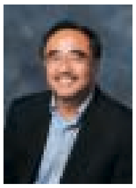
November, 2009, IOA

THE INDEPENDENT VOICE

News from the International Ombudsman Association



PRESIDENT'S LETTER

The IOA Needs You!

BY GARY YAMASHITA, IOA PRESIDENT

As the International Ombudsman Association (IOA) grows and becomes more diverse, our need for volunteers is deepening. Serving as a volunteer achieves the classical 'win-win' we try to reach in our role as ombudsmen: The organization benefits from the work of the volunteers and the volunteers benefit by playing an active role in developing an organization that meets their needs.

When I attended my first conference with The Ombudsman Association (TOA) about 11 years ago, I was disappointed to feel that the sessions failed to enhance my personal growth and development. At the time, TOA was an organization that literally ran on a checkbook and a part-time administrator. The following year, Elizabeth Pino, then the TOA Treasurer, asked me to join the Finance Committee. She convinced me that I should try to be part of the solution and help improve the organization and its conference. I took her up on the idea and volunteered for TOA and, now, for IOA. I have had many opportunities as a volunteer and a leader to give my input regarding our annual conference sessions. Now, I feel like I have some ownership of the decisions and a voice in improving IOA's programs and services.

Every year, there are more opportunities to volunteer and offer your input on the direction in which IOA is moving. Two examples that come to mind are the certification process and our training programs.

Certification has been discussed for many years, by both TOA and the University and College Ombuds Association (UCOA) before the groups merged and became IOA. Members discussed many different approaches to certification. In recent years, a group of dedicated volunteers, led by Marsha Wagner, reviewed the approaches before presenting a proposal to the IOA Board. Without these volunteers, we would not be ready to

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launch our first certification examination this winter. Of course, this work is not finished. The Certified Organizational Ombudsman Practitioner (CO-OP) Program has a volunteer Board in place to address your questions and concerns as the program moves forward. More volunteers are needed to ensure that the program thrives.

Our training programs are our main source of revenue and have been very successful through the years. In 2009, however, the economic recession took a toll on attendance at our programs. Several volunteers, including Francine Montemurro, David Talbot, Wilbur Hicks and the IOA Professional Development Committee, are working diligently and creatively to come up with new ways to deliver training. I am very optimistic about positive results in the near future.

Finally, beyond helping IOA to become a more effective organization to support both practitioners and the field, volunteering is an avenue to grow professionally and to work closely with other ombudsmen. I have always found that our relationships with other practitioners are some of the best support systems for our own practices. Since many IOA members are sole practitioners in their respective organizations, this is paramount to finding support when we face difficult situations.

Volunteers are needed in many other areas. Please contact a committee chair if you are interested in volunteering:

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john.carter@citadel.edu

CERTIFICATION TASK FORCE
Chair: Marsha Wagner,
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COMMUNICATIONS
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The Independent Voice is published by The International Ombudsman Association to provide information on developments in organizational ombudsman practice, Association news, and other topics of professional interest to members of IOA. Articles and advertisements do not necessarily represent the position of IOA. This newsletter is produced by Professional Management Associates, L.L.C., a full-service association management company.

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IOA Board Update

BY TOM KOSAKOWSKI, CENTER FOR HEALTH SERVICES, UCLA

A regular column from the Board of Directors to keep members informed about its activities and other IOA developments

Certification

The new Board of Certification for Certified Organizational Ombudsman Practitioners (CO-OP) held its inaugural meeting on September 21, 2009. This marked the end of the Board Task Force on Certification. The CO-OP Board has elected its officers: **Marsha Wagner**, President; **Carolyn Noorbakhsh**, Secretary; and **Diane Dorion**, Treasurer. The remaining Board members are **David Brubaker** as the Public Director, and **Jennifer (Wolf) Moumneh** and **Al Swenson**. The CO-OP Board will soon create standing committees on Appeals, Eligibility, Finance, Nominating, and Professional Practices.

The pilot administration of the certification exam will take place November 30 through December 5 at computer test centers. The exam will be offered again in New Orleans during the annual conference in April 2010. (*Please see additional information on page 6*.)

Board Retreat

The Board met in Houston on August 4-5 to address various strategic and organizational issues. IOA President **Gary Yamashita** hosted the meeting and his organization, Chevron, provided the meeting space and lunches. **Julia Classen**, an organizational consultant with Aurora Consulting, facilitated the meeting. The Board will meet again in person again at Mars Inc. in New Jersey on January 14-15, 2010.

Publishing Minutes

In response to member interest, the Board has begun publishing its meeting minutes in the Members Only section of the IOA website. In the future, minutes should become available 30 days after they are approved by the Board.

Committee Changes

The Board has approved a pilot consolidation of two IOA committees: Legal and Legislative Affairs and Professional Ethics, Standards and Best Practices. Lois Petzold will chair the combined committee and evaluate its effectiveness. As mentioned above, the Certification Task Force has been replaced with the creation of the CO-OP Board. The IOA Board is also undertaking a survey of committees to get feedback on organizational issues and to compile a complete list of all volunteers.

Agreement with Pepperdine University

The Board approved a tentative arrangement with the Straus Institute for Dispute Resolution at the Pepperdine University School of Law to create a joint program: the first-ever concentration in ombuds studies. Students can combine Pepperdine's academic courses with IOA's professional training to receive the concentration within the M.D.R. and LL.M. programs. Additional details are to be announced.

Thank You!

BY NICHOLAS DIEHL, NATIONAL INSTITUTES OF HEALTH

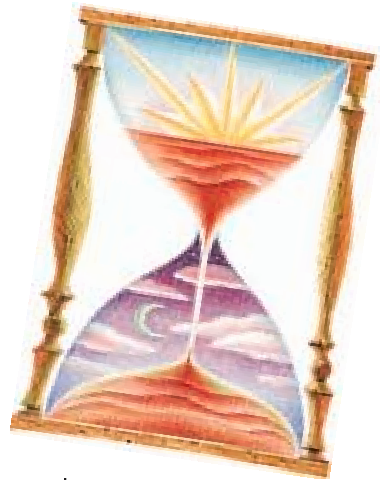
The Editors of ***The Independent Voice*** would like to extend many thanks to **Michael Eisner** and **Tom Barnette** for their years of service and contributions to the development and production of ***The Independent Voice*.**

Michael and Tom generated many of the ideas that have sustained ***The Independent Voice*** as an important resource where IOA members can find news on IOA activities and ombudsman practices.

In addition to soliciting and editing articles, they also both contributed a significant amount of their own writing to the pages of this newsletter.

As was planned for some time, Michael and Tom have both recently stepped away as editors of the newsletter.

But, true to their generosity, both continue to make great contributions to support both IOA and ***The Independent Voice*.**



Passages:

Promoting and Marketing the Ombudsman Function

BY WILBUR HICKS, INTERNATIONAL MONETARY FUND

It is has been my privilege and honor to work as an organizational ombuds in three organizations. In two of the organizations, it was my responsibility to establish the office and get it up and running. In my third venture, I stepped into an office that had been in existence for more than a quarter of a century. In fact, it was one of the oldest organizational ombuds offices in the world. In every situation, I was faced with the task of marketing the ombudsman's office. Over time, I recognized that the marketing approaches were different in newer offices compared to those where the function was well-established. Just as ombuds offices develop in stages, so must marketing and promotion strategies adapt to address the challenges encountered at each stage. Moreover, the secret to ombuds longevity is directly related to how the ombuds office is able to grow and evolve with its organization.

My experiences have given me the rare opportunity to look closely at several issues related to the ombuds function:

1. How ombuds are perceived by management and staff in their respective organizations;
2. The expectations that are held out for these offices, and
3. The degree to which these offices are considered a part of the way that their organizations "do business."

I have concluded that these perceptions and expectations are primarily related to ombuds effectiveness, but also to how the function evolves over time. Therefore, the ombudsman's marketing and promotion strategies must reflect this evolution. A uniform approach, i.e. doing things the same thing every year, will fail to raise the ombudsman's profile or entrench the office in the organization's culture.

But let's face it — ombudsmen are already starting off on uncertain footing. Most organizations do not have an ombudsman and those that do often have a difficult time explaining their *raison d'être* and answering such questions as: How can the ombudsman be truly independent and neutral and also be paid by the organization? And how can a member of the organization keep secrets without any obligation to report these secrets to management? These are just two of the many questions that ombudsmen commonly hear. As such, promoting the function is a challenge given that the organizational ombudsman function is, for many people, counterintuitive to traditional approaches to organizational management. Even if we try to market the function, perhaps by distributing posters, brochures, logo-emblazoned pens, and other objects that "sell" the office of the ombudsman, many of us are surprised, or least disappointed, when a visitor comes into the office and says, "What exactly do you do and how can you help me?" For me, this inquiry is totally acceptable. After all, as mentioned earlier, the ombudsman is a strange bird. Other than ourselves and maybe some Human Resources personnel, few people really understand what an ombuds does. I often compare the ombuds office to an insurance policy: You know where it is in case you need it, but you are not exactly sure of what's in it. Yet, it is precisely because the function is not completely understood and is so contrary to many notions of how organizations work that the function must be constantly explained and promoted — regardless of how long the role has existed within the organization.

The twin goals of a promotion and marketing program are to support the viability and endurance of the ombuds function and also to inform the organization of the valued service that the ombudsman provides. There are many cases in which, unfortunately, organizations decide that they cannot afford to support the continued operation of the office of the ombudsman, even if the

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office was valued. I propose that an effective, long-term marketing and promotion strategy should strive to position the ombuds function so that management sees the role as integral to the way the organization does business and that leaders cannot imagine the organization without the ombudsman and the vital role that she/he plays.

Based on my experience, I've listed below several strategies that ombuds can employ at the early, middle and advanced stages of their existence to help ensure that their offices become part of the fabric of their organizations.

PHASE ONE:
Initiation, Years 1 – 5

The beginning phase is critical, for it establishes everything that will happen in subsequent years. As Shakespeare wrote, "Well begun is half done." Here is your opportunity to place your stamp on the function – what it is, what it looks like, how it is perceived, and how you will measure and communicate success.

- **Gather good stories from visitors — those can be the most effective marketing tool.**
- **Develop relationships with key constituencies (or stakeholders), including those who do and do not support the function. You cannot visit with people too much in this phase. The ombudsman needs to get around the organization, be seen at events, and become recognizable (especially if you were hired from outside the organization).**
- **Produce tangible marketing materials — brochures, posters, websites, etc. — so that people become aware that the office exists.**
- **Develop a 30-second 'elevator speech' that explains why the function was created and its role in the organization. (Bear in mind that creation of the ombudsman function is unique to each organization. You need to know what created your office and speak to that reason whenever you talk about the office.)**
- **Understand the criteria that measure your success according to management/leadership. Be able to provide evidence that you have met or exceeded the standards for success.**

PHASE TWO:
Transition, Years 5 – 10

It is unlikely that you will reach Phase Two if you were unsuccessful in Phase One. Five years is a reasonable benchmark for organizations that have taken a chance on opening an ombudsman office. Many organizational ombuds offices either close or are phased into other functions (human resources, legal, Equal Employment Opportunity) during this time. If the office survives the initial period, however, the Transition phase must incorporate more sophisticated and deeper promotion and marketing approaches. The goal is to enhance and expand the function beyond counseling and advising visitors, and find other ways to establish the value of the ombuds within the organization. The credibility established in Phase One really pays off here. Management has begun to see the office as a partner by seeking advice and counsel and giving a heads-up to the ombudsman as issues develop. Departments seek out the office to give presentations on issues such as conflict resolution in the workplace. The organization's leader and other top managers seek the ombudsman's perspective on issues and are always available to meet with the ombudsman. The ombudsman is included in crisis management and other problem-solving opportunities. There is a significant increase in caseload, thus increasing the number of 'good stories' about the office. In the Transition phase, the ombudsman should:

- **Enhance the office's offerings and demonstrate expertise in facilitation and mediation.**
- **Seek opportunities to partner with human resources, the legal counsel, and the staff association on projects such as conflict resolution training sessions.**
- **Host professional meetings and conferences of ombuds.**
- **Seek a role in organizational change.**
- **Develop and provide data on the office's effectiveness.**

N.B. It is important that the ombudsman not rush into Phase Two activities during Phase One. Credibility takes a long time to develop and is essential to establish before one can effectively venture into Phase Two.

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PHASE THREE:

Entrenchment, Years 10 and beyond

At this stage, the function has been solidly established within the organization. Because attention has been paid to the implementation of all of the elements in the Initiation and the Transition phases, the ultimate goal, Entrenchment, has been reached. In this stage, the ombuds function is highly valued and respected. Questions of long-term viability are eliminated. The organization uses the office of the ombudsman as part of its way of "doing business." Staff routinely advise colleagues that they should talk to the ombudsman. Management welcomes the perspective of the ombudsman and refers staff to the ombudsman with the reassuring knowledge that the ombudsman will be neutral. In this stage, it is unimaginable for the enterprise to be without an ombudsman. When the ombudsman position is vacant, all of the stakeholders want to be included in the search for a new ombudsman. Because the ombudsman's periodic reports always provide a unique perspective on the organization, the publication of the report is widely anticipated. The original success criteria have been met, prompting the development of new success criteria. Few in the organization can remember a time when there was no ombudsman. Entrenchment may be the final phase, but it also calls for evolution and adaptation. The ombudsman should:

- **Actively seek to participate in big issues: organizational change, downsizing, re-organization, expansion, etc.**
- **Ensure that regular meetings with the CEO, and the heads of other relevant departments, are never routinely rescheduled.**
- **Get involved in the orientation for the new CEO (as opposed to Phases One and Two in which the ombudsman requests to meet the new CEO).**
- **Produce 10-year data to clearly establish the value of the office.**

CONCLUSION

The role of the office of the ombudsman in any organization is unique. It is independent of traditional organizational controls and is not aligned with management, staff, or any internal factions or groups. Information that comes to the office of the ombudsman is kept in strictest confidence. Given these factors, the marketing and promotion of the office requires unique approaches that must develop and evolve over time, just as the organization it serves adjusts to external and internal realities. Such an approach to marketing and promotion at all stages of establishment will help ensure that the ombudsman's office provides a valued service and will enhance the office's chances of a long organizational life.

News on the Certification Front

The Certified Organizational Ombudsman Practitioner (CO-OP) website is up and running! We encourage you to take some time to look it over. Go to the IOA website and click on "Board of Certification" or go to **www.ombudsassociation.org/boc**.

Here you will find information about the new program, its governance, mission, procedures, rules and regulations, and application forms. The Board of Certification website also directs you to the testing service's website *(go to "Obtaining Certification" and click on "Examination")* to get information about where the first computer-based test will be offered between November 30 and December 5, 2009.

There are benefits to being among the first:

- You may be eligible for certification earlier than those who do not sit for the preliminary exam;
- You will be able to take the exam at a reduced rate;
- You will be able to offer feedback on the exam; and
- You will get the satisfaction of being a trailblazer in the certification program for our profession!

Feel free to contact the following CO-OP Board Officers with any questions:

Marsha Wagner, **wagner@columbia.edu**

Carolyn Noorbakhsh, **carolyn.noorbakhsh@nrel.gov**

Diane Dorion, **diane.dorion@rbc.com**

Howard Gadlin on *Talking to Your Organization's Leaders:* From the First Meeting to Full Confidence

BY SAMANTHA LEVINE-FINLEY, NATIONAL INSTITUTES OF HEALTH

Among the organizational ombudsman's most important, and potentially most daunting, responsibilities is to establish and cultivate relationships with their organization's top leadership. Developing trust will encourage executives and officials to feel comfortable telling the ombudsman what they really think and engaging in a dialogue about a broad range of issues.

Here, **Howard Gadlin**, Ombudsman at the National Institutes of Health, talks to **Samantha Levine-Finley**, an associate ombudsman in his office, about building that relationship from the start.

The first conversation between the ombudsman and the executive can help begin the process of forging a relationship based on trust.

Initial meeting:

1. Make clear what the leader would find most useful or helpful in working with the ombudsman, the issues about which he/she has the most concerns, and the issues that he/she would like the ombudsman to bring to his/her attention.

2. The ombudsman may explain that if he/she requests a meeting, it is because the issue at hand is serious and important. In addition, the ombudsman can assure that he/she will always attempt to work through issues at the lowest level and will request such meetings only when absolutely necessary.

3. Make it clear that the ombudsman is interested in being helpful to the leader, in the same way that the ombuds is helpful to others within the organization. Bear in mind that people at the top are accustomed to individuals approaching them to ask for things, rather than offering to assist. *(Note: if the ombudsman's office is not well supported, it still may be very necessary to approach leadership to discuss such matters.)*

4. Discuss how to structure future conversations to make the best use of the time allotted. Working out these parameters in advance helps set clear expectations and provides an initial experience of jointly designing an element of your working relationship.

At subsequent meetings with the leader, the ombudsman should consider engaging in the following activities:

1. Check in with the leader to gauge his/her mood and whether things are frenetic or difficult. The goal is to create an opportunity for the executive to talk to the ombudsman about things they might not be able to talk to others about.

2. Brief the leader on issues or 'hotspots' of which he or she ought to be aware, and the possible implications of those issues. The ombudsman may also share what has been done so far to address the issues, taking care to maintain confidentiality.

3. Be willing to share with the leader, in a tactful manner, how he/she is being viewed by others in the organization and whether any negative perceptions exist.

4. Share new programmatic offerings or specific projects to ensure that the leader is informed of what is occurring within the organization. This conversation also gives the leader a sense what the ombuds office is doing beyond casework.

5. Inquire as to whether the leader might have information for the ombudsman about hotspots or issues that could explode.

Whether and how these conversations occur is contingent on the relationship that exists between the ombudsman and the leader. Of course, this is a developmental process that may take a long time to reach

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maturity. A critical aspect to building that relationship is the way in which the ombudsman handles confidentiality with respect to conversations with leadership. The ombuds must maintain 'maximum confidentiality' to ensure that he/she not reveal anything about how a leader may feel about a person or situation, or characterize a conversation — even as others may try to mine the ombudsman for information.

The ombudsman is at all times best served by recognizing that, for most upper leaders, there is often little separation between their personal and professional lives. Their work is intensely personal, it's not just a job they do from which they separate themselves. When the relationship between the ombudsman and the leader is strong, there is an opportunity for the executive to talk about substantive issues and his/her personal and professional reactions to them. The revelation of these perspectives may give the ombudsman a fuller feel for how the leader makes decisions and reacts to events. Ultimately, the executive will be less guarded when it comes to sharing his/her thoughts and feelings about issues that might be sensitive, personally and organizationally impactful, or simply difficult to discuss. Yet the establishment of such a connection for the ombudsman requires a delicate balance: The ombudsman should be seen as having access to the top, but not as too close to the top.

Uniform Reporting Categories Task Force Completes Its Mission

BY TOM SEBOK, UNIVERSITY OF COLORADO-BOULDER

Mission accomplished! After five years of work, the IOA's Uniform Reporting Categories Task Force has completed a two-page desk reference that contains all nine reporting categories, plus subcategories and definitions.

The document may be found in the Members Only section of the IOA webpage, or at the following link: **http://tinyurl.com/yftkle8**

The effort to achieve this goal began in 2004. From that year until 2007, the IOA Uniform Reporting Categories Task Force conducted numerous member surveys regarding the usefulness of its evolving classification system. It incorporated feedback from survey respondents and from attendees in concurrent sessions at the annual conferences from 2004 to 2008. Over this time period, the task force's membership changed, but the group continued to include representatives from the corporate, nongovernmental, academic, and government sectors.

The reporting categories classification system changed dramatically since the original 2004 draft. In recent years, however, the changes came in progressively smaller increments. The current version reflects the thinking that grew out of several hundred hours of conversations among Task Force members, not to mention all the hours of thought and effort that took place between meetings and the surveys and conference attendee comments. The Task Force's mission is now complete.

In addition to the creation of the desk reference, the Task Force recommended the following steps to the IOA Board:

1. Use the classification system to conduct an annual survey of members *(similar to the current Compensation Survey)* about the number and types of issues, questions, and concerns with which they assisted constituents in the previous year.
2. Every three to five years, review the usefulness of the classification system and modify it as needed. *(Note: Too-frequent modifications will undermine the ability to make meaningful year-to-year comparisons regarding the types and numbers of issues that ombuds are addressing.)*

Task Force members have included: **Nora Galer** (United Nations); **Doris Campos-Infantino** (National Institutes of Health during Task Force service); **Mary Simon** (Lucent Technologies); **Beatriz Dale** (American Express Corporation); **David Miller** (World Health Organization); **Sandy Morrison** (Scotiabank); and **Tom Sebok** (University of Colorado at Boulder).

What Would You Do?

BY NICHOLAS DIEHL, NATIONAL INSTITUTES OF HEALTH

Following is a hypothetical situation that an ombudsman might face. You are invited to weigh in with what you would do by sending us your comments. Please keep your comments brief so we can publish as many as possible.

SCENARIO

You recently met with John who had concerns about a recent confrontation he had with his supervisor, Lynn. The two have worked together for about three years, during which time they have had occasional arguments and a few blow-ups. They usually avoid each other for a while after the incidents until things simmer down. In a weekly update meeting last Friday, tensions between the two over task assignments resulted in a shouting match during which John insinuated that Lynn is racist. John is African-American and Lynn is white. Lynn ended the meeting by telling John to leave the office. She said that she would no longer meet with him alone.

John requested that you facilitate a conversation to discuss the incident. When you spoke with Lynn about that proposal, she decided that she didn't want to meet and, instead, would have group meetings rather than one-on-ones with her staff members to avoid being alone with John. She said she could handle the situation without intervention from the ombudsman's office, as she has done so far. John was angry about Lynn's decision, so he spoke with Lynn's supervisor, Susan, and questioned why Lynn would refuse to meet with him and the ombudsman. Susan told Lynn that even though she thought the intervention wouldn't make any difference, Lynn should meet with John and the ombudsman so that management could say they did what they are "supposed" to do when an employee asks a supervisor to work with the ombudsman. Lynn is not happy about that.

Lynn called you this morning and said, "Even though I don't want to, Susan told me that I have to have this meeting with you and John. I know it won't make any difference, but I have to do it so that John can't say that I refused to meet with him and the ombudsman. It's a complete waste of time. I really am too busy for this foolishness, but I have a half-hour free on Thursday to meet. Please contact John and let him know."

What would you do?

INSTRUCTIONS

To post your response, click on the Zoomerang Weblink below or copy and paste this link into your web browser.

Link: **http://tiny.cc/JyCAo**

What Would You Do? The Responses

Remember Laura and Liz? These were the two employees at the center of the August 2009 "What Are You Going to Do" feature in *The Independent Voice*. Their problems went back years, with both accusing the other of spreading rumors and damaging each other's belongings. You mediated a session with them, at the end of which they faced unresolved issues but said they would try to put their problems behind them and move forward. Subsequently, Liz told you that she confronted another employee, Fred, about negative remarks that Laura attributed to him during the mediation. Fred told

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Liz that he never said anything bad about Liz. After that conversation, Liz told you she wanted to set the record straight with Laura in a second mediation session. Faced with Liz's violation of confidentiality, here's what you said you would do:

Please Note: The responses were edited for clarity.

• I don't think it would help if the ombuds refused further involvement. Laura will likely hear about this from Fred. If Liz is willing to take the heat from Laura for breaching confidentiality, and Laura is willing to participate, I would facilitate another session.

• I would first address Liz's acts by asking her to consider how Laura would react to what she had done. Additionally, I would ask Liz to consider what she would really hope to accomplish by shifting the focus from their commitment to putting the problems behind them and moving forward back to who is "right." Whether or not Fred is right (there's the possibility that he felt pressured to deny saying what he allegedly said) Liz should not feel as if she needs to convince the mediator. I would have her consider whether even bringing up this piece of information (especially considering the way it was obtained) would only escalate the matter.

• I would attempt another mediation to try to resolve any unresolved issues from the initial session and address the breach of confidentiality. This may lead to another opportunity to finally put the past behind and move forward.

• This is one example of the several reasons I quit doing "mediations" years ago. While I still "facilitate conversations," people today tend to think that "mediator" has a formal compliance role. This places the ombudsperson acting in concert with IOA standards of confidentiality and informality in an untenable situation.

• This is an example of an ombuds case of "an ounce of prevention is worth a pound of cure." I would have immediately intervened as a mediator when I heard Laura say, "A lot of people have problems with Liz." I would have asked Laura to articulate the problems she personally had with Liz (separate the person from problems that affect your relationship) such as her being late for work, making too many personal phones calls, not completing, being slow at work, taking late lunches, asking for favors but never returning favors, and staring, glaring, giving the silent treatment, etc. Confidentiality is another problem unto itself. A workplace mediation agreement that is completed at the end of the mediation and clearly addresses and articulates breeches of confidentiality would address her behavior. The agreement is not something an ombuds would enforce.

Conference Committee Update

BY JOHN CARTER, THE CITADEL

Work is well underway to shape the 2010 IOA conference. Since July, the Conference Committee has met almost weekly to develop a conference theme, survey IOA members concerning their conference preferences, and begin the hundreds of tasks associated with hosting a conference in New Orleans, LA, next April. The Committee also is evaluating responses to its call for proposals for pre-conference courses, sessions for the conference, and keynote and plenary speakers. The Committee received about 10 proposals for pre-conference courses, 40 proposals for conference sessions, and is working to secure three keynote speakers, as well as a "surprise" speaker, to welcome everyone to New Orleans. Final programming decisions were expected by Nov. 1.

Members of the Conference Committee include:

Vicky Brown, John Carter, Larry Cohen, Lynn Connley, Nancy Deering, Glenda Dickson, Diane Dorion, Kristin Ecklund, Wendy Friede, D.A. Graham, Tommie Howard, Sarah Kith, Gabrielle Kluck, Patti Lynch, Marvin Neal, Pierre Niedlispacher, Don Noack, Trey Reckling, Kirsten Schwehm, Gina Spencer, Sophia Viola, Merle Waxman, Terri Wide, Lisa Witzler, and **Jim Wohl.**

Stay tuned for announcements about early registration for the conference and early-bird reservations at the conference hotel.

If you have questions or suggestions, please contact Committee Co-Chairs **Diane Dorian** at **diane.dorion@rbc.com** or **John Carter** at **john.carter@citadel.edu.**

Where in the world are IOA members?

COUNTRY	#	%
Australia	6	0.95%
Brazil	2	0.32%
Canada	63	9.98%
China	1	0.16%
Denmark	1	0.16%
Finland	1	0.16%
France	2	0.32%
Germany	2	0.32%
India	3	0.48%
Israel	1	0.16%
Italy	1	0.16%
Jamaica	2	0.32%
Japan	2	0.32%
Jordan	1	0.16%
Mexico	2	0.32%
Netherlands	1	0.16%
New Zealand	2	0.32%
Nigeria	1	0.16%
Puerto Rico	2	0.32%
Republic of Korea	1	0.16%
Republic of Singapore	5	0.79%
South Africa	2	0.32%
Switzerland	14	2.22%
Tunisia	3	0.48%
U.S.V.I.	1	0.16%
United Kingdom	3	0.48%
United States	506	80.19%
TOTAL	631	100%

IOA International Membership as of Sept. 30, 2009; # represents number of members, % represents percentage of membership.

Welcome New Members

Associate Member

Stephen Allen, Ombudsman, United States Secret Service, Washington, DC

Marilu Diaz-Casanas, Ombudsman, United States Secret Service, Millersville, MD

Lanai Greenhalgh, Director, Office of the Ombuds, Colorado State University, Fort Collins, CO

Victor Lee, Ombudsman, United States Secret Service, Los Angeles, CA

Debra Meislich, Medical Student/House Staff Ombudsman, Children's Regional Hospital, Camden, NJ

Karen Peterson, Scientific Ombudsman, Fred Hutchinson Cancer Research Center, Seattle, WA

Andrea Schreiber, Ombudsman, United States Secret Service, Springfield, VA

Amy Szestak, Ombudsman, United States Secret Service, Washington, DC

Affiliate Member

Ivonne Bayron Huertas, Students Ombudsman, University of Puerto Rico, Cayey, Puerto Rico

Andrew Cohn, Lighthouse Consulting, LLC, Wynnwood, PA

Christopher Coonrod, Mediator, Dispute Resolution Center of King County, Seattle, WA

Nana Yaa Marfo, Administrative Assistant, African Development Bank, Tunis 1002, Belvédère, Tunisia

Jans McCubbrey, Golden, CO

Mathew Milas, Ombudsman, Talecris Biotherapeutics, Research Triangle Park, NC

Matthew Pappas, Austin, TX

W. Stephen Parker, Director, Marketing, Merial Ltd., Monroe, GA

Marti Paschal, Oakland, CA

Zeke Reich, Cambridge, MA

Stephen Shields, Partner, Rule 31 Mediator, Jackson, Shields, Yeiser & Holt, Memphis, TN

T. Michael Townshend, Senior Mediator, Carpe Diem Coaching, Inc., Silver Spring, MD

Mark Travis, ADR Specialists, LLC, Cookeville, TN

Rich Weinerman, Professional Development and Mentoring Program Manager, KL Gates, LLP, New York, NY

Member

Wendy Abshire, UCAR Ombuds, University Corporation for Atmospheric Research, Boulder, CO

Kelley Alexander, Student and Staff Ombudsperson, Georgia State University, Atlanta, GA

Bruce Auerbach, University Mediation Coordinator, University of North Carolina at Charlotte, Charlotte, NC

Monique Bookstein, Associate Organizational Ombudsman, FBI, Dumfries, VA

Lina Borrelli, Ombudsman, Canadian National Railway, Montreal, QC, Canada

Juan Carlos, Soto Santiago, Student Ombudsman, University of Puerto Rico, Medical Campus, San Juan, Puerto Rico

Athanase Hagengimana, Lead Ombudsman, World Health Organization (WHO), Geneva 27, Switzerland

John Hart, Marblehead, MA

Mary Ann Haug, Assistant to the Ombudsman/Acting Ombudsman, Johns Hopkins University, Laurel, MD

Kathy Mitchell, University Ombudsman, Western Michigan University, Kalamazoo, MI

Amabel Orraca-Ndiaye, Ombudsman, African Development Bank, Tunis, Tunisia

Patricia Ponce, San Luis Obispo, CA

Ashley Robertson, Ombudsperson, Utah Valley University, Orem, UT

Barry Stimmel, Ombudsman, Mount Sinai School of Medicine, New York, NY

Brenda Troutner, Ombudsman, Summit Pointe, Battle Creek, MI

Samuel Wright, Tampa, FL