

MC 709

Box 19

8

COA + TOA conferences by year

1984 - 1997

COA Conferences

<u>1984</u> (Cape Cod) 7/22 (3PM) - 7/24 (Noon)	<u>1985</u> (Dallas) 4/24 (Noon) - 4/26 (Noon)	<u>1986</u> (St. Louis) 5/14 (0830AM) - 5/16 (Noon)
Orientation 1-1/2 hrs		
Techniques of Complaint Resolution 2 hrs	Case Study - Wrongful Discharge	Tours
Legal - Employment at Will 1-1/4 hrs	Who Are We? Update	Ethics 3 hrs
Reporting Structures 1 hr		
Legal - Confidentiality Duty to Warn 2 hrs	What is an Ombudsman? How are we Different?	Differences in Corporate Culture 1-1/2 hrs
		Practical Considerations of an Ombuds' Office 1-1/2 hrs
Upward and Downward Communications 1-1/2 hrs	Workshop on Sensitive Issues	Mediation Skills 3 hrs
What's Next? 1 1/2 hrs	Research Report	McDonnell Douglas Startup 1 hr
	Legal Update	
	How to set up an Ombuds Office	AIDS - Legal & Medical 2 hrs
		What's Next? 1 hr
	Impact & Effectiveness	
	Association Meeting	

COA Conferences

<u>1987</u> (Los Angeles) 5/20 (0830AM) - 5/21 (5PM)	<u>1988</u> (Boston) 5/23 (3PM) - 5/25 (5PM)	<u>1989</u> (Raleigh) 5/22 (4PM) - 5/24 (0330PM)
	Orientation 1 hr	Orientation 1-1/2 hrs
Ethics 1-1/4 hrs	Ethics 1-1/2 hrs	Ethics 1-1/2 hrs
Research 1-1/4 hrs	Research 1 hr	Legal 1 hr
Peer Review 1 hr	Mediation Skills 4 hrs	Confidentiality 2 hrs
Working with Human Resources 2-1/4 hrs		Research 1-1/4 hrs
	Legal 1-1/2 hrs	
	Influencing Corporate Culture 1-1/2 hrs	Tools of the Trade 1-1/2 hrs
Immoral, Unsafe & Illegal Problems 1-3/4 hrs	Defense Industry - Ethics 1 hr	Catalyst for Change 1-1/2 hrs
	Downsizing 1 hr	
Legal Perspective 1-1/2 hrs	Crystal Ball 1 hr	Crystal Ball 3/4 hr
System Feedback 1-1/4 hrs	Annual Meeting 1-1/2 hrs	Annual Meeting 1-1/4 hrs
The 3 R's 1 hr		
Looking Ahead 1 hr		

TOA Conferences

<u>1990</u> (Hershey) 5/22 (1PM) - 5/24 (1230)	<u>1991</u> (Minneapolis) 5/14 (0330) - 5/16 (Noon)	<u>1992</u> (Cincinnati) 5/11 (0830AM)-5/13 (0330PM)
Orientation 1 hr	Orientation 2 hrs	Orientation 1-1/2 hrs
Training-Investigations 4 hrs		Annual Meeting 45 mins
Ethics Cases - "What are the Essential Questions?" 1-1/4 hrs	Crystal Ball 1/2 hr	Crystal Ball 45 mins
Mental Illness & Violence-"What the Ombudsman Needs to Know" 1-1/2 hrs	Legislative Initiatives & Legal Decisions that will Impact the Ombudsman in the 90's" 3/4 hr	Credibility & Diversity 1-1/2 hrs
Drugs, Including Alcohol-"How to Identify & Deal with Affected Employees" 2 hrs	Leading by Values 2 hrs	Workshops- A) Letting People Know Who You Are and What You Do 1-1/2 hrs B) Everything You Want and Need to Know About Operating an Ombudsman's Office C) Maintaining Confidentiality - How Would You Do It? D) Evaluating the Effectiveness of the Ombudsman
Waste, Fraud & Abuse-"The Corporate Hotline-Success Thru Development of a Positive Image" 3/4 hr	Coping with Difficult People 2-1/2 hrs	"Both Sides Now" 1 - 1/4 hrs
Annual Meeting 3/4 hr	Annual Meeting 50 mins	Harassment in the Workplace 1-1/2 hrs
Diversity-"Dealing with the Changing Faces of the Corporate Workforce" 3-3/4 hrs	Mediating Sexual Harassment Complaints 1-1/2 hrs	Workshops- (see above) 1-1/2 hrs
Crystal Ball 1/2 hr	Confidentiality, Privilege & the Ombudsman 1/2 hr	"The Role of Ombudsmen in Organizations Undergoing Change" 1-1/2 hrs
Closing Remarks 1/4 hr	Cost Effectiveness & Cost Avoidance-Cost Saving Contributions of Ombudsman Programs to their Organizations 1 hr	Closing Remarks 1-4 hr
	Closing Remarks 1/4 hr	

TOA Conferences

1993

(San Francisco)

5/12 (2PM) - 5/14 (1230)

Orientation	2-1/3hrs.
Annual Meeting	1-3/4hrs.

Crystal Ball	1 hr.
"What's the Ombudsman's Role in Diversity"	2 hrs.

Breakout Groups - (2 hrs.)
1) Marketing the Ombudsman Function
2) Facilitating Conflict Management
Sessions

Breakout Groups - (1-1/2 hrs.)
1) Ethics
2) Building Relationships with Human
Resources and Management

Program Committee Meeting	1/2 hr.
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"Predictions of Danger/Violence in the Workplace"	2 hrs.
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Discussion of Current Issues Affecting Ombudsman	1-1/2 hrs.
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Conference Feedback	1/2 hr.
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Closing Remarks	1/4 hr.
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COA Conferences

<u>1984</u> (Cape Cod) 7/22 (3PM) - 7/24 (Noon)	<u>1985</u> (Dallas) 4/24 (Noon) - 4/26 (Noon)	<u>1986</u> (St. Louis) 5/14 (0830AM) - 5/16 (Noon)
Orientation 1-1/2 hrs		
Techniques of Complaint Resolution 2 hrs	Case Study - Wrongful Discharge	Tours
Legal - Employment at Will 1-1/4 hrs	Who Are We? Update	Ethics 3 hrs
Reporting Structures 1 hr		
Legal - Confidentiality Duty to Warn 2 hrs	What is an Ombudsman? How are we Different?	Differences in Corporate Culture 1-1/2 hrs
		Practical Considerations of an Ombuds' Office 1-1/2 hrs
Upward and Downward Communications 1-1/2 hrs	Workshop on Sensitive Issues	Mediation Skills 3 hrs
What's Next? 1 1/2 hrs	Research Report	McDonnell Douglas Startup 1 hr
	Legal Update	
	How to set up an Ombuds Office	AIDS - Legal & Medical 2 hrs
		What's Next? 1 hr
	Impact & Effectiveness	
	Association Meeting	

COA Conferences

<u>1987</u> (Los Angeles) 5/20 (0830AM) - 5/21 (5PM)	<u>1988</u> (Boston) 5/23 (3PM) - 5/25 (5PM)	<u>1989</u> (Raleigh) 5/22 (4PM) - 5/24 (0330PM)
	Orientation 1 hr	Orientation 1-1/2 hrs
Ethics 1-1/4 hrs	Ethics 1-1/2 hrs	Ethics 1-1/2 hrs
Research 1-1/4 hrs	Research 1 hr	Legal 1 hr
Peer Review 1 hr	Mediation Skills 4 hrs	Confidentiality 2 hrs
Working with Human Resources 2-1/4 hrs		Research 1-1/4 hrs
	Legal 1-1/2 hrs	
	Influencing Corporate Culture 1-1/2 hrs	Tools of the Trade 1-1/2 hrs
Immoral, Unsafe & Illegal Problems 1-3/4 hrs	Defense Industry - Ethics 1 hr	Catalyst for Change 1-1/2 hrs
	Downsizing 1 hr	
Legal Perspective 1-1/2 hrs	Crystal Ball 1 hr	Crystal Ball 3/4 hr
System Feedback 1-1/4 hrs	Annual Meeting 1-1/2 hrs	Annual Meeting 1-1/4 hrs
The 3 R's 1 hr		
Looking Ahead 1 hr		

TOA Conferences

<u>1990</u> (Hershey) 5/22 (1PM) - 5/24 (1230)		<u>1991</u> (Minneapolis) 5/14 (0330) - 5/16 (Noon)		<u>1992</u> (Cincinnati) 5/11 (0830AM)-5/13 (0330PM)	
Orientation	1 hr	Orientation	2 hrs	Orientation	1-1/2 hrs
Training-Investigations	4 hrs			Annual Meeting	45 mins
Ethics Cases - "What are the Essential Questions?"	1-1/4 hrs	Crystal Ball	1/2 hr	Crystal Ball	45 mins
Mental Illness & Violence-"What the Ombudsman Needs to Know"	1-1/2 hrs	Legislative Initiatives & Legal Decisions that will Impact the Ombudsman in the 90's"	3/4 hr	Credibility & Diversity	1-1/2 hrs
Drugs, Including Alcohol-"How to Identify & Deal with Affected Employees"	2 hrs	Leading by Values	2 hrs	Workshops- A) Letting People Know Who You Are and What You Do B) Everything You Want and Need to Know About Operating an Ombudsman's Office C) Maintaining Confidentiality - How Would You Do It? D) Evaluating the Effectiveness of the Ombudsman	1-1/2 hrs
Waste, Fraud & Abuse-"The Corporate Hotline-Success Thru Development of a Positive Image"	3/4 hr	Coping with Difficult People	2-1/2 hrs	"Both Sides Now"	1 - 1/4 hrs
Annual Meeting	3/4 hr	Annual Meeting	50 mins	Harassment in the Workplace	1-1/2 hrs
Diversity-"Dealing with the Changing Faces of the Corporate Workforce"	3-3/4 hrs	Mediating Sexual Harassment Complaints	1-1/2 hrs	Workshops- (see above)	1-1/2 hrs
Crystal Ball	1/2 hr	Confidentiality, Privilege & the Ombudsman	1/2 hr	"The Role of Ombudsmen in Organizations Undergoing Change"	1-1/2 hrs
Closing Remarks	1/4 hr	Cost Effectiveness & Cost Avoidance-Cost Saving Contributions of Ombudsman Programs to their Organizations	1 hr	Closing Remarks	1/4 hr
		Closing Remarks	1/4 hr		

TOA Conferences

<u>1993</u> (San Francisco) 5/12 (2PM) - 5/14 (1230)		<u>1994</u> (Chicago) 5/18 (245PM) - 5/20 (1245)	
Orientation	2-1/4hrs.	Concurrent Sessions - (2-1/4hrs.) 1) New Member Orientation 2) Standards of Practice (for seasoned ombuds)	
Annual Meeting	1-3/4hrs.	Annual Meeting	3/4hr.
		Poster Groups and Discussions - +Ombudsman and the Organizational Structure +Aspects of Asian Cultures +The Freelance Ombudsman +Performance Outcome - Two to Three Year Follow-ups of Clients +Upward Feedback +Dealing with an Aging Population	1-1/2hrs.
Crystal Ball	1 hr.	President's Welcome	1/4hr.
"What's the Ombudsman's Role in Diversity"	2 hrs.	Mary Rowe's Crystal Ball	1hr.
Breakout Groups - (2 hrs.) 1) Marketing the Ombudsman Function 2) Facilitating Conflict Management Sessions		Workshop - Methods of Conflict Management Aiki Works, Inc.	2-1/2hrs.
Breakout Groups - (1-1/2 hrs.) 1) Ethics 2) Building Relationships with Human Resources and Management		Workshop in Conflict Management continues	3-1/4hrs.
Program Committee Meeting	1/2 hr.		
"Predictions of Danger/Violence in the Workplace"	2 hrs.	Workplace Harassment - Changing Regulations	1-1/2hrs.
Discussion of Current Issues Affecting Ombudsman	1-1/2 hrs.	Current Issues	1-1/4hrs.
Conference Feedback	1/2 hr.	Conference Feedback	1/4hr.
Closing Remarks	1/4 hr.	President's Closing Remarks	1/4hr.

TOA Conferences

<u>1995</u> (New Orleans) 4/26 (1PM) - 4/28 (12PM)		<u>1996</u> (St. Louis) 5/15 (8:30AM) - 5/18 (12:00PM)	
Crystal Ball Presentation - Mary Rowe	1 hr	Preconference Workshops	
Myers-Briggs Test Instrument - Nancy Radcliff	1 hr	<ul style="list-style-type: none"> • Conducting an Investigation • Dealing with Reprisal 	
Annual Meeting - TOA Committee Presentation - TOA Standards	2 hrs		
Poster Sessions	1 hr		
"Nightmare Case" Discussion Groups	1 hr	Opening comments	½ hr
		The Death of Common Sense	1 hr
		Introduction to the Participants of the First North American Conference	1-1/2 hr
		Concurrent sessions	1-1/2 hr
		Concurrent sessions	1-1/2 hr
Myers-Briggs Feedback-Con't Use as a Tool in Conflict Resolution	1 hr	Lee Fjelstad, Speaker	1 hr
Dispute Resolution Systems Design - Chorda conflict Management, Inc.	5 hrs	Communicating Across Cultures	1 hr
		Concurrent sessions	1-1/2 hr
		Annual Business Meetings	2 hrs
		Concurrent sessions	1-1/2 hr
Panel Discussion: <ul style="list-style-type: none"> • - Judicial Recognition of Ombudsman Privilege • - Standards of Confidentiality • - Need for Shield Laws 	1-3/4 hrs	Legal Updates	1-1/2 hr
Message From the President - Tom Furtado	¾ hrs	Status of the Profession: - Current Issues	¾ hr
Open Discussion - Evaluations	½ hr	Conference Wrap-up	½ hr

TOA Conferences

1997

(Montreal)

5/13 (11:00AM) - 5/16 (12:45PM)

Preconference Courses

- The Ombuds & the Organization
- Dealing with Reprisal

Poster sessions	½ hr
Keynote speaker: Ms. Suzanne Belson	1 hr
Annual Meeting	2 hrs
“Mixed Roles - Ombuds and ethics officers”	1-1/2 hr
Results of the salary/compensation survey	½ hr
“Ombudsing - Variations in practice”	1 hr

Poster session	½ hr
“Keeping Rambo out of the workplace”	3 hrs
Evolution, Change and Paradigms”	2 hrs
“Life after Ombudsing”	1-1/2 hrs

The Survivor Syndrome - Panel	1-1/2 hrs
Mary Rowe’s Crystal Ball	1 hr
“A day in the life of an Ombuds”	1 hr
Remarks from incoming TOA President	¼ hr

COA MEMBERSHIP

<u>YEAR</u>	<u>MEMBERS</u>	<u>ASSOCIATES</u>
1986	43	7
1987	53	6
1988	93	-
1989	110	-
1990	120*	-

* As of 5/20/90

5/19/90

1990 COA MEMBERSHIP, BY REGION

As of the above date, the COA membership consisted of 120 members and came from four regions of North America as shown below:

<u>EAST</u>	<u>(number)</u>	<u>MIDWEST</u>	<u>(number)</u>	<u>SOUTH</u>	<u>(number)</u>	<u>WEST</u>	<u>(number)</u>	<u>Totals</u>
CAN	3	IL	5	AL	2	CA	13	
CT	9	IN	1	FL	7	WA	3	
DC	6	KY	2	LA	1			
MA	6	MI	3	OK	1			
MD	4	MN	2	SC	4			
NJ	8	MO	15	TN	2			
NY	10	OH	3	TX	2			
PA	5	WI	1					
VA	2		—		—		—	—
Totals	53		32		19		16	120
Percent	44		27		16		13	100

COA 1990 MEMBERSHIP, BY YEAR OF INITIAL MEMBERSHIP

The year 1986 was selected as the initial year of the COA because that is the year when the Association became incorporated; prior to that year the COA cannot be said to have legal existence, although conferences were held in 1984 and 1985. The 1990 COA membership, as of the above date and distributed according to the year in which the first membership is recorded, is as follows:

<u>Year of Initial Membership</u>	<u>Number of Members</u>	<u>Percent</u>
1986	27	23
1987	7	6
1988	24	20
1989	23	19
1990	<u>39</u>	<u>32</u>
Totals	120	100

Information taken from 1990 COA Membership, by state (Membership total 117)

NORTHEAST

Connecticut	9
Maine	0
Massachusetts	6
New Hampshire	0
New York	10
Rhode Island	0
Vermont	0
Canada (Quebec)	2
Total	27

MIDDLE ATLANTIC STATES

Delaware	0
Washington, DC	6
Maryland	4
New Jersey	8
North Carolina	0
Pennsylvania	5
South Carolina	3
Virginia	2
West Virginia	0
Total	28

SOUTH ATLANTIC STATES

Alabama	2
Georgia	0
Florida	7
Tennessee	2
Kentucky	1
Total	12

SOUTHWEST AND SOUTH CENTRAL

Arkansas	0
Colorado	0
Kansas	0
Louisiana	1
Missouri	15
New Mexico	0
Oklahoma	1
Texas	2
Total	19

GREAT LAKES REGION

Illinois	5
Indiana	1
Michigan	3
Ohio	3
Wisconsin	1
Canada (Ontario)	0
Total	13

CALIFORNIA AND THE WEST

Arizona	0
California	12
Nevada	0
Utah	0
Total	12

NORTHWEST AND GREAT PLAINS

Idaho	0
Iowa	0
Minnesota	2
Montana	0
Nebraska	0
North Dakota	0
Oregon	0
South Dakota	0
Washington	3
Wyoming	0
Canada (Toronto)	1
Total	6

5/19/90

1990 COA MEMBERSHIP, BY AFFILIATION

As of the above date, the COA membership came from 63 different organizations. The breakdown below shows the membership under ten different types of organization.

<u>Type of Organization</u>	<u>Organizations</u>		<u>Members</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Manufacturing	11	18	12	10
Utilities	10	16	12	10
Defense-related	8	13	41	34
Health-related	7	11	9	7
Hi-Tech	4	6	17	14
Public Service	4	6	4	3
University	4	6	6	5
School Districts	3	5	3	3
Insurance	2	3	3	3
Other	<u>10</u>	<u>16</u>	<u>13</u>	<u>11</u>
Totals	63	100	120	100