

**8th ANNUAL CONFERENCE**

April 19-24, 2013  
Miami, Florida



*Join the Conversation: Learn. Share. Grow.*

**The Premiere Provider of Professional Development  
for Ombudsman Practitioners**



INTERNATIONAL  
**OMBUDSMAN**  
ASSOCIATION

Dear Conference Attendees,

On behalf of The International Ombudsman Association I am delighted to welcome you to The IOA's 8th Annual Conference in beautiful and exciting Miami! The theme of this year's conference reflects our hopes for the experience: *Join the Conversation. Learn. Share. Grow.* As always, the IOA annual conference is a fantastic opportunity to expand our knowledge and broaden our thinking in collaboration with our colleagues.

By any measure this conference is a high quality event, but what is truly amazing is that it is the product of a group of IOA member volunteers who work tirelessly to ensure every detail is attended to, with the support of PMA, our management company. While there are countless people who contribute to this effort, special thanks go to Anamaris Cousins-Price and Lisa Witzler who co-chair the Conference Committee. Their work on this meeting started almost immediately following our 2012 conference in Houston, which was a great success.

While the Conference Committee takes the lead for this event, it is also important to recognize the work that is done by each of IOA's committees and the Board throughout the year in support of our many initiatives. IOA is blessed with strong engagement from our members who are dedicated to advancing the organizational ombudsman practice.

This conference will be enriched by presenters who have come from many parts of the world to share their ideas and insights. This is an opportunity for all of us to help advance the field by exchanging ideas and considering how we might raise the level of our individual practices. Many thanks go to the people who have taken the initiative to prepare sessions for this meeting.

Finally, the generosity of organizations that are sponsoring the meeting is greatly appreciated. Sponsorships in many forms are of great assistance to IOA in making the conference financially feasible.

I wish you a great experience during this event, both as you engage in professional growth with colleagues and in your exploration of Miami.

Wishing you a great conference,

**Nicholas Diehl**  
American Red Cross  
President, International Ombudsman Association

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Development Bank, IOA Vice President  
Wayne Blair, University of North Carolina at Chapel Hill, IOA Treasurer  
Ted Williamson, The Coca-Cola Company, IOA Assistant Treasurer  
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## CONFERENCE COMMITTEE WELCOME LETTER

¡Bienvenidos a Miami!

We're so excited you're here with us in Miami for what we hope will be one of the best and most memorable conferences yet. We hope you're ready for three packed days with stimulating discussions, thought-provoking panels, and many opportunities to meet and reconnect with some amazing people. While we've all traveled different distances (many from very far) and bring with us unique backgrounds and experiences, contrasting ideas and values, we all have at least one thing in common: we are active supporters of the organizational ombudsman profession. We know the value organizational ombudsmen bring to our organizations, and we want to learn how to continue improving our skills and help others understand our role.

The Conference Committee has been working arduously for the past eleven months and designed a program that offers something for everyone. It doesn't matter if this is your first IOA conference or your eighth, our goal is that you will leave better equipped to work with visitors, more confident to speak of the value you bring to your organization, and more knowledgeable of how ombudsmen around the world perform their jobs. We fully understand the value of spending time with people who understand what you do, so we've scheduled some time for you to recharge, relax and take in the warmth and vibrant culture of Miami with some familiar and new faces.

We can't sign off without expressing our deepest thanks and appreciation to our dedicated volunteers, our very generous sponsors and PMA's staff. Please know this conference is a reality only due to your support and relentless commitment to excellence and IOA.

*Go on. Join the conversation: Learn. Share. Grow!*

Conference Committee Co-chairs  
Anamaris Cousins Price, Halliburton  
Lisa Witzler, National Institutes of Health

Carol Breslin, Chevron Corporation  
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Lawrence Cohen, MD, Yale University School of Medicine  
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Jayla Henry, Halliburton  
Elizabeth Hill, Apollo Group, Inc.  
Sharon Lanier, Munroe Regional Medical Center

Melinda Miner, Halliburton  
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Teresa Ralicki, American Red Cross  
Marcia Riley, University of California, Berkeley  
Dawn Sander, Conflict Transformation Associates, LLC  
Richard Thurer, Miller School of Medicine, University of Miami  
Shreya Trivedi, University of Central Florida  
Merle Waxman, Yale University School of Medicine

## AGENDA AT A GLANCE

### PROFESSIONAL DEVELOPMENT AND PRE-CONFERENCE COURSES

#### FRIDAY, APRIL 19, 2013

**Professional Development Courses**, separate registration required

<b>7:30am-5:00pm</b>	Registration Desk Open	<i>Regency Ballroom Foyer</i>
<b>7:30am-8:30am</b>	Breakfast for all Course Attendees	<i>Jasmine</i>
<b>10:00am-10:15am</b>	Coffee Break	<i>Foyer</i>
<b>12:00pm-1:00pm</b>	Lunch	<i>Jasmine</i>
<b>2:45pm-3:00pm</b>	Coffee Break	<i>Foyer</i>
<b>8:30am-5:30pm</b>	<b>Professional Development Course: Foundations of Organizational Ombudsman Practice – Day One</b> (formerly Organizational Ombudsman 101)	<i>Hibiscus B</i>
<b>8:30am-5:30pm</b>	<b>Professional Development Course: Knowledge and Skills Series: Working with Visitors and Respondents</b> Day One	<i>Gardenia C</i>

#### SATURDAY, APRIL 20, 2013

**Professional Development Courses**, separate registration required

<b>7:30am-5:00pm</b>	Registration Desk Open	<i>Regency Ballroom Foyer</i>
<b>7:30am-8:30am</b>	Breakfast for all Course Attendees	<i>Jasmine</i>
<b>10:00am-10:15am</b>	Coffee Break	<i>Foyer</i>
<b>12:00pm-1:00pm</b>	Lunch	<i>Jasmine</i>
<b>2:30pm-2:45pm</b>	Coffee Break	<i>Foyer</i>
<b>8:00am-5:00pm</b>	IOA Board Meeting	<i>Orchid C</i>
<b>8:30am-5:30pm</b>	<b>Professional Development Course: Foundations of Organizational Ombudsman Practice – Day Two</b> (formerly Organizational Ombudsman 101)	<i>Hibiscus B</i>
<b>8:30am-5:30pm</b>	<b>Professional Development Course: Knowledge and Skills Series: Working with Visitors and Respondents</b> Day Two	<i>Gardenia C</i>

#### SUNDAY, APRIL 21, 2013

**Professional Development Courses**, separate registration required

**Pre-Conference Courses**, separate registration required

<b>7:30am-5:00pm</b>	Registration Desk Open	<i>Regency Ballroom Foyer</i>
<b>7:30am-8:30am</b>	Breakfast for all Course Attendees	<i>Jasmine</i>
<b>10:00am-10:15am</b>	Coffee Break	<i>Foyer</i>
<b>12:30pm-1:30pm</b>	Lunch	<i>Jasmine</i>
<b>2:45pm-3:00pm</b>	Coffee Break	<i>Foyer</i>
<b>8:30am-12:30pm</b>	<b>Professional Development Course: Foundations of Organizational Ombudsman Practice – Day Three</b> (formerly Organizational Ombudsman 101)	<i>Hibiscus B</i>
<b>8:30am-12:30pm</b>	<b>Professional Development Course: Knowledge and Skills Series: Working with Visitors and Respondents</b> Day Three	<i>Japengo Room</i>
<b>8:30am-12:30pm</b>	<b>Pre-Conference Half Day AM Course</b>	
	<b>AM #1: Improvisation, Intuition and Spontaneity: A New Approach for the Ombuds Trainer</b> <i>Adam Barak Kleinberger</i>	<i>Orchid D</i>
	<b>AM #2: Engaging with Complexity: A Systems Paradigm for Ombuds</b> <i>Jan Morse, Glenda Eoyang, Howard Gadlin, Wendell Jones</i>	<i>Brickell South</i>
	<b>AM #3: Recognizing and Managing the Impact of Mental Health Symptoms in Ombudsman Practice</b> <i>Samantha Levine-Finley, Kathleen Moore</i>	<i>Orchid C</i>
<b>12:30pm-1:30pm</b>	Lunch for all Course Attendees	<i>Foyer</i>
<b>1:30pm-5:30pm</b>	<b>Professional Development Course: Next Step for New or Growing Programs</b> (formerly Organizational Ombudsman 101 PLUS)	<i>Hibiscus B</i>
<b>1:30pm-5:00pm</b>	<b>Pre-Conference Half Day PM Course</b>	
	<b>PM #1: The Reflective Observer Model: Incorporating Reflective Practice into your Ombuds Work</b> <i>Kathleen Moore, Howard Gadlin, Kenneth Kressel, Lisa Witzler</i>	<i>Brickell South</i>
	<b>PM #2: Mind-Hack: Ombudsing with the Brain in Mind</b> <i>Mauricio Ramos</i>	<i>Orchid C</i>
<b>5:30pm-6:00pm</b>	<b>Welcome Reception for Ombudsman New to the Profession &amp; First Time Attendees</b>	<i>Riverwalk- Outdoor Terrace</i>
<b>6:00pm-7:00pm</b>	<b>Welcome Reception</b> , Open to all Attendees (cash bar)	<i>Riverwalk- Outdoor Terrace</i>
<b>7:00pm</b>	Evening On Your Own	<i>*In case of inclement weather the receptions will be held in the Jasmine Ballroom</i>

## AGENDA AT A GLANCE

### GENERAL CONFERENCE - DAY ONE

Professional Development Hours: 5

#### MONDAY, APRIL 22, 2013

<b>6:00am-7:00am</b>	Fun Run/Walk Around Miami	
<b>6:00am-7:00am</b>	Yoga Class, <i>separate registration fee applies</i>	Gardenia A
<b>7:00am-5:30pm</b>	Registration Desk Open	Regency Ballroom Foyer
<b>7:00am-8:00am</b>	Breakfast for All Conference Attendees	Jasmine
<b>8:00am-8:30am</b>	<b>Conference Welcome &amp; Opening Remarks</b>	Regency Ballroom
<b>8:30am-9:30am</b>	<b>Keynote Address: The Sustainable Ombuds: Taking Charge of Taking Care</b> <i>Ellen Schreiber, Ombuds, University of Idaho</i>	Regency Ballroom
<b>9:45am-10:45am</b>	<b>Plenary: Human Rights and Citizenship: Impact and Effectiveness of Ombudsmen's Offices in Brazil</b> <i>Maria Inês Fornazaro, President Association of Ouvridores (ABO)</i> (Simultaneous Translation from Portuguese to English)	Regency Ballroom
<b>10:45am-11:15am</b>	Networking Break	Foyer
<b>11:15am-12:30pm</b>	<b>IOA Strategic Planning: Reshaping IOA to Advance the Organizational Ombudsman Field</b>	Regency Ballroom
<b>12:30pm-1:45pm</b>	Volunteer Recognition Luncheon for All Conference Attendees	Jasmine
<b>1:45pm-3:15pm</b>	<b>Concurrent Session One</b>	
	1. <b>Virtual Mediations for an Economically Challenged Environment - Can They Be Effective?</b> <i>Susan Casino</i>	Hibiscus A
	2. <b>Campus Unrest &amp; Protest: What's an Ombuds to do?</b> <i>Andrew Larratt-Smith, Judy Bruner</i>	Hibiscus B
	3. <b>Helping Visitors Put 'First Things First'</b> <i>Elisa Enriquez</i>	Regency Ballroom
	4. <b>Lessons Learned from Evaluating an Ombuds-lite Program at the World Bank Group</b> <i>Thomas Zgambo, Odile Rheume</i>	Tuttle Pre-Function
	5. <b>Now That We're Here, How Far Do We Go?</b> <i>Rita Franklin, Cathy A. Barchi</i>	Orchid CD
	6. <b>The Greased Tightrope: Navigating Issues of Identity within Ombuds Practice</b> <i>Linda Brothers, David E. Michael, Wayne Blair, Indu Sen</i>	Brickell South
<b>3:15pm-3:30pm</b>	Networking Break	Foyer
<b>3:30pm-5:00pm</b>	<b>Concurrent Session Two</b>	
	7. <b>Norms and Variances in University Ombuds Practices</b> <i>Caitlan Hendrickson</i>	Hibiscus A
	8. <b>Ombuds Questioning Authority and "Authorities": A Reflective Practice Panel Session</b> <i>Don Noack, Mary Rowe, Howard Gadlin, Craig Mousin, Mauricio (Reese) Ramos</i>	Regency Ballroom
	9. <b>Ombuds Outreach Services: Adding Value to the Ombudsman Role</b> <i>Ilene Butensky, Gennette Tripari</i>	Hibiscus B
	10. <b>Dispute Resolution in Challenging Environments: Lessons From the Field</b> <i>John Barkat, Doris Campos-Infantino, Jose Martinez, Maria Montiel, Nicholas Theotocatos, Thomas P. Zgambo</i>	Tuttle Pre-Function
	11. <b>Conflicting Roles and Same Goals: Organizational Ombuds and the 1-800 Helpline</b> <i>Frank R. Baskind, Jacqueline L. Kniska</i>	Orchid CD
	12. <b>The Ombuds as Trainer- Materials and Methods (Part I)</b> <i>Melissa Brodrick, David E. Michael</i>	Brickell South
<b>5:00pm</b>	Conclusion of General Conference Day One	
<b>8:30pm-10:00pm</b>	Salsa and Sweets Social Event, <i>included with your registration</i>	Riverwalk- Outdoor Terrace

## AGENDA AT A GLANCE

### GENERAL CONFERENCE - DAY TWO

Professional Development Hours: 5

#### TUESDAY, APRIL 23, 2013

<b>6:00am-7:00am</b>	Fun Run/Walk Around Miami	
<b>6:00am-7:00am</b>	Yoga Class, <i>separate registration fee applies</i>	Gardenia A
<b>7:00am-5:00pm</b>	Registration Desk Open	Regency Ballroom Foyer
<b>7:00am-8:00am</b>	Breakfast for All Conference Attendees	Jasmine
<b>8:15am-8:30am</b>	Announcements	Regency Ballroom
<b>8:30am-9:30am</b>	<b>Keynote Address: Ombudsing and Law of Duality</b> <i>Gérard Sueur, Freelance Trainer/Manager, Formarep Co., France</i> (Simultaneous Translation from French to English)	Regency Ballroom
<b>9:30am-10:00am</b>	Networking Break	Foyer
<b>10:00am-11:15am</b>	IOA Annual Business Meeting. Attendance limited to IOA Members.	Regency Ballroom
<b>11:30am-12:30pm</b>	Lunch for All Conference Attendees	Jasmine
<b>11:30am-12:30pm</b>	Lunch for Ombudsman New to the Profession & First Time Attendees	Brickell Center & North
<b>12:45pm-2:15pm</b>	<b>Concurrent Session Three</b>	
	13. <b>Help for PhD Students - Increasing the 50% Graduation Rate</b> <i>Jan Morse, Molly McAvoy, Matthew Hanson</i>	Hibiscus A
	14. <b>The Un-wrenched Heart: Compassion Fatigue and the Organizational Ombuds</b> <i>Laurie Miller Patterson, Brian Bloch, Mary Rowe</i>	Hibiscus B
	15. <b>The Do's and Don'ts of Digital Communication in the Workplace</b> <i>Elisa Enriquez</i>	Tuttle Pre-Function
	16. <b>Organizational Change and Conflict: Challenges and Opportunities for the Ombudsperson</b> <i>Tom Ward</i>	Regency Ballroom
	17. <b>How does Ombuds work in China and the Asian Culture?</b> <i>Sophia Qiao, Charmhee Kim, Devyani Singh</i>	Orchid CD
	18. <b>Identifying Underlying Interests: Tips from Nature, History and the Cinema</b> <i>Kevin Coonrod</i>	Brickell South
<b>2:15pm-3:00pm</b>	IOA Town Square	Regency Ballroom Foyer
<b>3:00pm-4:30pm</b>	<b>Concurrent Session Four</b>	
	19. <b>Branching Out: An Ombudsman's Approach to Decision Trees and Risk</b> <i>John Barkat, Nicholas Theotocatos, Wendell Jones</i>	Hibiscus A
	20. <b>"What Just Happened?" Capturing Lessons of Our Failures and Successes</b> <i>David E. Michael, Francine Montemurro</i>	Regency Ballroom
	21. <b>Workshop for Supervisors: Dealing with Conflict Among or Between Supervisees</b> <i>Tom Sebok</i>	Hibiscus B
	22. <b>Let 1000 Flowers Blossom: 10 Years of the European Network for Ombudsmen in Higher Education</b> <i>Josef Leidenfrost, Dolores Gomez-Moran</i>	Tuttle Pre-Function
	23. <b>The Ombuds as Trainer – How to Market and Meet a Need (Part2)</b> <i>Mary Chavez Rudolph, Elizabeth Hill, Linda Myers, Susan Casino</i>	Orchid CD
	24. <b>360°: Benefits and Challenges in Serving Internal and External Stakeholders</b> <i>Indumati Sen, Wayne Blair</i>	Brickell South
<b>5:00pm-6:30pm</b>	Pecha Kucha Cocktail Hour Facilitated by <i>Nick Diehl</i> and <i>Howard Gadlin</i> with presentations by <i>Doris Campos Infantino, Tom Sebok, Wayne Blair, Jose Martinez, Judy Bruner,</i> and <i>Francine Montemurro</i>	Jasmine
<b>6:30pm</b>	Conclusion of General Conference Day Two. Evening on your own.	
<b>6:30pm</b>	Dinner with Friends Reservations at Local Restaurants (Sign up at the registration desk)	

## AGENDA AT A GLANCE

### GENERAL CONFERENCE - DAY THREE

Professional Development Hours: 6

### WEDNESDAY, APRIL 24, 2013

<b>6:00am-7:00am</b>	Fun Run/Walk Around Miami	
<b>6:00am-7:00am</b>	Yoga Class, <i>separate registration fee applies</i>	Gardenia A
<b>7:00am-5:00pm</b>	Registration Desk Open	Regency Ballroom Foyer
<b>7:30am-8:30am</b>	Breakfast for All Conference Attendees	Jasmine
<b>8:30am-9:30am</b>	<b>Keynote Address: Adaptive Action: Beyond Conflict Resolution</b> <i>Glenda Eoyang, Executive Director, Human Systems Dynamics Institute</i>	Regency Ballroom
<b>9:30am-10:00am</b>	Networking Break	Foyer
<b>10:00am-11:00am</b>	<b>Plenary: Ombudsing by Sectors: Apples to Oranges?</b> <i>Lisa Witzler, Anamaris Cousins Price, Camilo Azcarate, Sean A. Banks, Howard Gadlin, Marvin Neal, Judi Segall</i>	Regency Ballroom
<b>11:15am-12:15pm</b>	Sector Forum Discussions, world café format held in the plenary room.	Regency Ballroom
<b>12:30pm-1:30pm</b>	Networking Luncheon	Jasmine
<b>1:30pm-3:00pm</b>	<b>Concurrent Session Five</b>	
	25. <b>When Intuition Meets Influence: Identifying and Reporting External Patterns as They Impact Your Organization</b> <i>Teresa Ralicki, Elizabeth Hill, Ilene Butensky, Marsha Wagner</i>	Regency Ballroom
	26. <b>Peacemaker in a Sick Society: The Role of Conflict in Defining Group and Organizational Identity</b> <i>Linda Brothers</i>	Hibiscus A
	27. <b>Who's Out Front: Skills for the Ombuds Assistant</b> <i>Victoria Dowd, Glenda Dickson, Jayla Henry, Tanisha McGill</i>	Hibiscus B
	28. <b>Ombuds and EO/AA: Change Agents for Individuals with Temporary Impairments</b> <i>Shreya Trivedi, Janet Park Balanoff</i>	Tuttle Pre-Function
	<del>29. <b>Training Students as Peer Mediators: Capturing the Next Generation</b> <i>Barbara McCulloch</i></del> <b>CANCELLED</b>	Orchid CD
	30. <b>How to Use Concept Mapping to Make Sense Out of Complex Conversations</b> <i>Edward Rogers</i>	Brickell South
<b>3:00pm-3:30pm</b>	Networking Break	Foyer
<b>3:30pm-5:00pm</b>	<b>Concurrent Session Six</b>	
	31. <b>Update on Dear Colleague Letter and Confidentiality in the Education Sector</b> <i>Tom Kosakowski, Judy Bruner, Chuck Howard</i>	Regency Ballroom
	32. <b>Conflicts: What if I am the Common Denominator?</b> <i>Cole Struhar</i>	Hibiscus A
	33. <b>The Case for Ombuds Visibility within the Organization</b> <i>Randy Daron, Kathy Biala</i>	Hibiscus B
	34. <b>Establishing a Leadership-Driven Ombuds Office: the Baker Hughes Experience</b> <i>Melanie Lewis, Bonnie Bonnivier, Dale Kunneman</i>	Tuttle Pre-Function
	35. <b>Good Administration: Key ideas from Classical to Contemporary Ombudsing</b> <i>McKenna Lang, Josef Liedenfrost, Karen Peterson, Nora Farrell, Toni Robinson</i>	Orchid CD
	36. <b>Conflicts are Assets</b> <i>Joelle Thibault</i>	Brickell South
<b>5:00pm</b>	Conclusion of the 8th Annual Conference	

## KEYNOTE SPEAKERS

### MONDAY, APRIL 22, 2013

8:30am-9:30am

Keynote Address: **The Sustainable Ombuds: Taking Charge of Taking Care**  
*R. Ellen Schreiber, M. Ed., Ombuds, University of Idaho*



Self-care has been long recognized as an essential responsibility of nearly all helping professions; and more recently, various authors and researchers from these disciplines have described it as an 'ethical imperative.' Self-care as an area of ombuds professional responsibility is no less essential. For not only does self-care support the continued health and well-being of the ombuds over a lengthening career life-span, but it helps to ensure that the ombuds remains effective and capable of providing quality services. This session draws on a few simple lessons learned from the natural environment and connects the concepts of sustainability and stewardship from natural resource management with a multi-dimensional wellness model to illustrate a practical framework for approaching ombuds self-care and sustainability.

*Ellen Schreiber joined the University of Idaho in 1985 and was appointed to the Ombuds Office in 1998. Prior to her appointment as fulltime ombuds, she held concurrent half-time appointments as ombuds and as the university's employee work/life specialist. Previously, Ellen served as the assistant director and senior program counselor for Student Support Services.*

*Ellen holds credentials as a licensed professional counselor and as a national certified counselor. She has master's degrees in counseling and human services and in vocational education (with emphasis in adult learning and development). Ellen is an experienced mediator, facilitator, and trainer. Her related professional interests include: interpersonal communication and human relations, group processes and development, and organizational culture, ethics, and conflict resolution. Ellen is an active member of the American Red Cross and serves on a disaster action team as a volunteer disaster mental health counselor.*

### TUESDAY, APRIL 23, 2013

8:30am-9:30am

Keynote Address: **Ombudsing and Law of Duality** (Simultaneous Translation from French to English)  
*Gérard Sueur, Freelance Trainer/Manager, Formarep Co., France*



Duality is an immanent universal law. A conflict situation arises when, in a relationship of authority, one of the two components of a duality becomes disturbing for one of the parties. In this context, an intervention of the Ombudsperson is requested. It is often by dealing himself/herself with his/her own representations, by personal development, that the ombudsperson will break the existential deadlock in which he/she is trapped -by ignorance- by that law of duality.

*Gérard Sueur is a Freelance trainer for the past 22 years, then Manager of FORMAREP training Co. 3 600 people attended his training "Self reconciliation", covering Partnership and human factors within a company; Systematic approach to the relationship between care-giver and patient; Development of soft skills and behavioral abilities; Group cohesion; Prevention and management of conflict; The various stages of life; Systematic approach to human factors; Assertiveness and relational ethics. 28 years of experience as a Freelance osteopath; Pedagogical director of the Institute of Clinical Osteopaths (IPCO) and the department of the osteopathy academy in Paris, France. Masters degree in engineering of training from the University of Tours (France); Lecturer at the same university. Teacher and international speaker. Centers of interest: He is*

*passionate about Personal development, pedagogy based on experience and all forms of learning through direct contact. He actively explores various approaches to cognitive development using expansion of consciousness, psycho corporal techniques and visits to indigenous peoples.*

### WEDNESDAY, APRIL 24, 2013

8:30am-9:30am

Keynote Address: **Adaptive Action: Beyond Conflict Resolution**  
*Glenda Eoyang, PhD, Executive Director, Human Systems Dynamics Institute*



In this time of shared inquiry and practice, Glenda Eoyang will introduce human systems dynamics, a field of inquiry that draws theory, models, and methods from chaos and complexity. She will introduce an adaptive approach that unbraids the bonds of intractable conflict and leads to constructive action in the midst of chaos. Attendees will build their own adaptive capacity and prepare to help their clients do the same.

*Glenda H. Eoyang, PhD, is the founding executive director of the Human Systems Dynamics (HSD) Institute. Since 1986 she has pioneered applications of chaos and complexity to improve adaptive capacity of people as they work and play together. She leads a network of 300 scholar practitioners who use her models and methods to engage with intractable issues, including conflict at all scales, quality of life for victims of Alzheimer's, school transformation, public policy advocacy, health-care delivery, technical and social innovation, and every other major challenge of the 21st century. She teaches and consults internationally with public and private organizations that are ready to live into a new and more adaptive paradigm.*



## PLENARY SESSIONS

### GENERAL CONFERENCE - DAY ONE

**MONDAY, APRIL 22, 2013**

**9:45am-10:45am**

Plenary: **Human Rights and Citizenship: Impact and Effectiveness of Ombudsmen's Offices in Brazil**  
*Maria Inês Fornazaro, President, Association of Ouvidores (ABO)*  
(Simultaneous Translation from Portuguese to English)

The experiences with Ombudsman's Office services around the world are different, even though their essence remains that of rescuing and qualifying the relationships inside and outside organizations. Each country has its features in the social, economic, and political development and distinctive needs regarding the approach of the institutions with the citizens. The Brazilian ombudsmen's offices are going through an important historical moment both in its consolidation as a dialogue channel with the citizen and in its growth in public and private companies, both motivated by social recognition, trust, and reliability. In Brazil, the high organizational echelons today make sure that transparent dialogue between the consumer or user of products and services is important to strategic management. This service gives space for the problem to be discussed inside their own home, with the possibility of avoiding lawsuits, customer dissatisfaction, or the waste of resources, and aims to improve the quality of the processes.

We invite you all to learn how the Associação Brasileira de Ouvidores follows the growth of ombudsmen's offices in the country and in several sectors including banks, insurance companies, healthcare, universities, and public administration. See how we search for the best practices through the bond of the ombuds service with the high offices of the organization and in the informed operation of the principles of autonomy, independence, confidentiality, and impartiality.

**IOA Strategic Planning:  
Reshaping IOA to Advance the Organizational Ombudsman Field**

**11:15am-12:30pm**

Continuing the conversation begun at last year's conference, the IOA Board will engage attendees in a discussion about the proposed vision and strategic plan. The Board will set off the session by giving an update on the State of the Association including the progress achieved in addressing the suggestions made by participants to meet the challenges facing the association at last year's conference. Back by popular demand, facilitated table discussions will follow to generate input and feedback on the plans outlined by the Board and IOA committees aimed at growing the IOA as an organization toward advancing the Ombudsman profession.



IOA Board of Directors 2012-2013

## PLENARY SESSIONS

### GENERAL CONFERENCE - DAY TWO

**TUESDAY, APRIL 23, 2013**

**10:00am-11:15am**

**IOA Annual Business Meeting. Attendance limited to IOA Members**

This is a great opportunity for members 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.

**Pecha Kucha Cocktail Hour**

**5:00pm-6:30pm**

Facilitated by: *Nicholas Diehl, Deputy Ombudsman, American Red Cross and Howard Gadlin, PhD, Ombudsman and Director, Office of the Ombudsman, National Institutes of Health*

Presentations by: *Doris Campos Infantino, Tom Sebok, Wayne Blair, Jose Martinez, Judy Bruner, Francine Montemurro*

The Pecha Kucha presentation style is a lively way to share ideas in a short time. Each presenter describes a concept using 20 presentation slides with only 20 seconds per slide. Half of this session will be dedicated to seven of these mini presentations and the second half will be an "open space" time for people to interact and discuss the presentations. The presentations will focus on how individual interests, such as art, music and faith, shape approaches to ombudsman work. Session attendees will be introduced to thought-provoking ideas that can be explored both during and following the session.

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### GENERAL CONFERENCE - DAY THREE

**WEDNESDAY, APRIL 24, 2013**

**10:00am-11:00am**

Plenary: **Ombudsing by Sectors: Apples to Oranges?**

Moderators: *Lisa Witzler, Anamaris Cousins Price*

Panelists: *Camilo Azcarate, Sean A. Banks, Howard Gadlin, Marvin Neal, Judi Segall*

We all hear the whispers; has IOA gone corporate? Is academia calling the shots? What about our brethren outside of the US borders or those providing independent ombuds services? Are all OO's created equal? This will be a frank and highly interactive discussion about the pros and cons of ombudsing by sector and whether we can learn from each other, regardless of our sector of practice. The panel discussion will be followed by audience participation in a world café format.

**Sector Forum Discussions**

**11:15am-12:15pm**

This year's sector forum discussions will be conducted in a world café format and held in the plenary session room immediately following the session, Ombudsing by Sectors: Apples to Oranges?

# NETWORKING and SOCIAL OPPORTUNITIES

## **Sunday, April 21, 2013, Welcome Reception**

**5:30pm-6:00pm Welcome Reception for Ombudsman New to the Profession and First Time Attendees**

**6:00pm-7:00pm Welcome Reception, Open to All Attendees (cash bar)**

The Hyatt is graciously hosting a complimentary bar with wine & beer only from 5:30 - 6:30 after 6:30 a cash bar will be available.

Join us for light refreshments and networking in a place where colleagues know what you do for a living and understand you; a place where they want to hear how you handled a situation; a place where you can ask their opinion. Weather permitting, this will be held on the patio, where you will be able to enjoy a great atmosphere, 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, soft drinks, and a cash bar will be available.

## **Monday, April 22, 2013**

Complimentary Shuttle Service from Hyatt to the Bayside Marketplace for shopping and dining options. You will need this ticket OR your name badge in order to board the shuttle. The bus will leave from the front of the Hyatt and drop at the main entrance of Bayside. The shuttle will be every 30 minutes between Bayside and the Hyatt Regency Miami. To begin at 5:30pm and the last shuttle will leave Bayside at 9:30pm.

## **Monday, April 22nd - 8:30pm - 10:00pm, Salsa and Sweets Social Event**

Experience the spicy culture of Miami at the Salsa and Sweets social event! This year's event will feature professional salsa dancers on hand for one-on-one Latin dance instruction provided by our generous sponsor, Halliburton. You can satisfy your sweet tooth with desserts provided thanks to our generous sponsor Mars, Inc. If the Miami weather cooperates, this evening event will be held on the Hyatt Regency Miami's outdoor patio by the river. Come dance the night away with old and new friends and take in a little of the Miami flavor!

## **Tuesday, April 23, 2013 11:30am-12:30pm, Lunch for Ombudsman New to the Profession & First Time Attendees**

You are invited to join representatives from the Mentoring Program and some of our "seasoned" colleagues to learn more about the Mentoring Program and to network with other new Ombudsman Practitioners to 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.

## **Tuesday, April 23rd - 2:15pm - 3:30pm, IOA Town Square**

Join us for an extended networking break and an opportunity to meet and speak with chairs and members of the IOA standing committees, editors of the Journal, and the CO-OP and IOA boards. You will be able to see what your fellow IOA members have been up to this past year, what they have planned for the future, and how your own talents can be utilized to further the mission of the IOA. The goals and objectives of the IOA are achieved largely through the work of volunteers. Members volunteer their expertise, time, and talent to these committees and are the driving force behind IOA's successes. Stop by for the snacks and coffee and stay to learn how you can help make IOA's mission a reality.

## **Career Connections Program**

**Are you hiring new ombuds staff in the near future? Are you looking for an ombuds position?**

The IOA Annual Conference Committee is pleased to offer the "Career Connections" program again. There is no better opportunity to find qualified ombuds candidates, or to introduce yourself to potential employers than at the annual meeting of ombuds professionals! This program is an easy to use mailbox system in which candidates can privately indicate their interest in ombuds positions and employers can privately invite candidates to interview for available positions within their organizations. The Career Connections service will be offered at no extra charge to registered employers and candidates.

## **Bookstore at the Conference**

The University of Miami Bookstore will have a booth onsite during the conference to sell books of interest. Books on the following subjects will be available for purchase: Mediation, Negotiation, Alternative Dispute Resolution, Conflict Resolution. Stop by to pick up a copy of the latest literature in the field.

## **Cena con Amigos**

Back by popular demand, IOA will make reservations at local restaurants each evening of the conference for small group dinners. Attendees can sign up at the local information booth. Sign up with a group of friends or to meet new friends. We provide the reservation, you provide the cash and the good company.

## **Yoga**

IOA's Annual Conference is geared towards exercising the mind, but we also want to help exercise bodies! We are offering a limited number of spots in a yoga class that will be offered each morning. If you are interested, please sign up at the conference registration desk. There is a **\$5.00 per day fee for the yoga classes** and each participant must complete a waiver. Classes will be held 6:00 am-7:00 am Monday, Tuesday, and Wednesday.

## **Fun Run/Walk Around Miami**

As we know, several attendees are runners so we thought it may be nice to explore the town together. If you would like to join us for daily runs/walks while at the conference, please sign up at the conference registration desk. **Meet at the Registration Desk each morning at 6:00 am.** Maps will be provided at the conference registration desk for several different mileages.

## WHAT CONFERENCE ATTENDEES NEED TO KNOW FOR MIAMI

### Wi-Fi Access at the Conference

Just a reminder that for those attendees staying at the conference hotel, the Hyatt, Wi-Fi is included in the room rate. You will have access to the internet in your guest room and the hotel lobby only, not in the meeting rooms. We regret to inform you that the Hyatt does not have free public Wi-Fi for those not staying at the hotel and that we will not have internet access in the meeting rooms or foyers.

### Name Badge Recycling

Thank you to American Express for sponsoring the name badge holders. IOA would like to “Go Green” and recycle the name badge holders to re-use next year. Please drop off your name badge holder at the registration desk at the end of the conference.

### Attendee Roster

A big part of attending the conference is connecting with old friends and making new friends. However we are mindful that many attendees do not want their full contact information published and we want to save a tree so we are not printing attendee rosters this year. This year we will post the attendee list on-line so you may view and download at your leisure. You will receive an email with the log-on to access the roster via the conference website. Please note that the attendee roster will only include the attendee’s name, organization, city, state, country, it will not include email or phone, again for privacy concerns. The attendee roster is also available through the IOA Conference App, see below. The attendee roster may not reflect the most recent registrants. An updated final attendee roster will be posted on the password protected internal conference website and emailed to all attendees after the conference.

### Apps that Might be Useful

**IOA is proud to offer a mobile / web app this year. We will be using “Sched.org”** to post the conference schedule, speakers with bios, exhibitors, sponsors and the attendee list all of which you can access via the web, iPad or SmartPhone. Sched.org is only visible to invited attendees, speakers, exhibitors and sponsors. You will receive an email invitation to log on, create your password and update your profile. Please note that NO emails, phone numbers or full addresses are visible on this app. Only the name, title and organization of attendees is included.

**AroundMe**, Hungry and looking for inspiration? Meeting friends at a bar close by? Or just need to find the closest ATM? AroundMe allows you to search for the nearest restaurants, banks, gas stations, book an hotel or find a movie schedule nearby.

**UrbanSpoon** Mobile apps are a kind of restaurant slot machine. Just hit the Shake button (or shake the phone) and the wheels will spin, until they settle on a good nearby restaurant. You can also lock down the neighborhood, cuisine, and/or price range to narrow the results.

**WalkJogRun Running Routes By Almost Awesome Inc**, WalkJogRun helps you find the safest routes to run, exercise without injury and stay motivated, whether you need a change of scenery or are on vacation and unfamiliar with your surroundings. Or **MapMyRun** iMapMy is a fitness tracking application that enables you to use the built-in GPS of your mobile device to track all of your fitness activities.

## INFORMATION | POLICIES

**Dress:** Dress for the entire conference is business casual.

**Confidentiality Statement:** Being mindful of the standards of confidentiality for the ombuds profession, things may be said about people or organizations that are not part of common knowledge or the public domain. Sharing is expected during a conference, however these statements are protected by our parameters of confidentiality.

**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 speaker presentations on-line that are submitted to the IOA Office. 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 which will be sent via email to attendees who have registered. Please visit the conference website and click on "**Speaker Presentations available to download,**" the **passcode is Miami2013**

**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.

**Consent to Receive Communications From IOA:** By registering / attending this event, constitutes consent for the International Ombudsman Association to communicate with you via fax, e-mail, mail, text messaging, instant messaging, social media and to make you aware of products and services.

**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.

**Disclaimer:** 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 association 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.



# Become a Certified Organizational Ombudsman Practitioner!

## WHY?

- Gain Recognition
- Invest in Your Career
- Show Commitment
- Distinguish Yourself
- Strengthen and Professionalize the Organizational Ombudsman field

## HOW?

- Pass the certification examination
- Hold a bachelor's degree or equivalent
- Have one year of full-time experience, or its equivalent, in practice as an organizational ombudsman adhering to the IOA Code of Ethics and Standards of Organizational Practice

**WE WISH TO CONGRATULATE THE FOLLOWING  
CERTIFIED ORGANIZATIONAL OMBUDSMAN PRACTITIONERS  
WHO RECEIVED CERTIFICATION SINCE LAST YEAR'S ANNUAL IOA CONFERENCE  
(as of March 13, 2013)**

### PRACTITIONER

Brian Bloch  
Terry Boudreau  
Karen Campbell  
Linda Falkson  
Cynthia Joyce  
Adam Kleinberger  
Andrew Larratt-Smith  
Sana Manjeshwar  
Reto Meister  
Wokie Nwabueze  
Dawn Osborne-Adams  
Shreya Trivedi  
Guy Weber  
Patricia Wynegar

### ORGANIZATION

Department of the Interior  
Eaton Corporation  
American Express  
Cornell University  
University of Iowa  
Cornell University  
University of California, Riverside  
Alliance Bernstein  
International Committee of the Red Cross  
Princeton University  
Binghamton University  
University of Central Florida  
Transportation Security Administration  
Federal Deposit Insurance Corporation

**IOA and the CO-OP Board are proud to report  
we have certified 99 organizational ombudsman practitioners.**

For the complete Directory of all Certified Organizational Ombudsman Practitioners and for more information, visit our website at [www.ombudsassociation.org/certification](http://www.ombudsassociation.org/certification)

### **Professional Development Hours (PDH) for CO-OP® Recertification:**

For all those Certified Organizational Ombudsman Practitioners®, remember that 60 Professional Development Hours (PDHs) are required for recertification. Continued use of the CO-OP® credential requires recertification every four years. Recertification demonstrates that the practitioner has kept abreast of developments in the field and has maintained a level of professional knowledge consistent with status as a certified practitioner. Each of the sessions at this year's conference has been reviewed by the Recertification committee, approved as falling under one or more of the content domains and assigned a number of PDHs. Please remember to pick up your Professional Development Hours tracking sheet at the Board of Certification table. For additional information concerning Recertification and activities eligible for PDHs please visit the website link. <http://www.ombudsassociation.org/boc/obtain/recert/>

**S A V E T H E D A T E S !**

**See You Next Year!**

**9th Annual Conference of the  
International Ombudsman Association**

**April 6-9, 2014  
Sheraton Denver Downtown Hotel, Denver, CO**



*Join the Conversation: Learn. Share. Grow.*

**Watch for the call for papers!**

The annual conference is intended to help attendees increase awareness, knowledge and skills in order to become more effective catalysts for change within their organizations.



## **Continue Learning with IOA**

**Attend an IOA Professional Development Course**

**June 2013 International Professional Development**

Sunday, June 23, 2013 - Wednesday, June 26, 2013  
World Food Programme Headquarters, Rome, Italy

**July 2013**

Monday, July 8, 2013 - Friday, July 12, 2013  
Sheraton Downtown, Phoenix, AZ, USA

**October 2013**

Monday, October 21, 2013 - Friday, October 25, 2013  
Hotel Monaco in Baltimore, MD, USA

For details and registration, visit the IOA Professional Development Web page.

**IOA would like to recognize and thank the following organizations and individuals for supporting the 2013 Annual Conference.**

**PLATINUM SUPPORTER**

The Coca-Cola Company

**GOLD SUPPORTER**

Pfizer Inc

**BRONZE SUPPORTER**

Marathon Oil Company

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Chevron Corporation

**BRASS SUPPORTER**

Miller School of Medicine, University of Miami

**SALSA & SWEETS RECEPTION** Mars, Inc.

**SALSA & SWEETS RECEPTION** Halliburton

**PROGRAM BOOK** Halliburton

**TOTE BAGS** Baker Hughes

**NAME BADGES AND NECK WALLET** American Express

**EXHIBITORS** i-Sight

Master of Science in Organization Development Program, School of Public Affairs, American University

**MARS**  
**incorporated**

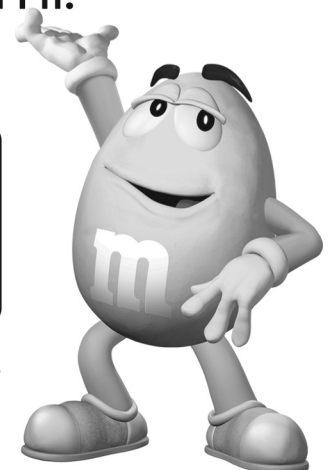
extends its best wishes for a successful  
2013 IOA Conference in Miami.



**The Five Principles**  
Quality Responsibility Mutuality Efficiency Freedom



You need to talk,  
we're here to listen.



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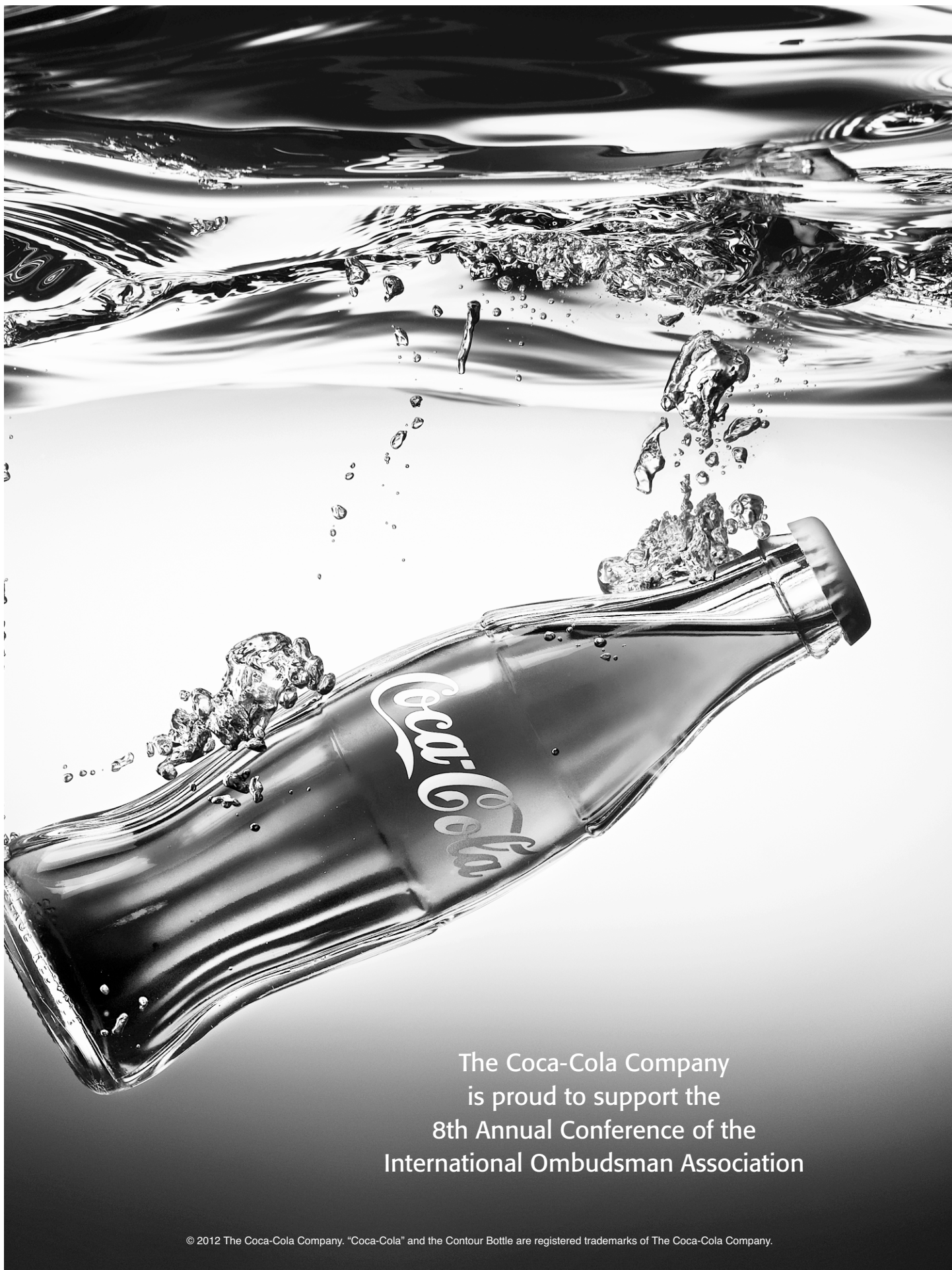
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Working together for a healthier world®

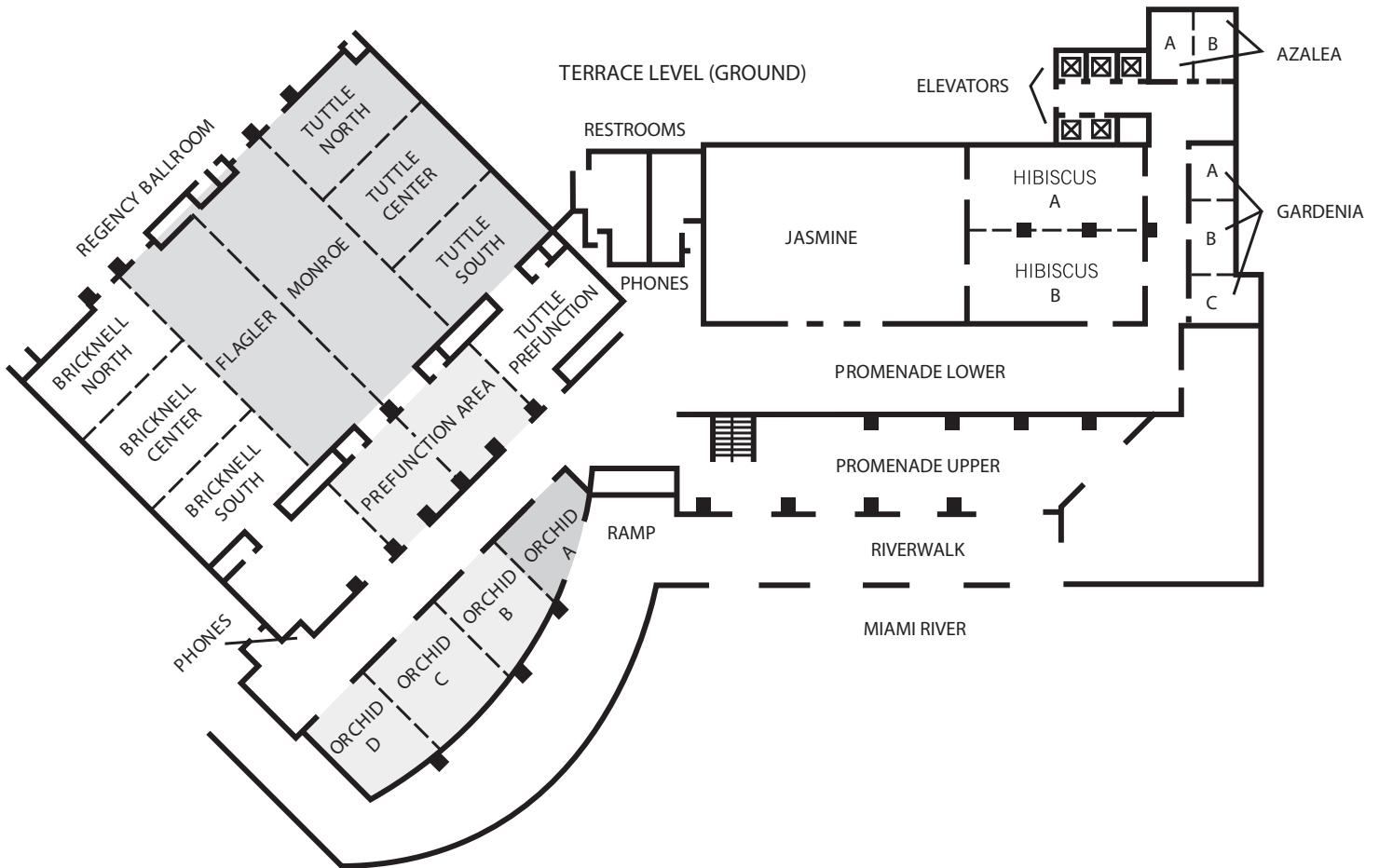
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The Coca-Cola Company  
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8th Annual Conference of the  
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## HYATT REGENCY MIAMI



**DRP**  
Dispute RESOLUTION Program

**The Halliburton Dispute Resolution Program**

**WELCOMES**

**the International Ombudsman Association,  
its members and guests to Miami, FL for**

**THE 8<sup>TH</sup> ANNUAL  
IOA CONFERENCE**

**HALLIBURTON**