



INTERNATIONAL
OMBUDSMAN
ASSOCIATION

12th Annual Conference

Conference Program

April 24 – 26, 2017

Professional Development Courses & Specialty Workshops: April 21 – 23, 2017

Minneapolis Marriott City Center * Minneapolis, Minnesota USA



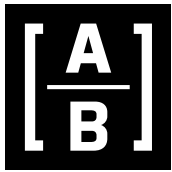
Minneapolis



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#IOA2017



Proud Sponsor of the

INTERNATIONAL OMBUDSMAN ASSOCIATION ANNUAL CONFERENCE



Celebrating 13 Years
of the AB Ombuds Office

[AHEAD OF TOMORROW]

Welcome to Minneapolis, City of Lakes and IOA's 12th Annual Conference!

Change. The wheel turns to another year, to another season, and in this moment we find ourselves in another city: Minneapolis, also known as the City of Lakes.

Minneapolis appears to know a thing or two about change as it redefines itself every few generations. Before it was known as Minneapolis the area was a fur trading post in the 1600s where local indigenous people traded furs with the French. In the early 1800s Fort Snelling was established at the confluence of the Mississippi and Minnesota Rivers and soldiers began using the waterfalls for power. Two small towns emerged, Saint Anthony on one side of the falls and Minneapolis (a word made up of the Dakota Sioux word "mni" for water and the Greek word "polis" for city) on the other side. The two towns merged and Minneapolis became known as "Mill City" as it became a world leader in the production of flour. Generations later (as with the fur trade previously) the flour mills disappeared and Minneapolis is now known as a regional center in banking and industry. I don't know what Minneapolis will be known for in a few generations but I have a feeling the City of Lakes will be just fine and thriving as it continues to change and transform itself as the need arises.

If you spend enough time in Minneapolis the city also has a mystical way of shaping you into something else, of almost encouraging you to reinvent yourself. Decades back a man by the name of Robert Zimmerman spent about two years in a neighborhood in Minneapolis called Dinkytown. During that time he traded his electric guitar for an acoustic guitar, adopted a new name, Bob Dylan, and became a legend. Another music legend, who passed away shortly after our last conference, was Prince, who was not only born here but called Minneapolis his home.

And so as we begin IOA's 12th Annual Conference I invoke the wise words of one of those creative geniuses transformed by this city, Bob Dylan:

*Come gather around people
Wherever you roam
And admit that the waters
Around you have grown
And accept it that soon
You'll be drenched to the bone
And if your breath to you is worth saving
Then you better start swimming or you'll sink like a stone
For the times they are a-changing*

Perhaps all these lakes (22 right here in Minneapolis) surrounding us invite us to reflect upon who we are and encourages us to immerse ourselves in the wisdom we can share with each other and transform ourselves into even better practitioners. That process might involve letting go of old ways of thinking about or doing something. I don't know what the specifics might be in our own individual situations but I look forward to the next few days as we collectively explore ideas, strategies and techniques that can enhance our practice.

May we all leave Minneapolis in a few days with new cherished memories, perhaps a song or two in our hearts of the legendary music in this town and the tools that will propel us to be better practitioners.



Reese Ramos, CO-OP
Sandia National Laboratories
President,
International Ombudsman Association

Conference Committee Welcomes You Welcome to Minneapolis!

The Conference Committee is excited to present the 12th Annual International Ombudsman Association Conference in Minneapolis, Minnesota. Every conference has a unique flavor depending on the location, but the core remains unchanged. We are proud to provide outstanding programming, the opportunity to reflect and recharge, as well as to network with old and future friends. We hope everyone returns to their office with an enhanced tool kit.

- We have three dynamic keynote presentations from Laura van Dernoot Lipsky, Loraleigh Keashly, and Ilene Butensky delivering the Mary Rowe Honorary Keynote Address.
- This year's Undebate will provide an interesting panel discussion on the role of confidentiality and testimonial privilege for today's organizational ombudsperson.
- Our sector networking meetings will follow a World Café format, wherein small groups will discuss a topic relevant to our profession.
- Additionally, our varied concurrent conference sessions are designed to inspire and nurture the continued development of your ombudsman practice.
- Our crowd favorite, the Pecha Kucha Program, will feature seven of our colleagues with diverse backgrounds and perspectives on ombudsmanship and life in general.

Budgetary challenges provided the opportunity for assessment and creativity, and we hope you will enjoy the new aspects of this year's conference. We will have our Welcome Reception on Monday night at the Prohibition Room in the historic Foshay Tower, just a 2-1/2 block walk from the conference hotel. Spectacular views from the top-floor Prohibition Room are sure to lend ambiance to the evening. The change from Sunday to Monday night reception was intended to allow all conference attendees, not just the early-birds, to participate and be welcomed. Our "OMBassadors" will introduce first-time conference-goers to our veterans at the reception.

The Conference Committee supports the Board's decisions to invest in the long-term growth of IOA. As with many professional conferences, budget trade-offs mean that we are unable to provide as many meals as at past conferences. The upside is that we were able to keep conference registration rates unchanged.

- Breakfasts will be on your own; check out one of the many breakfast places available within one to four blocks of the hotel.
- Wednesday's lunch will be part of a new small-group networking event designed to provide more networking time with colleagues at a variety of locations outside the hotel (attendee cost varies by restaurant).
- We encourage our veteran conference-goers to link up with newer members and first-time attendees during these "on-the-town" meals, to forge new and strong bonds.

Finally, we encourage you to enjoy all the fun and nostalgia offered by Minneapolis. A pedestrian sky bridge, accessible from the hotel and a handy way to avoid the spring elements, links numerous downtown sites. The Twin Cities offer numerous opportunities to learn more about the indigenous Ojibwa and Dakota tribes. Immigrants from Scandinavia also settled in the area, and the influences of Nordic art and culture are evident from the local accents, baked treats, and the personal warmth of Minnesotans.

If landmarks are your thing, Minneapolis itself boasts First Avenue, the club where Prince performed early in his career. And be sure to have a friend snap a photo of you doing your best Mary Richards impersonation (of the Mary Tyler Moore TV series circa 1970s) by tossing your hat into the air, either at the original site, the corner of South 7th Street and Nicollet Mall, or at Mary's statue, located in the Visitor's Center at South 5th Street and Nicollet Mall.

It can't be said enough that our conference would not be possible without the financial support of our sponsors. They have graciously supported many of our activities and refreshments. Lastly, we are indebted to our wonderful committee volunteers and support of our staff from Kellen. Together, these individuals have worked hard to bring you what we are sure will be another outstanding conference.

As always, we invite your feedback via our daily evaluations. Tell us what you value at this conference and what needs refining or improvement next time.

Enjoy, learn and recharge!

IOA Conference Committee Co-Chairs,
C. Kevin Coonrod, CO-OP, Auburn University
Patricia Currier, NASA

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The International Ombudsman* Association (IOA) is the largest international association of professional organizational ombudsmen practitioners in the world, representing more than 700 members from the United States and across the globe. The association supports organizational ombudsmen 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.*

What Conference Attendees Need to Know

Sector and Level of Difficulty

Each concurrent session has been categorized with the following information located to the left of the session name:
 Sector – Level of Difficulty, e.g. ALL – F or A – A

Sector descriptions are:

- A – Academic
- C – Corporate
- G – Government
- H – Healthcare
- N – Non-Profit
- I – International
- ALL – Sessions relevant for all sectors

Level of Difficulty descriptions are:

- F – Fundamental
- I – Intermediate
- A – Advanced

Wi-Fi Access at the Conference

Wi-fi has been provided throughout the meeting rooms for all attendees. Additionally, for those attendees staying at the Minneapolis Marriott City Center, wi-fi is included in your room rate.

Name Badge Recycling

IOA would like to “Go Green” and recycle the name badge holders to re-use next year. Please drop off your name badge holder at the registration desk on your last day at the conference.

Attendee Roster

A big part of attending the IOA conference is connecting with old friends and making new friends. However we are mindful that many attendees do not want their full contact information published and we want to continue our initiatives to “go green.” There is no printed attendee roster. Pre-registered attendees should have received an email with a link to the attendee list; download it at your leisure.

Please note that the attendee roster includes only the attendee’s name, organization, city, state and country. It does not include email or phone for privacy reasons. Also, the attendee roster may not reflect the most recent registrants. An updated final attendee roster will be posted in the conference section of the IOA website and emailed to all attendees after the conference.

Conference Evaluations

We need and value your feedback! In an effort to reduce our carbon footprint, we will send the conference evaluation form via email. At the end of each day we will email registrants the daily conference evaluation form and ask for session feedback. At the conclusion of the meeting, we will send a conference evaluation form focusing on conference logistics. Please respond daily to the content-related evaluations. The committee reviews the responses carefully and your feedback helps us to continue to improve the conference. Attendees taking specialty workshops on Sunday, April 23, will receive a paper evaluation from the session room host. Email evaluations will not be provided for these sessions.

IOA Raffle

Support the IOA by purchasing raffle tickets during the conference. Tickets are available as follows:

1 ticket for \$2, 6 tickets for \$10, and 15 tickets for \$20. Fantastic raffle prizes include electronics, gift cards, gift baskets, university-logo items and more. Write your name and cell phone number (or a number where we can reach you) on the back of each ticket and drop it into the corresponding prize bag. We will draw the winning tickets and announce winners at the Pecha Kucha Reception, 4:30 - 5:00 p.m., Tuesday, April 25. You do not need to be present to win! We will call the number you provided so that you can come to the IOA registration desk to claim your prize.

If you brought a prize to the conference to be raffled, drop it off at the IOA registration desk at the beginning of the conference.



Schedule at a Glance

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

Friday, April 21

Professional Development Course

		Location	PDH Credit
7:00 a.m. – 10:00 a.m.	Registration Desk Open	Registration Room, 4th Floor	
8:00 a.m. – 5:00 p.m.	Foundations of Organizational Ombudsman Practice Course Day 1 <i>Instructors:</i> <i>Wayne Blair, University of North Carolina at Chapel Hill;</i> <i>Lauren Bloom, CO-OP, University of California, Berkeley;</i> <i>Melissa Brodrick, Harvard Medical School;</i> <i>Mindy Eaves, Jefferson County Public Schools;</i> <i>Ralph Johnson, McKinsey & Company;</i> <i>Donna Loudon, National Renewable Energy Laboratory;</i> <i>Dawn Osborne-Adams, Shell Oil Company;</i> <i>Judi Segall, Massachusetts Institute of Technology;</i> <i>Lee Twyman, Rochester Institute of Technology</i>	Group A: Excelsior Bay/ Layfayette Bay, 8th Floor; Group B: Grays Bay/ Wayzata Bay, 8th Floor	n/a
10:15 a.m. – 10:30 a.m.	Coffee Break for All Foundations Course Attendees	Spring Park Bay, 8th Floor	
Noon – 1:00 p.m.	Lunch for Foundations Course Attendees	Spring Park Bay, 8th Floor	
3:15 p.m. – 3:30 p.m.	Coffee Break for All Foundations Course Attendees	Spring Park Bay, 8th Floor	

Saturday, April 22

Professional Development Course

		Location	PDH Credit
8:00 a.m. – 5:00 p.m.	Foundations of Organizational Ombudsman Practice Course Day 2	Group A: Excelsior Bay/ Layfayette Bay, 8th Floor; Group B: Grays Bay/ Wayzata Bay, 8th Floor	n/a
10:30 a.m. – 10:45 a.m.	Course Refreshment Break for All Foundations Course Attendees	Spring Park Bay, 8th Floor	
Noon – 1:00 p.m.	Lunch for Foundations Course Attendees	Spring Park Bay, 8th Floor	
Noon – 5:00 p.m.	Registration Desk Open	Registration Room, 4th Floor	
2:15 p.m. – 2:30 p.m.	Refreshment Break for All Foundations Course Attendees	Spring Park Bay, 8th Floor	

Sunday, April 23

Professional Development Course & Specialty Workshops

		Location	PDH Credit
7:30 a.m. – 8:30 a.m..	Coffee Service for Specialty Workshops	Registration Foyer, 4th Floor	
7:30 a.m. – 5:00 p.m.	Registration Desk Open	Registration Room, 4th Floor	
8:00 a.m. – 5:00 p.m.	Foundations of Organizational Ombudsman Practice Course Day 3	Group A: Excelsior Bay/ Layfayette Bay, 8th Floor; Group B: Grays Bay/ Wayzata Bay, 8th Floor	n/a

Schedule at a Glance

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

Sunday, April 23 (continued)

Professional Development Course & Specialty Workshops		Location	PDH Credit
8:30 a.m. – 5:00 p.m.	Full-day Specialty Workshop		
All - A	FD1: Ombudsing: Skills for Mindful Ombuds Practice <i>Presented by Caitlan Hendrickson & Cornelia Zelter</i>	Deer Lake, 4th Floor	6.5
8:30 a.m. – Noon	Half-day Specialty Workshops		
All - F	AM1: Beyond Brainstorming: Developing Creativity Through Improvisation <i>Presented by Adam Barak Kleinberger, CO-OP</i>	Birch Lake/Maple Lake, 4th Floor	3.5
All - F	AM2: A Research Primer for Ombuds <i>Presented by Shannon Lynn Burton</i>	Pine Lake/Cedar Lake, 4th Floor	3.5
All - F	AM3: Meaningful Connections: Nonviolent Communication (NVC) for the Ombuds Practitioner <i>Presented by Donna Douglass Williams, CO-OP</i>	Elk Lake, 4th Floor	3.5
10:30 a.m. – 10:45 a.m.	Course Refreshment Break for All Course Attendees	Atrium, 4th Floor	
Noon – 1:00 p.m.	Lunch for Foundations Course Attendees	Spring Park Bay, 8th Floor	
Noon – 1:00 p.m.	Lunch on your own for all Specialty Workshop Attendees		
1:30 p.m. – 5:00 p.m.	Half-day Specialty Workshops		
A; C; H; G; NP - F	PM1: Communicating Through Conflict <i>Presented by Bonnie Wichtner-Zoia</i>	Birch Lake, 4th Floor	3.5
All - A	PM2: Compliance or Engagement? Reconciling Competing Organizational Approaches <i>Presented by David Michael & Karen Dean</i>	Pine Lake/Cedar Lake, 4th Floor	3.5
All - F	PM3: One-sided Conflict Resolution <i>Presented by Nicole Gravagna</i>	Elk Lake, 4th Floor	3.5
2:30 p.m. – 2:45 p.m.	Course Refreshment Break for All Course Attendees	Atrium, 4th Floor	

Monday, April 24

General Conference – Day One

		Location	PDH Credit
7:00 a.m. – 6:00 p.m.	Registration Desk Open	Registration Room, 4th Floor	
7:00 a.m. – 8:00 a.m.	Morning Coffee/Tea for All Conference Attendees	Atrium, 4th Floor	
8:00 a.m. – 8:30 a.m.	Welcome/Opening Remarks	Ballroom 1/2/Prefunction, 4th Floor	
8:30 a.m. – 9:30 a.m. All - F	Mary Rowe Honorary Keynote Address: Ombuds Compendium – A Look Back, Where We are Now, and a Look Forward <i>Presented by Ilene Butensky, CO-OP</i>	Ballroom 1/2/Prefunction, 4th Floor	1.0
9:30 a.m. – 10:00 a.m.	Networking Refreshment Break	Atrium, 4th Floor	

Schedule at a Glance

Monday, April 24 (continued)

General Conference – Day One

		Location	PDH Credit
10:00 a.m. – 11:00 a.m. All - F	Keynote Address: From Observation to Engagement: Developing Bystander Efficacy to Address Problematic Behaviors <i>Presented by Loreleigh Keashley, PhD</i>	Ballroom 1/2/Prefunction, 4th Floor	1.0
11:15 a.m. – 12:15 p.m.	Session with the IOA Board	Ballroom 1/2/Prefunction, 4th Floor	n/a
12:15 p.m. – 1:30 p.m.	Volunteer Recognition Luncheon for All Conference Attendees	Ballroom 3/4, 4th Floor	
1:30 p.m. – 3:00 p.m.	Concurrent Session 1		
All - F	1. Adaptive Action: Beyond Systems Thinking <i>Presented by Glenda Eoyang & Jan Morse</i>	Minnesota Room, 6th Floor	1.5
A - I	2. Mentor or Tormentor? Helping Promote Positive Mentor-Mentee Relationships in Our Institutions <i>Presented by Francine Montemurro, Melissa Brodrick & Judi Segall</i>	St. Croix 1, 6th Floor	1.5
All - F	3. Organizational Ombuds Office: Vision, Implementation and First Year Challenges <i>Presented by Karen Dean & Laura Hyle</i>	Deer Lake, 4th Floor	1.5
A; O - A	4. Research Collaboration: Misunderstandings, Conflicts, and Misconduct <i>Presented by Nancy Day, Mary Sue Love & Gregory Stephens</i>	Elk Lake, 4th Floor	1.5
All - I	5. Discussing the Undiscussable <i>Presented by Wayne Blair</i>	St. Croix 2, 6th Floor	1.5
All - F	6. Operationalizing Fairness as an Organizational Ombudsman <i>Presented by Andrew Larratt-Smith, CO-OP</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
3:00 p.m. – 3:30 p.m.	Networking Refreshment Break <i>Sponsored by Chevron</i>	Atrium, 4th Floor	
3:30 p.m. – 5:00 p.m.	Concurrent Session 2		
All - F	7. Working with Groups: An Interactive Exercise <i>Presented by Linda Brothers & Tyler Smith</i>	Minnesota Room, 6th Floor	1.5
All - A	8. Should Ombuds Work with Groups? <i>Presented by Ellen Goldstein, CO-OP & Rita Callahan, CO-OP</i>	St. Croix 1, 6th Floor	1.5
A - I	9. Education Conflict Resolution: Establishing Ombuds Programs in K-12 Schools <i>Presented by Charles Howard, Joyanna Smith, Esther Salinas & Nancy Deering, CO-OP</i>	Deer Lake, 4th Floor	1.5
All - I	10. Assessing and Demonstrating the Value of an Ombuds Office <i>Presented by Timothy Hedeem, CO-OP, & Mary Rowe</i>	Elk Lake, 4th Floor	1.5

Schedule at a Glance

Monday, April 24 (continued)

General Conference – Day One

		Location	PDH Credit
A; C; G; NP - I	11. Let's NOT go to Abilene: Examining Group Decision-making <i>Presented by Nicholas Raichart</i>	St. Croix 2, 6th Floor	1.5
A - F	12. Caroami: An Artificial Intelligence-guided Dispute Resolution App for Campus Dorms <i>Presented by Conchita Serri</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
5:30 p.m. – 7:00 p.m.	Welcome Reception: The Living Room Bar and Prohibition Bar at the Foshay Towers <i>Sponsored by Pfizer</i>	821 S. Marquette Ave., Minneapolis	

Tuesday, April 25

General Conference – Day Two

		Location	PDH Credit
7:15 a.m. – 8:15 a.m.	Meeting of CO-OP Certified Practitioners	Ballroom 3/4, 4th Floor	
7:30 a.m. – 8:30 a.m.	Morning Coffee/Tea for All Conference Attendees	Atrium, 4th Floor	
7:30 a.m. – 5:00 p.m.	Registration Desk Open	Registration Room, 4th Floor	
8:30 a.m. – 9:45 a.m. All - F	Keynote Address: Transforming Trauma – How to Do This Work and Stay Sane <i>Presented by Laura van Dernoot Lipsky, MSW</i>	Ballroom 1/2/Prefunction, 4th Floor	1.25
9:45 a.m. – 10:45 a.m.	Sector Networking Break		
	Academic	Ballroom 3/4, 4th Floor	
	Corporate	St. Croix 1, 6th Floor	
	Government	St. Croix 2, 6th Floor	
	Potpourri (all other sectors)	Minnesota Room, 6th Floor	
10:45 a.m. – Noon	IOA Annual Business Meeting (<i>Members only</i>)	Ballroom 1/2, 4th Floor	
Noon – 1:00 p.m.	Lunch for All Attendees <i>Sponsored by Chevron</i>	Ballroom 3/4, 4th Floor	
	Lunch for First Time Attendees and Ombuds New to the Profession	Terrace/Windows, 6th Floor	
1:00 p.m. – 2:30 p.m.	Concurrent Session 3		
All - I	13. Measuring Organization-Wide Perceptions of the Ombuds Office <i>Presented by Shereen Bingham, Andrea Griffin, Bryan Hanson & Tyler Smith</i>	Minnesota Room, 6th Floor	1.5
A; C; I; NP - I	14. The Left Brain: Changing Organizations With Strategic Use of Data <i>Moderator: John Barkat</i> <i>Panelists: Karen Campbell, Francisco Espejo & Timothy Hedeon, CO-OP</i>	St. Croix 1, 6th Floor	1.5

Schedule at a Glance

Tuesday, April 25 (continued)

General Conference – Day Two

		Location	PDH Credit
All - F	15. Advocacy of the Ombuds Office Without Losing One's Neutrality <i>Presented by Sana Manjeshwar, CO-OP, Scott Deyo, CO-OP, Wendy Friede, CO-OP & Elizabeth Hill, CO-OP</i>	Deer Lake, 4th Floor	1.5
All - I	16. Understanding the Ombuds-Leader Relationship <i>Presented by Mary Conger</i>	Elk Lake, 4th Floor	1.5
All - F	17. Opening an Ombuds Office and Beyond: Version 2.0 <i>Presented by Roy Baroff & Brett Harris</i>	St. Croix 2, 6th Floor	1.5
A; C; G; H - F	18. Working with Victims of Bullying <i>Presented by Brad Holland</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
2:30 p.m. – 3:00 p.m.	Networking Refreshment Break	Atrium, 4th Floor	
3:00 p.m. – 4:30 p.m.	Concurrent Session 4		
All - F	19. Academic Writing for the Ombuds <i>Presented by Shannon Lynn Burton</i>	Minnesota Room, 6th Floor	1.5
All - F	20. What Would You Do? Navigating Ethical Principle Dilemmas <i>Presented by The IOA Mentoring Committee: Melissa Connell, CO-OP, Lynne Chaillat, Donna Douglass Williams, CO-OP, Dolores Gomez-Moran, CO-OP, Mary Beth Stevens, CO-OP, Ronnie Thomson & Shreya Trivedi, CO-OP</i>	St. Croix 1, 6th Floor	1.5
All - I	21. The Ombuds Role in Creating More Compassionate Workplaces <i>Presented by Elisa Enriquez, CO-OP</i>	Deer Lake, 4th Floor	1.5
A; C; G; I - A	22. When International Politics Come to the Workplace <i>Moderator: Francisco Espejo Panelists: John Barkat, Deniz Ogretir, Nikolai Pankratiev</i>	Elk Lake, 4th Floor	1.5
A - F	23. Student Unrest: A Fourfold Emergency Management Metaphor for Ombuds <i>Presented by Angela Dash & Katherine Greenwood, CO-OP</i>	St. Croix 2, 6th Floor	1.5
All - I	24. Resilience and Wellbeing for Ombudsmen <i>Presented by Sarah Kith, CO-OP</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
4:30 p.m. – 5:00 p.m.	Networking Refreshment Break		
5:00 p.m. – 6:30 p.m.	Pecha Kucha <i>Sponsored by Mars Facilitated by Nicholas Diehl, CO-OP Presenters: Caroline Adams, CO-OP, Balassa Balint, Takeelia Garrett, Timothy Hedeem, CO-OP, Sana Manjeshwar, CO-OP, Tyler Smith, Diana Trillos</i>	Ballroom 3/4, 4th Floor	n/a
6:30 p.m.	Dinner on your own at suggested restaurants		

Schedule at a Glance

Wednesday, April 26
General Conference – Day Three

		Location	PDH Credit
7:30 a.m. – 5:00 p.m.	Registration Desk Open	Registration Room, 4th Floor	
7:30 a.m. – 8:30 a.m.	Morning Coffee/Tea for All Conference Attendees	Atrium, 4th Floor	
8:30 a.m. – 9:30 a.m. All - I	Plenary: The Dignity Model <i>Presented by Camilo Azcarate</i>	Ballroom 1/2/Prefunction, 4th Floor	1.0
9:30 a.m. – 10:00 a.m.	Networking Refreshment Break	Atrium, 4th Floor	
10:00 a.m. – 11:30 a.m. All - F	Plenary: The Annual Howard Gadlin Un-debate The Role of Confidentiality and Testimonial Privilege for Today's Organizational Ombudsperson <i>Facilitated by Bruce MacAllister;</i> <i>Panelists: Tom Kosakowski, Dawn Osborne-Adams, Michael Kilpatrick, CO-OP, & Angelica Alejandro</i>	Ballroom 1/2/Prefunction, 4th Floor	1.5
11:30 a.m. – 1:15 p.m.	Networking Lunch (<i>on your own</i>)		
1:30 p.m. – 3:00 p.m.	Concurrent Session 5		
All - F	25. Unique Lens: The Overlap of Ombudstry with other Professions <i>Presented by Caroline Adams, CO-OP, Elizabeth Hill, CO-OP, Nancy Deering, CO-OP, Guy Weber, CO-OP, & Tyler Smith</i>	Minnesota Room, 6th Floor	1.5
All - I	26. Risky Business: Ombudsman's Contribution to the Organization's Risk Mitigation Efforts <i>Presented by Konstantina Vitoratou & Stylianos Karvelas</i>	St. Croix 1, 6th Floor	1.5
A; C; G; I - I	27. Navigating the Unknown: The Rise and Expansion of Federal Ombuds <i>Presented by Timothy Hedeon, Mary Rowe & Scott Deyo, CO-OP</i>	Deer Lake, 4th Floor	1.5
All - A	28. Ombudsman 2.0: Advancing Systemic Practice <i>Presented by David Michael & Sarah Kith, CO-OP</i>	Elk Lake, 4th Floor	1.5
All - F	29. Self-Care: Wellness, Sustainability, and Tools for Ethical Ombuds Practice <i>Presented by Mindy Eaves</i>	St. Croix 2, 6th Floor	1.5
All - A	30. Ombuds Interventions – Bringing Cases Forward <i>Presented by Melanie Jagneaux, CO-OP, Ilene Butensky, CO-OP, Donna Douglass Williams, CO-OP & Wayne Blair</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
3:00 p.m. – 3:30 p.m.	Networking Refreshment Break <i>Sponsored by Chevron & Mediate.com</i>	Atrium, 4th Floor	
3:30 p.m. – 5:00 p.m.	Concurrent Session 6		
All - F	31. Cow Savvy and Communication Skills – Cowboy Ombudsing <i>Presented by Rick Anderson</i>	Minnesota Room, 6th Floor	1.5

Schedule at a Glance

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

Wednesday, April 26 (continued)

General Conference – Day Three

		Location	PDH Credit
O - I	32. How Much is Conflict Costing Your Organization? <i>Presented by C. McKenna Lang</i>	St. Croix 1, 6th Floor	1.5
All - F	33. Managing your Ombuds Career: Tips for Aspiring and Existing Ombuds <i>Presented by Sana Manjeshwar, CO-OP, Scott Deyo, CO-OP, & Nicholas Diehl, CO-OP</i>	Deer Lake, 4th Floor	1.5
A; C; H; G; NP - I	34. Starting Where the Client is... and Other Lessons from Social Work <i>Presented by Karen Green</i>	Elk Lake, 4th Floor	1.5
All - I	35. The Debate in Ombuds' Record Retention and Data Management <i>Presented by Kerry Egdorf & Shannon Lynn Burton</i>	St. Croix 2, 6th Floor	1.5
A; C; G; NP - I	36. 2016 Clery Handbook: Implications and Best Practices for the Ombudsman <i>Presented by Linda Falkson, CO-OP, Marcia Martinez-Helfman, Bruce MacAllister & Charles Howard</i>	Pine Lake/Cedar Lake/Birch Lake, 4th Floor	1.5
5:00 p.m. – 5:15 p.m.	Final Remarks	Minnesota Room, 6th Floor	

Download the IOA Meeting App!

This year, the International Ombudsman Association is pleased to provide a meeting app to help you navigate the IOA 12th Annual Conference.

With this app from **Whova**, you can browse the **meeting schedule**, read session descriptions, create a personalized itinerary, network with other attendees, snap and post photos, and even live tweet (use #IOA2017) – all digitally via your mobile phone or device of choice.

Accessing the app is as simple as 1-2-3:

- **Step 1:** Download and install the **Whova app** from App Store (for iPhones) or Google Play (for Android phones). Or visit the Whova website for links to the app stores.
- **Step 2:** Sign up in the app using the email address you used to register for the IOA Annual Conference or use the code ioa2017.
- **Step 3:** You're all set. Now enjoy!

Get the most from the App!

- Network with other attendees
- Peruse the agenda and create a personal itinerary or take notes right on your device
- Take and share a photo right from the app

Under **Logistics**, you'll find information about:

- Hotel and parking information
- The hotel floor map
- A map, showing nearby restaurants and attractions

Questions? Email info@ombudsassociation.org or inquire at the IOA Registration Desk for assistance.



Keynote Speakers

Monday, April 24
8:30 a.m. – 9:30 a.m.

Mary Rowe Honorary Keynote Address

Ombuds Compendium – A Look Back, Where We Are Now, and A Look Forward

Ilene Butensky, CO-OP, *Vice President, Office of the Ombuds, Eaton Corporation*

What does it mean to be an ombudsman? Butensky will put all aspects of her experience together in one place to answer that question and more. Why is the profession where it is today? What do we need to do to move it forward? The discussion will be based on her (almost) ten years working as the ombuds office director for a multinational corporation. She will address the effective ombuds office, global ombuds, the value proposition, and finally, challenge us all with a call to action.



Ilene Butensky, CO-OP, is vice president of the Eaton's Office of Ombuds, and has led the globalization of Eaton's ombuds office for almost ten years. Prior to her current position, she held a variety of human resources roles for Eaton where she has worked for the past 38 years, including serving as director of compensation and benefits where she oversaw global base pay, variable pay and incentive plans, equity plans and health and welfare programs. Butensky is a lawyer and a Certified Organizational Ombudsman Practitioner® (CO-OP®).

Butensky currently serves on the Board of Directors for the International Ombudsman Association, and is the association's vice president. She is a frequent speaker at the International Ombudsman Association conferences. Butensky holds a bachelor's degree in Economics from University at Albany; a master's degree in Labor and Industrial Relations from the University of Illinois and a law degree from Cleveland State University.

Keynote Speakers

Monday, April 24

10:00 a.m. – 11:00 a.m.

From Observation to Engagement: Developing Bystander Efficacy to Address Problematic Behaviors

Loraleigh Keashly, PhD, *Associate Professor in the Department of Communications, Wayne State University*

Most negative interactions at work happen in the presence of others. What these others (bystanders, witnesses, observers) do and don't do has profound implications for the development and direction of these interactions. We will examine Latane and Darley's (1970) model of bystander decision-making and explore specific ways to build the efficacy of these others to engage in constructive influence and action to address problematic interactions.



Loraleigh Keashly, PhD, is an associate professor in the Department of Communications at Wayne State University (WSU). Her research, teaching and consulting focus on conflict and conflict resolution at the interpersonal, group, intergroup and organizational levels. She is part of the core faculty of the MA in the Dispute Resolution program at WSU, having served as Academic Director (MADR) for more than a decade.

Her main research focus is the nature, effects and amelioration of uncivil and bullying behaviors in the workplace with a particular interest in the role of organizational structure and culture in the facilitation or prevention and management of these behaviors. She has focused her recent attention on the academic environment and works with universities on these issues. Keashly has developed and conducted trainings in building bystander efficacy to take constructive action in challenging situations. Her works in progress focus on the power of relationships at work and civility in academia. She has published over 40 articles and book chapters. She has been a consultant to organizations and an expert witness on cases of workplace bullying and hostility.

Keynote Speakers

Tuesday, April 25
8:30 a.m. – 9:45 a.m.

Transforming Trauma – How to Do This Work and Stay Sane

Laura van Dernoot Lipsky, MSW

We will discuss the context for how a cumulative toll arises and how we will engage in this conversation, along with discussing some principles that may be helpful in taking in the information. Next, we will move on to The Trauma Exposure Response. These are the specific manifestations of cumulative toll. From numbing to anger to cynicism we will dive deeply into how one is impacted individually and collectively. We will look at very concrete strategies for how to create sustainability for oneself individually. Lastly, we will broaden the conversation by looking at how to create sustainability for oneself within a larger context as well as how to create larger organizational, institutional and movement level change.



Laura van Dernoot Lipsky, MSW, founder and director of The Trauma Stewardship Institute and author of *Trauma Stewardship: An Everyday Guide to Caring for Self While Caring for Others*, has worked directly with trauma survivors for more than three decades.

She has worked with groups as diverse as zookeepers and reconstruction workers in post-Hurricane Katrina New Orleans, community organizers and health care providers in Japan, U.S. Air Force pilots, Canadian firefighters, public school teachers, private practice doctors, tiny non-profits, massive state agencies, libraries, the Pentagon, alternative colleges, and Ivy League universities. Much of her work is being invited to assist in the aftermath of community catastrophes—whether they are fatal storms or

mass shootings. She has worked locally, nationally, and internationally. Laura is known as a pioneer in the field of trauma exposure.

Laura is also an associate producer of the award-winning film *A Lot Like You* and was given a Yo! Mama award in recognition of her work as a community-activist mother.

Plenary Sessions

Monday, April 24

11:15 a.m. – 12:15 p.m.
Session with the IOA Board

This session continues the tradition set several years ago to provide an opportunity for attendees to connect with the IOA Board of Directors. Our 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 25

5:00 p.m. – 6:30 p.m.
Pecha Kucha Cocktail Hour
Sponsored by Mars, Inc.

Facilitated by: Nicholas Diehl, *Ombudsman, Asian Development Bank*

Presenters: Caroline Adams, CO-OP, Balassa Balint, Takeelia Garrett, Timothy Hedeem,
Sana Manjeshwar, CO-OP, Tyler Smith and Diana Trillos

The concept of Pecha Kucha originated among designers in Tokyo in 2003 as a way to share innovative ideas in a short amount of time. The idea has grown in popularity in many different venues and Pecha Kucha sessions are regularly held in cities around the world. The format of 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 people who are interested can connect with the presenter or take the ideas and explore them more on their own. With such little time, presentations are generally high energy, fast moving and give an overview of a concept or experience. The value is the audience is exposed to lots of different ideas that can generate curiosity. If a presentation does not resonate with someone it is only a short wait until the next.



Plenary Sessions

Wednesday, April 26

8:30 a.m. – 9:30 a.m.

The Dignity Model

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

The Dignity Model is an approach developed to understand the role that dignity plays in the lives and relationships and in particular, the way we approach conflicts. For many researchers and practitioners there is a “missing link” in our understanding of conflict. That missing link is “the failure to recognize how vulnerable humans are to being treated as if they didn’t matter.” This vulnerability has evolutionary roots. Human connections and growth-fostering relationships are a central survival concern. We are born with a desire to be treated well because “we are psychologically programmed to believe that our lives are dependent on it.” The human desire for dignity is then in constant tension with our obvious vulnerability in our social environments. Getting a better understanding of the elements of human dignity, and the ways dignity is violated and honored, can improve the ombudsman’s ability to help visitors experiencing situations such as bullying, emotional abuse, social undermining and insidious workplace behaviors.

10:00 a.m. – 11:30 a.m.

The Annual Howard Gadlin Undebate

The Role of Confidentiality and Testimonial Privilege for Today’s Organizational Ombudsperson

Moderator: **Bruce MacAllister**, *Ombudsman, International Foundation for Online Responsibility*

Panelists: **Tom Kosakowski**, *Associate Director and Ombudsperson for Center for the Health Services University of California, Los Angeles*

Dawn Osborne-Adams, *Consulting Ombuds, Shell Oil Company*

Michael Kilpatrick, *CO-OP, Ombudsman, Metropolitan State University of Denver*

Angelica B. Alejandro, *Programs Officer, Asian Development Bank*

Get ready for the Annual Howard Gadlin Undebate! This general plenary session will be held each year at the annual IOA conference beginning in 2017. In the spirit of many of the presentations and sessions given by Howard Gadlin over the years, the purpose of this session is to raise and discuss critical questions related to the practice of organizational ombudsmen. Howard has and continues to “push the envelope” and challenges OO’s to openly discuss issues in a “critically supportive” manner. The Undebate will focus on a discussion on the role of confidentiality and testimonial privilege for today’s organizational ombudsperson.

This year’s Undebate featured discussion topic is based on two key points from Bruce MacAllister’s recent article, “The Five Current Challenges that Pose Opportunities to Improve and Consolidate the Ombuds Profession” in the *Journal of the California Caucus of College and University Ombuds*. Come prepared for a lively and interactive discussion!

Link *Cal Caucus Journal* to the <http://journal.calcaucus.com/index.html>.

Networking and Social Opportunities

Monday, April 24

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 contribution over the past year.

5:30 p.m. – 7:00 p.m.

Welcome Reception for All Attendees (cash bar)

Sponsored by Pfizer

Living Room Bar and Prohibition Bar at the Foshay Towers, 27th Floor

821 S. Marquette Ave., 4 blocks from the Marriott

Join us for light refreshments and networking in a place where colleagues know what you do for a living and understand you; a place where they want to hear how you handled a situation; a place where you can ask their opinion. You will be able to catch up with old friends, make new friends, share stories and discuss with others the conference sessions you plan to attend.

This year's Welcome Reception will be held at the Living Room Bar and Prohibition Bar at the Foshay Towers. The Prohibition Bar features a breathtaking design and 360 degree views of downtown Minneapolis from the 27th floor. Foshay Tower is located at 821 South Marquette Ave., a 4-block (6-minute) walk from the Marriott.

Light hors d'oeuvres will be served as well as coffee, tea and soft drinks. Cash bars will also be available.



Networking and Social Opportunities

Tuesday, April 25

9:45 a.m. – 10:45 a.m.

Sector Networking Break

This break offers attendees a unique opportunity to connect and network with other members of their professional sectors. Each sector (see page 11) will be assigned a specific meeting room equipped with note-taking tools. Use this time to discuss issues or topics pertinent to the participants, capture any questions or ideas the sectors wish to pose to the IOA Board of Directors or IOA Committees and specify the intended recipient for a particular question as well as contact information for the response. At the conclusion of the break, a member of the Conference Planning Committee will collect and deliver all questions to the appropriate person or group.

A bit of background, the idea of the World Café comes out of the Communities of Practice philosophy. The structure of the Café allows for groups of people to freely share diverse perspectives and opinions on a question that matters to them. The question should be timely, something that is on peoples' minds, and broad enough so that it crosses any sub-groups that exist. It's an opportunity to 'go deep' on a matter of importance, which is accomplished through the same question being asked through three successive rounds of dialogue, rather than skipping around on various subjects.

The paradox is that by asking only one question, you actually get more useable information in terms of emerging themes and patterns which then provides a basis for meaningful action. World Café participants appreciate the chance to contribute their views on an important question, especially when the information 'harvested' is a platform for progress.

Noon – 1:00 p.m.

Networking Lunch for All Conference Attendees and

Lunch for Ombuds New to the Profession and First-time Attendees

Lunches Sponsored by Chevron

Welcome to IOA! You are invited to join 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.

Wednesday, April 26

11:30 a.m. - 1:15 p.m.

Networking Lunch

This networking lunch will be "on your own." Attendees will be free to select an off-site dining spot for an opportunity to network freely with colleagues. A list of local "walk-to" restaurants will be provided for your convenience. Attendees are responsible for cost.

2017 Professional Development Hours

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

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

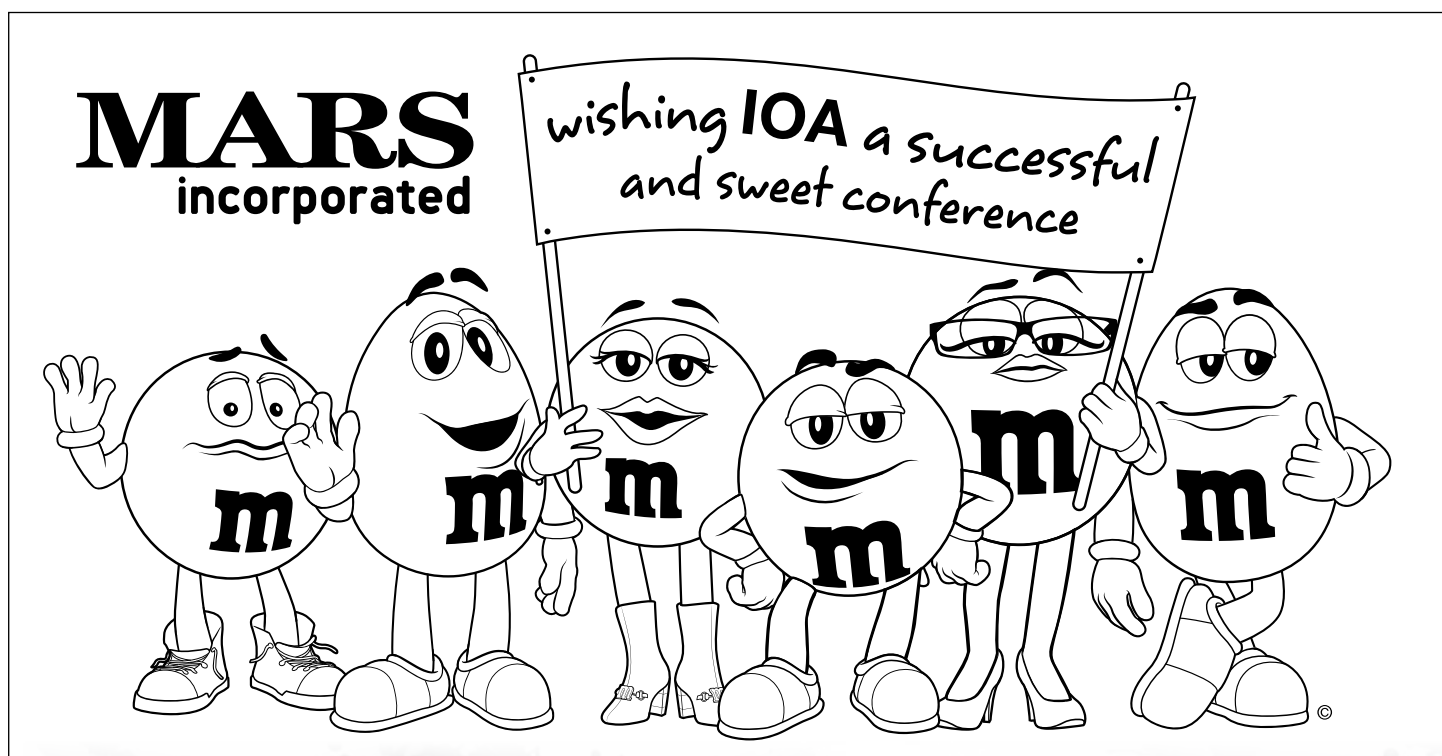
Specialty Workshops:

Full Day Course:	6.5
AM Half Day Course:	3.5
PM Half Day Course:	3.5

General Conference:

General Conference, Day 1	5
General Conference, Day 2	4.25
General Conference, Day 3	5.5

Actual hours for 2017 may vary pending Certification Committee approval.



Become a Certified Organizational Ombudsman Practitioner®!



WHY?

- Gain recognition
- Invest in your career
- Show commitment
- Distinguish yourself
- Strengthen and professionalize the organizational ombudsman field

HOW?

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

We Wish to Congratulate the Newest
Certified Organizational Ombudsman Practitioners
Who Received Certification Since Last Year's Annual IOA Conference
(as of March, 2017)

PRACTITIONER

Crystal Brakke, CO-OP
Felicia Bunns, CO-OP
Nicholas Diehl, CO-OP
Carolyn Esposito, CO-OP
Rita Franklin, CO-OP
Brad Ginn, CO-OP
Elizabeth Hill, CO-OP
Patrick Holman, CO-OP
Gabor Kocsenda, CO-OP
Joan Waters, CO-OP

ORGANIZATION

Teach for America
Department of Energy
Asian Development Bank
AllianceBernstein
Department of Energy
Northeastern Illinois University
University of Colorado, Boulder
United States Department of Energy
Mars, Inc.
Columbia University

IOA and the CO-OP® Board are proud to report
we have certified 107 Organizational Ombudsman practitioners.

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

General Information & Policies

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

Ethics and Standards of Practice: The organizational ombudsman is mindful of the 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: By 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 Association. By producing publications and sponsorship of this event, the Association does not guarantee the accuracy of the information disseminated and is not engaged in rendering professional advice; if such advice is desired, you should seek the services of a competent professional.

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

Intellectual Property Rights: All content on the IOA 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.

PDH Signatures: To obtain PDH signatures from your attendance of an accredited sessions, you may do the following:

- Ask your Session Moderator to sign your PDH form at the conclusion of the session.
- Go to the CO-OP® desk and obtain signature from a CO-OP® Board Member or Committee Chair.
- Seek out anyone wearing a red, white and blue PDH Signer ribbon or a CO-OP® ribbon to obtain signatures.
- At the conclusion of each General Session (Keynote/ Plenary) CO-OP® Board, Recertification Board and anyone wearing a red, white and blue PDH Signer ribbon will be on hand to sign PDH Credit Forms.



IOA Code of Ethics

PREAMBLE

The IOA is dedicated to excellence in the practice of Ombudsman work. The IOA Code of Ethics provides a common set of professional ethical principles to which members adhere in their organizational Ombudsman practice.

Based on the traditions and values of Ombudsman practice, the Code of Ethics reflects a commitment to promote ethical conduct in the performance of the Ombudsman role and to maintain the integrity of the Ombudsman profession.

The Ombudsman shall be truthful and act with integrity, shall foster respect for all members of the organization he or she serves, and shall promote procedural fairness in the content and administration of those organizations' practices, processes, and policies.

ETHICAL PRINCIPLES

INDEPENDENCE

The Ombudsman is independent in structure, function, and appearance to the highest degree possible within the organization.

NEUTRALITY AND IMPARTIALITY

The Ombudsman, as a designated neutral, remains unaligned and impartial. The Ombudsman does not engage in any situation which could create a conflict of interest.

CONFIDENTIALITY

The Ombudsman holds all communications with those seeking assistance in strict confidence, and does not disclose confidential communications unless given permission to do so. The only exception to this privilege of confidentiality is where there appears to be imminent risk of serious harm.

INFORMALITY

The Ombudsman, as an informal resource, does not participate in any formal adjudicative or administrative procedure related to concerns brought to his/her attention.



IOA Standards of Practice

PREAMBLE

The IOA Standards of Practice are based upon and derived from the ethical principles stated in the IOA Code of Ethics.

Each Ombudsman office should have an organizational Charter or Terms of Reference, approved by senior management, articulating the principles of the Ombudsman function in that organization and their consistency with the IOA Standards of Practice.

STANDARDS OF PRACTICE

INDEPENDENCE

- 1.1** The Ombudsman Office and the Ombudsman are independent from other organizational entities.
- 1.2** The Ombudsman holds no other position within the organization which might compromise independence.
- 1.3** The Ombudsman exercises sole discretion over whether or how to act regarding an individual's concern, a trend or concerns of multiple individuals over time. The Ombudsman may also initiate action on a concern identified through the Ombudsman's direct observation.
- 1.4** The Ombudsman has access to all information and all individuals in the organization, as permitted by law.
- 1.5** The Ombudsman has authority to select Ombudsman Office staff and manage Ombudsman Office budget and operations.

NEUTRALITY AND IMPARTIALITY

- 2.1** The Ombudsman is neutral, impartial, and unaligned.
- 2.2** The Ombudsman strives for impartiality, fairness and objectivity in the treatment of people and the consideration of issues. The Ombudsman advocates for fair and equitably administered processes and does not advocate on behalf of any individual within the organization.
- 2.3** The Ombudsman is a designated neutral reporting to the highest possible level of the organization and operating independent of ordinary line and staff structures. The Ombudsman should not report to nor be structurally affiliated with any compliance function of the organization.



- 2.4** The Ombudsman serves in no additional role within the organization which would compromise the Ombudsman's neutrality. The Ombudsman should not be aligned with any formal or informal associations within the organization in a way that might create actual or perceived conflicts of interest for the Ombudsman. The Ombudsman should have no personal interest or stake in, and incur no gain or loss from, the outcome of an issue.
- 2.5** The Ombudsman has a responsibility to consider the legitimate concerns and interests of all individuals affected by the matter under consideration.
- 2.6** The Ombudsman helps develop a range of responsible options to resolve problems and facilitate discussion to identify the best options.

CONFIDENTIALITY

- 3.1** The Ombudsman holds all communications with those seeking assistance in strict confidence and takes all reasonable steps to safeguard confidentiality, including the following: The Ombudsman does not disclose confidential communications unless given permission to do so in the course of informal discussions with the Ombudsman, and even then at the sole discretion of the Ombudsman; the Ombudsman does not reveal, and must not be required to reveal, the identity of any individual contacting the Ombudsman Office, nor does the Ombudsman reveal information provided in confidence that could lead to the identification of any individual contacting the Ombudsman Office, without that individual's express permission; the Ombudsman takes specific action related to an individual's issue only with the individual's express permission and only to the extent permitted, unless such action can be taken in a way that safeguards the identity of the individual contacting the Ombudsman Office. The only exception to this privilege of confidentiality is where there appears to be imminent risk of serious harm, and where there is no other reasonable option. Whether this risk exists is a determination to be made by the Ombudsman.
- 3.2** Communications between the Ombudsman and others (made while the Ombudsman is serving in that capacity) are considered privileged. The privilege belongs to the Ombudsman and the Ombudsman Office, rather than to any party to an issue. Others cannot waive this privilege.
- 3.3** The Ombudsman does not testify in any formal process inside the organization and resists testifying in any formal process outside of the organization, even if given permission or requested to do so.
- 3.4** If the Ombudsman pursues an issue systemically (e.g., provides feedback on trends, issues, policies and practices) the Ombudsman does so in a way that safeguards the identity of individuals.
- 3.5** The Ombudsman keeps no records containing identifying information on behalf of the organization.



- 3.6 The Ombudsman maintains information (e.g., notes, phone messages, appointment calendars) in a secure location and manner, protected from inspection by others (including management), and has a consistent and standard practice for the destruction of such information.
- 3.7 The Ombudsman prepares any data and/or reports in a manner that protects confidentiality.
- 3.8 Communications made to the ombudsman are not notice to the organization. The ombudsman neither acts as agent for, nor accepts notice on behalf of, the organization and shall not serve in a position or role that is designated by the organization as a place to receive notice on behalf of the organization. However, the ombudsman may refer individuals to the appropriate place where formal notice can be made.

INFORMALITY AND OTHER STANDARDS

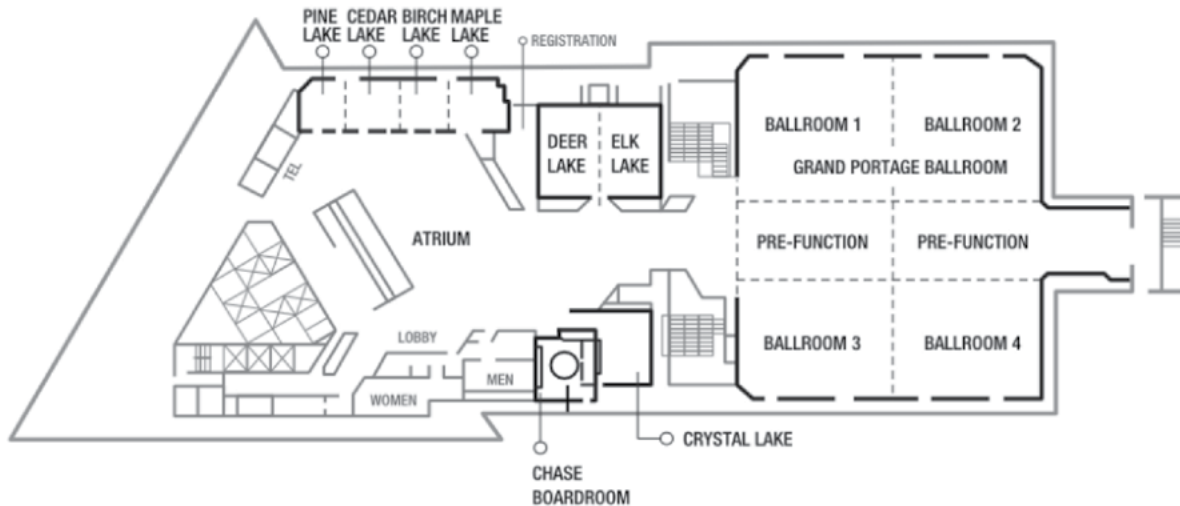
- 4.1 The Ombudsman functions on an informal basis by such means as: listening, providing and receiving information, identifying and reframing issues, developing a range of responsible options, and – with permission and at Ombudsman discretion – engaging in informal third-party intervention. When possible, the Ombudsman helps people develop new ways to solve problems themselves.
- 4.2 The Ombudsman as an informal and off-the-record resource pursues resolution of concerns and looks into procedural irregularities and/or broader systemic problems when appropriate.
- 4.3 The Ombudsman does not make binding decisions, mandate policies, or formally adjudicate issues for the organization.
- 4.4 The Ombudsman supplements, but does not replace, any formal channels. Use of the Ombudsman Office is voluntary, and is not a required step in any grievance process or organizational policy.
- 4.5 The Ombudsman does not participate in any formal investigative or adjudicative procedures. Formal investigations should be conducted by others. When a formal investigation is requested, the Ombudsman refers individuals to the appropriate offices or individual.
- 4.6 The Ombudsman identifies trends, issues and concerns about policies and procedures, including potential future issues and concerns, without breaching confidentiality or anonymity, and provides recommendations for responsibly addressing them.
- 4.7 The Ombudsman acts in accordance with the IOA Code of Ethics and Standards of Practice, keeps professionally current by pursuing continuing education, and provides opportunities for staff to pursue professional training.
- 4.8 The Ombudsman endeavors to be worthy of the trust placed in the Ombudsman Office.

Notes

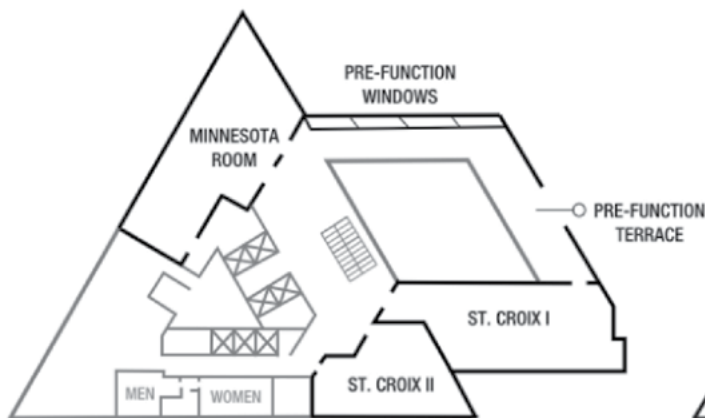
This image shows a single page of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Hotel Floor Plan

FOURTH FLOOR



SIXTH FLOOR



EIGHTH FLOOR



4th Floor

Registration Desk – Registration Room
 Morning Coffee Service & Refreshment Breaks – Atrium
 Specialty Workshops – Deer Lake, Birch Lake, Pine Lake/
 Cedar Lake, Elk Lake
 Keynote/Plenary Sessions – Ballroom 1/2/Prefunction
 Lunches – Ballroom 3/4
 Concurrent Sessions – Deer Lake, Elk Lake, Pine Lake/Cedar Lake/
 Birch Lake
 Sector Networking Meetings – Ballroom 3/4
 Pecha Kucha – Ballroom 3/4

6th Floor

Concurrent Sessions – Minnesota Room, St. Croix 1, St. Croix 2
 Sector Networking Meetings – St. Croix 1, St. Croix 2,
 Minnesota Room
 Lunch for Ombudsmen New to the Profession and
 First Time Attendees – Terrace/Windows

8th Floor

Foundations of Organizational Ombudsman Practice, Group A –
 Excelsior Bay/Lafayette Bay
 Foundations of Organizational Ombudsman Practice, Group B –
 Grays Bay/Wayzata Bay
 Foundations of Organizational Ombudsman Practice Refreshment
 Breaks & Lunches – Spring Park Bay

2017

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