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[Ombudsmen associations news and member lists]

1992-1994



## 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 *paid extra for running training*
- 3. Conference/Training Site Selection and Negotiation
- 4. 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.

*Where should the bank be?*

*Needs a budget?*

*3 monthly review of job + reimbursement*

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.







**DRAFT****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**
- 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**
- 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**

**DRAFT**

**DRAFT****Thursday, February 24th**

8:30 am

**CONTINENTAL BREAKFAST**

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.

10:15

**BREAK**

10:30

**"Marketing" Your Function - Tom Furtado**

Maintaining awareness of your function to your clients and others, identifying and reporting trends, gaining, keeping and communicating management's support.

11:45

**Closing Remarks****DRAFT** *You can make a difference!***DRAFT**





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