation.

8 “You Can Be Plugged In– Strategies for Using Electronic Communication and Remaining Confidential”

Arelne Yetnikoff, Director of Information Services at DePaul University
Craig B. Mousin, University Ombudsperson, DePaul University

Technology continues to advance and offer expanding ways of communicating with those seeking the assistance of the Ombuds office. Some Ombuds refuse to use email because of confidentiality concerns. Others may not realize that digital phone systems may leave permanent records never previously anticipated under older technology. Moreover, E-Discovery in litigation expands the reach of the courts and challenges Ombuds to protect the identity of visitors. What's an Ombuds to do? This session will discuss some of the issues raised by new technology while also exploring methods to maintain professional standards, both with certain practices and other software or technological fixes. We will explore areas of protection ranging from the minimum standards to methods the most sophisticated user might enjoy working with to maintain confidentiality. We invite your questions and also ask you to bring any responses you may have developed to share with other Ombuds.

9 “Sustaining Community and Preventing Violence: A Campus Approach to Dealing with Intimidation, Threats of Violence, and Acts of Violence”

Priscilla Mori, University of California - Santa Barbara

How can we coordinate resources effectively on a college or university campus to respond to threatening or unusual behavior that is potentially dangerous? How is information shared and who needs to know? Does the Ombuds have a role? What about confidentiality? Can a single policy related to violence prevention to applicable to faculty, staff, and students? In this session you will hear how the University of California, Santa Barbara faced these challenges, and what role the Ombuds has played in the development and operation of a Threat Management Team. We will consider hypothetical case studies together and discuss strategies for participants who may be called upon to respond to threats at our own campuses.

10 “How to Talk So Your Visitor Will Listen & Listen So Your Visitor Will Talk”

David M. Richardson, Kaiser Permanente
Susana J. Garcia, Kaiser Permanente

It is not uncommon for the communication between the Ombudsman and visitor to be imperiled by some of the same ineffective communication and traps as those experienced by the visitor with the original conflict partner(s). This proposed session adds value in addressing the needs of practicing Ombuds primarily by helping them to improve their communication skills while working with visitors from the point of the initial conversation through the implementation of a resolution strategy. Delivering news, such as when explaining what the Ombudsman has learned from his/her inquiry, can be particularly challenging when the other party is invested in an outcome other than the one experienced. The skills highlighted in this session will give the participant immediate access to a simple, effective, and highly practical strategy for improving communication through listening and speaking.



Rebirth

Where are We Now?
What's the Current Global View?
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Thursday, April 8, 2010 *continued*

FIRST DAY OF GENERAL CONFERENCE

4:00 pm – 5:30 pm

CONCURRENT SESSIONS *continued*

11 “Creating Conflict Resolution Training that Sticks”

Kenneth T. Davis, Antioch University-McGregor

Conflict Resolution training is often expected to take place in short time frames with mandated participants. This workshop will address how to create a learning experience which assures the students engagement and ability to utilize the course material in practice. This workshop will focus on the application of Adult Education principles in a highly interactive and engaging delivery style. Participants will be encouraged to be active through kinesthetic, visual and auditory engagement. Key adult education resources and web based delivery systems will be introduced and experienced. Workshop will be highly interactive bringing the “New Orleans Vibe” into the classroom.

12 “An Exploration of Hidden Bias in the Workplace and How Managing It Can Reduce Conflicts”
(Repeat of Session #4)

Freda Kapor Klein and Jacqueline Switzer, Level Playing Field Institute

As companies and organizations strive to recover from the economic downturn, there is no better time to refresh and adopt cutting-edge approaches to reducing conflict in the workplace. The Level Playing Field Institute’s Corporate Leavers Survey found that often the more subtle, hidden forms of bias result in inequitable workplaces, employee disengagement, and eventually lead to unwanted turnover. Ombuds are in a unique position to understand how hidden biases manipulate employee relations at every level and how they can be managed to effectively resolve conflicts.

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5:30 pm – 6:30 pm

Conversations with the IOA Board, Part 1

The directors and associate member representatives of the Association are eager to have a conversation with you about the future of the Association. This open forum is an opportunity to raise issues, ask questions and engage the board and other participants in discussion about the association and its work. We look forward to a rich and varied discussion.

6:30 pm

Conclusion of Day One

Meet To Eat or locally known as “Manger et Rôder – to eat and roam”

The French Quarter Festival is being held April 9-11 in New Orleans

http://www.fqfi.org/frenchquarterfest/fqfi_faqs.html

As not to compete with the Festival we will not offer the optional ticketed group evening dinner so you can have your nights free to enjoy the festival. French Quarter Festival is held throughout the historic French Quarter (Vieux Carre) neighborhood.

See page 21 for additional information.



Rebuild

Friday, April 9, 2010

SECOND DAY OF GENERAL CONFERENCE

Where do We Want to Go?
 What do We Want the Future to Look Like?
 Rebuild a Fresh Landscape

- 7:30 am – 9:00 am** **Breakfast for All Conference Attendees and Recognition of Volunteers**
“Philanthropy is a critical element to organizational health”
- Each year a significant number of IOA members donate hundreds of hours to admirably perform the necessary committee work vital to continued successes of the International Ombudsman Association. All IOA Conference attendees are invited to participate in the Conference Breakfast on Friday morning 9 April 2010 when IOA committee volunteers will be recognized and thanked. IOA President Gary Yamashita will deliver brief remarks. We sincerely hope everyone will join us for this celebration of service as we continue to build our committee volunteer base.
- 9:00 am – 10:00 am** **Keynote Speaker**
Sandra Stokes, PhD, MA, BA, Professor, University of Wisconsin-Green Bay
- “Academic Mobbing: An Interactive Session Using Case Studies to Demonstrate Gender Roles”**
 This interactive session is designed to elicit audience participation using case studies to foster small group discussion of academic mobbing, what it is and isn't, and how both men and women act as “mobbers” as well as as targets of mobbing. There will be a Power Point presentation with an outline of relevant facts, small group discussions, reporting out of the discussions, and a summary that will include what ombudspersons can do to both prevent and stop mobbing from occurring.
- 10:00 am – 10:30 am** **Networking Break**
- 10:30 am – 12:00 pm** **General Session: The Crystal Ball**
 Moderator: *Wayne Blair, University of North Carolina at Chapel Hill*
- Two important reasons to have an Organizational Ombudsman office are: early identification of “trends”— and still earlier identification of new problems especially if they may be disruptive to the organization. We asked Organizational Ombudsmen where they thought new or disruptive problems might arise. This year's panel will present a compilation of ideas submitted by many Organizational ombudsmen about problems we may encounter during the next decade.
- 12:00 pm – 1:00 pm** **Lunch for All Conference Attendees**
- 12:00 pm – 1:00 pm** **Lunch for Ombudsmen New to the Profession / First-Time Attendees**
 Welcome to IOA! You are invited to join representatives from the Mentoring Program and some of our “seasoned” colleagues to learn more about the Mentoring Program and discuss issues and challenges you have experienced or anticipate in your new role. IOA wants to make your transition to the profession a positive experience. We are here to help and look forward to the opportunity to meet you at this informal luncheon and answer any questions you may have. See Vicky Brown or e-mail vbrown@mail.ucf.edu
- 1:00 pm – 2:00 pm** **Conversations with the IOA Board, Part 2**
 The directors and associate member representatives of the Association are eager to have a conversation with you about the future of the Association. This open forum is an opportunity to raise issues, ask questions and engage the board and other participants in discussion about the association and its work. We look forward to a rich and varied discussion.
- 2:00 pm – 2:30 pm** **Networking Break and Dessert Served from Lunch**



Rebuild

Friday, April 9, 2010 *continued*

SECOND DAY OF GENERAL CONFERENCE

Where do We Want to Go?
 What do We Want the Future to Look Like?
 Rebuild a Fresh Landscape

2:30 pm – 4:00 pm

CONCURRENT SESSIONS

13 “Online Dispute Resolution for Ombudsman Offices”

Frank Fowlie, Internet Corporation for Assigned Names and Numbers (ICANN)

This session will examine the application of the principles of Online Dispute Resolution (ODR) on Ombudsman operations. ODR is a growing field of practice in Alternative Dispute Resolution, and it is gaining the attention of international organizations such as the Office of Economic and Cultural Development and the European Union as a nimble and cutting edge way of resolving disputes. Is there a future for ODR as a way of conducting Ombudsmanship? Are there barriers to ODR?

14 “Perspectives from the Field: A Panel Discussion with Senior, Mid-level and Entry-level Ombudspersons”

Panelists: *Kelley Alexander, Georgia State University*
Bernard Anderson, Kennesaw State University
Dorothy H. Graham, Kennesaw State University
Terri R. Taylor-Hamrick, Clayton State University

This panel discussion, comprised of senior, mid-level, and entry-level ombudspersons, is meant to serve as a sounding board and think-tank for issues, challenges, and perspectives faced by ombudspersons in various phases of their careers. Although the primary target audience is new ombudspersons, all are welcome to attend and contribute. Representative samples of topics include, but are not limited to socialization of new ombudspersons, mentorship, career advancement, and motivation to remain in a challenging field. The outcomes of the session could potentially have training and professional development implications for the International Ombudsman Association, especially with respect to newcomers.

15 “The Ombuds and Post-Conflict Departmental Rebuilding”

Katherine Hale, Florida Gulf Coast University

One of the most difficult aspects of organizational conflict may be the work environment that emerges in the aftermath of adjudication or other kinds of resolution. This presentation/discussion will focus on the contexts, issues, and opportunities for the Ombuds to contribute to improved system and relational functioning. The presenter is Faculty Ombuds at a University, and so will speak partially from a University context, though much of the discussion will be applicable to other organizational contexts.

16 “Maintaining A Strong Practice Through Times of Organizational Change”

Janis Schonauer, AllianceBernstein LP
Judi Segall, Stony Brook University

This session will be a combined lecture and group discussion on Maintaining a Strong Practice through times of Organizational Change. Judi Segall and Janis Schonauer will discuss recent changes in their own workplaces, describe effective strategies and elicit comments and experience from the attendees in small group discussions.

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Rebuild

Friday, April 9, 2010 continued

SECOND DAY OF GENERAL CONFERENCE

Where do We Want to Go?
 What do We Want the Future to Look Like?
 Rebuild a Fresh Landscape

2:30 pm – 4:00 pm

CONCURRENT SESSIONS continued

17 “The Ombudsman of the Portuguese Electric Utility: Innovation and Performance”*Luis Valadares Tavares, PhD, Portuguese Electric Utility,*

In this paper/presentation, the authors will present the system developed for the Ombudsman at EDP – Portuguese Electric Utility – based on an innovative automated taxonomy classification for the complaints submitted by the customers and on the intensive use of Information and Communication Technologies (ICT), namely the Internet channel (<http://provedordocliente.edp.pt>). The developed e-system will serve as a model for a new front of developments within the Portuguese scenery of Ombudsmen with the purpose of improving the efficiency and effectiveness of the internal processes of these companies, along with a significant improvement in the performance of the Ombudsmen's response addressing customers' complaints.

18 “The Art of Dialogue: New Possibilities for Managing Polarizing Conflicts”*Donna J. Loudon, The University of Colorado at Boulder*

Groups like the Public Conversations Project and the Public Dialogue Consortium specialize in fostering dialogues about polarizing public issues. Many of the methods these organizations use to develop more effective and respectful ways of relating can be applied to ombudsman practice. This workshop will help ombudsmen build upon their facilitation skills, allowing them to more effectively promote conversations that foster mutual understanding between disputing parties and groups. We will examine some of the key elements of dialogue practice including: Communication agreements Dialogue structure Carefully crafted questions Participants will explore ways of incorporating these practices into their work with visitors.

4:00 pm – 4:15 pm

Networking Break



Rebuild

Friday, April 9, 2010 *continued*

SECOND DAY OF GENERAL CONFERENCE

Where do We Want to Go?
 What do We Want the Future to Look Like?
 Rebuild a Fresh Landscape

4:15 pm – 5:45 pm

CONCURRENT SESSIONS

19 “Reflective Practice and the New Ombudsman: Getting from ‘There’ to ‘Here’”*Jenna Brown, University of Denver**Howard Gadlin, PhD, National Institutes of Health / NIH**Thomas A. Kosakowski, University of California**Samantha Levine-Finley, National Institutes of Health / NIH**Jim Wohl, Auburn University*

How does what we learn and how we learn it, impact the development of effective organizational ombudsmen? This session starts with a presentation from someone respected in our field and his views on reflective practice, followed by presentations from three relative newcomers to this work who come from different and differing fields. It concludes with an opportunity for session participants to ask questions and discuss their own experiences, and to contribute their own insights and observations. Session participants will receive a list of readings and references, as well as a summary of ideas for professional development.

20 “Mind-hack: The Eye of the Storm”*Reese A. Ramos, Sandia National Laboratories*

Ever wonder where conflict really begins? The source of any conflict is triggered not by the words or actions of others but by our brain. Join us for this session that will focus on how as Ombuds we can help organizations and individuals be more responsive to conflict by looking at research in neuroscience in the past year that sheds light on how our brains and conflict interact. By understanding this link we can help individuals and organizations create a center of balance for when the storms of conflict hit.

21 “Notice: Definitions, Strategies, and Recent Developments”Panelists: *Judith C. Bruner, University of California, San Diego**Dolores Gomez-Moran, George Mason University**Tim Griffin, Northern Illinois University**Donna Douglas Williams, World Health Organization*

The ombudsman, as an independent and informal resource, operates independently from other organizational entities and often promulgates the position that communications with the ombuds office do not provide ‘notice’ to the organization. Still, the ombudsman is required to report annually on his/her office activities, which for many of us includes reporting on the types of issues of concern that we have been told about. In addition, many of us have informal conversations with the leadership of the organization when certain trends are noticed. But, are we putting the organization on notice by what we state in our annual report (even if it’s just a number in a category)? Might those ‘informal conversations’ constitute formal or legal ‘notice’ to the organization? If so, under what circumstances? How can we better protect ourselves from such a consequence? This workshop will include a brief and current (U.S.) legal analysis, practice examples including some common practices and strategies to reduce risk, and consist substantially of an interactive discussion on these and other related questions raised by the participants and enhanced by case examples.

continued on next page



Rebuild

Friday, April 9, 2010 continued

SECOND DAY OF GENERAL CONFERENCE

Where do We Want to Go?
 What do We Want the Future to Look Like?
 Rebuild a Fresh Landscape

4:15 pm – 5:45 pm

CONCURRENT SESSIONS continued

22 “The Role of the Ombuds in Organizational Politics and Justice”*Sean Banks, Shell Oil Company**Belinda Newman, University of North Texas*

In Ombuds practice, the concerns and issues addressed frequently involve consideration of the organizational climate as a system in addition to the individual concerns of the visitor. Two major factors in shaping organizational climate are the politics of the organization and its philosophy regarding organizational justice. In this session, key concepts describing the nature of organizational politics and organizational justice as it relates to the ombuds practice will be discussed, including strategies for reducing negative politics in organizations and options to enhance organizational justice in addition. The presenters will examine how the unique politics of organizations and the philosophical decisions about organizational justice processes impact and shape the options and choices made by visitors.

23 “Ombudsman Support 2.0” **SESSION CANCELLED***Bridgett Johnson, Alliance Bernstein*

Analyzing your current role,
 Mapping out your next steps,
 What to do to enhance your professional growth.

24 “Ombuds Becoming Solution- Focused in Brief Sessions”*D. A. Graham, Princeton University*

With an emphasis on the third aspect of the conference theme “respond” This session is based on John Walters and Jane Peller’s work “Becoming Solution Focused in Brief Therapy with the focus on Ombudsing rather than therapy. This session introduces Ombuds to 18 skill building methods that cover all aspects of constructing solutions to bear on the spectrum of issues that arise in our practice. The emphasis is on the construction of Ombuds questions that incorporate the assumption that the problem will be solved and, thereby, invite the visitor to a position of optimism wherein change can happen quickly and effectively. If you want to become solution focused in your work this is the workshop for you.

5:45 pm – 6:45 pm

Sector Dialogs

These will be structured and facilitated opportunities to discuss issues of importance to the individual forums, as well as begin mapping future plans and directions for the profession.

- Academic Forum
- Corporate Forum
- Governmental Forum
- International Forum
- Consultant – Contract Ombudsman Practitioners Forum
- Healthcare Forum

6:45 pm

Conclusion of Day Two

Meet To Eat or locally known as “Manger et Rôder – to eat and roam”

The French Quarter Festival is being held April 9-11 in New Orleans

http://www.fqfi.org/frenchquarterfest/fqfi_faqs.html

As not to compete with the Festival we will not offer the optional ticketed group evening dinner so you can have your nights free to enjoy the festival. French Quarter Festival is held throughout the historic French Quarter (Vieux Carre) neighborhood.

See page 21 for additional information.



Respond

How Do We Get From Here to There?
How Can We Optimize Individual
and Professional Growth?
Respond to Challenges.

Saturday, April 10, 2010
THIRD DAY OF GENERAL CONFERENCE
AND CONCLUSION

8:00 am – 9:00 am Breakfast for All Conference Attendees

9:00 am – 10:00 am Keynote Speaker
Robert C. Bordone, AB, JD, Thaddeus R. Beal Clinical Professor of Law; Director, Harvard Negotiation and Mediation Clinical Program

10:00 am – 10:30 am Networking Break

10:30 am – 12:00 pm CONCURRENT SESSIONS

25 “International Town Hall Meeting”

Patrick Robardet, Commission Scolaire de Montréal
Diane Dorion, RBC

This session seeks to gather the views and expectations of participants about the international dimension of IOA and ombuds work. Short presentations will be made by Diane and Patrick, to introduce and guide the ensuing group discussions. Some of the issues that will be addressed are how the international dimension of ombudsing is reflected in the understanding participants have of the ombuds role, the training they received prior to, or during their incumbency, their practice, and the specifics of their individual context, be it at the national, sub-national, local, or organizational, level. We also want to address some of the concerns that the International participants are having about the direction IOA is taking on the International issues such as language, cultures and the role of the International Ombuds as compared to the US Ombuds. The discussions will help provide the IOA with a clearer picture of international members’ needs and expectations in terms of IOA activities and membership. We will be sending in a full report on our discussions, issues and expectations to the IOA Board after the conference.

26 A Conversation With the Winner of IOA's First Student Writing Competition

Presenters:

Tom A. Kosakowski, JD, University of California Los Angeles
Andrew Larratt-Smith, Student, UCLA School of Law and Pepperdine University Straus Institute for Dispute Resolution

In most US jurisdictions, legislatures retain the exclusive authority to create legal privileges. A statutory privilege protecting the confidentiality of communications with organizational ombuds would enhance compliance with IOA Standards of Practice and help shield organizations from imputed liability. However, a statutory privilege does not yet exist. IOA’s first Student Writing Competition solicited papers on the arguments for an ombuds privilege. The winner of this contest will summarize his paper, “An Ethical Privilege: The Case for a Statutory Privilege for the Organizational Ombuds.” This will be followed by a group discussion on the topic.

27 “Academic Civility: Achieving Real Results Through Strategy Mapping”

Carolyn Chalmers, University of Minnesota
Howard Gadlin, National Institutes of Health
Jan Morse, University of Minnesota

Want to supplement a case by case approach with skills to deal with destructive behavior at a systems level? Learn strategies and tools to improve the climate at your institution. At the U of MN a cross-sector work group was convened to develop an action plan to address hostile, intimidating, and offensive behavior. Learn how key initiatives were identified and implemented - and how the culture is changing as a result.



Respond

How Do We Get From Here to There?
How Can We Optimize Individual
and Professional Growth?
Respond to Challenges.

Saturday, April 10, 2010 continued

THIRD DAY OF GENERAL CONFERENCE
AND CONCLUSION

10:30 am – 12:00 pm

CONCURRENT SESSIONS continued

28 “Conversations with Pioneers of the Ombudsman Profession”*Samantha Levine-Finley, National Institutes of Health / NIH**John S. Carter, The Citadel**Brian Bloch, ISKCONResolve**Thomas P. Zgambo, World Bank Group**Tim Griffin, Northern Illinois University**Wilbur Hicks, International Monetary Fund**Don Perigo, retired, University of Michigan**Marsha Wagner, Columbia University**Merle Waxman, Yale School of Medicine*

In this conversation-based session, several pioneers and leaders in the organizational ombudsman field will share their stories, lessons learned, tips and general wisdom gleaned throughout their fascinating careers. Attendees will have the opportunity to ask questions about issues that are important to them, as well as gain a greater sense of the history and diversity of the field. This should be the right place to learn a significant amount...after all, the panelists have combined experience of 131 years as ombudsmen!

29 “Ombudsman Across the World”*Lisa Witzler, Harvard Law School, Program on Negotiation*

This presentation is a review of the ombudsman offices and their differences in mandates, specifically focusing on the 4 major principles of IOA: Confidentiality, Independence, Neutrality, and Informality.

How can members of the IOA have a meaningful dialogue and best serve our clients/visitors regardless of adherence to the 4 principles? Is there room at the IOA table for all of these different types of ombudsmen? An example of this would be the parliamentary ombuds that issue public reports versus a university ombuds in the US that does not investigate. I will focus on the similarities and how all ombudsmen can accomplish their mandates of serving their clients/visitors and how we can learn from different types of offices. This presentation will appeal to the international audience and will be for all levels of ombudsmen.

30 “Vaccinating your Organization: Preventive Medicine as a Metaphor for Proactive Ombuds Practice”*Kirsten W. Schwehm, Louisiana State University**Jim Wohl, Auburn University*

Ombuds practice is, by necessity, often focused on crisis intervention and problem management. This presentation proposes Preventive Medicine as a metaphor for a more proactive focus to services offered by Ombuds Offices. The Preventive Medicine model employs health strategies which make disease more avoidable and prepare individuals to better manage, compensate for, and heal from illness when it does occur. The principles applied include: focus on prevention rather than treatment or cure, encouraging healthy lifestyles, targeting at-risk groups, providing patient education, promoting self-examination, and improving stress management. We will consider which preemptive methods have been successful in preparing individuals and organizations to avoid destructive conflict and diffuse potentially escalating situations. An analysis of pertinent literature and best practices in the field will be presented, with a focus on practical application of the Preventive Medicine metaphor. Three strategies of implementation developed and used by cutting edge Ombuds Offices will be reviewed: (1) Ombuds as Educator: providing community education (through presentations, website, interviews, and publications) about conflict management; (2) Ombuds as Role Model: modeling effective communication and dialogue by giving presentations, facilitating group meetings, and representing and assisting multiple parties; and (3) Ombuds as Sentinel: suggesting resources for systemic change through upward feedback. Practices discussed in these contexts include facilitator systems, consensus documents, collaborations with external groups, online outreach, unfettered access to administrative bodies, and policy development.

12:00 pm

Conclusion of Day Three. Conference is Adjourned.



The Marriott New Orleans • New Orleans, Louisiana

Keynote Speaker Bios

Thursday, April 8, 2010

André Marin, Ombudsman,
Ombudsman of Ontario

André Marin was appointed as Ontario's sixth Ombudsman in April 2005, for a five-year term. He brings to the Ombudsman's office a highly respected and extensive background in the oversight of public institutions. Since his appointment, he has reorganized the office and refocused its resources on high-profile, systemic investigations into issues affecting millions of Ontarians, from newborn babies to property taxpayers to lottery players, through the creation of the Special Ombudsman Response Team (SORT). Along with responding to more than 16,000 individual complaints a year, the office has conducted more than 20 systemic investigations using SORT, resulting in dramatic government reforms. The Ombudsman's recommendations to date have been overwhelmingly accepted by the government.

Mr. Marin's pioneering work in conducting systemic administrative investigations has drawn the interest of the global ombudsman community. His expertise in setting up an effective ombudsman office and investigative teams has been sought out by ombudsmen and other watchdog agencies across Canada and around the world. In April 2009, Mr. Marin was awarded the Ontario Bar Association's Tom Marshall Award of Excellence for his outstanding contribution to the practice of public sector law in Ontario. From May 2007 to May 2009, he served as president of the Forum of Canadian Ombudsmen, representing public and private ombudsmen across the country. He has also been the North American Regional Vice-President of the International Ombudsman Institute since July 2006.

Prior to his appointment as Ombudsman of Ontario, Mr. Marin served as Canada's first Ombudsman for the Department of National Defence and the Canadian Forces, responsible for the investigation of complaints from those serving in the Canadian military as well as civilian members. His work led to resolving systemic problems as he made recommendations to ensure accountability, transparency and the integration of ethics into Canada's military.

Before becoming the military Ombudsman, Mr. Marin was Director of the Special Investigations Unit (SIU) of the Ontario Ministry of the Attorney General, from 1996 to 1998. The SIU is an independent, civilian agency mandated to maintain public confidence in Ontario's police services by assuring police actions resulting in serious injury or death are subjected to rigorous, independent investigations. Prior to 1996, Mr. Marin was an Assistant Crown Attorney with the Ministry of the Attorney General in Ottawa and became known for prosecuting difficult, high-profile and sensitive criminal cases.

Friday, April 9, 2010

Sandra Stokes, PhD, MA, BA, Professor,
University of Wisconsin, Green Bay, WI

Dr. Stokes is Professor Emerita of Education and Gender Studies at the University of Wisconsin—Green Bay. She is presently writing a book on the topic of academic mobbing and gender roles, to be published by the Edwin Mellen Press. Dr. Stokes has given numerous presentations about academic mobbing at the National Women Studies Association Conference as well as the University of Wisconsin Women's Studies Consortium conferences. Dr. Stokes is the editor of the Wisconsin State Reading Association's *Journal* and has edited books on assessment and written numerous articles for scholarly journals.

Saturday, April 10, 2010

Robert C. Bordone, AB, JD,
Director, Harvard Negotiation and
Mediation Clinical Program, Harvard Law
School, Cambridge, MA

Robert C. Bordone, A.B., J.D., Thaddeus R. Beal Clinical Professor of Law; Director, Harvard Negotiation and Mediation Clinical Program. Robert Bordone is the Thaddeus R. Beal Clinical Professor of Law, Director of the Harvard Negotiation and Mediation Clinical Program and the lead instructor for Harvard Law School's Spring Negotiation Workshop. He also teaches several other research courses on dispute resolution, leadership, and dispute systems design. With Michael Moffitt, Mr. Bordone is the co-editor of *The Handbook of Dispute Resolution*. Mr. Bordone has authored a number of articles including *Negotiation Teaching in Law Schools*, a working paper published in *Negotiation Pedagogy: A Research Survey of Four Disciplines*, 11 (2000); *Teaching Interpersonal Skills for Negotiation and for Life in the Negotiation Journal* (October 2000) and *Electronic Online Dispute Resolution: A Systems Approach—Potential, Problems, and a Proposal*, 3 *Harv. Neg. L. Rev.* 175 (1998). He has written numerous case simulations used in negotiation courses in American law schools. A graduate of Dartmouth College and Harvard Law School, Mr. Bordone clerked for the Honorable George A. O'Toole, Jr. and worked for *Crowell & Moring, LLP* in Washington, D.C., the U.S. Department of Justice, the Boston Consulting Group, and CBS News before returning to Harvard.

Pre-Conference Information

Pre-Conference Fees

- \$290 for the Full Day Course OR for two half-day courses, one AM and one PM course
- \$190 for one half-day course.

* Students please contact the office for student rates. Note you must be a full time student to be eligible for a student rate.

- Full Day course registration includes: Continental breakfast, am & pm refreshment break, lunch and course materials
- AM course registration fee includes: Continental breakfast, morning refreshment break, and course materials.
- PM course registration fee includes: Afternoon refreshment break, and course materials.
- Lunch is included in the registration fee for participants who register for two half-day courses, one AM and one PM course.
- Early registration for pre-conference courses is recommended as most courses will be limited.

Pre-Conference Certificates of Completion:

Certificates of Completion will be awarded only for Pre-Conference Courses and only to those who attend the entire course. Please arrange your schedule accordingly.

General Conference Information

General Conference Fees, Full Conference

| | ON OR BEFORE FRIDAY, MARCH 5, 2010 | AFTER FRIDAY, MARCH 5, 2010 |
|-------------|------------------------------------|-----------------------------|
| Members | \$450 | \$500 |
| Non-Members | \$500 | \$550 |

General Conference Fees, One-Day Fees

| | ON OR BEFORE FRIDAY, MARCH 5, 2010 | AFTER FRIDAY, MARCH 5, 2010 |
|----------------------------------|------------------------------------|-----------------------------|
| Thursday, April 8, 2010 – Day 1 | \$245 | \$295 |
| Friday, April 9, 2010 – Day 2 | \$245 | \$295 |
| Saturday, April 10, 2010 – Day 3 | \$150 | \$200 |

Early Bird fees apply on or before Friday, March 5, 2010 after that date the regular fees apply.

Registration fees includes:

- Wednesday, April 7, 2010 – Pre-Conference Courses and Evening Welcoming Reception all are invited.
- Thursday, April 8, 2010 – Day One includes: breakfast, two coffee breaks, lunch, all plenary and concurrent sessions for the day.
- Friday, April 9, 2010 – Day Two includes: breakfast, two coffee breaks, lunch, all plenary and concurrent sessions for the day.
- Saturday, April 10, 2010 – Day Three includes: breakfast, one coffee break, all plenary and concurrent sessions for the day.

* Students please contact the office for student rates. Note you must be a full time student to be eligible for a student rate.
info@ombudsassociation.org

Dress

Dress for the entire conference is “business casual”.

Cancellation / Refund Policy

Notice of cancellation must be in writing via facsimile or e-mail. Cancellation by telephone is not allowed. To cancel via e-mail, send the cancellation notice to: info@ombudsassociation.org To cancel by fax send to +1 (908) 842-0376. If you must cancel your registration, you are encouraged to send a substitute to take your place. Please contact the office and notify us of the change so we can arrange for a name badge.

If you cannot find a substitute to take your place, please refer to the following cancellation policy:

- 10 business days prior to the course - 100% refund
- 5-9 business days prior to the course - 50% refund
- 0-4 business days prior to the course - No refund

Special Events

There will be no planned off-site events schedule this year, however an impressive array of “ideas” will be published for attendees.

Wednesday, April 7, 2010 WELCOME RECEPTION FOR ALL CONFERENCE ATTENDEES

6:00 – 8:00 pm Join us for light refreshments and networking. A place where colleagues know what you do for a living and understand, a place where they want to hear how you handled a situation, and a place where you can ask their opinion. This is a great atmosphere to catch up with old friends, meet new friends, share stories, and discuss with others the conference sessions you plan to attend. Light refreshments will be served as well as coffee, tea and soft drinks, and a cash bar will be available. Then venture out on the town for dinner with your new friends where you can continue the conversations.

Meet To Eat or locally known as “Manger et Rôder – to eat and roam” The French Quarter Festival is being held April 9-11 in New Orleans

As not to compete with the Festival we will not offer the optional ticketed group evening dinner so you can have your nights free to enjoy the festival.

French Quarter Festival is held throughout the historic French Quarter (Vieux Carre) neighborhood. A map of the Festival will be included in your on site attendee packet and at the hotel. Visit the IOA Annual Meeting website to view the 2009 map so you may have an idea of what to expect.

IOA will provide local restaurant options if you would like to sign up in advance to dine in small groups at your own expense. Or sign up as a group that will wonder the Festival together and create your meal as you visit the festival food booths.

The French Quarter Festival offers the "World's Largest Jazz Brunch". The festival food booths are operated by nearly 60 local chefs and restaurants throughout the festival weekend. Booths can be found in Jackson Square, Woldenberg Riverfront Park, and, in the past, Louisiana State Museum's Old U.S. Mint. Music stages are located at Jackson Square, Woldenberg Riverfront Park, Bourbon Street, Royal Street, the French Market Performance Pavilion and, in the past, Louisiana State Museum's Old U.S. Mint. Special events take place at various locations throughout the French Quarter.

Hotel Reservation Information



Marriott New Orleans

555 Canal Street
New Orleans, LA 70130
(504) 581-1000

Website: <http://www.marriott.com/hotels/travel/msyla-new-orleans-marriott/>

Reservations:

To receive the group rate you must make your hotel reservations by Friday, March 5, 2010.

- Make your hotel reservations online: [Click here](#)
- Make your hotel reservations by calling the numbers below: Reservations Department at 504-581-1000 or the Global Reservations Centre at 1-800-228-9290. Group code is IOAIOAA

The Hotel is offering a special IOA group rate as noted below.

Run of the House - \$159.00 Single / Double

Hotel room rates are subject to applicable state and local taxes (currently 13% plus \$3.00 per person per night occupancy tax) in effect at the time of check-out.

Check-In/Check-Out Times

Please plan your travel accordingly. Check-in: 03:00PM Check-out: 12:00PM

Guarantee Rules and Cancellation Policy

All reservations must be accompanied by a first night room deposit **or guaranteed with a major credit card**. The hotel will not hold any reservations unless secured by one of the above methods.

Travel and Transportation

Map and Directions from the Hotel website:

<http://www.marriott.com/hotels/maps/travel/msyla-new-orleans-marriott/>

By Air

Louis Armstrong New Orleans International Airport (MSY)

Phone: (504) 464-3547

Website: <http://www.flymsy.com>

The Louis Armstrong International Airport is convenient; just 15 miles from the Central Business District and French Quarter, it is a quick ride away, whether you go by bus, shuttle, taxi or limousine.

The hotel **does not** provide shuttle service from the airport to the hotel.

Taxicabs: A cab ride costs approx \$28.00 from the airport to the Central Business District (CBD) for one or two persons and approx \$12.00 (per passenger) for three or more passengers. Pick-up is on the lower level, outside the baggage claim area. There may be an additional charge for extra baggage. \$1 fuel surcharge added to total fare.

Airport Shuttle: Shuttle service is available from the airport to the hotels in the CBD for approx \$15.00 (per person, one-way) or approx \$30.00 (per person, round-trip). Three bags per person. Call 1-866-596-2699 or (504) 522-3500 for more details or to make a reservation. Advance reservations are required 48 hours prior to travel for all ADA accessible transfers. Please call well enough in advance for the specially-equipped shuttle to be reserved. For group reservations of 10 or more people please dial 1-866-596-2699. Ticket booths are located on the lower level in the baggage claim area. <http://www.airportshuttleneworleans.com/>

Amtrak: Union Station is located at 1001 Loyola Avenue. Amtrak does not provide transportation to or from the airport. Passengers should use limousine, public bus, or taxi service to reach the station. <http://www.amtrak.com/servlet/ContentServer?pagename=Amtrak/HomePage>

Greyhound: Greyhound Bus no longer serves Armstrong International Airport. The closest location is the Downtown Bus Station at 101 Loyola Avenue, New Orleans, 70113. For information fares and scheduling, call (504) 525-9371 or toll free 1-800-231-2222. <http://www.greyhound.com/home/>

Jefferson Transit: The Airport-Downtown Express (E-2) Bus picks up outside airport Entrance #7 on the upper level.

Bus Fare: The fare for Airport-Downtown Express (E-2) is \$1.10. The fare boxes will accept \$1, \$5, \$10, \$20 dollar bills and all U.S. coins. The fare boxes will provide change in the form of a value card that can be used for future fares.

About the Airport-Downtown Express (E-2) Route: The Airport-Downtown Express (E-2) provides service from the Louis Armstrong New Orleans International Airport in Kenner, down Airline Drive into New Orleans. The Airport bus stop is on the second level of the Airport, near the Delta counter, in the median (look for the sign and bench). At Carrollton at Tulane it connects with RTA's 27-Louisiana and 39-Tulane buses. (Visit the RTA website to check their current schedules.) For more information on public transit in the area, visit the Jefferson Transit website, www.jeffersontransit.org, or the RTA website www.norta.com

Northshore Airport Express: Provides shuttle service to/from the North shore and the Airport. Current rates are approx \$50 to/from the Airport and Northshore hotels and residences. Call for fares to other locations. **ADVANCED RESERVATIONS REQUIRED.** Additional passengers in your party pays 1/2 price.

About New Orleans

Did you Know

New Orleans Nicknames

Of all the nicknames New Orleans has, the “Big Easy” and the “Crescent City” are certainly the most well known. The origins of “Big Easy” go back to the turn of the century and a famed dance hall of that name. Eventually, the nickname transferred to the city as a whole, referring to the gentle pace of life for which New Orleans is known. As for the “Crescent City,” during the 19th century, new neighborhoods expanded outward from what is now known as the French Quarter, following the great curve of the Mississippi, and thus giving New Orleans a crescent shape.

Attractions and Landmarks

- French Quarter / Bourbon Street
- The Audubon Zoo / Aquarium of Americas
- Garden District / St. Charles Avenue
- Jackson Square
- St. Louis Cathedral
- French Market
- Oak Alley Plantation
- Harrah's New Orleans Casino
- Pat O'Briens Bar

International Members

VISA Information

We want to make you aware of important visa Information that might impact your attendance at the meeting. If you are planning to attend the Conference and you require a visa for entrance into the United States, please be advised the processing time to secure a visa has substantially increased due to security issues. Consulates in some countries are now taking several months to process visa applications. Please consider this and allow enough time for visa processing. Please see the notice below from the U.S. Department of State Bureau of Consular Affairs. http://travel.state.gov/visa/visa_1750.html

“Visa applications are now subject to a greater degree of scrutiny than in the past. Applicants affected by these procedures are informed of the need for additional screening at the time they submit their applications and are being advised to expect delays. The time needed for adjudication of individual cases will continue to be difficult to predict. We recommend that individuals build in ample time before their planned travel date when seeking to obtain a visa.”

“We recognize that these delays are having an impact on visa applicants, and we have already had success streamlining the process, consistent with our security and legal responsibilities. The State Department is working hard with other government agencies to rationalize clearance procedures in ways that continue to protect US borders, our first priority, while facilitating legitimate travel.” If you are planning to attend the 2008 Conference, we urge you to apply for your visa immediately. For International members arriving a few days prior to the conference, or leaving after the conference, the Hotel will honor the group room rate three days prior and post conference based on availability



Name _____
 Organization _____
 Address _____
 City _____ State/Province _____ Postal Code _____
 Country _____ E-mail _____
 Phone _____ Emergency Contact Phone _____
 First Time Attendee Dietary Restrictions/Food Allergies: _____ ADA Accommodation: _____

Pre-Conference Course Registration for Wednesday, April 7, 2010

| | | |
|---|----------|-------|
| <input type="checkbox"/> Full day #1 - Dynamic Governance: Addressing Conflicts Inherent in Organizational Structure | \$290.00 | _____ |
| <input type="checkbox"/> Full day #2 - Developing Your Facilitation Mindset and Skill Set | \$290.00 | _____ |
| <input type="checkbox"/> Half-day AM #1 - IOA Standards of Practice and Code of Ethics: Understanding the Core Principles of an Organizational Ombudsman Practice | \$190.00 | _____ |
| <input type="checkbox"/> Half-day AM #2 - Talking About Fairness in the Workplace: Making Fairness Explicit in Training, Coaching, and Policy Discussions | \$190.00 | _____ |
| <input type="checkbox"/> Half-day PM #1 - Therapeutic Skills for the Ombuds: A Family Systems Approach | \$190.00 | _____ |
| <input type="checkbox"/> Half-day PM #2 - Change Agent: Ombudsmen's Contribution to Organizational Value | \$190.00 | _____ |
| <input type="checkbox"/> OR Two Half-day Courses. One AM and One PM together | \$290.00 | _____ |

AM # _____ PM # _____

General Conference Registration for Thursday, April 8 - Saturday, April 10, 2010

| | BEFORE 03/05/10 | AFTER 03/05/10 | |
|--|--------------------|-------------------|-------|
| Full Conference Registration - April 8 - 10, 2010 | | | |
| IOA Member Full Conference Registration | \$450. USD | \$500. USD | _____ |
| Non-Member Full Conference Registration | \$500. USD | \$550. USD | _____ |
| One Day Conference Registration | | | |
| Thursday only | \$245. USD | \$295. USD | _____ |
| Friday only | \$245. USD | \$295. USD | _____ |
| Saturday only | \$150. USD | \$200. USD | _____ |

Ombuddy Donation

"Ombuddy" Sponsorships go directly to offset expenses of the 2010 Conference and allow attendees an opportunity to support our Association and profession.

Ombuddy Sponsorship \$ _____

Use this Credit Card for my "Ombuddy" Sponsorship: _____ Exp. Date: _____

I will send a separate check for my Ombuddy Sponsorship

Please charge the same credit card below for my Ombuddy Sponsorship

Payment Method IOA Federal ID #5417854444

Checks or money orders should be in United States funds, payable to the International Ombudsman Association. Credit cards are accepted. **No electronic funds transfers (EFT's) are permitted.**

Amex MasterCard Visa OR Check will be mailed

Credit Card # _____ Expiration Date _____

Card Holder's Name _____ Total of Charge _____

"Ombuddy" Sponsorship \$ _____ + Pre-Conference \$ _____ + General Conference \$ _____ = Total \$ _____

Friday, March 5, 2010, is the hotel group rate reservation deadline .

Friday, March 5, 2010, is the cut off for early bird conference registration. You must submit your registration form to the office by Friday, March 5th in order to receive the early bird fees. Fax to (908) 842-0376. You do not need to send payment by March 5th to receive early bird fees. If you plan to pay by check, please FAX a copy of your registration form to the IOA Office and then mail a copy with your check. Mail your registration to: IOA
 390 Amwell Road, Suite 402
 Hillsborough, NJ 08844

We will send weekly email confirmations for those registration forms we receive. If you do not receive an email confirmation a week after you submit your form, please contact the office at info@ombudsassociation.org or call (908) 359-0246. You will also receive a confirmation packet in the mail prior to the Conference.

Breakout Session Options

Please indicate which sessions you plan to attend. This does not obligate you to attend a specific session, however your information will help conference planners better match session preferences with appropriate meeting room assignments. See Agenda at a Glance: http://www.ombudsassociation.org/conf/erence/2010/agends_at_a_glance.pdf

THURSDAY, APRIL 8, 2010

Concurrent Breakout Sessions

- 2:00 to 3:30 pm
 Breakout # 1 Breakout # 2
 Breakout # 3 Breakout # 4
 Breakout # 5 Breakout # 6

Concurrent Breakout Sessions

- 4:00 to 5:30 pm
 Breakout # 7 Breakout # 8
 Breakout # 9 Breakout # 10
 Breakout # 11 Breakout # 12

FRIDAY, APRIL 9, 2010

Concurrent Breakout Sessions

- 2:30 to 4:00 pm
 Breakout # 13 Breakout # 14
 Breakout # 15 Breakout # 16
 Breakout # 17 Breakout # 18

Concurrent Breakout Sessions

- 4:15 to 5:45 pm
 Breakout # 19 Breakout # 20
 Breakout # 21 Breakout # 22
 Breakout # 23 Breakout # 24

SATURDAY, APRIL 10, 2010

Concurrent Breakout Sessions

- 10:30 to 12:00 pm
 Breakout # 25 Breakout # 26
 Breakout # 27 Breakout # 28
 Breakout # 29 Breakout # 30