


will be redrafted
into
Board
training etc

The
Ombudsman
ASSOCIATION

WELCOMES YOU
TO THE
13th ANNUAL CONFERENCE

Building
bridges



Bonaventure Hilton Hotel
Montréal, Québec, Canada

MAY 14-16th, 1997



Tuesday, May 13

- | | | |
|----------------------|--|--|
| 11:00a.m. • 5:00p.m. | <ul style="list-style-type: none"> ■ Pre-Conference Specialized Courses <li style="padding-left: 20px;">- Dealing With Reprisal
<i>Tom Furtado</i> <li style="padding-left: 20px;">- Ombuds and the Organization
<i>Elizabeth Lorimer</i> | <p style="text-align: right;">Mont Royal</p> <p style="text-align: right;">Hampstead</p> |
| 12:30p.m. • 1:30p.m. | <ul style="list-style-type: none"> ■ Lunch Buffet for Specialized Courses | <p style="text-align: right;">Cote St. Luc</p> |
| 5:00p.m. • 7:00p.m. | <ul style="list-style-type: none"> ■ Registration for 13th Annual Conference | |
| 7:00p.m. • 8:30p.m. | <ul style="list-style-type: none"> ■ TOA Executive Board Meeting | <p style="text-align: right;">St.Pierre</p> |

Wednesday, May 14

- | | | |
|-------------------|--|--|
| 7:30am • 8:30am | <ul style="list-style-type: none"> ■ Continental Breakfast <li style="padding-left: 20px;">- Registration for 13th Annual Conference | |
| 8:30am • 9:00am | <ul style="list-style-type: none"> ■ Opening of the Poster sessions - <i>Elizabeth Lorimer</i> <li style="padding-left: 20px;">- The Poster session is available throughout the three days of the conference outside the main session rooms | |
| 9:00am • 10:00am | <ul style="list-style-type: none"> ■ Keynote speaker: - <i>Ms. Suzanne Belson</i> <li style="padding-left: 20px;">- Concordia University, Montreal, "Where is Darwin now we need him?"The Ombudsman in Evolution | <p style="text-align: right;">Verdun, Lachine, Lasalle</p> |
| 10:00am • 10:30am | <ul style="list-style-type: none"> ■ Refreshment break | |
| 10:30am • 12:30pm | <ul style="list-style-type: none"> ■ Annual Business Meeting <li style="padding-left: 20px;">- TOA Committee Report <li style="padding-left: 20px;">- TOA Executive Director's Report <li style="padding-left: 20px;">- Other business | <p style="text-align: right;">Verdun, Lachine, Lasalle</p> |
| 12:30pm • 2:00pm | <ul style="list-style-type: none"> ■ Luncheon | <p style="text-align: right;">Outremont</p> |
| 2:00pm • 3:30pm | <ul style="list-style-type: none"> ■ "Mixed Roles - Ombuds and ethics officers" <li style="padding-left: 20px;"><i>Tom Furtado</i> | <p style="text-align: right;">Verdun, Lachine, Lasalle</p> |
| 3:30pm • 4:00pm | <ul style="list-style-type: none"> ■ Refreshment break | |
| 4:00pm • 4:30pm | <ul style="list-style-type: none"> ■ Results of the salary / compensation survey. <li style="padding-left: 20px;"><i>Mary Rowe and Mary Simon</i> | <p style="text-align: right;">Verdun, Lachine, Lasalle</p> |
| 4:30pm • 5:30pm | <ul style="list-style-type: none"> ■ "Ombudsing - Variations in practice" <li style="padding-left: 20px;"><i>Ann Bensinger</i> | |
| 6:30pm • 8:30pm | <ul style="list-style-type: none"> ■ Opening Reception and Buffet | <p style="text-align: right;">Portage</p> |

The
Ombudsman
ASSOCIATION

Thursday, May 15

- | | | |
|-------------------|---|--------------------------|
| 7:30am • 8:30am | ■ Continental Breakfast
– Poster session | |
| 8:30am • 10:00am | ■ "Keeping Rambo out of the workplace"
<i>Linda Wilcox</i> | Verdun, Lachine, Lasalle |
| 10:00am • 10:30am | ■ Refreshment break | |
| 10:30am • Noon | ■ "Keeping Rambo out of the workplace" <i>continued</i> | |
| Noon • 1:30pm | ■ Luncheon | Outremont |
| 1:30pm • 3:30pm | ■ "Evolution, Change and Paradigms"
<i>Deborah Cardillo</i> | Verdun, Lachine, Lasalle |
| 3:30pm • 4:00pm | ■ Refreshment break | |
| 4:00pm • 5:30pm | ■ "Life after Ombudsing"
<i>Larry Wood</i> | Verdun, Lachine, Lasalle |
| 5:45pm | ■ Buses leave for Montreal City Hall | |
| 6:00pm | ■ Civic Reception (Vin d'honneur) City Hall
<i>Evening Sign-up group dinners</i> | |

Friday, May 16

- | | | |
|-------------------|--|--------------------------|
| 7:30am • 8:30am | ■ Continental Breakfast | |
| 8:30am • 10:00am | ■ "The Survivor Syndrome"
<i>Elizabeth Clark</i> | Verdun, Lachine, Lasalle |
| 10:00am • 10:30am | ■ Refreshment break / Poster Session Awards | |
| 10:30am • 11:30am | ■ Mary Rowe's Crystal Ball | Verdun, Lachine, Lasalle |
| 11:30am • 12:30pm | ■ "A day in the life of an Ombuds"
<i>Nancy Radcliff</i> | Verdun, Lachine, Lasalle |
| 12:30pm • 12:45pm | ■ Message and closing remarks
from incoming TOA President | Verdun, Lachine, Lasalle |
| 12:45pm • 2:00pm | ■ Luncheon - Optional | Outremont |
| 2:00pm • 4:00pm | ■ TOA Executive Board Meeting | Salon Castillon |

NOTES

A large area of the page is filled with horizontal dotted lines, providing a space for handwritten notes.

THE OMBUDSMAN'S ASSOCIATION
CONFERENCE 1994

Forum Hotel
525 North Michigan Avenue
Chicago
telephone (312) 944-0055
facsimile (312) 944-1320

Wednesday, May 18

- 2:45-5:00 **New Member Orientation**
- 2:45-5:00 **Standards of Practice [for seasoned ombuds]** As the occupation grows, standards - or the lack of standards - can determine the viability of the profession. Sharan Levine, Esq., who has represented Upjohn's ombudsman office in protecting confidentiality, will join us for the discussion.
- 5:15-6:00 **Annual Meeting**
- 6:30 **Reception**
- 7:30 -9:00 **Poster groups and discussions - simultaneous small group discussions.** Members can roam among groups. *If you have special experience or interest in any of these areas, please join-in as a facilitator or as a contributor of written hand-outs. What you have learned can help your colleagues! (Use a pen name if you wish.)*
- **Ombudsman and the Organizational Structure ***
facilitators: Debbie Cardillo and Patti Lynch
 - * **Everyone, please bring diagrams of how your ombudsman's office fits into your organizational structure**
 - **Aspects of Asian Cultures**
facilitators: Jan Newcomb-Briggs and Marsha Wagner
 - **The Freelance Ombudsman**
facilitators: Dawn Duquet and Gene Herbert
 - **Performance Outcome - Two to Three Year Follow-ups of Clients**
facilitator: Judy Matousek
 - **Upward Feedback**
facilitators: Melinda Kohn and Mary Simon
 - **Dealing with an Aging Population**
facilitators: Ward O'Neil and Tom Hurd

TOA Conference agenda - page two

Thursday, May 19

- 7:30-8:15 **Continental Breakfast**
- 8:15-8:30 **President's Welcome - Lou Garcia**
- 8:30-9:30 **Mary Rowe's Crystal Ball**
- 9:30-12:00 **Workshop - Methods of Conflict Management**
Aiki Works, Inc.
- 12:00-1:30 **Lunch**
- 1:45-5:00 **Workshop in Conflict Management continues**
- 6:30 - ? **Dinner ** Please look for the sign-up lists **** There will be a variety of
dinner topics for those who want to continue discussions and there will be
some non-topic dinners for those who want a change of pace.

Friday, May 20

- 7:30-8:15 **Continental Breakfast**
- 8:30 - 10:00 **Workplace Harassment - Changing Regulations**
speaker: Cindy Rhodes Victor, Esq.
- 10:00 - 10:30 **Break**
- 10:30 -11:45 **Current Issues [back by popular demand]**
moderator, Jan Newcomb-Briggs
- 11:45 **Conference Feedback**
- 12:00-12:15 **President's closing remarks**

**** Dress for the 1994 conference is CASUAL and comfortable.** [Suggested packing guideline, "If it has seen an iron, don't bring it."]

TOA STRATEGIC VISIONING EXERCISE
May 17, 2003

POA

If TOA were to be recognized as "Organization of the Year" in 2013, what would have been the achievements that got us there?

- Improved member services
- Recognition of the Ombuds role
- Credentialing
- Uniformity of Practice
- Some disaster avoided/reputation maintained
- Five dramatic instances
- Definite and communicate effectiveness
- Standard of Excellence
- "Every organization has one"
- Association is stable, solid, secure financially
- Large global membership
- Widely accepted standards
- Curriculum > Credentialing
- Articulated recognition Ombuds by other groups
- Innovator – Pioneer of novel interventions
- Viewed as an understood PROFESSION – with credentialing and widely accepted standards
- Encompasses different models of Ombuds – types and sectors
- Research: to support effectiveness of the function
- No organization hires ombuds that hasn't been trained by TOA
- Be the credentialing agency
- Be consultants for designing peaceful structures
- Lead in training
- More proactive actions with respect to ADR systems
- Not just resolution
- Build capacity for international work
- Increase national/international membership maximum sustainable level
- Viewed as a profession
- Supreme Court supports the Ombuds privilege & benefit
- Stop trying to squash subpoenas
- Practical, scalable, networked
- Spreading innovation

Through a voting process, the following five were identified as having the highest priority for TOA:

- 1. Increase national/international membership to maximum sustainable level**
- 2. Viewed Ombuds as a profession – with credentialing and widely accepted standards**
- 3. Supreme Court supports Ombuds privilege**
- 4. “Every organization has one”**
- 5. There are TOA-trained ombuds in every organization**

The attendees were then split into smaller groups, and given the task of addressing one of these issues. The results from the groups are detailed on the following pages.

TOA Talking Points for the Ombudsman

The Organizational Ombudsman (OO) Role:

- Confidential, informal, neutral resource
- Senior position reporting to the head of organization (e.g., CEO, President, Agency Director or Audit Committee of the Board of Directors)
- A resource where issues can be brought forward without fear of retaliation.
- Typical allegations handled by OO: wrongdoing, harassment, discrimination, civil or criminal, conflict, safety, security and health, diversity, ethics, governance, fairness and equity, etc.
- A facilitator of:
 - Informal mediation
 - Shuttle diplomacy
 - Escalating issues to a formal channel
 - Coaching on complex issues
 - Proactive change, sharing best practices, issue prevention, trend reports
- A supplement to an organization's formal channels (e.g., Legal, Audit, HR, Line Management, Department Heads, EEO, Labor Relations, Health, Safety and Environment)

Organizational Benefits:

- Assists in minimizing risk by serving as an early warning process that surfaces and helps resolve issues in order to:
 - Protect financial, human and other assets
 - Fulfill a U.S. Sentencing Guidelines requirement
 - Comply with the Sarbanes-Oxley Act 2002
 - Support a fair, ethical environment within an organization
 - Protect an organization's reputation
 - Provide financial return
 - Avoid costly litigation
 - Effectively surface allegations of fraud, theft, financial malfeasance
- Safety net

Possible risks of not having an Organizational Ombudsman function:

- Undetected/unreported criminal behavior
- Persistence of improper practices (e.g. accounting misconduct)
- Continuation of illegal behaviors (e.g., harassment or discrimination)
- Absence of timely escalation of violations due to
 - Fear of retaliation or actual retaliation
 - Lack of clarity about where to take issues
 - Unavailable confidential reporting mechanism

Tips For Conducting a Successful Media Interview

These tips are also useful when preparing for a conversation with a reporter about the value or status of an Ombuds program. Preparation is key.

Before the Interview

- Find out or anticipate what the journalist want to discuss
- Ask for the questions in advance to try to determine the angle the journalist intends to pursue
- Anticipate all questions that the reporter might ask. Put yourself in the shoes of the journalist. If you were the journalist, what questions would you ask?
- Decide if you are the best person to do this interview. If not, ensure the reporter makes contact with the appropriate person
- Decide what "big picture" message or theme to communicate in the interview
- Select three or four of the most important points you want to make
- Confirm that you have the latest and most accurate information
- Practice the answers
- If appropriate, find visuals (charts, graphs, videos, etc.) to help make your points
- Set a time limit: about 15 or 20 minutes will be enough for most requests

During the interview

- Keep answers short: 20 to 30 seconds for print and 10 to 20 seconds for radio or television
- Avoid using industry-related jargon or buzzwords
- Have immediate access to all the information needed to answer questions
- Be prepared to cite the source of any studies, statistics or other information used in your answers
- If you do not know the answer to a question, say so. Tell the journalist you will get back with the answer
- Be a good listener to what the reporter is saying and pay attention to how the reporter is reacting to your answers
- Don't assume you know what the journalist is asking before he or she finishes the question. Be sure you listen and fully understand the question before responding

After the Interview

- Be as objective as possible to evaluate how the interview went and determine what you might do differently the next time
- Evaluate the printed story. Did the reporter accurately report your answers? Are there any mistakes or errors that you should call to his or her attention or discuss with the editor?
- Send a letter or e-mail to the reporter to thank him or her for the interview and offer to be of assistance on future stories.

Source: Edward Segal, a journalist and PR expert



Department of Distinctive Collections
Massachusetts Institute of Technology
77 Massachusetts Avenue
Cambridge, MA 02139-4307

libraries.mit.edu



The remaining contents of this folder have been redacted.

If you would like to see the full folder, please email the

Department of Distinctive Collections at

distinctive-collections@mit.edu