

**7th ANNUAL CONFERENCE**

April 13-18, 2012  
Houston, Texas



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



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

AGENDA AT A GLANCE

**PROFESSIONAL DEVELOPMENT AND PRE-CONFERENCE COURSES\***

**FRIDAY, APRIL 13, 2012**

**8:30am-5:30pm** Organizational Ombudsman 101: Foundations of Practice Professional Development Course

**PDH's**

**15<sup>+</sup>**

**SATURDAY, APRIL 14, 2012**

**8:30am-5:30pm** Organizational Ombudsman 101: Foundations of Practice Professional Development Course (cont.)

**SUNDAY, APRIL 15, 2012**

**7:30am-8:30am** Breakfast for all Professional Development and Pre-Conference Course Attendees

**8:30am-12:30pm** Organizational Ombudsman 101: Foundations of Practice Professional Development Course (cont.)

**8:30am-5:00pm** Pre-Conference **Full Day Course #1: Conflict Coaching for the Organizational Ombuds** **7.5**  
*Melissa Brodrick, Ombudsperson, Harvard Medical School/Dental School/School of Public Health*  
*Jean Griffin, Associate Ombuds, University of Cincinnati*

**8:30am-5:00pm** Pre-Conference **Full Day Course #2: Using Mediation and other Informal Interventions to Deal with Workplace Bullying and Harassment Issues** **7.5**  
*Barbara McCulloch, Principal Mediator and Prevention of Harassment Officer, The University of Auckland, New Zealand*

**8:30am-12:00pm** Pre-Conference **Half Day AM Course #1: Improving the Organization's Conflict Climate** **3.5**  
*Michael Dues, Professor, University of Arizona*  
*Sue Theiss, Ombudsman, Oregon State University*

**8:30am-12:00pm** Pre-Conference **Half Day AM Course #2: Mind-Hack: Ombudsing with the Brain in Mind** **3.5**  
*Mauricio Ramos, Corporate Ombudsman, Sandia National Labs*

**12:00pm-1:30pm** Lunch for all Professional Development and Pre-Conference Attendees

**1:30pm-5:30pm** Organizational Ombudsman 101 PLUS Professional Development Course **4**

**1:30pm-5:00pm** Pre-Conference **Half Day PM Course #1: Managing Up: Helping Visitors Improve Relationships with their Supervisors** **3.5**  
*Nancy Day, Faculty Ombudsperson, University of Missouri, Kansas City*  
*Doranne Hudson, Associate Teaching Professor & Executive in Residence, University of Missouri, Kansas City*

**1:30pm-5:00pm** Pre-Conference **Half Day PM Course #2: The Culture Bump® Approach: Embracing our Prejudices... An Ombudsman's Guide to Universal Connections** **3.5**  
*Carol Archer, Instructor, LCC/University of Houston*  
*Jim Wohl, Ombudsman, Auburn University*  
*Stacey Nickson, Associate Director, Biggio Center, Auburn University*

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

**6:00pm-7:00pm** Welcome & Opening Reception  
Cash Bar. Open to all Professional Development, Pre-Conference, and General Conference Attendees.

**7:00pm** Evening On Your Own

\*Pre-Registration and Separate Registration Fee associated with all courses

\*For full 2 1/2 day course

## AGENDA AT A GLANCE

### GENERAL CONFERENCE, DAY ONE

#### MONDAY, APRIL 16, 2012

|                        |                                                                                                                             | PDH's |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------|-------|
| <b>6:00am-7:00am</b>   | <b>Yoga/Run/Walk Around Houston</b>                                                                                         |       |
| <b>7:30am-8:30am</b>   | <b>Breakfast for All Conference Attendees</b>                                                                               |       |
| <b>7:30am-8:30am</b>   | <b>Career Connections Program</b>                                                                                           |       |
| <b>8:45am - 9:00am</b> | <b>Conference Welcome &amp; Opening Remarks</b>                                                                             |       |
| <b>9:00am-10:00am</b>  | <b>Keynote Address</b><br><i>David Yamada, Professor of Law, Suffolk University Law School</i>                              |       |
| <b>10:00am-10:30am</b> | <b>Networking Break</b>                                                                                                     |       |
| <b>10:30am-11:45am</b> | <b>IOA Pre-Annual Business Meeting Discussion</b><br>Hosted by the IOA Board of Directors.                                  |       |
| <b>12:00pm-1:00pm</b>  | <b>Luncheon for All Conference Attendees</b>                                                                                |       |
| <b>1:15pm-2:45pm</b>   | <b>Concurrent Sessions</b>                                                                                                  |       |
|                        | 1. Resolving 21st Century Disputes with a Pre-Historic Mind                                                                 | 1.5   |
|                        | 2. Understanding Your Cultural Patterns Across Conflict Styles                                                              | 1.5   |
|                        | 3. Confidentiality as a Standard of Practice, Challenged and Challenging                                                    | 1.5   |
|                        | 4. Supervisors are People, Too: Ombuds Work with Managers                                                                   | 1.5   |
|                        | 5. The Ombuds as Trainer                                                                                                    | 1.5   |
|                        | 6. Systems Thinking in the Ombuds Office: Theory, Tools, and Practice                                                       | 1.5   |
| <b>2:45pm-3:15pm</b>   | <b>Networking Break</b>                                                                                                     |       |
| <b>3:15pm-4:45pm</b>   | <b>Concurrent Sessions</b>                                                                                                  |       |
|                        | 7. Ombudsman Pecha Kucha                                                                                                    | 1.5   |
|                        | 8. Rethinking the Ombuds Role When Mediating                                                                                | 1.5   |
|                        | 9. Exposing the Best Kept Secret - Ombudsing Works                                                                          | 1.5   |
|                        | 10. Case Review with an Experienced Ombuds                                                                                  | 1.5   |
|                        | 11. The Neuro-Ombuds: Apollo 13, the Ombudsman and Helping Visitors Create Breakthroughs                                    | 1.5   |
|                        | 12. Managing the "Proximity Effect" - Impact on Ombuds' Visitor Demographics and Office Utilization in Global Organizations | 1.5   |
| <b>5:00-6:00pm</b>     | <b>Cocktails with the IOA Board</b><br>Cash Bar. Open to All Conference Attendees.                                          |       |
| <b>6:00pm</b>          | <b>Conclusion of General Conference Day One; Evening On Your Own</b>                                                        |       |

## AGENDA AT A GLANCE

### GENERAL CONFERENCE, DAY TWO

#### TUESDAY, APRIL 17, 2012

|                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | PDH's                                                                            |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <b>6:00am-7:00am</b>   | <b>Yoga/Run/Walk Around Houston</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                  |
| <b>7:30am-8:30am</b>   | <b>Breakfast for All Conference Attendees</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                  |
| <b>8:45am-9:45am</b>   | <b>Keynote Address</b><br><i>Michael Dues, Lecturer, University of Arizona, Management Consultant</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                  |
| <b>9:45am-10:15am</b>  | <b>Networking Break</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                  |
| <b>10:30am-11:45am</b> | <b>IOA Annual Business Meeting</b><br>Limited to IOA Members Only.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>1.25</b>                                                                      |
|                        | <b>Concurrent Plenary Sessions (for Non-Members):</b><br>A. <i>The Ombuds Behind the Scenes - Jayla Henry, Halliburton</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                  |
| <b>12:00pm-1:00pm</b>  | <b>Lunch for All Conference Attendees</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                  |
| <b>12:00pm-1:00pm</b>  | <b>Lunch for Ombudsman New to the Profession &amp; First Time Attendees*</b><br><i>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 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. RSVP required to reserve space - see conference registration form. *Pre-Registration Required</i> |                                                                                  |
| <b>1:15pm-2:45pm</b>   | <b>Concurrent Sessions</b><br>13. Analyze This! Adapting the Law School IRAC Framework to Ombuds Case Analysis<br>14. Corporate Organizational Ombudsman Round Table<br>15. A Classical Ombudsman's Survival in Tough Economic Times<br>16. The Process of Bullying<br>17. Increasing Your Effectiveness with Visitors: Establishing Rapport and Engaging in Case Reflection<br>18. Latest Developments in the Certified Organizational Ombudsman Practitioner® (CO-OP®) Program                                                                                                                                                                                                                                    | <b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b> |
| <b>2:45pm-3:15pm</b>   | <b>Networking Break</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                  |
| <b>3:30pm-5:00pm</b>   | <b>Sector Forum Discussions</b><br>A. Academic<br>B. ADR<br>C. Corporate<br>D. Government<br>E. International<br>F. Other                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b><br><b>1.5</b> |
| <b>5:00pm</b>          | <b>Conclusion of General Conference Day Two; Evening On Your Own</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                  |

## AGENDA AT A GLANCE

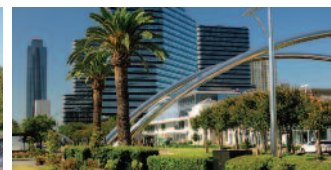
### GENERAL CONFERENCE, DAY THREE

#### WEDNESDAY, APRIL 18, 2012

|                        |                                                                                                                                                                                                       | PDH's |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| <b>6:00am-7:00am</b>   | <b>Yoga/Run/Walk Around Houston</b>                                                                                                                                                                   |       |
| <b>7:30am-8:30am</b>   | <b>Breakfast for All Conference Attendees</b>                                                                                                                                                         |       |
| <b>9:00am-10:00am</b>  | <b>Keynote Address</b><br><i>Sherry D. Williams, Esq., Sr. VP, Chief Ethics and Compliance Officer, Halliburton</i>                                                                                   |       |
| <b>10:00am-10:30am</b> | <b>Networking Break</b>                                                                                                                                                                               |       |
| <b>10:30am-11:45am</b> | <b>General Session:</b><br><i>Thomas Zgambo, Ombudsman, The World Bank Group</i>                                                                                                                      | 1.25  |
| <b>12:00pm-1:00pm</b>  | <b>Volunteer Recognition Luncheon</b><br>All Conference Attendees Welcome.                                                                                                                            |       |
| <b>1:15pm-2:45pm</b>   | <b>Concurrent Sessions</b>                                                                                                                                                                            |       |
|                        | 19. The Quest for Fairness – Do the Complainant's Unique Circumstances Matter?                                                                                                                        | 1.5   |
|                        | 20. Straight Thinking: Common Logical Fallacies an Ombuds Should Know                                                                                                                                 | 1.5   |
|                        | 21. Inclusion of the Physically Challenged in the Workforce                                                                                                                                           | 1.5   |
|                        | 22. Employment Law for Ombuds - What do we really need to know?                                                                                                                                       | 1.5   |
|                        | 23. Mapping the European Higher Education Area (and Beyond): International Ombudsmen as GPS Guideposts for Internationally Mobile Students Within the International Labyrinth of Academic Cooperation | 1.5   |
|                        | 24. The Culture Bump® Approach: Embracing our Prejudices... An Ombudsman's Guide to Universal Connections                                                                                             | 1.5   |
| <b>2:45pm-3:15pm</b>   | <b>Networking Break</b>                                                                                                                                                                               |       |
| <b>3:15pm-4:45pm</b>   | <b>Concurrent Sessions</b>                                                                                                                                                                            |       |
|                        | 25. What Would You Do?                                                                                                                                                                                | 1.5   |
|                        | 26. What To Do With All That Data?!                                                                                                                                                                   | 1.5   |
|                        | 27. You Can Remain Plugged In – Using Electronic Communication and Remaining Confidential – The Next Generation                                                                                       | 1.5   |
|                        | 28. The Sustainable Ombuds: Taking Charge of Taking Care                                                                                                                                              | 1.5   |
|                        | 29. Corporate Organizational Ombudsman Round Table (repeat)                                                                                                                                           | 1.5   |
|                        | 30. Ombudsing in a VUCA World                                                                                                                                                                         | 1.5   |
| <b>4:45pm</b>          | <b>Conclusion of IOA 7th Annual Conference.</b>                                                                                                                                                       |       |

**See You Next Year...**  
**SAVE THE DATE!**

**IOA 8th Annual Conference**  
**April 19-24, 2013**  
**Hyatt Regency Hotel, Miami, FL, USA**



## 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-OPSM 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. The certification period begins with the date that certification (or recertification) is granted. The sixty hours do not need to be evenly distributed among the four years. PDHs are credited for educational programs that are approved by the Board of Certification's Eligibility Committee/Recertification Committee. These courses must be related to the organizational ombudsman role and must fall under one or more of the seven major content domains (link below) that comprise the organizational ombudsman Job Analysis, which are also the subject matter bases for the certification examination.

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 below.

<http://www.ombudsassociation.org/boc/obtain/recert/>

## 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.

## KEYNOTE SPEAKER BIOGRAPHIES



**Michael Dues, Lecturer, University of Arizona, Management Consultant**

An experienced administrator, consultant, and college professor, Michael Dues has spent 35 years helping organizations with the human side of management.

A former head of The University of Arizona Department of Communication, past President of the Arizona Communication Association, and former Chair of the University of Arizona Ombuds Committee, he continues to serve as a lecturer, teaching conflict management.

Focusing on organizational conflict management, he developed the Conflict Climate Inventory to help organizations assess the conflict management behavior of employees. His lecture course, The Art of Conflict Management, reaches an international audience as one of The Teaching Company's "Great Courses".



**Sherry D. Williams, Esq., Sr. VP, Chief Ethics and Compliance Officer, Halliburton**

Sherry D. Williams is Senior Vice President, Chief Ethics and Compliance officer for Halliburton, leading the Company's global compliance function. Prior to this appointment, Ms. Williams was Vice President and Corporate Secretary, with responsibility for the Public Company Law Group. In this capacity, she also serves on the Legal Management Team, the governing body that determines the function and development of Halliburton's Global Law Department.

Before these roles, Ms. Williams was Senior Counsel for Halliburton, where she managed complex commercial litigation, both domestic and international, and was responsible for setting litigation strategy, managing outside law firms, managing litigation budgets, and serving as a liaison between the Law Department and business-unit senior management.

Ms. Williams was formerly an attorney with the AmLaw 100 law firm of K&L Gates LLP, where she practiced in the areas of complex commercial litigation, employment, and class-action defense.

Ms. Williams earned her bachelor's degree from the University of Oklahoma in 1992 and is a 1995 graduate of the University of Miami School of Law. She is a member of the state bars of Florida, New Jersey and New York; The Greater Houston Business Ethics Round Table and the Ethics and Compliance Officer Association; the Association of Corporate Counsel; and the Society of Corporate Secretaries and Governance Professionals. She is a director of the Women's Business Enterprise National Council and Houston's Alley Theatre. She has formerly served on the board of directors of Women of Tomorrow, a nonprofit organization that mentors at-risk young women and the University of Miami Law Alumni Association. Ms. Williams is a frequent speaker and panelist on many topics, including client management and client development for outside counsel, legal training best practices, career management, ethics and leadership, and diversity.



**David Yamada, Professor of Law, Suffolk University Law School**

David Yamada is a Professor of Law and Director of the New Workplace Institute at Suffolk University Law School in Boston. He is an internationally recognized authority in the legal implications of workplace bullying, having authored leading law review articles on the topic. In addition, he is drafter of the Healthy Workplace Bill, model anti-bullying legislation being considered by state legislatures across the nation. His blog, Minding the Workplace (<http://newworkplace.wordpress.com>), is a popular source of commentary on work, workers, and workplaces. David received his J.D. from New York University and practiced as a public interest lawyer before entering academia.

## PROFESSIONAL DEVELOPMENT INFORMATION

### Professional Development Course Fees

|                                                              | EARLY REGISTRATION<br>On or before March 23, 2012 | REGULAR REGISTRATION<br>After March 23, 2012 |
|--------------------------------------------------------------|---------------------------------------------------|----------------------------------------------|
| <b>Organizational Ombudsman 101: Foundations of Practice</b> | \$1,095.00 USD                                    | \$1,195.00 USD                               |
| <b>Organizational Ombudsman 101 PLUS</b>                     |                                                   |                                              |
| IOA Members                                                  | \$ 350.00 USD                                     | \$ 450.00 USD                                |
| Non-IOA Members                                              | \$ 450.00 USD                                     | \$ 550.00 USD                                |

### Special Package Pricing Offer!

Register for *Organizational Ombudsman 101: Foundations of Practice* and the *General Conference* and receive a **\$250 discount!**

| IOA Members                                           | EARLY REGISTRATION<br>On or before March 23, 2012 | REGULAR REGISTRATION<br>After March 23, 2012 |
|-------------------------------------------------------|---------------------------------------------------|----------------------------------------------|
| Organizational Ombudsman 101: Foundations of Practice | \$1,095.00 USD                                    | \$1,195.00 USD                               |
| General Conference                                    | \$ 495.00 USD                                     | \$ 545.00 USD                                |
| <b>Special Package Discount</b>                       | <b>- \$ 250.00 USD</b>                            | <b>- \$ 250.00 USD</b>                       |
| <b>Total:</b>                                         | <b>\$1,340.00 USD</b>                             | <b>\$1,490.00 USD</b>                        |

| Non-IOA Members                                       | EARLY REGISTRATION<br>On or before March 23, 2012 | REGULAR REGISTRATION<br>After March 23, 2012 |
|-------------------------------------------------------|---------------------------------------------------|----------------------------------------------|
| Organizational Ombudsman 101: Foundations of Practice | \$1,095.00 USD                                    | \$1,195.00 USD                               |
| General Conference                                    | \$ 545.00 USD                                     | \$ 595.00 USD                                |
| <b>Special Package Discount</b>                       | <b>- \$ 250.00 USD</b>                            | <b>- \$ 250.00 USD</b>                       |
| <b>Total:</b>                                         | <b>\$1,390.00 USD</b>                             | <b>\$1,540.00 USD</b>                        |

### 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](mailto: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

**SUBJECT TO CHANGE OR CANCELLATION:** All IOA Courses are subject to change and/or cancellation. We ask that you do not make your hotel reservations or travel plans until you have received a confirmation from the office that you are registered for the course. If you do not receive a confirmation either in the mail or via email please contact the administrative office to check the status of your registration. Course agendas are constantly being updated by the instructors to ensure that the most current materials are presented. If pre-registration attendance is below half of the maximum attendance, instructors may cancel the course.

### Dress

Dress for the entire conference is business casual.

## PRE-CONFERENCE INFORMATION

**REGISTER EARLY!** Early registration for Pre-Conference courses is recommended as most courses will be limited.

### Pre-Conference Fees

**\$290** for one (1) full day course OR two (2) half-day courses, including one (1) AM and one (1) PM course

**\$190** for one (1) half-day course (AM or PM course)

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

*Included in a full day or two half day (one AM and one PM) course registration:*

- Continental Breakfast
- Morning and Afternoon Refreshment Breaks
- Lunch
- Course Materials

*Included in a AM half day course registration:*

- Continental Breakfast
- Morning Refreshment Break
- Course Materials

*Included in a PM half day course registration:*

- Afternoon Refreshment Break
- Course Materials

### 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

|                 | EARLY REGISTRATION<br>On or before March 23, 2012 | REGULAR REGISTRATION<br>After March 23, 2012 |
|-----------------|---------------------------------------------------|----------------------------------------------|
| IOA Members     | \$495.00 USD                                      | \$545.00 USD                                 |
| Non-IOA Members | \$545.00 USD                                      | \$595.00 USD                                 |

#### Conference Fees Include:

All conference meals and refreshment breaks from Monday, April 16, 2012 through Wednesday, April 18, 2012; Access to the Sunday evening Welcome Reception; Access to all Keynote, Plenary/General, and Concurrent Sessions offered throughout the conference.

### General Conference Fees, One-Day Fee

Fees below are for both IOA members and non-IOA members

|                   | EARLY REGISTRATION<br>On or before March 23, 2012 | REGULAR REGISTRATION<br>After March 23, 2012 |
|-------------------|---------------------------------------------------|----------------------------------------------|
| One-Day Monday    | \$295.00 USD                                      | \$345.00 USD                                 |
| One-Day Tuesday   | \$295.00 USD                                      | \$345.00 USD                                 |
| One-Day Wednesday | \$295.00 USD                                      | \$345.00 USD                                 |

#### Conference Fees Include:

Conference Breakfast, morning and afternoon coffee breaks, lunch, and all Keynote, Plenary/General and Concurrent Sessions on the day of choice.

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

### Group Registration

IOA is offering group registrations for the Annual Conference. Group registrations require five (5) or more attendees from the same organization/company/affiliation to register for the Annual Conference (excluding Professional Development and Pre-Conference Courses). If five (5) or more attendees from the same organization/company/affiliation register, registrants who are IOA members will receive a \$25 discount off of the member pricing, and registrants who are non-IOA members will receive the member rate.

In order to take advantage of this opportunity, you must fill out the **2012 Pre-Conference and General Conference Registration Form** and select the check box under "Group Registration." Online group registration is not available. Please send in all five (5) registration forms together to ensure correct processing. Online group registration is not available.

## PROFESSIONAL DEVELOPMENT COURSE ABSTRACTS

### **Organizational Ombudsman 101: Foundations of Practice**

**15 PDH's**

This course covers the fundamentals of the organizational Ombudsman role. It provides basic information and training for the organizational Ombudsman by emphasizing the principles of confidentiality, neutrality, independence, and informality.

The 2-1/2 day course focuses on how the Ombudsman works with the visitor to the office as well as how they act as a change agent within their organization. The course will allow you to practice key Ombudsman skills of listening, asking questions, clarifying, generating options, and moving to actions throughout the Ombudsman Process. In addition, an experienced and highly committed faculty of Ombudsmen will share best practices around setting up an office and evaluating and communicating the effectiveness of the office.

#### **WHO SHOULD ATTEND?**

The course will benefit the recently-appointed Ombudsman, individuals interested in becoming an Ombudsman, or anyone desiring to establish an Ombudsman function in industry, government, higher education, and public or private social services agencies.

#### **AS A RESULT OF THIS PROGRAM YOU WILL LEARN:**

- How the role, scope, and duties of today's Ombudsman began and evolved
- The three basic principles of the organizational Ombudsman role: neutrality, independence, and confidentiality
- Why confidentiality is essential to the practice, how to maintain confidentiality
- How to listen as a neutral, including effective techniques for interviewing and inquiring, reflective listening, reframing, identifying issues, and providing options
- How to manage and work with conflict by employing a battery of skills including listening, coaching, and negotiation techniques
- How to decide which intervention would be most effective and how to provide upward feedback to management
- How to set up and operate an Ombudsman office, including the fundamentals of how to log concerns, report to management, and design reports to track issues
- How to align the Ombudsman function with the mission, values, and culture of the organization
- How to promote the Ombudsman role and function, including ways to gain and keep management support

**PREREQUISITES:** None

**MAXIMUM ATTENDANCE:** 50 participants

### **Organizational Ombudsman 101 PLUS**

**4 PDH's**

This 1/2 day course, which compliments the Organizational Ombudsman 101: Foundations of Practice course will concentrate on how to communicate the value and benefits of an Ombudsman function internally to management who are considering starting an Ombudsman Office, and from the outside if you are an entrepreneur.

#### **WHO SHOULD ATTEND?**

- Managers, executives, organization thought leaders who are thinking about creating the Ombudsman function
- Independent Ombudsman who want to establish Ombudsman contract services
- Aspiring Ombudsmen

#### **WHAT WILL BE COVERED IN Organizational Ombudsman 101 PLUS?**

- How to identify the benefits and value of an Ombudsman function
- How to identify the benefits and value of an Ombudsman function
- How to present the benefits and value of an Ombudsman function to an organization
- How to design the Ombudsman function to fit your organization
- How to market the internal independent Ombudsman
- How to identify a good Ombudsman
- How to identify an organization "ripe" for the creation of the Ombudsman function

**PREREQUISITES:** Completion of Organizational Ombudsman 101: Foundations of Practice

**MAXIMUM ATTENDANCE:** 50 participants

## PRE-CONFERENCE COURSE ABSTRACTS

### Pre-Conference Full Day Course #1

Maximum Attendance: 25 participants

#### **Conflict Coaching for the Organizational Ombuds**

*Melissa Brodrick, Ombudsperson, Harvard Medical School/Dental School/School of Public Health*  
*Jean Griffin, Associate Ombuds, University of Cincinnati*

This highly interactive workshop will explore the theory and practice of conflict coaching for the organizational ombuds. As one of the most utilized services of many ombuds offices, what framework, skills and attitude does an ombuds bring to this activity that best support visitors as they seek to manage their conflicts? Participants will consider standard elements of an effective conflict coaching session and will also consider 1) the self-awareness and self-care needed to remain effective for each coaching session, 2) the interpersonal skills needed to build trust, facilitate communication, identify issues and goals and explore options and 3) the ways in which conflict coaching can help support broader change in the community.

### Pre-Conference Full Day Course #2

Maximum Attendance: 25 participants

#### **Using Mediation and other Informal Interventions to Deal with Workplace Bullying and Harassment Issues**

*Barbara McCulloch, Principal Mediator and Prevention of Harassment Officer, The University of Auckland, New Zealand*

This day long workshop will provide information to assist Organizational Ombuds to work with visitors who have concerns related to workplace behaviors often referred to as bullying. It will introduce a process so that those people who don't want to use formal processes can have the option of attending mediation to deal with their concerns.

We will discuss the process developed and used by the presenter and then, using case studies will practise the interventions suggested in small groups.

### Pre-Conference Half Day AM Course #1

Maximum Attendance: 25 participants

#### **Improving the Organization's Conflict Climate**

*Michael Dues, Professor, University of Arizona*  
*Sue Theiss, Ombudsman, Oregon State University*

Organizational Ombudsmen coach, facilitate, and teach employees to deal constructively with everyday conflicts. Promoting better conflict management behavior can be more effective when organizations articulate clear expectations for how employees should go about addressing and resolving conflicts, and hold employees accountable for their conflict management behavior. This workshop describes processes to:

- Assess how well everyday conflicts are handled
- Articulate and implementing an accountable policy for constructive conflict management
- Measure progress and continue to improve

We will discuss the roles the ombudsman can play in this more global approach to improving the organization's conflict management.

### Pre-Conference Half Day AM Course #2

Maximum Attendance: 25 participants

#### **Mind-Hack: Ombudsing with the Brain in Mind**

*Mauricio Ramos, Corporate Ombudsman, Sandia National Labs*

Ever wonder where conflict really begins? Why is it that when the storms of change or conflict hit some people can deal with the situation better than others? Why is it that some people start making progress in changing their behavior but then it never becomes a habit? The answer to all these questions has to do with our brain. Join this interactive Pre-Conference Session as we focus on how we, as Ombuds, can help individuals be more responsive to conflict and change by applying research from neuroscience and behavioral psychology.

We will examine three primary questions:

1. What does the brain do when it reacts to conflict?
2. Why is it that people do not like change?
3. How can we apply findings in neuroscience to encourage "mind-hacks", which will help people develop and grow, so that they are better able to deal with conflict and change when those storms hit?

By the end of the session you will have a better understanding of how the brain works, how an Ombuds can tailor specific strategies to better influence the individuals being worked with, thus adding more value to their work lives. This Pre-Conference Session is open to novices and experienced Ombuds alike.

*continued on next page*

PRE-CONFERENCE COURSE ABSTRACTS *continued*

**Pre-Conference Half Day PM Course #1**

Maximum Attendance: 25 participants

**Managing Up: Helping Visitors Improve Relationships with their Supervisors**

*Nancy Day, Faculty Ombudsperson, University of Missouri, Kansas City*

*Doranne Hudson, Associate Teaching Professor & Executive in Residence, University of Missouri, Kansas City*

Visitors to ombuds offices often report conflicts or misunderstandings with their supervisors. Indeed, establishing and maintaining strong, mutually beneficial relationships with supervisors, who may or not be well-versed in management skills, can be challenging and frustrating. This session provides ombuds with a framework to help visitors diagnose, evaluate, and generate solutions to problems with their supervisors by teaching them to “manage up.”

Using a framework of ethical politics, we will discuss how to show visitors that their needs and those of their supervisor can coalesce. We'll discuss creating “win-win” situations with the supervisor, present a “boss analysis” that can help visitors navigate the supervisor/ subordinate relationship, and explore effective communication strategies.

**Pre-Conference Half Day PM Course #2**

Maximum Attendance: 25 participants

**The Culture Bump® Approach: Embracing our Prejudices... An Ombudsman's Guide to Universal Connections**

*Carol Archer, Instructor, LCC/University of Houston*

*Jim Wohl, Ombudsman, Auburn University*

*Stacey Nickson, Associate Director, Biggio Center, Auburn University*

The workshop will immerse ombudsmen in culture bump theory and methodology so as to learn how to guide clients in developing specific cross cultural communication skills. The skills include the ability to manage emotional responses to cultural and other differences and life changes and to teach clients to do the same. Another skill is the ability to recognize and adapt to specific cultural behaviors such as communication styles, spatial and time orientations. Another skill is the ability to self-reflect on one's own expectations in behaviors and values in such a way as to achieve detachment from them.

GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

**1. Resolving 21st Century Disputes with a Pre-Historic Mind**

*Geoff Drucker, Manager, Dispute Resolution Services, American Health Lawyers Association*

A newly released book (December, 2011) attributes many of the "irrational" and dysfunctional behaviors that generate and prolong disputes to the fact that our minds are seriously out of date. They evolved to resolve disputes among inhabitants of simple, stable, and homogeneous communities. The complex, diverse, and dynamic society we live in presents challenges for which our unconscious and conscious minds are ill prepared. We can overcome these challenges by learning how to recognize when our minds are steering us in the wrong direction and how to get ourselves back on track-and help others do the same.

**2. Understanding Your Cultural Patterns Across Conflict Styles**

*Bernard Anderson, Associate University Ombuds, Kennesaw State University*

*Deidra Dennie, Director of EEO, Kennesaw State University*

As cultural diversity increases in our country, so does the need to resolve conflict around values, experiences, beliefs, and perceptions. The intercultural conflict style inventory describes your preferred approach or style for resolving conflict. Your conflict style may or may not be similar to the normative approach characteristic in your primary cultural community. The ICS inventory reflects your own learned patterns for dealing with disagreements and expressing emotions under conflict conditions.

**3. Confidentiality as a Standard of Practice, Challenged and Challenging**

*Ilene Butensky, VP Office of the Ombuds, Eaton Corporation*

*Nicholas Diehl, Deputy Ombudsman, American Red Cross*

*Charles Howard, Partner, Shipman & Goodwin LLP*

*Craig Mousin, University Ombudsperson, DePaul University*

*The JIOA Editorial Board*

Mandatory reporting has been much in the news with the OCR "Dear Colleague Letter", responses to many stories of sexual misbehavior in many organizations, the Adverse Information Reporting Requirement for some government employees and so on. This workshop will examine many aspects of our Standard of Practice about confidentiality as illuminated in JIOA 4(2) fall 2011.

**4. Supervisors are People, Too: Ombuds Work with Managers**

*Kirsten Schwehm, Ombudsperson, Louisiana State University* *Jim Wohl, Ombudsperson, Auburn University*

Managers and supervisors are frequent constituents of the Ombuds Office, and problems with "Evaluative Relationships" appear to be the most common IOA Uniform Reporting Category cited across all Ombuds sectors. Being in charge does not mean you have absolute control of conflict – should Ombuds always try to "level the playing field?" What strategies are available to the supervisor and manager in their leadership role and how do we as Ombuds engage to meet their goals? This presentation will utilize slides and lecture, interactive exercises, and group discussion for the purpose of elucidating approaches for manager coaching, attending to the power realities of hierarchical work environments, and monitoring our own biases regarding the party of greater power.

**5. The Ombuds as Trainer**

*Melissa Brodrick, Ombudsperson, Harvard Medical School/Dental School/School of Public Health*

*David Michael, Deputy Ombudsman, National Institutes of Health*

This workshop is for Ombuds seeking to initiate or expand their training offerings, whether an integral and substantial part of the office or an occasional service. We'll consider the benefits of trainings to increase our visibility, enhance our credibility, increase our understanding of specific concerns and workplace dynamics, and provide skills for our constituents. We'll share training experiences, strategies, lessons learned, and resources as we discuss such training topics as dealing with difficult people, sexual harassment, negotiation skills and managing conflict in the workplace.

GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

**6. Systems Thinking in the Ombuds Office: Theory, Tools, and Practice**

*Howard Gadlin, Ombudsman, National Institutes of Health*

*Wendell Jones, Ombudsman (Emeritus), Sandia National Laboratories*

*Jan Morse, Ombudsman, University of Minnesota*

Looking to add some fun new things to your toolbox and value to your organization? As ombudsmen we most frequently work with individuals to help them achieve positive outcomes during times of conflict. But ombudsmen also have the opportunity to provide benefit to our institutions by identifying chronic problem areas and helping to bring about systemic improvements in our organizations. Along with an introduction to complexity theory, this interactive session will provide you with a few basic tools to add a dimension of systems thinking to your practice. These tools will enable you to frame individual issues in an organizational context and opportunities to work in new ways with some common “sticky issues.”

**7. Ombudsman Pecha Kucha**

*Nicholas Diehl, Deputy Ombudsman, American Red Cross*

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.

**8. Rethinking the Ombuds Role When Mediating**

*Howard Gadlin, Ombudsman, National Institutes of Health*

*David Michael, Deputy Ombudsman, National Institutes of Health*

Ombuds practice allows us to talk with individuals to understand concerns, challenge assumptions, and explore possibilities to achieve constructive outcomes. This may lead to a facilitated conversation in which the parties take on greater responsibility for these functions. Once individuals agree to mediate, does the ombuds role need to transition to allow the parties to more directly engage in their own facilitated conversation? Is it possible that we can otherwise limit the potential of a facilitated dialogue, jeopardize our impartiality, and undermine party self-determination? These issues and their implications on ombuds practice will be explored through case study, role play, and discussion.

**9. Exposing the Best Kept Secret - Ombudsing Works**

*Ilene Butensky, Eaton Corporation*

STAY TUNED! Course Abstract to be posted shortly.

**10. Case Review with an Experienced Ombuds**

*Tom Sebok, Director, Ombuds Office, University of Colorado, Boulder*

*Mary Chavez Rudolph, Associate Director, Ombuds Office, University of Colorado Denver*

This workshop will provide an opportunity for participants to critically examine cases they have found challenging. Please bring a current or past case(s) you would like to discuss. Participants will talk one-on-one or in small groups with experienced colleagues about their questions, why the case was challenging for them, important personal and/or organizational case dynamics, and the application of relevant skills and Standards of Practice. Presenters will briefly model a case review process but most of the session will involve discussion between participants and experienced colleagues.

## GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

### 11. The Neuro-Ombuds: Apollo 13, the Ombudsman and Helping Visitors Create Breakthroughs

*Mauricio Ramos, Corporate Ombudsman, Sandia National Labs*

Ever wonder how insights truly happen? The ability to create a space where thinking outside the box can flourish is not only achievable but also necessary in conflict resolution. Join us for this session that will focus on lessons from neuroscience and how as Ombuds we can help individuals be more creative and create the space needed for breakthroughs to occur.

### 12. Managing the “Proximity Effect” – Impact on Ombuds’ Visitor Demographics and Office Utilization in Global Organizations

*Patricia Lynch, Ombudsman, United Technologies Corporation*

*Odile Rheume, Respectful Workplace Advisor Program Administrator, The World Bank Group*

*Thomas Zgambo, Ombudsman, The World Bank Group*

In this interactive session the facilitators will present the World Bank Group’s Respectful Workplace Advisors (RWA) program and United Technologies Corporation Ombudsman/DIALOG electronic program as examples of programs that enable the Ombuds office to broaden its reach without excessive travel. The facilitators will engage the participants in a discussion to generate ideas for programs that can increase the utilization of Ombuds services by employees located in remote facilities w/o an Ombuds office on site. The goal is to have participants walk away with ideas they can implement in their organizations to counteract the demographic skewing impact of the “Proximity Effect.”

### 13. Analyze This! Adapting the Law School IRAC Framework to Ombuds Case Analysis

*Donna Douglass Williams, Ombudsperson, World Health Organization*

*Indumati Sen, Ombudsman, International Baccalaureate Organization*

The historical narrative relayed to an Ombudsperson by a visitor is often long, complicated, spanning several months/years, and may involve several issues. As such, it may be beneficial for practicing Ombuds to develop an approach that helps to organize the concerns raised, analyze what may be applicable rules, policies, etc., and provide feedback to the visitor to assist in generating resolution options. Borrowing from IRAC, a process frequently used by law students to brief cases and analyze law school exam questions, this session introduces practicing Ombuds to an adapted processes that fuses IRAC with an interest-based process as a way to frame feedback given to visitors as well as shape dialogue for generating options and planning next steps. (This session may be of interest to newly practicing ombudspersons as well as more experienced practitioners who wish to share and compare their own systems of analysis and planning.)

### 14. Corporate Organizational Ombudsman Round Table

*Amos Morale, Ombudsman, Marathon Oil Company*

*Gary Yamashita, Manager, Global Office of Ombuds, Chevron Corporation*

Topics will include social media and its impact on your practice; what you can do to have effective practice; and marketing the practice within your organization. Additional topics may be chosen by participants, time permitting.

### 15. A Classical Ombudsman's Survival in Tough Economic Times

*Stephanie Maxberry, Ombudsman, Los Angeles County Office of Ombudsman*

The Los Angeles County Office of Ombudsman has been in existence for seventeen years. Learn how the office has survived through consolidations and budget and reductions.

### 16. The Process of Bullying

*Sue Theiss, University Ombudsman, Oregon State University*

Bullying is a process which moves through identifiable stages. To effectively assist with cases of bullying, Ombuds need to help managers and bystanders identify both the types of bullying occurring and the stage of development when considering options for action or intervention. This session will help participants understand the process of bullying, its far reaching affect and multiple dimensions, and review options for effective assistance and support.

GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

**17. Increasing Your Effectiveness with Visitors: Establishing Rapport and Engaging in Case Reflection**

*Mary Chavez Rudolph, Ombudsman, University of Colorado Denver*  
*Howard Gadlin, NIH Ombudsman, National Institutes of Health*  
*Patricia Ponce, Associate Ombuds, California Polytechnic State University*  
*Tom Sebok, Director, Ombuds Office, University of Colorado Boulder*

Have you ever had an interaction with a visitor go badly or it was wonderful and you wondered what makes the difference? Is case reflection necessary and helpful? Perhaps you are the only Ombuds in your organization and don't have an opportunity to discuss the case with anyone or don't know exactly how to debrief or analyze the interaction. We will present information about the importance of "relationship building" and tools to assist in case reflection.

**18. Latest Developments in the Certified Organizational Ombudsman Practitioner® (CO-OP®) Program**

*Constance Bernard, Ombudsman, The World Bank Group*  
*Wendy Friede, Consulting Ombuds, Friede Consulting Services*  
*Jennifer Moumneh, Associate Ombudsman, University of California, Irvine*  
*Albin Swenson, Ombudsman, Chevron Corporation*  
*Marsha Wagner, University Ombuds Officer, Columbia University*

The IOA certification program's Directors (CO-OP® Board) are eager to meet with conference attendees to provide certification updates and address questions. Five Board members will be present to give information about the number of people who have become certified, updates on the process for recertification, future plans for the program, as well as responses to any questions you may have.

**19. The Quest for Fairness – Do the Complainant's Unique Circumstances Matter?**

*Douglas Melville, Ombudsman and Chief Executive Officer, Ombudsman for Banking Services and Investments (Canada)*

An Ombudsman is expected to employ fairness both in terms of process and substance when attempting to resolve a complaint. Does the concept of what is fair change depending upon the unique circumstances of the complainant? The experience of Canada's banking and investment sector Ombudsman will be shared along with a number of case studies that illustrate the challenge of approaching all complainants through a uniform fairness lens.

**20. Straight Thinking: Common Logical Fallacies an Ombuds Should Know**

*Brian Bloch, Ombudsman, ISKCONResolve*

We often succumb to unclear thinking in our day-to-day lives. How much more so do our visitors when faced with a situation causing them angst. Fallacies often seem reasonable, but when looked at carefully, they muddy our thinking and often lead to choosing less-than-ideal options.

In this quick paced presentation we will cover the 10 most common fallacies I have found in my Ombuds work and how to remedy them-both for our own benefit and for the benefit of our visitors.

GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

**21. Inclusion of the Physically Challenged in the Workforce**

*Chantal Perreault, President, Ombudsman Solution*

If it is true that our collective wealth depends on our capacity to accept diversity in terms of race, talent, culture, language, physical challenges and age then it must be equally true that, as persons or businesses, we have to take whatever steps are required to succeed in the inclusion of the physically challenged in the workforce. Our collective success depends on our recognition of that fact and on our ability to overcome the major impediments we face in our attempts to do "what is right": fear, discomfort, ignorance, and prejudice.

This workshop aims to give you the tools to improve your personal relationships with the handicapped as well as your personal capacity to help your business develop a vision that will allow it to prosper in an environment that is sensitive to such a challenge. To that end, it will allow you to:

- Control your emotions in relation to the handicapped
- Learn to better interact with the handicapped
- Prepare an action plan that will favour mainstreaming of the handicapped

**22. Employment Law for Ombuds – What do we really need to know?**

*Judy Bruner, UC San Diego*

STAY TUNED! Course Abstract to be posted shortly.

**23. Mapping the European Higher Education Area (and Beyond): International Ombudsmen as GPS Guideposts for Internationally Mobile Students Within the International Labyrinth of Academic Cooperation**

*Josef Leidenfrost, Austrian Student Ombudsman*

Students and faculty are on the move! Increasing international academic mobility of students and faculty, dual degree programs and offshore universities, etc. are resulting in an increasing number of cross-border issues and changing the daily work of university administrators and academics. Varying national rules, regulations and procedures, different national cultures and legal regimes, sometimes make transnational cooperation difficult. Higher education ombudsmen networks such as ENOHE (Europe), ACCUO (Canada), and REDDU (Mexico), in cooperation with internationalists in higher education, serve as guides and guideposts through the labyrinth of international academic cooperation. This session will use case studies to explore common concerns such as pre-departure paperwork and post-arrival bureaucracy for mobile students and teachers and provide complaint and relationship management tools for dealing with them.

**24. The Culture Bump® Approach: Embracing our Prejudices... An Ombudsman's Guide to Universal Connections**

*Carol Archer, Instructor, University of Houston*

*Jim Wohl, Ombudsman, Auburn University*

*Stacey Nickson, Assistants Director, Biggio Center, Auburn University*

This session will present culture bump (specific cultural differences) activities and methods so that ombudsmen may utilize them in their activities. They will be able to assist their clients in the development of specific cultural and communication competencies including being able to manage emotional responses to cultural and other differences. Another competency would be to be able to recognize and adapt to specific cultural behaviors such as communication styles as well as spatial and time orientations.

**25. What Would You Do?**

*Melinda Miner, Sr. Ombudsman and Analyst, Halliburton Dispute Resolution Program*

This concurrent session will provide scenarios that challenge the Ombuds on how to address certain issues.

## GENERAL CONFERENCE CONCURRENT SESSION ABSTRACTS (By Session Number)

### **26. What To Do With All That Data?!**

*Kelley Alexander, Ombudsperson, Georgia State University*

This presentation will cover the importance and usage of the visitor information gathered in the Ombudsperson's office—from intake through follow-up and close-out processes. Also discussed will be how to use the data to demonstrate the value of your services, in accordance with IOA standards and as they relate to the goals of your organization.

### **27. You Can Remain Plugged In – Using Electronic Communication and Remaining Confidential – The Next Generation**

*Craig Mousin, University Ombudsperson, DePaul University*

*Arlene Yetnikoff, Director of Information Security, DePaul University*

The expansion of electronically stored information (ESI) has had a dramatic impact on how an Ombuds produces, maintains, and destroys Ombuds' records. Maintaining confidentiality becomes increasingly difficult, both as a practical matter of controlling an Ombuds' ESI, but also in preparing to respond to any potential litigation challenging the Ombuds' claim of privilege to protect the confidentiality of Visitors. In this session, DePaul University's Ombudsperson and DePaul's Director of Information Security will outline some of the issues faced by Ombuds and explore how technology, ongoing understanding of the scope of ESI, and the developments in the legal world regarding ESI can assist an Ombuds in maintaining best practices regarding records.

### **28. The Sustainable Ombuds: Taking Charge of Taking Care**

*R. Ellen Schreiber, Ombuds, University of Idaho*

The role of ombuds offers practitioners varied and challenging opportunities to make meaningful contributions to people and their organizations, to achieve professionally, and to receive recognition. These benefits, while healthy and satisfying, often come with a cost over time, especially if not monitored and managed effectively. This session draws on lessons learned from the natural environment and applies sustainability concepts from natural resource management to address the impacts of extended ombuds life on individual health and well-being. By connecting these sustainability concepts with those of the wellness model; participants will come away with a functional framework for approaching ombuds' self-care.

### **29. Corporate Organizational Ombudsman Round Table**

*Amos Morale, Ombudsman, Marathon Oil Company*

*Gary Yamashita, Manager, Global Office of Ombuds, Chevron Corporation*

Topics will include social media and its impact on your practice; what you can do to have effective practice; and marketing the practice within your organization. Additional topics may be chosen by participants, time permitting.

### **30. Ombudsing in a VUCA World**

*Dr. Patrick Robardet, Montreal (French) School Board*

The VUCA acronym stands for Volatility, Uncertainty, Complexity and Ambiguity. These elements are used to describe the current environment for organizations. The VUCA world offers opportunity to learn new skills as the its positive flip side includes Vision, Understanding, Clarity and Agility. The session will explore the relevancy of this dual "VUCA approach" to the ombuds role, in relation to IOA current SoP and CoE. The organization I serve as OO, the "Commission scolaire de Montréal", will be used as a reference point as it has decided to redesign itself as a "New" School Board under the pressure of uncertainty about its future.

## HOTEL INFORMATION



**Hyatt Regency Houston**  
1200 Louisiana Street, Houston, TX USA  
Main Line: (713) 654-1234  
<http://www.houstonregency.hyatt.com>



Reservations: (888) 421-1442

Please reference **“International Ombudsman Association”** and **“Annual Conference”** to secure the group room rate.

IOA is pleased to offer the following room rate, based on Single/Double Occupancy: **\$139.00 USD**

\*This rate is exclusive of all state and local taxes or applicable hotel fees at the time of check-in.

For online reservations, please visit: <https://resweb.passkey.com/go/IOA2012>

**Deadline for Group Room Rate: Monday, March 26, 2012**

**Check-In:** 3:00 PM    **Check-Out:** 12:00 PM

### Guarantee Rules

Cancellations must be made 72 hours prior to 3:00pm CST the day of arrival, or first nights room and tax will be charged.

**Self Parking:** \$16.00 USD per day. This is a city-owned parking lot next door to the hotel.

**Valet Parking:** \$25.00 USD per day plus tax

## TRAVEL & TRANSPORTATION

### Airport Information:

George Bush Intercontinental Airport (IAH) - approximately 30 minutes from hotel

William P. Hobby Airport (HOU) - approximately 20 minutes from hotel

Visit <http://www.fly2houston.com/> for additional flight information.

### Taxi Information:

To/From George Bush Intercontinental Airport: Taxis are available at every terminal. Cost: approximately \$48.00 To/From Hobby Airport: Taxis are available at Curb Zone 3 outside of the baggage claim area in the lower level. Cost: approximately \$23.00

### METRO Rail:

This is a fast and convenient way to travel between downtown and other Houston areas. METRO Rail is only two blocks from the hotel. A one-way fare is just \$1.25 (Subject to change).

## ABOUT HOUSTON

### Points of Interest Near Hotel

- Houston Pavilions featuring House of Blues, Lucky Strike and numerous restaurants (three blocks)
- Downtown Theater District (six blocks)
- Downtown Aquarium (six blocks)
- Discovery Green (eight blocks)
- Toyota Center for Rockets basketball (eight blocks)
- Minute Maid Park for Houston Astros baseball (ten blocks)
- Museum District (five miles)
- Reliant Stadium for Houston Texans football (six miles)
- Galleria Shopping Center (seven miles)
- Connected to Houston's seven-mile tunnel system
- Hermann Park, Houston Zoo and Children's museum (four miles)

### Complimentary Shuttle to Downtown Areas Only

The Hyatt Regency Houston operates a courtesy shuttle between our hotel and downtown Houston's office buildings in the morning and afternoon. Seating is based upon space availability. Contact the Concierge for more details.

**Galleria Shuttle**The Hyatt Regency Houston will provide transportation to the Houston, Texas Galleria (Based on Availability). Roundtrip cost is \$18.00. (Subject to change)

**For more information about Houston and all it has to offer, visit: <http://www.visithoustontexas.com/>**



## Professional Development Registration Form

**Paperless Registration Option – Fill out this form, save it to your computer, then email to [info@ombudsassociation.org](mailto:info@ombudsassociation.org)**

Name: \_\_\_\_\_

Title: \_\_\_\_\_ Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Postal Code \_\_\_\_\_

Country: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Check here if you will need special accommodations to participate in this conference.

### COURSE FEES

#### Organizational Ombudsman 101: Foundations of Practice Friday, April 13 - Sunday, April 15, 2012

| REGISTER BY:  | On or Before 03/23/12 | After 03/23/12 |
|---------------|-----------------------|----------------|
| All Attendees | \$1,095.00 USD        | \$1,195.00 USD |

#### Organizational Ombudsman 101 PLUS Sunday, April 15, 2012

| REGISTER BY: | On or Before 03/23/12 | After 03/23/12 |
|--------------|-----------------------|----------------|
| IOA Members  | \$350.00 USD          | \$450.00 USD   |
| Non-Members  | \$450.00 USD          | \$550.00 USD   |

Course registration will not be confirmed until course is paid in full. If your registration is not paid in full 2 weeks prior to the course you will not be confirmed and your seat will be given to a person on the wait list.

### SPECIAL PACKAGE PRICING OFFER!

**Register for Organizational Ombudsman 101: Foundations of Practice and the General Conference and receive a \$250 discount!**

PLEASE NOTE: This Special Package Pricing Offer does not include Organizational Ombudsman 101 PLUS. Organizational Ombudsman 101 PLUS can be purchased at an additional fee (please see above).

| REGISTER BY:                                          | On or Before 03/23/12 | After 03/23/12        |
|-------------------------------------------------------|-----------------------|-----------------------|
| <b>IOA Members</b>                                    |                       |                       |
| Organizational Ombudsman 101: Foundations of Practice | \$1,095.00 USD        | \$1,195.00 USD        |
| General Conference                                    | \$495.00 USD          | \$545.00 USD          |
| <b>Special Package Discount</b>                       | <b>-\$250.00 USD</b>  | <b>-\$250.00 USD</b>  |
| <b>Total</b>                                          | <b>\$1,340.00 USD</b> | <b>\$1,490.00 USD</b> |

#### Non-IOA Members

|                                                       |                       |                       |
|-------------------------------------------------------|-----------------------|-----------------------|
| Organizational Ombudsman 101: Foundations of Practice | \$1,095.00 USD        | \$1,195.00 USD        |
| General Conference                                    | \$545.00 USD          | \$595.00 USD          |
| <b>Special Package Discount</b>                       | <b>-\$250.00 USD</b>  | <b>-\$250.00 USD</b>  |
| <b>Total</b>                                          | <b>\$1,390.00 USD</b> | <b>\$1,540.00 USD</b> |

Please indicate which General Conference breakout sessions you plan to attend on the right hand side of this form. Please refer to the Agenda at a Glance posted on our website for session details.

First time Attendee –  I would like to attend the First Time Attendee Lunch on Tuesday, April 17, 2012

### METHOD OF PAYMENT

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. IOA Federal ID # 541785444

\_\_\_\_\_ Check will be mailed.

\_\_\_\_\_ Credit Card payment. We accept:  American Express  Visa  MasterCard  Discover

Credit Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Card Holder's Name: \_\_\_\_\_

International Ombudsman Association, 390 Amwell Road, Suite 402, Hillsborough, NJ 08844, USA

**This form should be used if you are registering for:**

- Organizational Ombudsman 101: Foundations of Practice and/or
- Organizational Ombudsman 101 PLUS and/or
- Organizational Ombudsman 101: Foundations of Practice and the General Conference

Once completed, **please fax this form to +1 (908) 842-0376** to register even if you will be mailing it in with a check or use our new paperless registration option.

### General 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 at [www.ombudsassociation.org](http://www.ombudsassociation.org).

#### MONDAY, APRIL 16, 2012

##### 1:15 to 2:45 pm

- Breakout # 1  Breakout # 2  
 Breakout # 3  Breakout # 4  
 Breakout # 5  Breakout # 6

##### 3:15 to 4:45 pm

- Breakout # 7  Breakout # 8  
 Breakout # 9  Breakout # 10  
 Breakout # 11  Breakout # 12

#### TUESDAY, APRIL 17, 2012

##### 1:15 to 2:45 pm

- Breakout # 13  Breakout # 14  
 Breakout # 15  Breakout # 16  
 Breakout # 17  Breakout # 18

##### Sector Forum Discussions, 3:30 - 5:00 pm

- Academic  Government  
 ADR  International  
 Corporate  Other

#### WEDNESDAY, APRIL 18, 2012

##### 1:15 to 2:45 pm

- Breakout # 19  Breakout # 20  
 Breakout # 21  Breakout # 22  
 Breakout # 23  Breakout # 24

##### 3:15 to 4:45 pm

- Breakout # 25  Breakout # 26  
 Breakout # 27  Breakout # 28  
 Breakout # 29  Breakout # 30

# 2012 Pre-Conference and General Conference Registration Form

## 7th ANNUAL CONFERENCE

April 13 - 18, 2012  
Houston, Texas

**Paperless Registration Option** – Fill out this form, save it to your computer, then email to [info@ombudsassociation.org](mailto:info@ombudsassociation.org)

Name \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Country \_\_\_\_\_ E-mail \_\_\_\_\_

Phone \_\_\_\_\_ Emergency Contact Phone \_\_\_\_\_

First Time Attendee     Food Allergies: \_\_\_\_\_     ADA Accommodation: \_\_\_\_\_

I would like to attend the First Time Attendee Luncheon on Tuesday, April 17, 2012

### PRE-CONFERENCE COURSE REGISTRATION for Sunday, April 15, 2012

Full day #1 - Conflict Coaching for the Organizational Ombuds \_\_\_\_\_ \$290.00

Full day #2 - Using Mediation and other Informal Interventions to Deal with Workplace Bullying and Harassment Issues \_\_\_\_\_ \$290.00

Half-day AM #1 - Improving the Organization's Conflict Climate \_\_\_\_\_ \$190.00

Half-day AM #2 - Mind-Hack: Ombudsing with the Brain in Mind \_\_\_\_\_ \$190.00

Half-day PM #1 - Managing Up: Helping Visitors Improve Relationships with their Supervisors \_\_\_\_\_ \$190.00

Half-day PM #2 - The Culture Bump® Approach: Embracing our Prejudices... An Ombudsman's Guide to Universal Connections \_\_\_\_\_ \$190.00\*

OR Two Half-day Courses. One AM and One PM together (excluding Ombudsman 101 PLUS) \_\_\_\_\_ \$290.00  
AM # \_\_\_\_\_ PM # \_\_\_\_\_

Organizational Ombudsman 101 PLUS \_\_\_\_\_ \$350.00/\$450.00

### GENERAL CONFERENCE REGISTRATION for Mon., April 16, 2011 - Wed., April 18, 2012

|                                                         | On or Before 03/23/12 | After 03/23/12 |
|---------------------------------------------------------|-----------------------|----------------|
| <b>Full Conference Registration - April 16-18, 2012</b> |                       |                |
| IOA Member Full Conference Registration                 | \$495.00 USD          | \$545.00 USD   |
| Non-Member Full Conference Registration                 | \$545.00 USD          | \$595.00 USD   |

#### One Day Conference Registration

Please select your day of attendance:

Monday     Tuesday     Wednesday    \$295.00 USD    \$345.00 USD

### GROUP REGISTRATION

I am part of a group registration. I understand that the IOA Office will process my registration fee according to the group registration policy.

### OMBUDDY DONATION

"Ombuddy" Sponsorships go directly to offset expenses of the 2012 Conference and allow attendees an opportunity to support our Association and profession.

Ombuddy Sponsorship \$ \_\_\_\_\_

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

Please charge the same credit card below     I will send a separate check

### 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 \$ \_\_\_\_\_



INTERNATIONAL  
**OMBUDSMAN**  
ASSOCIATION

#### IMPORTANT DATE:

**Monday, March 23, 2012**

Monday, March 23, 2012 is the cut off for Early Bird conference registration.

You must submit your registration form to the office by Monday, March 23, 2012 in order to receive the early bird fees. Fax to (908) 842-0376. You do not need to send payment by March 10th 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](mailto:info@ombudsassociation.org) or call (908) 359-0246.

### General 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 at [www.ombudsassociation.org](http://www.ombudsassociation.org).

#### MONDAY, APRIL 16, 2012

1:15 to 2:45 pm

Breakout # 1     Breakout # 2  
 Breakout # 3     Breakout # 4  
 Breakout # 5     Breakout # 6

3:15 to 4:45 pm

Breakout # 7     Breakout # 8  
 Breakout # 9     Breakout # 10  
 Breakout # 11     Breakout # 12

#### TUESDAY, APRIL 17, 2012

1:15 to 2:45 pm

Breakout # 13     Breakout # 14  
 Breakout # 15     Breakout # 16  
 Breakout # 17     Breakout # 18

**Sector Forum Discussions, 3:30 - 5:00 pm**

Academic     Government  
 ADR     International  
 Corporate     Other

#### WEDNESDAY, APRIL 18, 2012

1:15 to 2:45 pm

Breakout # 19     Breakout # 20  
 Breakout # 21     Breakout # 22  
 Breakout # 23     Breakout # 24

3:15 to 4:45 pm

Breakout # 25     Breakout # 26  
 Breakout # 27     Breakout # 28  
 Breakout # 29     Breakout # 30