



INTERNATIONAL  
**OMBUDSMAN**  
ASSOCIATION

# 13th Annual Conference

Registration Brochure

# 2018



**April 23-25, 2018**

Professional Development Courses &  
Specialty Workshops:

April 20-22, 2018

Richmond Marriott • Richmond, Virginia



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

[www.ombudsassociation.org](http://www.ombudsassociation.org)  
#IOA2018

## A Message From The IOA Conference Planning Committee

The Conference Committee welcomes you to the 13th Annual IOA Conference in historic and metaphoric Richmond, Virginia. Our global need to listen, understand, empathize and respect is as great now as it ever has been. Voices are being expressed as loudly as in the 1960s, and long-standing issues involving justice, security, and dignity are surfacing, worldwide.

Ombuds are positioned to assist community members peaceably work through conflict and challenging circumstances. As we navigate through today's tumultuous environment, we invite you to develop and hone skills to help your visitors confront dissension and strive for peaceful understanding and resolutions.

Please join us as we learn and discuss ways with which to successfully confront conflict, work with intimidating and imposing power figures, and deal with unrest, all with the aspiration of empowering our visitors and ourselves as ombuds. Through all of this, gain insight into maintaining ombuds neutrality as well as honoring other ethical precepts.

We have a lineup of interesting and accomplished keynote speakers.

- **Rita Franklin**, former Department of Energy Ombudsman, reflects on ombudsing with the federal government in the Mary Rowe Honorary Keynote Address;
- **Joe Weston** translates the use of respectful confrontation into peaceful and supportive interactions with organizational power figures. Mr. Weston will also conduct a full-day Sunday preconference workshop on the subject of respectful confrontation;
- The Boss Whisperer **Laura Crawshaw** will speak about empowering abrasive administrators to use positive leadership strategies in furtherance of a welcoming, relaxed, and productive workplace for previously abraded employees.

Plenaries will include a topical discussion on sexual harassment in organizational cultures and this year's Un-debate, which will examine ombuds neutrality in our politically volatile times.

For fun, we will have networking opportunities available throughout the day, as well as a Monday evening welcome reception and the always popular Tuesday Pecha Kucha vignettes. On Sunday evening, enjoy an informal, acoustical talent extravaganza, Ombuddies Unplugged, featuring amazing feats and homegrown IOA ombuds artistry.

We listened to constructive input from last year's conference and will provide continental breakfasts each morning, as well as all lunches. We encourage you to use the Whova App to connect with old and new friends after conference hours, and to arrange for your own get-togethers in downtown Richmond.

The capitol city of the state of Virginia offers fine restaurants, outdoor activities, and interesting cultural, historical and art exhibits. Enjoy a walk, run, or canal cruise along the James River waterfront. Dine in one of the more than 200 downtown restaurants that prompted National Geographic to include Richmond on the "Where to Travel for Food in 2016" list. Museums include the Edgar Allen Poe Museum, the American Civil War Museum, the Black History Museum and Cultural Center of Virginia, and the Virginia Museum of Fine Arts.

Above all, have a fun time at this year's conference. Take the opportunity to enrich your ombuds practice skills, catch up with old friends, make valued new friends, and return to your organization refreshed, energetic, and eager to serve.

### Enjoy!

#### IOA Conference Committee Chairs:

##### Conference Co-Chairs

**C. Kevin Coonrod, CO-OP**, Auburn University

**Tammy Harman**, Benefits Ombudsman, Communications Manager, LEOFF Plan 2 Retirement Board

##### Programming Chair

**Lisa Neale, CO-OP**, University of Colorado, Denver | Anschutz Medical Campus

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**Nick Raichart**

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## Committee Members

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**Gloria Carr,** *University of Memphis*

**Larry Cohen,** *Yale University*

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**Brad Holland,** *University of Virginia*

**Ryan Liu,** *Ombuds Consultant*

**Sana Manjeshwar,** *Chevron*

**Melinda Miner,** *Halliburton*

**Diana Mosonyi,** *Student of Ombudsing*

**Kristine Paranica,** *University of North Dakota*

**Bina Patel,** *National Ground Intelligence Center*

**Mark Patterson,** *College of William & Mary*

**Marcia Riley,** *University of California, Berkeley*

**Merle Waxman,** *Yale University*

## IOA Staff

**Rick Koepke,** *Executive Director*

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**Christopher Vigilione,** *Conference Director*

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*Marketing Communications Manager*



**The International Ombudsman\* Association (IOA)** is the largest international association of professional organizational ombuds practitioners in the world, representing more than 700 members from the United States and across the globe. The association supports organizational ombuds worldwide, working in corporations, universities, non-profit organizations, government entities, and non-governmental organizations. IOA offers a full roster of professional training and education programs for the practicing ombudsman professional and those interested in learning about our practice. In addition, the association works to support and promote the profession through strategic partnerships and communication with government agencies and other professional organizations as appropriate.

**The mission of the International Ombudsman Association** is to support and advance the global organizational ombudsman profession and ensure that practitioners work to the highest professional standards by:

- Setting standards of practice, regulatory platform, and code of ethics for the organizational ombudsman profession
- Assisting in the establishment of organizational ombudsman offices
- Providing excellent professional development resources, research, and information
- Increasing awareness and understanding of organizational ombudsman value among key stakeholders and the general public
- Creating strategic alliances or direct communications with other key organizations and professionals involved in dispute resolution, governance, ethics, and risk mitigation

**Vision Statement:** IOA leads the global organizational ombudsman profession by setting the standard for excellence in practice and demonstrating the effectiveness of the organizational ombudsman role to organizational leaders, policy makers, other professions and associations, and the public.

### **International Ombudsman Association Values**

- **Integrity:** IOA conducts all activities responsibly with equity and accountability to its membership and profession.
- **Service:** IOA supports its membership by providing innovative and high quality services.
- **Respect:** IOA embraces a range of differences of people and viewpoints in building a robust organization.
- **Collaboration:** IOA promotes interaction among ombudsman practitioners and engages with other organizations to advance the profession.

*\*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.*

## Schedule at a Glance

This schedule is preliminary and subject to change.

Additional registration is required for all Professional Development and Specialty Workshops.

### Professional Development Courses

#### Friday, April 20

<b>8:00 a.m. – 5:00 p.m.</b>	Foundations of Organizational Ombudsman Practice Day 1
<b>8:30 a.m. – 5:30 p.m.</b>	Core Course – Conflict: Theory and Applications for the Organizational Ombudsman Day 1 <i>Instructors: Sue Theiss and Michael Dues</i>

#### Saturday, April 21

<b>8:00 a.m. – 5:00 p.m.</b>	Foundations of Organizational Ombudsman Practice Day 2
<b>8:30 a.m. – 5:30 p.m.</b>	Core Course – Conflict: Theory and Applications for the Organizational Ombudsman Day 2 <i>Instructors: Sue Theiss and Michael Dues</i>

#### Sunday, April 22

### Professional Development and Specialty Workshops

<b>8:00 a.m. – 3:30 p.m.</b>	Foundations of Organizational Ombudsman Practice Day 3
<b>8:30 a.m. – 5:00 p.m.</b>	<b>Full-Day Specialty Workshop</b>
	<b>FD 1: Respectful Confrontation: Promoting Resilience Through Body-based Skill Building</b> <i>Presented by: Joe Weston</i>
<b>8:30 a.m. – Noon</b>	<b>Half-Day Specialty Workshops</b>
	<b>AM 1: Influence and Negotiation for Designated Neutrals</b> <i>Presented by: Mary Beth Stevens, CO-OP</i>
	<b>AM 2: Healthcare Ombuds and Patient-Provider Conflict: Broadening Our Reach</b> <i>Presented by: Haavi Morreim and Howard Gadlin</i>
	<b>AM 3: Playing Well with Others: Building Conflict Management Skills Through Improvisation</b> <i>Presented by: Adam Barak Kleinberger, CO-OP</i>
<b>1:30 p.m. – 5:00 p.m.</b>	<b>Half-Day Specialty Workshops</b>
	<b>PM 1: A Research Primer for Ombuds</b> <i>Presented by: Shannon Lynn Burton</i>
	<b>PM 2: Bullied on the Job: Understanding Distressed and Diverse Visitors</b> <i>Presented by: Kathleen Canul</i>
	<b>PM 3: Manage Conflict/Maintain Ethical Communication Through the Throes of Grief</b> <i>Presented by: Laura Smythe</i>
<b>7:00 p.m.</b>	Ombuddies Unplugged: No Host Talent Show Open to All Conference Attendees

## Schedule at a Glance

### Monday, April 23

#### General Conference Day 1

7:00 a.m. – 8:00 a.m.	Continental Breakfast for All Attendees
8:00 a.m. – 8:30 a.m.	<b>Conference Welcome and Opening Remarks</b>
8:30 a.m. – 9:30 a.m.	<b>Mary Rowe Honorary Keynote Address: It's Not Just a Title – It's a Calling</b> <i>Presented by: Rita Franklin, CO-OP, PCC</i>
9:30 a.m. – 10:00 a.m.	Networking Break
10:00 a.m. – 11:00 a.m.	<b>Keynote</b> <b>Respectful Confrontation: Reframing Power and Leadership in the 21st Century</b> <i>Presented by: Joe Weston</i>
11:00 a.m. – 11:15 a.m.	Networking Break
11:15 a.m. – 12:15 p.m.	Plenary: Session with the IOA Board
12:15 p.m. – 1:30 p.m.	Volunteer Recognition Luncheon for All Conference Attendees
1:30 p.m. – 3:00 p.m.	<b>Concurrent Session 1</b>
	1. <b>Om'biance: A Practical Discussion of Ombuds Office Space and Esthetics</b> <i>Presented by: Katherine Greenwood and Patricia Ponce</i>
	2. <b>Extra Extra! What "Solutions Journalism" and Conflict Resolution Can Learn from Each Other</b> <i>Presented by: Amanda Ripley, Samantha Levine-Finley and Mary Conger</i>
	3. <b>Compassion Fatigue</b> <i>Presented by: Sigal Shoham and Brian Bloch, CO-OP</i>
	4. <b>Demonstrating Your Value (2018): How Ombuds Help to Manage Risk</b> <i>Presented by: Timothy Hedeem, CO-OP, Mary Rowe, and Jennifer Schneider</i>
	5. <b>Labor Relations: Just Cause for Conflict Resolvers</b> <i>Presented by: Sarah Espinosa, CO-OP, and Homer LaRue</i>
	6. <b>Systemic Dignity</b> <i>Presented by: Camilo Azcarate</i>
3:00 p.m. – 3:30 p.m.	Networking Break
3:30 p.m. – 5:00 p.m.	<b>Concurrent Session 2</b>
	7. <b>Tricksters and Heroes – How Mediators Redefine Conflict Boundaries</b> <i>Presented by: Linda Brothers</i>
	8. <b>Build Ombudsman Legacies by Listening Better So People Feel Heard</b> <i>Presented by: Steffi Berkowitz and Joshua Berkowitz</i>
	9. <b>The Space Before the Facilitated Conversation: Preparing Visitors</b> <i>Presented by: David Michael and Tyler Smith</i>

## Schedule at a Glance

### Monday, April 23

3:30 p.m. – 5:00 p.m.

#### Concurrent Session 2 (continued)

**10. Experience: On Display**

*Presented by: Teresa Ralicki, CO-OP, and Adam Barak Kleinberger, CO-OP*

**11. What Would You Do? Navigating Ethical Principle Dilemmas**

*Presented by: The IOA Mentoring Committee: Lynne Chaillat, Melissa Connell, CO-OP, Donna Douglass-Williams, CO-OP, Dolores Gomez-Moran, CO-OP, Jon Lee, Shreya Trivedi, CO-OP, Ronnie Thomson, and Mary Beth Stevens, CO-OP*

**12. Ombuds Practice in the New Protest Era**

*Presented by: Amanda Dean*

5:00 p.m. – 7:00 p.m.

IOA Welcome Reception

### Tuesday, April 24

#### General Conference Day 2

7:30 a.m. – 8:30 a.m.

Continental Breakfast for All Attendees

8:30 a.m. – 9:45 a.m.

#### Keynote

**Empowering Ombuds to Help Solve the Problem of Abrasive Leadership**

*Presented by: Laura Crawshaw, PhD, BCC*

9:45 a.m. – 10:45 a.m.

Sector Networking Meeting (see page 36 for more information)

10:45 a.m. – Noon

IOA Annual Business Meeting (IOA members only)

Noon – 1:00 p.m.

Lunch for All Conference Attendees; or Lunch for Ombuds New to the Profession and First-time Attendees (RSVP Required)

1:00 p.m. – 2:30 p.m.

#### Concurrent Session 3

**13. Strange Bedfellows: Negotiating Neutrality Through Institutional and Interpersonal Entanglements**

*Presented by: Julia Heck and Sean Woolf*

**14. Developing a Shield Law to Protect the Organizational Ombuds**

*Presented by: Jon Lee*

**15. Conversations with Leaders**

*Presented by: David Michael and Maureen Brodie*

**16. Value Proposition for Ombuds Programs**

*Presented by: William Maurer, CO-OP, Patrick Holman, CO-OP, Gareth Willatt, and Felecia Bunns, CO-OP*

**17. In the Room Where it Happen: Inside Ombuds Practices**

*Presented by: Chuck Sloane, Angela Dash, Andrew Larratt-Smith, CO-OP, Shirley Nakata, and Ruthy Kohorn Rosenberg*

## Schedule at a Glance

### Tuesday, April 24

1:00 p.m. – 2:30 p.m.

#### Concurrent Session 3 (continued)

- 18. Tough Choices: Reflecting on Decision Points in Challenging Cases**  
*Presented by: Francine Montemurro, Nicholas Diehl, CO-OP, and Howard Gadlin*

2:30 p.m. – 3:00 p.m.

Networking Break

3:00 p.m. – 4:30 p.m.

#### Concurrent Session 4

- 19. Establishing Trust in Groups: Lencioni and Google Models in Practice**  
*Presented by: Rita Callahan, CO-OP, and Ellen Goldstein, CO-OP*
- 20. Translating Mediation Theory and Practice to Ombuds Practice**  
*Presented by: Roy Baroff, CO-OP*
- 21. The Power of Data and Benchmarking in Ombuds Programs**  
*Presented by: Jackie Osborne, CO-OP, Eric Mayo, CO-OP, Sana Manjeshwar, CO-OP, Tiffani Neu, and Vickie Rose*
- 22. Building Capacity: Demonstrating Our Worth in K-12 School Systems**  
*Presented by: Edward Newsome, Jr., Consuela Robinson, and Carlesa Finney*
- 23. Conducting a Conflict Resolution Student Academy**  
*Presented by: Erica Hansen and Olga Moran*
- 24. Popcorn Share: Discover New Resources to Enhance Your Ombuds Practice**  
*Presented by: Vikram Kapoor, Carolyn Esposito, CO-OP, Doris Campos-Infantino, and Elizabeth Hill, CO-OP*

4:30 p.m. – 5:00 p.m.

Networking Break

5:00 p.m. – 6:30 p.m.

Pecha Kucha Cocktail Hour



## Schedule at a Glance

Wednesday, April 25

### General Conference Day 3

7:30 a.m. – 8:30 a.m.	Continental Breakfast for All Attendees
8:30 a.m. – 9:45 a.m.	<b>Plenary: Dealing with Sexual Misconduct in Organizations</b> <i>Facilitator: Shereen Bingham</i> <i>Panel: Linda Brothers, Lynne Chaillat, and Eric Mayo</i>
9:45 a.m. – 10:15 a.m.	Networking Break
10:15 a.m. – 11:45 a.m.	<b>Plenary - Howard Gadlin Un-Debate: Ombuds Neutrality in a Politically Charged Era: Time for a Reexamination?</b> <i>Facilitator: Sana Manjeshwar, CO-OP</i> <i>Panel: Wayne Blair, Carolyn Esposito, CO-OP and Howard Gadlin</i>
11:45 a.m. – 1:30 p.m.	Networking Lunch
1:30 p.m. – 3:00 p.m.	<b>Concurrent Session 5</b>
	<b>25. Fairy Tale Fishbowl</b> <i>Presented by: Teresa Ralicki, CO-OP, and Adam Barak Kleinberger, CO-OP</i>
	<b>26. Academic Writing for the Ombuds</b> <i>Presented by: Shannon Lynn Burton</i>
	<b>27. Breaking Into Tech: Growing the Industry Through the Contract Ombudsman</b> <i>Presented by: Amanda Dean</i>
	<b>28. Ombuds as a Conflict Resolution Trainer</b> <i>Presented by: Diana Anderson</i>
	<b>29. Validate Your Office and Create Sustainability with Your Annual Report</b> <i>Presented by: Karey Barnes</i>
	<b>30. What's an Ombuds To Do...in a Conflict Management System?</b> <i>Presented by: Brian Bloch, CO-OP, and Sigal Shoham</i>
3:00 p.m. – 3:30 p.m.	Networking Break

## Schedule at a Glance

Wednesday, April 25

General Conference Day 3

3:30 p.m. – 5:00 p.m.

Concurrent Session 6

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- 31. The Ombuds Role When Consultants are Hired by Your Institution**  
*Presented by: Lisa Neale, CO-OP, and Hector Escalante*
- 
- 32. Assessing Your Data: What Compelling Stories are Hiding There?**  
*Presented by: Timothy Hedeem, Ilene Butensky, CO-OP, Scott Deyo, CO-OP, Mary Rowe, and Jennifer Schneider*
- 
- 33. Politics and the Ombuds: Navigating the New Era**  
*Presented by: Shannon Lynn Burton and Caitlan Hendrickson*
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- 34. When Visitors Speak: How to Manage Issues Relating to Confidentiality**  
*Presented by: Joan Waters, CO-OP, and Ruth Kohorn Rosenberg*
- 
- 35. Neutrality: Our Ombuds Superpower**  
*Presented by: Carolyn Esposito, CO-OP, and Sana Manjeshwar, CO-OP*
- 
- 36. T.E.A.C.H. Employees to Prevent Conflicts**  
*Presented by: Clare Fowler*
- 

5:00 p.m. – 5:15 p.m.

Final Remarks/Conclusion of Conference



## Professional Development

### Pre-Conference Professional Development Courses and Specialty Workshops

Friday, April 20 – Sunday, April 22

Make the most out of your trip to Richmond with professional development courses and specialty workshops prior to this year's annual conference. Take advantage of package pricing to receive more than \$300 off when you register for the annual conference and Foundations of Organizational Ombuds Practice.

### Foundations of Organizational Ombuds Practice

**Friday and Saturday: 8:00 p.m. – 5:00 p.m.**

**Sunday: 8:00 a.m. – 3:30 p.m.**

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 three-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 ombuds 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 four basic principles of the organizational ombudsman role: neutrality, independence, confidentiality, and informality
- Why confidentiality is essential to the practice and 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 ombuds' office, including the fundamentals of how to log concerns, report to management, and design reports to track issues
- How to align the ombuds function with the mission, values, and culture of the organization
- How to promote the ombuds' role and function, including ways to gain and keep management support

**Prerequisites:** None

**Course Limit:** 68 participants



## Professional Development

### Professional Development Courses and Specialty Workshops

#### New Core Course!

#### **Conflict: Theory and Applications for the Organizational Ombudsman**

Friday, April 20 – Saturday, April 21

8:30 a.m. – 5:30 p.m.

Faculty: Michael Dues, Senior Lecturer and Professor, University of Arizona  
Sue Theiss, University Ombuds, Oregon State University

Develop a broader and deeper understanding of the full range of research and theory regarding human conflict. Learn how to apply this understanding to conflict in organizations and the practical applications for both working with specific disputes and helping to improve the organization's systems and culture for addressing conflict.

As a result of this program you will learn:

- The seminal theories and research in conflict management across various disciplines
- How to combine concepts from these various fields to inform the role and work on the organizational ombuds
- New conceptual tools for facilitating dispute resolutions in the context of broader, sometimes counterproductive, conflict management systems

**Prerequisites:** Foundations of Organizational Ombudsman Practice

**Course Limit:** Minimum: 6 participants; Maximum: 30 participants





## Specialty Workshops

Sector descriptions are:

A - Academic

G - Government

N - Non-profit

ALL - Sessions relevant for all sectors

C - Corporate

H - Healthcare

I - International

### Full-day Course

#### Sunday, April 22

Take advantage of an extra day of professional development before the conference begins! Additional registration is required. Seating is limited.

#### Respectful Confrontation: Promoting Resilience Through Body-based Skill Building

**Presented by:** **Joe Weston**, *Author, Consultant and Founder of Respectful Confrontation®*

Do you experience dismissive or unresponsive leadership? Compassion fatigue in your leaders and yourself? Using the techniques of Joe Weston's "The 4 Pillars of Resilient Power," at the core of the Respectful Confrontation method, ombuds will learn and practice strategies and easy-to-apply tools to effectively navigate resistance - from others and also from yourself.

Resistance and power struggles show up when ombuds challenge practices of status quo and work to help with change and transition. In this full-day session you will learn to build resilience to better navigate challenges and resistance, leading to enhanced performance, time and energy management, integration of mind, heart and body, as well as overcoming the patterns of burn out and compassion fatigue with effective self-care practices.

### Morning Half-day Courses

#### 8:30 a.m. – Noon

##### AM 1: Influence and Negotiation for Designated Neutrals

**Level:** Fundamental

**Sector:** All

**Faculty:** **Mary Beth Stevens**, *CO-OP, Ombudsman, Los Alamos National Laboratory*

Gain skills to influence key people, even in situations where you have no positional authority. Review principled negotiation fundamentals and practice approaches essential to good negotiation practice.

##### AM 2: Healthcare Ombuds and Patient Provider Conflict: Broadening Our Reach

**Level:** Intermediate

**Sector:** C, H, NP

**Faculty:** **Haavi Morriem**, *Professor, University of Tennessee College of Medicine, and*  
**Howard Gadlin**, *Retired Ombuds, National Institutes of Health*

Medical center ombuds typically focus exclusively on staff/employee conflicts, referring patient/provider issues elsewhere. However, patients and families also need neutral, informal, and independent conflict resolution services, and institutions need the system-level feedback that ombuds can provide. This highly interactive session will discuss the benefits, potential avenues toward, and potential barriers to, medical center ombuds' ability to broaden services to encompass patient/provider issues. Attendees will participate in two patient-provider mock mediations, followed by extensive debriefing.

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## Specialty Workshops

### Morning Half-day Courses

8:30 a.m. – Noon

#### AM 3: **Playing Well with Others: Building Conflict Management Skills Through Improvisation**

**Level:** Fundamental

**Sector:** All

**Faculty:** **Adam Barak Kleinberger**, *CO-OP, Associate Ombuds, Boston University*

Learn how to think on your feet, collaborate with others, and really, truly listen. All are welcome to attend this non-traditional, participatory training session that uses improvisation to build the conflict management skills of each learner. Other areas of focus include how to build trust and integrate feedback in order to use this new approach with learners in your own established training sessions.

### Afternoon Half-Day Courses

1:30 p.m. – 5:00 p.m.

#### PM 1: **A Research Primer for Ombuds**

**Level:** Fundamental

**Sector:** All

**Faculty:** **Shannon Lynn Burton**, *Associate University Ombudsperson, Michigan State University*

Many ombuds have “big questions” about their practice, but have not been able to explore them in a meaningful space. In this session, ombuds can explore research questions and consider methods. Through utilizing the critical friends process, which allows for collegial reflection and sharing of information, ombuds will work together to create a community of scholars to begin expanding their research base and design a strategy for answering their questions.

#### PM 2: **Bullied on the Job: Understanding Distressed and Diverse Visitors**

**Level:** Fundamental

**Sector:** All

**Faculty:** **Kathleen Canul**, *Director of Ombuds Services, University of California, Los Angeles*

Bullying in the workplace is destructive to the target individual and the organization. The toll of incivility can be ameliorated by effective interventions. Learn about the types of workplace bullying and the ramifications to the employee and the organization. Additionally, gender, race, and sexual orientation will be explored as “risk factors” to being bullied. Explore a holistic approach to understanding and aiding bullied visitors.

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## Specialty Workshops

### Afternoon Half-day Courses

1:30 p.m. – 5:00 p.m.

**PM 3:** **Manage Conflict/Maintain Ethical Communication Through the Throes of Grief**

**Level:** Fundamental

**Sector:** A, C, H, NP

**Faculty:** **Laura Smythe**, *CEO/Organizational Culture Diagnostician, Communication Connections, LLC*

Grief and stress both impact the ways in which we process information, interact with people, and experience our place in the world. Managing conflict in the midst of grief often feels like an additional burden that is impossible to manage. Gain key skills you can use both to work within this realm and to role model for others who may need to do so.



## Keynote Speakers

Monday, April 23

8:30 a.m. – 9:30 a.m.

### Mary Rowe Honorary Keynote Address It's Not Just a Title – It's a Calling

Presented by **Rita Franklin, CO-OP, PCC, Executive Coach and Organizational Consultant**

Have you thought about what brought you to this great profession? Who are you as an ombudsman and how do you show up to fulfill this great occupation? Have you thought about the impact you have on your organization achieving its mission and the impact on its employees? Have you thought about your role as a servant leader for your staff, your organization, and the ombudsman profession? Please consider joining Rita as she describes her journey as a federal government organizational ombudsman and shares her perspective regarding this professional calling.



**Rita R. Franklin** is an executive coach and organizational consultant. She served as the director of the Office of the Ombudsman for the Department of Energy from March 2012 until her retirement in January 2018. The Office of the Ombudsman was a Secretarial initiative and Franklin was selected to spearhead this effort. Prior to assuming her role as ombudsman, Franklin was the deputy chief human capital officer and she was responsible for the management and execution of the Department's human capital management programs.

Franklin has served the U.S. Federal Government for nearly 40 years in three agencies—the U.S. Information Agency, the U.S. Department of Treasury, and the U.S. Department of Energy. She began her career in a clerical position and progressed to the level of senior executive service. Franklin worked in the human capital field for 12 years before accepting the role as the ombudsman and she is recognized as a leader in human capital management and ombudsman communities in the federal government.

Franklin earned a bachelor of science in business management/law and public policy from the University of Maryland University College. She is a graduate of the Georgetown University Leadership Coaching Program and is International Coaching Federation certified. She is a Certified Organizational Ombudsman by the International Ombudsman Association.



## Keynote Speakers

Monday, April 23

10:00 a.m. – 11:00 a.m.

### Respectful Confrontation: Reframing Power and Leadership in the 21st Century

Presented by Joe Weston

Power and resistance is at the heart of organizational struggles to address complex issues and structural change. Joe Weston will speak to us about how compassionate engagement and reframing views on confrontation, assertiveness, and true power lead to greater self-confidence, peaceful interactions with others, and a deeper understanding of transformational leadership. Reframing how we think of power and resistance will help guide our actions with our organizations' leaders to support their courage and safety to change what can feel like intractable cultural notions, mores, and norms to achieve peace.



**Joe Weston** is an international workshop facilitator, author, consultant, personal life coach, and advocate for lasting peace. His book, *Mastering Respectful Confrontation*, is selling throughout the world.

Born and educated in New York, Joe lived in Amsterdam for 17 years and now lives in Washington, DC. Joe brings a wealth of insight to his work based on many teachings, including Tai Chi Chuan, mindfulness, and a variety of ancient traditions—plus his experience in theater and various organizational trainings, to

create a unique style of training and coaching that combines theory with somatic exercises.

His clients include NASA, the World Bank, Oxfam, KLM, Dutch Ministry of Foreign Affairs, Mitsubishi Motors and various government and educational institutions.

He is currently adjunct professor at Georgetown University, School of Government, Department of Conflict Resolution, teaching a course: Body-based skill building for navigating stress and confrontation.

Weston works with women's rights and other humanitarian organizations in the Middle East, focusing on empowerment and leadership, reframing power/masculinity, and overcoming gender-based violence.

He has also worked with different veterans organizations, supporting returning and wounded veterans in their process of integration and healing, and has also volunteered for the Liberation Prison Project, teaching meditation and leadership to inmates.

For a more comprehensive list of clients, go to [www.respectfulconfrontation.com](http://www.respectfulconfrontation.com).

## Keynote Speakers

Tuesday, April 24

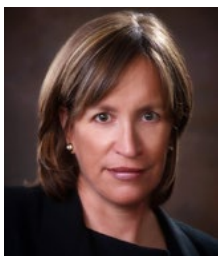
8:30 a.m. – 9:45 a.m.

### Empowering Ombuds to Help Solve the Problem of Abrasive Leadership

Presented by **Laura Crawshaw, PhD, BCC, Founder, The Boss Whisperer**

All too often visitors arrive at the ombudsman's office seeking relief from suffering caused by abrasive leadership, and all too often ombuds feel helpless to resolve this problem. You've listened to visitors who sought help from various institutional entities and shared in their sense of helplessness and hopelessness when nothing changed. Visitors may also have been referred to mediation with their manager even though mediation is not designed to address chronically abrasive leadership styles. This path implies the visitor, rather than the organization, should shoulder the intimidating task of correcting an abrasive leader's behavior. Concluding that the organization does not care enough to intervene, or worse, tacitly condones unacceptable leadership conduct, visitors are left with two alternatives: submit and suffer, or leave. The result? As one ombudsman put it: "I'm tired of helping good people leave."

Learn how the ombudsman role can be enhanced to actively help both the organization and individuals solve the problem of abrasive leadership. Working from their ethical foundation of independence, neutrality, impartiality, confidentiality, and informality, ombuds are perfectly positioned to fulfill the roles of 1) intervention educator, training institutional leadership on how to manage unacceptable workplace conduct, and 2) specialist coach for abrasive leaders, helping them develop insight into their management approaches. The time has come to stop the suffering caused by abrasive leadership, and equipped with the courage, compassion, and curiosity inherent to the ombuds role, ombuds should be empowered to take pride in "helping good people stay."



With more than 40 years' experience as a psychotherapist, corporate officer, executive coach, researcher and author, **Dr. Laura Crawshaw** founded the Executive Insight Development Group in 1994, The Boss Whispering Institute in 2009, and the Consortium on Abrasive Conduct in Higher Education in 2013. Executive Insight specializes in coaching abrasive leaders, and has served an international clientele of organizations including more than 40 Fortune 500 companies and the United Nations. The Boss Whispering Institute is dedicated to research and training in the field of coaching abrasive leaders, and it is the

Institute's mission is to relieve individual and organizational suffering caused by workplace bullying. Crawshaw lectures and trains coaches worldwide and is the author of *Taming the Abrasive Manager: How to End Unnecessary Roughness in the Workplace* (Jossey-Bass, 2007). A founding fellow of Harvard's Institute of Coaching, Crawshaw also holds membership in the International Society for the Psychoanalytic Study of Organizations, the American Psychological Association, the British Psychological Society, and the International Association on Bullying and Harassment at Work.

## Plenary Sessions

**Monday, April 23**

**11:15 a.m. – 12:15 p.m.**

### Session with the IOA Board

This is your opportunity to connect with the IOA Board of Directors. IOA's strategic plan is in place, and the Board of Directors is committed to continuing the conversation about the state of the association and other emerging topics. Come prepared for an engaging dialogue as we continue to grow as an association and profession.

**Tuesday, April 24**

**5:00 p.m. – 6:30 p.m.**

### Pecha Kucha Cocktail Hour

**Facilitated by:** **Nicholas Diehl**, *Ombudsman, Massachusetts Institute of Technology*, and **Howard Gadlin**, *Former Ombudsman, National Institutes of Health*

Don't miss this fun, high-energy, fast-moving session! Pique your curiosity with a series of short overviews about an innovative concept or experience which may range beyond the organizational ombuds profession. A Pecha Kucha session is a series of short presentations; 20 slides per presentation, 20 seconds per slide; therefore, each presentation lasts exactly 6 minutes and 40 seconds. There is no time allotted for Q&A, but we encourage you to connect with the presenter or take the ideas and explore them more on your own. Pecha Kucha originated among designers in Tokyo in 2003 and the idea has grown in popularity, with sessions held regularly in cities around the world.



## Plenary Sessions

**Wednesday, April 25**

**8:30 a.m. – 9:30 a.m.**

**Title:** Dealing with Sexual Misconduct in Organizations  
**Level:** Intermediate  
**Sector:** All  
**Facilitator:** Shereen Bingham, *Professor and Ombudsperson, University of Nebraska*  
**Panelists:** Linda Brothers, *Senior Associate Ombudsman, National Institutes of Health*; Lynne Chaillat, *EMEA Ombuds, McKinsey and Company*; Eric Mayo, *Manager, Global Office of the Ombudsman, Chevron*

At any particular moment in history, understandings of sexual misconduct and what should be done about it emerge and change in discourses circulating within a culture. Over the past several months, a surge in public discourse about sexual harassment and assault experiences has illuminated the urgency and challenges of prevention and response. The present cultural moment offers an opportunity for our profession to bring overtly into public consciousness the unique and valuable role the organizational ombuds can play in helping organizations prevent and address sexual misconduct. Are we ready for this moment? How much common ground is there within the profession regarding the ombud's involvement with these concerns? What challenges and complexities do these situations introduce for ombuds ethics and standards of practice? This plenary session will feature a panel of ombuds from different sectors who will share their perspectives and then discuss how they would approach and handle a specific case. Audience members also will have the opportunity to offer input and share their views and experiences as ombuds.

**10:00 a.m. – 11:30 a.m.**

**Title:** Howard Gadlin Un-debate: Ombuds Neutrality in a Politically-Charged Era: Time for a Reexamination?  
**Facilitator:** Sana Manjeshwar, CO-OP  
**Panelists:** Wayne Blair, Carolyn Esposito, and Howard Gadlin

This Annual Howard Gadlin Un-debate is a general plenary session held at the annual IOA conference since 2016. In the spirit of the many offerings of Howard Gadlin over the years, the purpose of this session is to raise for discussion critical questions related to the practice of organizational ombuds. This session continues Howard's predilection to "push the envelope" in a way that challenges us to openly discuss issues in a critically supportive manner.

This Un-debate will begin a discussion of neutrality and the challenges it raises for ombuds in the current political environment. Are we able to promote fairness and still maintain neutrality? What is our role in supporting the values of our organizations? Do we need to suppress our identities and perspectives to remain neutral? At what point does neutrality begin to eviscerate our effectiveness? Come prepared for a lively and interactive discussion!

2018



## Concurrent Sessions

Monday, April 23

1:30 p.m. – 3:00 p.m.

### Concurrent Session 1

#### 1. Om'biance: A Practical Discussion of Ombuds Office Space and Esthetics

**Level:** Fundamental

**Sector:** All

**Speakers:** **Katherine Greenwood, CO-OP**, *Director, University of California, Davis Ombuds Office*  
**Patricia Ponce**, *Student Ombuds, California Polytechnic State University*

Ombuds may be unified by an aspirational goal of creating a welcoming and safe place for visitors, yet, the use of space, the placement of furniture, and interior décor varies greatly from office to office. What story is your office telling? By integrating concepts of form and function, and viewing images of colleague's offices, we will explore the benefits of conscious attention to office esthetics on the visitor and ombuds.

#### 2. Extra Extra! What "Solutions Journalism" and Conflict Resolution Can Learn from Each Other

**Level:** Intermediate

**Sector:** All

**Speakers:** **Amanda Ripley**, *Senior Fellow, Emerson Collective*;  
**Samantha Levine-Finley**, *Manager of Technical Assistance/LEARN, Dexis Consulting Group*;  
**Mary Conger**, *Executive Director, American Dialogue Project*

We don't often think of journalists and ombuds having much in common. But for reporters practicing "solutions journalism" there is more overlap than you might imagine. At the root, both camps aim to catalyze more civil, substantive, productive conversations, albeit with different ends in mind and some different tools at their disposal. In this session, we will hear about the "solutions journalism" movement and how conflict resolution professionals can learn from it as well as contribute to its success. It will feature insights from journalist and author Amanda Ripley (*The Atlantic*, *TIME*, *Wall Street Journal*); Samantha Levine-Finley, a former print journalist and ombuds; and Mary Conger, who runs The American Dialogue Project ([americandialogueproject.org](http://americandialogueproject.org)).

## Concurrent Sessions

Monday, April 23

1:30 p.m. – 3:00 p.m.

### Concurrent Session 1 (continued)

#### 3. Compassion Fatigue

**Level:** Intermediate

**Sector:** All

**Speakers:** **Sigal Shoham**, *Department of Interior, National Park Service*;  
**Brian Bloch, CO-OP**, *Ombuds, Department of Interior, National Park Service*

As ombuds, we listen to people share negative situations or difficult dilemmas each day. It can be hard not to become disappointed, hopeless, or have the issues affect us in other personal ways. The result might be that we have less compassion or space for our visitors. This session will explore the impacts our jobs have on us as individuals and include a brainstorm and discussion of strategies to deal with and prevent compassion fatigue.

#### 4. Demonstrating Your Value (2018): How Ombuds Help to Manage Risk

**Level:** Intermediate

**Sector:** All

**Speakers:** **Timothy Hedeem**, *Ombuds and Professor*;  
**Mary Rowe**, *Professor and Former Ombuds, MIT*;  
**Jennifer Schneider, CO-OP**, *Ombuds, University of South Florida*

Organizations recognize the value of risk management, and ombuds offices can play critical roles in recognizing and mitigating risk. Individuals—complainers, responders, and bystanders alike—also encounter risk, and an ombuds office can be a valuable resource for them. Inspired by IOA Practice Survey data, we will consider how ombuds might monitor their role in risk management and how to communicate with stakeholders about that work.

#### 5. Labor Relations: Just Cause for Conflict Resolvers

**Level:** Intermediate

**Sector:** All

**Speakers:** **Sarah Espinosa, CO-OP**, *Arbitrator, Mediator, Ombuds, SME Dispute Resolution, LLC*; **Homer LaRue**, *Arbitrator, Mediator, Professor of Law, Howard University School of Law*

This session provides conflict resolution professionals with an understanding of the just cause standard and a framework to analyze appropriate levels of employee discipline. This knowledge will assist professionals in helping visitors identify interests and explore options while ensuring compliance with the IOA Code of Ethics. Additionally, an overview of grievance and arbitration procedures will be reviewed. The session will include interactive scenarios and small and large group discussions.

## Concurrent Sessions

Monday, April 23

1:30 p.m. – 3:00 p.m.

### Concurrent Session 1 (continued)

#### 6. Systemic Dignity

**Level:** Intermediate

**Sector:** A, C, G, H, NP

**Speaker:** **Camilo Azcarate**, *Manager, Mediation Services, World Bank Group*

Human dignity is the inherent sense of self-worth that all humans share. The protection of this dignity and the promotion of our well-being is the natural mission of all social systems, including families, organizations and the society at large. The concept of Systemic Dignity is conceived as a way to increase our understanding about differences in a social system's capacity to honor human dignity. It merges two fields of study: dignity/ humiliation studies and Dynamic Systems.

Monday, April 23

3:30 p.m. – 5:00 p.m.

### Concurrent Session 2

#### 7. Tricksters and Heroes – How Mediators Redefine Conflict Boundaries

**Level:** Fundamental

**Sector:** All

**Speaker:** **Linda Brothers**, *Senior Associate Ombudsman, National Institutes of Health*

How can you identify the different implicit cultural assumptions that are embodied within our visitors' conflict narratives? Examine strategies for deconstructing and reframing these conflict narratives in a way that helps individuals to understand each other and reach agreement across lines of difference and cultural assumption.

#### 8. Build Ombudsman Legacies by Listening Better So People Feel Heard

**Level:** Fundamental

**Sector:** All

**Speakers:** **Steffi Berkowitz**, *CEO, Berkowitz Civility Group*;  
**Joshua A. Berkowitz**, *Principle, Joshua A. Berkowitz, P.L.*

Now more than ever, we are challenged to navigate conflict environments where people's basic human needs involve being heard and understood. In the ombudsman setting, do your listening skills give, receive, and share information that model for others inviting ways to navigate challenges and sensitive discussions? Are you delivering the best, most authentic ability to listen that you can? Come learn about listening styles, competencies, and ways to better convey them in conflict environments and conversations.

## Concurrent Sessions

Monday, April 23

3:30 p.m. – 5:00 p.m.

Concurrent Session 2 (continued)

### 9. The Space Before the Facilitated Conversation: Preparing Visitors

**Level:** Intermediate

**Sector:** All

**Speakers:** **David Michael**, *Deputy Ombuds, National Institutes of Health*;  
**Tyler Smith**, *Associate Ombudsman, National Institutes of Health*

The way you approach the space before a facilitated conversation can have a critical impact on individuals' experiences and outcomes. Participate in a staged dialogue around preparing individuals for a facilitated conversation. Practice approaches that empower individuals to understand their situations differently, develop skills, and foster a shift in their relationships with one another.

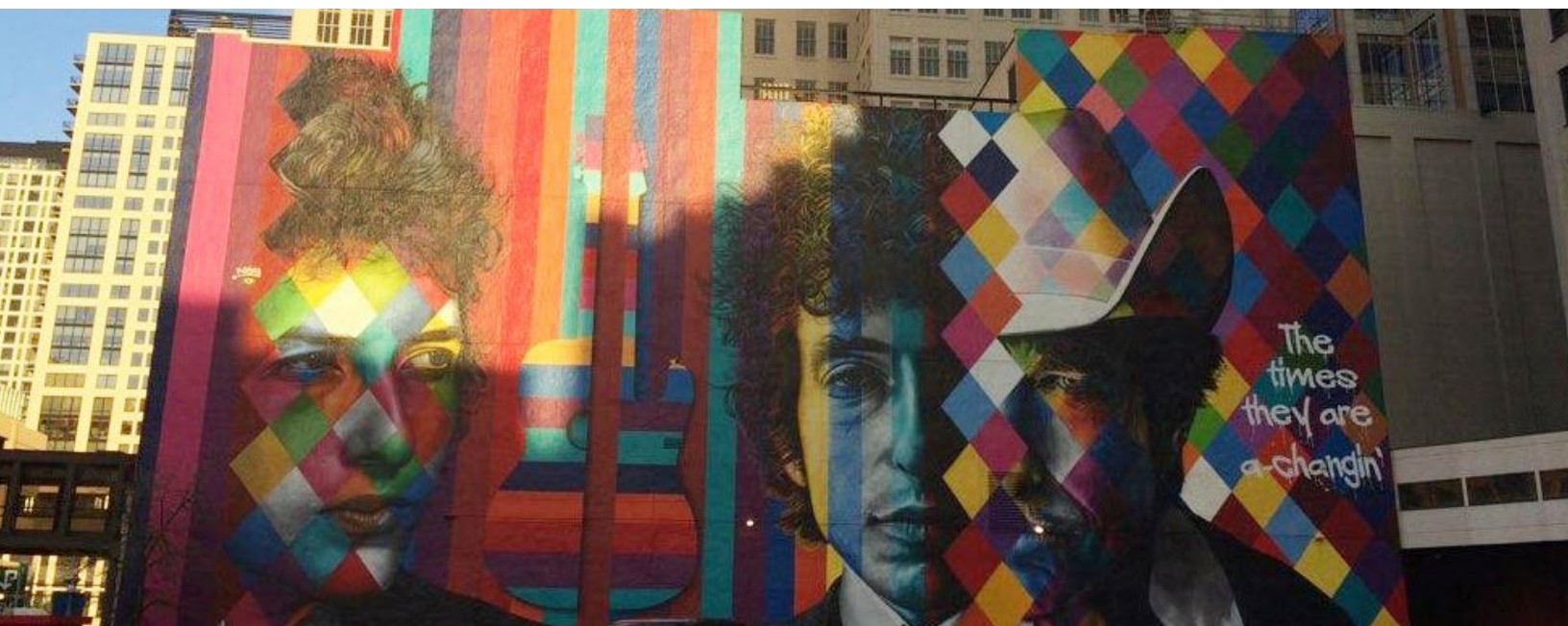
### 10. Experience: On Display

**Level:** Fundamental

**Sector:** All

**Speakers:** **Teresa Ralicki, CO-OP**, *Ombuds, University of Colorado, Denver*;  
**Adam Barak Kleinberger, CO-OP**, *Associate Ombuds, Boston University*

Ombuds and ombuds supporters are often isolated from one another, and there is a need to exchange and empathize over shared experiences and challenges. Podium and panel formats allow only one dimension of interaction. All attendees are invited to submit artwork for this session. **Submission forms are due March 1.**





## Concurrent Sessions

Monday, April 23

3:30 p.m. – 5:00 p.m.

Concurrent Session 2 (continued)

### 11. What Would You Do? Navigating Ethical Principle Dilemmas

**Level:** Fundamental

**Sector:** All

**Speakers:** **IOA Mentoring Committee:**  
**Lynne Chaillat**, *EMEA Ombud, McKinsey and Company;*  
**Melissa Connell, CO-OP**, *Director, Ombuds Office, University of Colorado, Denver;*  
**Donna Douglass Williams, CO-OP**, *Director, Ombuds Program, MD Anderson Cancer Center;*  
**Dolores Gomez-Moran, CO-OP**, *Ombudsman, Pan American Health Organization;*  
**Jon Lee**, *Associate Ombuds, University of New Mexico;*  
**Mary Beth Stevens, CO-OP**, *Los Alamos National Laboratory;*  
**Ronnie Thomson**, *Corporate Ombudsman, Haliburton;*  
**Shreya Trivedi, CO-OP**, *University Ombuds Officer, University of Central Florida*

Designed as an interactive session for relatively new practitioners, this workshop presents participants with practice scenarios—challenging one or more IOA ethical principles—and invites discussion on possible approaches in a small group format. Ombudspersons in their early years can discuss with more experienced practitioners on questions of practice, reflect on handling of “real-life” cases, as well as share other challenges in the ombuds role.

### 12. Ombuds Practice in the New Protest Era

**Level:** Fundamental

**Sector:** All

**Speaker:** **Amanda Dean**, *Assistant Ombuds, University of California, Berkeley*

Since November 2016 we have seen a new awakening of protest culture in America. From the women’s marches following the election to the tragedy of Charlottesville, Virginia, USA, public demonstrations are on the rise. In this session we will discuss how this new political climate is affecting the work of the organizational ombuds.

## Concurrent Sessions

Tuesday, April 24

1:00 p.m. – 2:30 p.m.

### Concurrent Session 3

#### 13. **Strange Bedfellows: Negotiating Neutrality Through Institutional and Interpersonal Entanglements**

**Level:** Intermediate

**Sector:** A, C, NP

**Speakers:** **Julia Heck**, *Associate Director, Office of the Ombuds, Eastern Michigan University*;  
**Sean Woolf**, *Interim Associate Director, Eastern Michigan University*

In an ideal world every ombuds office would be situated in a way that avoids conflicts of interest, minimizes intrusion from institutional stakeholders, and maximizes autonomy. Unfortunately, in practice this isn't always the case. The question then is how to manage an ethical ombuds practice when institutional and interpersonal entanglements encroach on our work. Discuss best practices and learn how to facilitate ethical ombuds practice in compromised situations.

#### 14. **Developing a Shield Law to Protect the Organizational Ombuds**

**Level:** Intermediate

**Sector:** A, C, G, H, NP

**Speaker:** **John Lee**, *Associate Ombuds, University of New Mexico*

Explore the development process of a shield law used to protect the confidentiality privileges of organizational ombuds in New Mexico, the guiding philosophies that went into its creation, and its relationship to the IOA Standards of Practice. Learn best practices to create a framework for developing similar laws in your own state. We will also discuss the need for protection and the potential impact it could have for ombuds.

#### 15. **Conversations with Leaders**

**Level:** Advanced

**Sector:** All

**Speakers:** **David Michael**, *Deputy Ombudsman, National Institutes of Health*;  
**Maureen Brodie, CO-OP**, *Director, Office of the Ombuds, University of California, San Francisco*

Systemic or organization-wide conflicts may lead us into important conversations with senior leaders. These conversations allow us to build intimacy, challenge paradigms, raise values, consider possibilities, and define the orientation of the ombuds within the organization. Ombuds who serve corporate, academic, and government organizations will lead a discussion, present a demonstration of a conversation, and share stories of leadership conversations which reveal their thinking, preparation, content, what was gained, and lessons learned.

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## Concurrent Sessions

Tuesday, April 24

1:00 p.m. – 2:30 p.m.

### Concurrent Session 3 (continued)

#### 16. Value Proposition for Ombuds Programs

**Level:** Intermediate

**Sector:** All

**Speakers:** **William Maurer, CO-OP**, Associate Ombudsman, U.S. Department of Energy;  
**Patrick Holman, CO-OP**, Associate Ombuds, U.S. Department of Energy;  
**Gareth Willatt**, Interim Office of the Ombuds, U.S. Department of Energy;  
**Felecia Bunns, CO-OP**, Associate Ombudsman, U.S. Department of Energy

Presenters will introduce a methodology they created to assess the financial impact of their ombuds practice. The approach is replicable and transferable to all sectors and offices within the organizational ombuds community. Questions and feedback are strongly encouraged and may be incorporated into a finalized version of their analysis.

#### 17. In the Room Where it Happen: Inside Ombuds Practices

**Level:** Fundamental

**Sector:** All

**Speakers:** **Chuck Sloane**, University Ombuds, University of Washington;  
**Shirley Nakata, Ombudsperson**, University of British Columbia;  
**Angela Dash**, Director, Ombuds, Northeastern Ohio Medical University;  
**Andrew Larratt-Smith, CO-OP**, University Ombuds, University of California, Riverside;  
**Ruthy Kohorn Rosenberg, Ombudsperson**, Brown University

The presenters videotaped a series of mock visitor sessions in order to “pull back the curtain” and reveal what their actual process looks like in the room. This training will feature video from those mock sessions, a moderated discussion of the similarities and difference in the practitioners’ techniques, and also highlight what the presenters learned from watching their colleagues in action.

#### 18. Tough Choices: Reflecting on Decision Points in Challenging Cases

**Level:** Intermediate

**Sector:** A, C, G, I

**Speakers:** **Francine Montemurro**, Ombuds, Boston University;  
**Nicholas Diehl, CO-OP**, Ombudsperson, Massachusetts Institute of Technology;  
**Howard Gadlin**, Consultant/Mediator

Learn from actual cases where the best course of action for the ombuds was less than obvious or less than ideal. Using a case review, you’ll explore how and why the ombuds decided to handle the case as s/he did. Participate in the ensuing discussion, give feedback, suggest alternate means of handling the case. The ombuds will discuss the course of action taken, resulting consequences, and reflections in hindsight.

## Concurrent Sessions

Tuesday, April 24

3:00 p.m. – 4:30 p.m.

### Concurrent Session 4

#### 19. Establishing Trust in Groups: Lencioni and Google Models in Practice

**Level:** Intermediate

**Sector:** A, C, G, H, NP

**Speakers:** **Rita Callahan, CO-OP**, *Ombuds, University of California, San Francisco*;  
**Ellen Goldstein, CO-OP**, *Ombuds, University of California, San Francisco*

Improve ombuds skills in working with groups. Learn how and when to use Patrick Lencioni's Organizational Health and Team models, and Google's Project Aristotle results to work with groups to rebuild trust, improve communication, increase conflict competence, or work better together. Explore how to use these tools during organizational change, during or after escalated conflicts, with abrasive leaders, or to get back on track after staffing or leadership changes.

#### 20. Translating Mediation Theory and Practice to Ombuds Practice

**Level:** Fundamental

**Sector:** A, C

**Speaker:** **Roy Baroff, CO-OP**, *Faculty and Staff Ombuds, North Carolina State University*

Pull back the curtain on mediation and its role in our work as ombuds. We will explore and play with facilitative, transformative, and narrative mediation theories and "try them on" as ombuds. This is a chance to add some new clothes to your ombuds wardrobe!

#### 21. The Power of Data and Benchmarking in Ombuds Programs

**Level:** Intermediate

**Sector:** Corporate

**Speakers:** **Jackie Osborne, CO-OP**, *Principal Ombuds Manager, Chevron*;  
**Eric Mayo, CO-OP**, *Ombuds Manager, Chevron*;  
**Sana Manjeshwar, CO-OP**, *Ombuds Manager, Chevron*;  
**Tiffani Neu**, *Ombuds Manager, Chevron*;  
**Vickie Rose**, *Analyst, Chevron*

Chevron's Global Office of Ombuds shares the ways in which data has been helpful to the ombuds program and lessons learned in the process of benchmarking against other programs.



## Concurrent Sessions

Tuesday, April 24

3:00 p.m. – 4:30 p.m.

Concurrent Session 4 (continued)

### 22. Building Capacity: Demonstrating Our Worth in K-12 School Systems

**Level:** Fundamental

**Sector:** A, O

**Speakers:** **Edward Newsome, Jr.**, *Ombuds, Prince George's County Public Schools;*  
**Consuela Robinson**, *Ombudsman Resolution Coordinator,*  
*Prince George's County Public Schools;*  
**Carlesa Finney**, *Ombuds Resolution Coordinator,*  
*Prince George's County Public Schools*

Learn what factors and strategies to consider when establishing a K-12 ombudsman office that aligns with the school district mission, values, needs, and culture. Gain an understanding of the benefits of K-12 ombudsman services and strategies in collaboration with internal and education stakeholders. This lecture and discussion session is for individuals with an interest in or limited to moderate experience as an organizational ombudsman.

### 23. Conducting a Conflict Resolution Student Academy

**Level:** Fundamental

**Sector:** Academic

**Speakers:** **Erica Hansen**, *Ombudsperson, South Texas College;*  
**Olga Moran**, *Ombudsperson, South Texas College*

Design, develop, and implement a successful Conflict Resolution Student Academy! Hear insider experience about what works (and what doesn't) when conducting a student academy. Learn how to gain support from your administration to provide a well-oriented program that will greatly benefit the student body population.

### 24. Popcorn Share: Discover New Resources to Enhance Your Ombuds Practice

**Level:** Intermediate

**Sector:** All

**Speakers:** **Vikram Kapoor**, *Ombuds, FEMA;*  
**Elizabeth Hill, CO-OP**, *Ombuds, University of Colorado-Boulder;*  
**Carolyn Esposito, CO-OP**, *Ombuds, Alliance-Bernstein;*  
**Doris Campos-Infantino**, *Ombudsperson, World Bank Group*

Join a dynamic discussion with new and experienced ombuds and share "go-to" resources for the work we all do. Specifically, we will discuss resources used to develop internal trainings by ombuds for their respective organizations; and resources that help ombuds develop skills, coach visitors and navigate sticky situations. Expect to leave the session with a compilation of resources to enhance your trainings and ombuds practice.

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## Concurrent Sessions

Wednesday, April 25

1:30 p.m. – 3:00 p.m.

### Concurrent Session 5

#### 25. Fairy Tale Fishbowl

**Level:** Fundamental

**Sector:** All

**Speakers:** **Teresa Ralicki, CO-OP**, *University of Colorado, Denver*;  
**Adam Barak Kleinberger, CO-OP**, *Associate Ombudsman, Boston University*

Come “ombuds” your favorite fairy tale characters as they navigate the difficult situations that got them fairy tale status in the first place. Audience members have a chance to coach, mediate, and facilitate the characters’ paths to resolution. With the fishbowl format we can evaluate the impact of, and adjust, our interventions in real time. Using fairy tales allows freedom to try approaches we are hesitant to use in real life and to have fun, too.

#### 26. Academic Writing for the Ombuds

**Level:** Fundamental

**Sector:** All

**Speaker:** **Shannon Lynn Burton**, *Associate University Ombudsperson, Michigan State University*

Many ombuds want to share their stories, as well as best practices and research with the broader ombuds community. Learn the differences between academic writing and writing for other venues, gain strategies for improving your writing, and understand what the typical review and acceptance process looks like.

#### 27. Breaking into Tech: Growing the Industry Through the Contract Ombudsman

**Level:** Fundamental

**Sector:** C, NP

**Speaker:** **Amanda Dean**, *Assistant Ombuds for Students and Post-doctoral Students, University of California, Berkeley*

In February 2017 all eyes turned toward Uber as Susan Fowler’s now-infamous blog post detailing her experiences of harassment and professional sabotage went viral. As a conflict professional, Fowler’s post begged the question: could Uber have been saved from public ridicule if only they had an organizational ombuds office? This session will look at how contract ombuds could help break into the tech sector by helping startups scale from the ground up.

## Concurrent Sessions

Wednesday, April 25

1:30 p.m. – 3:00 p.m.

### Concurrent Session 5 (continued)

#### 28. Ombuds as a Conflict Resolution Trainer

**Level:** Intermediate

**Sector:** A, C, H

**Speakers:** **Diana Anderson**, *Ombudsperson, University of Texas MD Anderson Cancer Center*

Is there an opportunity for your organization to benefit from conflict resolution training from an ombuds' perspective? Not sure how to create an engaging session that will leave your participants with skills they can transfer back to work? New to seasoned ombuds will gain practical steps and ideas to make workshops useful and memorable.

#### 29. Validate Your Office and Create Sustainability with Your Annual Report

**Level:** Intermediate

**Sector:** Academic

**Speaker:** **Karey Barnes**, *Director of Student Rights and Responsibilities, South Texas College*

Wondering how to best leverage your annual report? Explore formatting your annual report, expectations for the report, how to add value to your organization once you have annualized your data, and how to incorporate this information into your strategic planning to ensure sufficient staffing and funding for future growth.

#### 30. What's an Ombuds to Do...in a Conflict Management System?

**Level:** Intermediate

**Sector:** All

**Speakers:** **Brian Bloch, CO-OP**, *Ombudsman, U.S. Department of the Interior*; **Sigal Shoham**, *Ombuds, U.S. Department of the Interior*

Whether they know it or not, every organization has a conflict management system. Some are more robust than others, some more explicit than others. Find out what an Integrated Conflict Management System looks like and how ombuds can help an organization become more intentional in its problem-solving options as well as have a more coordinated system with better partnerships.

## Concurrent Sessions

Wednesday, April 25

3:30 p.m. – 5:00 p.m.

### Concurrent Session 6

#### 31. The Ombuds Role When Consultants are Hired by Your Institution

**Level:** Intermediate

**Sector:** All

**Speakers:** **Lisa Neale, CO-OP**, *University of Colorado-Anschutz*;  
**Hector Escalante**, *Ombuds, Director, University of the Pacific*

While the ombuds office frequently works with high-level executives and leaders to improve supervisory skills, etc. it is likely, even inevitable, that your institution will hire a consultant to work with leadership to do much of the same work. How do ombuds navigate that landscape? Is there opportunity for ombuds to surface to leadership what banana peels might be in front of them? Is there room for synergy between leadership and the ombuds?

#### 32. Assessing Your Data: What Compelling Stories are Hiding There?

**Level:** Intermediate

**Sector:** All

**Speakers:** **Timothy Hedeem**, *Ombuds and Professor, Kennesaw State University*;  
**Mary Rowe**, *Professor and Former Ombuds, Massachusetts Institute of Technology*;  
**Jennifer Schneider**, *Ombuds, University of South Florida*;  
**Scott Deyo, CO-OP**, *Ombuds, National Park Service*;  
**Ilene Butensky, CO-OP**, *Vice President, Office of the Ombuds, Eaton Corporation*

In addition to the IOA reporting categories, what information should you keep? Maintaining standards of anonymity and confidentiality requires care, and yet blurring details or actions may wash out valuable information. Surveys suggest that many ombuds do compelling work that could be illuminating or convincing to stakeholders. Practitioners from various sectors will engage participants to consider how to record and relate information ethically.



## Concurrent Sessions

Wednesday, April 25

3:30 p.m. – 5:00 p.m.

### Concurrent Session 6 (continued)

#### 33. Politics and the Ombuds: Navigating the New Era

**Level:** Fundamental

**Sector:** All

**Speakers:** **Joan Waters, CO-OP**, *University Ombuds Officer, Columbia University*;  
**Ruthy Kohorn Rosenberg**, *University Ombudsperson, Brown University*

Discuss the questions, challenges, and opportunities that the political climate has presented to us as ombuds and as a profession. S. Burton suggests in her article, "Ombudsing in the New Era", that ombuds are uniquely positioned to address issues of unrest, incivility, and questions about rights and responsibilities. Join us for this engaging session exploring ombuds identity, civil political discourse, bridging the political divide, and implications for our profession.

#### 34. When Visitors Speak: How to Manage Issues Relating to Confidentiality

**Level:** Intermediate

**Sector:** Academic

**Speakers:** **Shannon Lynn Burton**, *Associate University Ombudsperson, Michigan State University*;  
**Caitlan Hendrickson**, *Ombuds Program Director, University of Arizona*

In theory, the ombuds and the visitor set an expectation that the fact that they met, and what they discuss, is confidential. What do you do when you learn that your visitor has shared the conversation? Explore confidentiality from all relevant angles and brainstorm with your fellow participants on how best to respond, whether to respond, when not to respond, and when it's absolutely necessary to respond.

#### 35. Neutrality: Our Ombuds Superpower

**Level:** Fundamental

**Sector:** All

**Speaker:** **Carolyn Esposito, CO-OP**, *Ombudsman, Alliance-Bernstein*;  
**Sana Manjeshwar, CO-OP**, *Ombuds Manager, Chevron*

Get new tools, including questions and behaviors to help you remain neutral in accordance with the IOA Standards of Practice. Learn about the various tools to remain neutral with visitors, including the O-R-E (Observe-Respond-Exchange) model used in executive coaching, and how our "unconscious bias" may impact our neutrality with visitors.

## Concurrent Sessions

Wednesday, April 25

3:30 p.m. – 5:00 p.m.

Concurrent Session 6 (continued)

### 36. T.E.A.C.H. Employees to Prevent Conflicts

**Level:** Intermediate

**Sector:** A, C, G

**Speakers:** **Clare Fowler**, *Managing Editor, Director of Caseload Manager, Mediate.com*

Based on a study of almost 4,000 conflicts, Dr. Clare Fowler found five commonalities that shifted conflicts from a positive to a negative experience. Learning these simple steps will shift the conflict resolution approach, allowing employees to be in control of their resolution plan. They will be invested in preventing their conflict before it escalates. This will be interactive, including feedback and ideas from the group on how to best implement each of the five phases.



## Networking and Social Opportunities

### Sunday, April 22

7:00 p.m.

#### Ombuddies Unplugged

#### Sing-Dance-Poetry-Sharing

Come and share your talents with your friends

Join us for an evening of unplugged (no amplification) music, poetry, and talent performed by fellow IOA conference attendees. The format will be "open mic" for up to five minutes per performance. Drinks are permitted if purchased through the hotel. Reservations to perform are not required, but are encouraged.

If you would like to reserve a slot, email [Sana.Manjeshwar@chevron.com](mailto:Sana.Manjeshwar@chevron.com) by March 30, 2018.

Bring friends. Please join us!

### Monday, April 23

12:15 p.m. – 1:30 p.m.

#### Volunteer Recognition Luncheon for All Conference Attendees

Each year, IOA volunteers give their time and tireless effort to help our association advance and achieve its goals. Let's join together during this fun-filled, memorable luncheon to recognize their hard work and thank them for their contributions over the past year.

5:00 p.m. – 7:00 p.m.

#### Welcome Reception for All Attendees (Cash bar)

Join us for light refreshments and networking in an environment where colleagues know what you do for a living and understand you; where they want to hear how you handled a situation; where you can ask their opinion. Catch up with old friends, make new friends, share stories, and discuss the conference sessions you plan to attend. Light refreshments will be served as well as coffee, tea, and soft drinks.

A cash bar will be available.

## Networking and Social Opportunities

**Tuesday, April 24**

**9:45 a.m. – 10:45 a.m.**

### **Sector Networking Break**

Connect and network with other members of your professional sector. Each sector will be assigned a specific meeting room equipped with note-taking tools.

- Use this time to discuss issues or topics pertinent to your sector.
- Capture any questions or ideas the sectors wish to pose to the IOA Board of Directors or IOA Committees. Specify the intended recipient for a particular question as well as contact information for the response.

**Noon – 1:00 p.m.**

### **Lunch for Ombuds New to the Profession and First-Time Attendees**

Welcome to IOA! Meet representatives from the Membership Committee, Mentoring Committee, and some of our “seasoned” colleagues to learn more about IOA membership benefits, 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 is required to reserve space; see the conference registration form.





## 2018 Professional Development Hours

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

Applies to Certified Organizational Ombudsman Practitioners®. Continued use of the CO-OP® credential requires recertification every four years, and 60 Professional Development Hours (PDHs) are required for recertification. Recertification demonstrates that the practitioner has kept abreast of developments in the field and has maintained a level of professional knowledge consistent with status as a certified practitioner. Each of the sessions at this year's conference has been reviewed by the Recertification Committee, approved as falling under one or more of the content domains, and assigned a number of PDHs. You may pick up your PDH tracking sheet at the Board of Certification table. For additional information concerning recertification and activities eligible for PDHs, visit the [IOA website](#).

### Professional Development Courses

#### Foundations of Organizational Ombudsman Practice: 24

#### Pre-Conference Courses

Full-Day Course:	7.5
AM Half-Day Course:	3.5
PM Half-Day Course:	3.5

#### General Conference

General Conference, Day 1:	7.5
General Conference, Day 2:	4.25
General Conference, Day 3:	6

**Conference PDHs listed above are based on 2017 hours.**

**Actual hours for 2018 sessions may vary pending Certification Committee approval.**

## General Information and Policies

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

**Cancellation/Refund Policy:**

*Notification of cancellation must be submitted in writing via email.*

Cancellations received 21 days in advance of the event will be refunded, less a \$75 USD cancellation fee. No refunds will be made for cancellations received less than 21 days from the start of the event. Substitutions can be made at any time, as long as both attendees are of the same registration type.

**Subject to Change or Cancellation:** All Professional Development and Specialty Workshop 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, contact the administrative office at [info@ombudsassociation.org](mailto:info@ombudsassociation.org) to check the status of your registration. If pre-registration attendance is below half of the maximum attendance, instructors may cancel the course.

**Non-North American Attendees:** If you are planning to attend the conference and you require a visa for entrance into the United States, please be advised that the processing time to secure a visa has substantially increased due to security issues. Consulates in some countries are now taking several months to process visa applications. Take this into consideration and allow enough time for visa processing. See the notice from the [U.S. Department of State Bureau of Consular Affairs](#).

**Session Abstracts:** In an effort to keep conference costs reasonable for all attendees, printing costs are being minimized by condensing the final printed program. In the past, session abstracts have been included in both the registration brochure and final program distributed at the conference.

**Full sessions descriptions are not included in the program. Use this registration brochure to refer to session abstracts while at the conference or access them through the Whova application.**

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 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 presentation and learning environment. We appreciate your understanding and patience in honoring these limitations.

**Speaker Presentations:** Since you can't possibly attend all the wonderful programs we have planned for the IOA 13th Annual Conference, your registration includes, at no extra cost, access to the speaker presentations that are submitted to the IOA office. All available speaker presentations will be posted online prior to the conference for registered/paid attendees to access. These will include keynote, plenary, and concurrent sessions only, and not pre-conference courses.

**Note: Speakers are asked to submit their presentations no later than one week in advance of the start of the meeting.** Therefore, only speakers who have not supplied their presentations will be asked to supply photocopies of their presentations onsite. Presentations will be available to registered/paid attendees by logging in to the IOA website. Attendees will be reminded via email to download presentations. IOA will highlight any new presentations that have been added. Providing access to presentations prior to the conference gives you a chance to review materials and get acquainted with the sessions you plan to attend.

**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.

## General Information and Policies

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

**Consent to Receive Communications from IOA:**

Registering/attending this event constitutes consent for the International Ombudsman Association to communicate with you via fax, email, mail, text messaging, instant messaging, and social media to make you aware of products and services.

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

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

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

**Intellectual Property Rights:** All content on the IOA website, 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.

## Professional Development Courses

*Early registration is recommended as courses have a limit on the number of participants. Likewise, courses may be cancelled if course attendance falls below this threshold.*

### **Foundations of Organizational Ombuds Practice and Core Course: Theory and Applications for the Organizational Ombudsman include:**

- Course materials
- Continental breakfast, morning and afternoon refreshment breaks, lunch

*Certificates of Completion will be awarded for Professional Development Courses and only to those who attend the entire course. Please arrange your schedule accordingly.*

### **Special Package Pricing**

*Register for the Foundations Course and the full conference for a discounted rate.*

### **Specialty Workshops**

*Early registration is recommended as courses have a limit on the number of participants per course. Likewise, courses may be cancelled if course attendance falls below this threshold.*

### **Included in TWO half-day (one a.m. and one p.m.) or ONE full-day course registration:**

- Course materials
- Morning and afternoon refreshment breaks

### **Included in ONE morning half-day course registration:**

- Course materials
- Morning refreshment break

### **Included in ONE afternoon half-day course registration:**

- Course materials
- Afternoon refreshment break

*Certificates of Completion will be awarded for Specialty Workshops and only to those who attend the entire course. Please arrange your schedule accordingly.*

## General Conference

**Full Conference Fees include:** Continental breakfast and lunch Monday through Wednesday; and morning and afternoon refreshment breaks Monday through Wednesday; access to the Monday evening Welcome Reception; access to the Tuesday evening Pecha Kucha; access to all Keynote, Plenary/General, and Concurrent Sessions offered throughout the conference; access to all available presentation slides posted online prior to, during and after the conference (preregistered/paid attendees only).

**One-Day Conference Fees include:** Morning and afternoon coffee breaks, lunch (when offered); all keynote, plenary/general and concurrent sessions on the day of choice; and access to all available speaker presentations posted online prior to, during, and after the conference (preregistered/paid attendees only).

**Students:** You must be a full-time student to be eligible for a student rate.

**Group Registration Discount:** Group registrations require four or more attendees from the same organization/company and affiliation to register for the IOA Annual Conference (excluding Professional Development and Specialty Workshops). If four or more attendees from the same organization/company or affiliation register:

- IOA members each will receive a \$25 discount off of the member pricing
- Non-IOA members each will receive the member rate

In order to take advantage of this opportunity, you must fill out the Registration Form and select the check box under "Group Registration."

Online group registration is not available. Please send in all four (4) registration forms together to ensure correct processing.

Certificates of Completion are NOT issued for the general conference.



## Conference Hotel

### Richmond Marriott

500 E. Broad St.

Richmond, Virginia 23219 USA

Phone: +1-804-643-3400

Reservations Toll Free: +1-800-228-9290

Fax: +1-804-788-1230

### IOA Negotiated Rate:

- \$175 USD for Single/Double Occupancy

Rooms and rates are based on availability and subject to state and local fees/taxes. These rates will be available to attendees, based on availability, through **Tuesday, March 27, 2018**.

**The IOA block rate is available April 18-26, 2018.**

To reserve a room online at the [discounted rate click here](#) and select "attendee" from the drop down list, or call Richmond Marriott at +1-804-643-3400 or +1-800-228-9290 and mention you are part of the International Ombudsman Association conference.

A credit card guarantee is required to hold your reservation. The hotel will charge the equivalent of one night's room and tax if cancellation notice is not provided to the hotel within 24 hours of reservation. Hotel check-in is 4 p.m. and check-out is at noon. Reservations must be made no later than **Tuesday, March 27, 2018**. After the cut-off date, discounted rates may not apply.

A limited number of government rated rooms are included within the contract at the Richmond Marriott. The IOA block rate is available April 18-26, 2018.

### The IOA negotiated government rate is:

- \$132 USD for Single/Double/Triple/Quad Occupancy

To reserve a room online at the [discounted rate click here](#) and select "Government" from the drop down list, or call Richmond Marriott at +1-804-643-3400 or +1-800-228-9290 and mention you are part of the International Ombudsman Association conference and require the government rate.



## Travel Information

### About the Richmond Marriott

All of IOA's educational sessions will take place at the Richmond Marriott. The Richmond Marriott lies in a prime location in downtown Richmond just steps away from its historical past. Enjoy easy access to top Richmond attractions including the Richmond Coliseum, the Virginia Museum of Fine Arts, Kings Dominion, Black History Museum, Richmond CenterStage, and much more. Guests can experience the city's unique ambiance by taking the complimentary shuttle to a number of diverse dining and entertainment venues.

### Fitness Center

Sitting too long in those educational sessions? Access to the fitness center and indoor swimming pool at the Richmond Marriott is complimentary for all IOA guests..

### Complimentary Internet

High-speed Internet access is complimentary in all Richmond Marriott guest rooms for IOA attendees.

### Richmond International Airport – RIC

The Richmond Marriott is approximately seven miles east of the Richmond International Airport. Taxi service is readily available at the airport in the center section of the lower level curbside, adjacent to the North and South parking garages (follow the Ground Transportation signs). Taxi fare is approximately \$40 USD (one way) to and from the Richmond Marriott.

### Public Bus Service

The Greater Richmond Transit Company provides public bus service to and from Richmond International Airport, as well as other Richmond locations. For services and schedules, call +1-804-358-4782 or [visit their website](#) to plan your trip.

### Sedan Service

James River Transportation staffs a customer service counter in the terminal to assist with executive sedan and limousine service. To schedule travel with James River transportation, please call +1-804-249-1052 or [click here](#) to [visit their website](#).

### Air Travel

Delta Air Lines is offering special discounted\* airfares for IOA 2018 attendees traveling in the U.S. to Richmond. Discounts vary, depending on the class of ticket purchased, up to 10 percent off the fare.

\*Please note the following:

- Not all fare codes are eligible for a discount; fare rules determine eligibility.
- Discounts vary, depending on the class of ticket purchased, and apply to round trip travel only.
- Not valid with any other discounts, certificates, coupons, or promotional offers.
- Name changes on the ticket are permitted at \$200 USD/\$200 CAD on select fares.

To take advantage of these travel discounts for flights to and from RIC:

- Visit the [www.delta.com](http://www.delta.com) website and click the [Advanced Search](#) link
- Complete the required fields, and enter meeting code "NMRCL"

2018

## Travel Information (continued)

You may also call Delta Meeting Network® Reservations at +1-800-328-1111. (Please use the same phone number to make changes to an existing Delta Meetings Network reservation.) On the Search Results page, verify the discount is applied. (Reminder: not all fare codes are eligible.)

### Car Rental

AVIS is the official car rental service for the IOA 2018 Annual Meeting. For details, call +1-800-331-1600 and indicate AWD number J626058 to receive special pricing. An advance reservation is recommended. For online reservations, visit the [AVIS website](#).

### Parking

Valet parking is available at the Richmond Marriott at a rate of \$27 USD daily. Self-parking is available at several nearby parking lots and garages not managed by Marriott.

### Travel Visas

Visit the [U.S. Department of State: Bureau of Consular Affairs website](#) to view instructions on the process of obtaining a temporary visa.

### Letter of Invitation

Please contact [Amy Metzgar at IOA Headquarters](#) to request a letter of invitation to the IOA 13th Annual Conference.

### Richmond Climate and Attire

Wondering what April in Richmond will be like? The average high temperature in April is 70° F / 21° C and average low temperature in April is 46° F / 8° C. Because of varying temperatures in the meeting rooms, we recommend bringing a light sweater or jacket to the meeting.

