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Responsibilities of TOA Operations Officer - 1994

General Office

Maintain the office of The Ombudsman Association --

Answer all telephone queries and respond to requests for information/referral Maintain supplies -- TOA brochures / membership cards / handbooks / directory / information packets, bulletins, newsletter, etc.

Maintain data base of queries

Membership --

Mail Annual Membership Forms / deposit checks / send ID cards / handbooks / directories / et al.

Maintain data base of members

Send questionnaires/other materials to membership as required

Library --

Maintain library of ombudsman articles -- send out as requested Maintain History of the association (ie archives)

Public Relations --

Develop and send news releases
Arrange for interviews
Make referrals for specific issues

Committees

Assist TOA committee chairs within guidelines --

(ie., communications committee wants T-shirts for something - track down supplier, get prices, etc. report to committee chair).

Annual Conference

Work with Conference Committee Chair - send out conference packets, deposit checks, develop list of participants, develop name tags if needed (usually done by hosting corporation), etc.

Training

Send out brochures, deposit checks, develop participant list.

Information

Capture information from E-mail that pertains to ombudsman issues and highlight trends, etc.

To be re-considered:

Ombudsman News

Ombudsman 101/202 Training

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3 Conference/Training Site Selection and Negotiation

Representation at other ombudsman functions, SPIDR, etc.

5. Treasurer responsibilities (suggest: Financial Officer).

Development of new materials (Committee project)

Brochures on sexual harassment, mediation, counseling, protecting the accused, performance evaluation, self assessment, other.

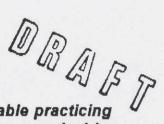
Other considerations:

Should TOA Operations Officer be a full board member?

Should there be a TOA Financial Officer who oversees the expenses and writes the checks over a certain amount. The Operations Officer would prepare monthly reports on the daily operation and expenses incurred by the TOA office. The FO and OO would develop the office budget (or OO would develop and FO approve) and present to the board.

TOA should be represented by the President and/or other board members at other functions.

Ombudsman 101 February 22 - 24, 1994 Sheraton at Fisherman's Warf Hotel San Francisco, California



Purpose: To provide basic information and training that will enable practicing ombudsmen, persons Interested In becoming ombudsmen, or anyone desiring to establish an ombudsman function to carry out their activity with purpose, understanding, and effectiveness.

Tuesday, February 22nd

8:30	REGISTRATION/CONTINENTAL BREAKFAST
9:00	Welcome and Introduction - Vincent J. Riley
9:15	Overview - Mary P. Rowe History of ombudsmanry, scope and duties of today's ombudsman, definition of a neutral, background on alternative dispute resolution, potential for "making a difference" in the organization.
10:15	BREAK LIJE
10:30	Confidentiality - Janet Newcomb-Briggs Need for confidentiality, how to maintain, limits, duty to warn, TOA code, you and the law, shield law, privilege, what the client should do, what to do if confidentiality is broken.
Noon	LUNCH
1:00	Skilled Listening by a Neutral - Marsha Wagner Listening, identifying the issue, providing a range of options, providing feedback, maintaining neutrality, disentangling knowled" communications.
3:30	BREAK
4:00	Conflict Mode Instrument - Mary Simon Discover your own conflict profile. Learn about the 5 different conflict handling modes and how you can use them to get more positive results.
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ADJOURN - Evening Open





Wednesday, February 23rd

8:30 am	CONTINENTAL BREAKFAST
9:00	Managing Conflict - Carole Trocchio What is conflict, how does it escalate, how can it be managed to bring about resolutions?
10:15	BREAK WISS
10:30	Relevant Employment Laws - Joan Schultz Capsule reviews of key rules, regulations, and legislation governing the workplace.
Noon	LUNCH
1:00 pm	Taking the Right Steps - Mary Rowe & Carole Trocchio Conciliation, negotiation, mediation, shuttle diplomacy, dealing with difficult people, sources of power, empowerment.
2:15	BREAK S
2:30	Role of the Ombudsman in a Multi-cultural Organization - Thomas A. Bolden, Jr. The changing diversity in the American work force and the challenges this presents to management and to the ombudsman.
5:00	ADJOURN - Evening Open

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clients and



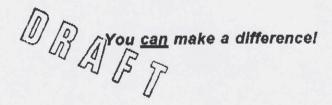
Thursday, February 24th

9:00	Operating an Ombudsman's Office - Virgil Marti
	Logging and following up, keeping and using data,
	budgeting, staffing, file and note keeping, recording
	devices, 800 phone numbers, setting up the office, personal
	safety, etc.
	safety, etc.

and communicating management's support.

10:15	BREAK WITH THE
10:30	"Marketing" Your Function Tom Furtado
	Maintaining awareness of your function to your clients and
	others, identifying and reporting trends, gaining, keeping

Closing Remarks 11:45







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