



**UNITED STATES OMBUDSMAN ASSOCIATION  
38th Annual Conference**



**The 21st Century Ombudsman:  
Big Challenges, Bigger Opportunities**

*Drury Plaza Hotel San Antonio Riverwalk  
105 South St. Mary's Street, San Antonio, Texas*

Pre-conference: October 2 and 3, 2017

Conference: October 4, 5, and 6, 2017



**REGISTRATION PACKET**



SAN ANTONIO RIVERWALK

## The 21st Century Ombudsman: Big Challenges, Bigger Opportunities

Greetings!

We are excited to be holding the 2017 United States Ombudsman Association Conference in the beautiful and historic city of San Antonio, Texas at the Drury Plaza Hotel on the Riverwalk. Everything is bigger in Texas so it is only fitting that our conference theme embrace the big challenges and bigger opportunities modern ombudsmen are facing. This conference will offer attendees ideas and tools for making changes, addressing difficulties, and capitalizing on opportunities. We believe you will find the conference sessions educational and invigorating. The USOA conferences also provide attendees opportunities to network with peers who have similar jurisdictions and responsibilities for moral support and information sharing. We hope to see you in October!

Sincerely,  
USOA Conferences and Training Committee

2017 USOA Conference Planning Co-Chairs

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## About USOA

Founded in 1972, the United States Ombudsman Association is the national organization for public sector ombudsman professionals. USOA is also North America's oldest national ombudsman association with members from ombudsman offices in local, state and federal government and affiliated ombudsman offices. Under its bylaws, USOA is organized to function exclusively to support members, education and charitable purposes.



USOA exists to help ombudsman and ombudsman organizations improve their operation and services throughout the United States. Additionally, USOA focuses on education, training, prudent practice and social means to promote as well as encourage the establishment of ombudsman offices at the state, local, national and international levels.

**Early bird conference and  
hotel registration discounts  
end August 30th**

***Special rate for  
USOA members!***

**Register at  
<http://www.usombudsman.org>**



## Questions or Need Assistance?

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# Pre-conference Agenda

*"May be Subject to Change"*

## **OCTOBER 2 AND 3 – MONDAY AND TUESDAY (Two-day training)**

**7:30 AM – 5:00 PM** Pre-conference and Conference Registrations

**8:00 AM – 5:00 PM** Pre-conference Workshops

**12:00 PM – 1:00 PM** Lunch

### **New Ombudsman Training (Pre-conference Workshop 1)**

This popular two-day workshop is designed for individuals who are relatively new to the role of government ombudsman. Faculty includes general jurisdiction/legislative ombudsmen and executive branch/agency-specific ombudsmen with more than 50 years of collective experience in their respective offices. Participants will learn about the origin, characteristics and standards of an ombudsman office. Instructors will discuss basic intake, interviewing and investigation techniques, reports and will present a case study to enable participants to apply knowledge to practice. The workshop will examine the role of the ombudsman in promoting an ethical climate in our organizations as well as review ethical challenges an ombudsman may face. Participants will also have the opportunity to discuss best practices, time saving tips and tools of the trade with a group of experienced, seasoned ombudsmen.

#### **Instructors:**

Kristie Hirschman – Ombudsman, Iowa Office of Ombudsman

Linda Lord-Jenkins – Retired Ombudsman, State of Alaska

Robin K. Matsunaga – Ombudsman, State of Hawaii

Gerald R. Papica – Ombudsman Program Director, TN Commission on Children and Youth

## **OCTOBER 2 (MONDAY) OR OCTOBER 3 (TUESDAY)**

***This is a one-day workshop. Attendance is capped at 40 each day so register early!***

### **Dealing with Unreasonable Complainant Conduct (Pre-conference Workshop 2)**

Unreasonable complainant conduct (UCC) can take up an inordinate amount of an agency's time and resources. Participants will learn the strategies developed as part of a joint project by the nine Australian Parliamentary Ombudsman offices to deal with UCC. This very popular and world-renowned one-day workshop will provide participants with specific strategies and skills to effectively and confidently deal with UCC. It is designed for staff who come into contact with, or respond to, complainants or customers who display unreasonable conduct, as well as supervisors and senior management responsible for setting complaint handling policy. The workshop will also examine participant examples of unreasonable complainant conduct.

Participants will learn:

- Strategies for managing UCC.;
- Key messages for complainants/clients/staff;
- Ways to support staff in implementing UCC strategies; and
- Staff health and safety considerations

**Instructor:** Donald Sword – Educator and Advocate, New South Wales, Australia



# Conference Agenda

*"May be Subject to Change"*

## OCTOBER 3 — TUESDAY

5:30 PM – 7:30 PM      Opening Reception - Drury Plaza Hotel, San Antonio Riverwalk

## OCTOBER 4— WEDNESDAY

7:30 AM – 5:00 PM      Registration

8:30 AM – 9:30 AM      Conference Opening and Welcome Remarks

9:30 AM – 9:45 AM      Break

9:45 AM – 10:45 AM    Concurrent Session 1/A

### **Raising Your Voice for Public Policy Advocacy as an Ombudsman**

Does your organization engage to amplify the voices of those you serve through advocacy? As an ombudsman, it is important to understand the public policy advocacy process and the opportunities throughout the process to advocate on issues. Public policy is made by cities and counties, by state agencies and state legislatures, and by federal agencies and Congress. The government is an important decision maker and partner in improving education, financial stability and health in our communities. This presentation will include general principals of advocacy including how the process works and an example using the Georgia General Assembly.

#### **Presenter:**

Melanie S. McNeil, Esq. – Georgia State Long-Term Care Ombudsman.

9:45 AM – 10:45 AM    Concurrent Session 1/B

### **Writing: Keep it Simple**

You've heard the bromides before: *Keep it simple. Say what you mean. The shorter the better. Write to inform, not to impress. Don't use a long word when a short one will do.* And they're all true. But how do you incorporate these and other tips for effective writing into the emails, correspondence, reports and other writing you do on a daily basis? Expect a one-hour session on ways to write more quickly, concisely and directly and to self-edit like a pro.

#### **Presenter:**

Marianne Odom – Journalism Coordinator/Associate Professor, San Antonio College

10:45 AM – 11:00 AM    Break



**11:00 AM – 12:00 PM Concurrent Session 2/A**

**Collaboration with Non-profit Sector**

The Dayton Ombudsman Office has found that entering into partnerships with area non-profits can provide improved services to citizens.

One such partnership is with Legal Aid through the program “Plan Ahead and Protect Yourself.” This program is in response to the increase in ombudsman cases where financial exploitation of seniors had placed the senior in a position of ineligibility for Medicaid and no way to pay for care.

Another partnership is with four area agencies serving victims of domestic abuse.

The workshop will demonstrate that ombudsman offices can enter into such partnerships and still retain the impartiality and independence of the office.

**Presenter:**

Diane Welborn – Dayton Ombudsman, Joint Office of Citizen Complaints)

**11:00 AM – 12:00 PM Concurrent Session 2/B**

**Creative Case Strategizing**

This session will present a case analysis from intake to resolution and will explain how the case progressed, how problems were identified and analyzed throughout the case and how action steps were chosen to ensure an effective outcome. The presenter will also consider the time, energy, and resources expended on the case.

**Presenter:**

Kristie Hirschman – Ombudsman, Iowa Office of Ombudsman

**12:00 PM – 1:15 PM Lunch and Keynote Speech**

**1:15 PM – 1:30 PM Break**

**1:30 PM – 3:00 PM Plenary Session 1**

**Crisis De-escalation for the Ombudsman**

As ombudsmen, we deal with people on a daily basis. Therefore we are not immune from having to face someone in crisis. What do you look for in an individual who is in crisis? What do you do? What do you say? During this session, participants will learn about engaging, assessing, and assisting individuals in crisis. This will include the use of evidence-based de-escalation techniques, communication skills, and information to help participants to be better prepared to effectively and safely navigate unique situations. The session will end with instructions on one of the worst scenarios we could encounter...an active shooter.

**Presenter:**

Dennis Nyland – Montana Mental Health Ombudsman



**3:00 PM – 3:15 PM      Break**

**3:15 PM – 5:15 PM      USOA Chapters Meeting**

USOA members have different areas of authority, interest and expertise in their jobs. For this reason, a number of specialized chapters are organized within USOA to share experiences, resources, accomplishments and to problem-solve. This time also allows chapter members to develop a plan of action for the upcoming year. You do not have to be a chapter member to attend any of these meetings.

- **Children and Families**
- **Corrections**
- **Education**
- **Federal**
- **Healthcare**
- **Municipal**

**5:30 PM – 6:30 PM      International Ombudsman Institute Meeting**

## **OCTOBER 5 — THURSDAY**

**8:30 AM – 9:45 AM      Plenary Session 2**

### **Administrative Fairness Guidelines**

When you receive a complaint about administrative fairness, do you ever struggle to keep your investigation focused? Which measuring stick should you use to determine if a government's actions were fair? How do you explain what was wrong or right about a situation in a way that makes sense to everyone involved? Are you looking for something to help you explain to decision makers what they need to consider and ensure they are being fair?

If you answered "yes" to any of these questions, this session is for you. It will cover eight points to assist you in your investigations, make decisions, and articulate why you made the decision. As an added bonus, you will be able to create a handout guide for administrative decision makers to help them do the right thing.

### **Presenter:**

Alberta Office of the Ombudsman

**9:45 AM – 10:00 AM      Break**



## 10:00 AM – 11:30 AM Concurrent Session 3/A

### **Effective Moral-suasion: Leveraging Social Behavior as a Catalyst for Change**

When moral-suasion is your only means to achieve change, social behavior needs to be considered. People care about “fairness” and their decisions can be highly influenced by the norms and values of society in general or the culture of the institution they work in. They are also prone to “group think” and subject to adopting “herd mentalities” which can make changing direction difficult (or easier). This session will discuss some of the factors to consider on how to make moral-suasion effective, including:

- The pros and cons of moral-suasion
- The need to define fairness
- Enabling change using an interest-based versus issue-based approach
- Social context is important
- Social bias needs be recognized
- Office of the Veterans Ombudsman strategies to overcome social bias
- Conclusion: Acknowledging and leveraging social behavior enables effective moral-suasion.

After completing this session, the participant will have considered:

- The importance of defining fairness and using an interest based approach
- The effects of social behavior in achieving change
- Strategies to create change when moral-suasion is your only avenue for influencing change

#### **Presenter:**

Sharon Squire – Deputy Veterans Ombudsman, Office of the Veterans Ombudsman (Canada)

## 10:00 AM – 11:30 AM Concurrent Session 3/B

### **Interviewing**

Interviewing is more than taking notes on a little pad and flatly stating “just the facts, ma’am;” it’s holding a conversation with people who have information you need. Interviewing involves multiple skills and good planning so that when you make the call or walk in your subject’s office, the person you’re talking to is ready to talk like they would over a cup of coffee at the local coffeehouse. This session will discuss the need for planning and conducting interviews that will yield the information you need in your complaint reviews. The instructor trained and worked as a reporter for 20 years before joining the Alaska Ombudsman office as an investigator. She has conducted more than 4000 complaint reviews and nearly 100 formal investigations.

#### **Presenter:**

Linda Lord-Jenkins – Retired Ombudsman, State of Alaska







**1:30 PM – 5:00 PM    Plenary Session 3**

**Building a Community of Respect through Effective Communication**

Have you ever experienced the frustration of thinking you have communicated effectively, only to find the message you sent was completely misunderstood? This session will share research based communication techniques used by different cultures and ethnicities. In addition to decoding how misunderstandings occur, by examining the stumbling blocks to effective intercultural communication, participants will learn how to adapt their own communication style for success. Through teaching, interactive activities and self-reflection, this session focuses on how other cultures (within the U.S. and internationally) process information, create relationships, and communicate. It prepares individuals from a wide range of professions to understand how to best work with people who are different from them and provides tools that can be used daily to facilitate more successful communications

**Presenters:**

Suzanne Droleskey – Executive Director, Public Partnership and Outreach Effectiveness, Office of the Provost,  
Texas A&M University

Linda Edwards – Training Specialist, Public Partnership and Outreach, Texas A&M University.

**6:00 PM – 9:00 PM    Networking Event — Rio Plaza**

**OCTOBER 6 — FRIDAY**

**9:00 AM – 11:45 PM    Plenary Session 4**

**Suffer from BURNOUT? Give'em the F.I.N.G.E.R.!**

Burnout affects millions of Americans each year and has been called “the disease of our civilization.” The unhappiness and detachment burnout causes can threaten your job, your relationships, and your health. But there’s good news -- burnout can be healed. Former 20-year elected District Attorney, Mark Yarbrough, personally experienced burnout, learned how to successfully overcome it, and went from “Burnout” to “On Fire!” He has since become a “burnout expert” and has written and published on the subject. Audience members will learn the definition and symptoms of Burnout and the symptoms. But more importantly, attendees will be laughing, and at the same time learning how to apply Mark’s F.I.N.G.E.R. philosophy to help themselves or their co-workers avoid and/or recover from Burnout. This is a training that you won’t want to miss!

**Presenter:**

Mark Yarbrough – Former County and District Attorney of Lamb County, TX

**11:45 AM – 12:00 PM    Conference Closing**

**A CERTIFICATE OF ATTENDANCE WILL BE PROVIDED**

# REGISTRATION FEES INFORMATION

There are three separate registration options this year:

- 1. Full Conference, 2. Pre-Conference (two options), 3. Guest Reception & Banquet Tickets**

*PLEASE TAKE NOTE OF THE REGISTRATION CANCELLATION POLICY ON THE PAGE 13*

## Full Conference Fees

Full Conference Registration Fees		
October 4, 5, and 6, 2017		
Includes the Tuesday evening reception, Wednesday and Thursday lunch, and breaks, Thursday evening banquet and a break on Friday morning		
	On or before August 30	After August 30
Member	\$475	\$525
Non-Member	\$600	\$650
Student*	\$400	\$400

\*Proof of full-time enrollment is required.

The registration process allows registrants to receive the conference materials in a binder or on a flash drive.

Single-Day Conference Registration Fees		
October 4 and/or October 5, 2017		
Single day registrations for Wednesday and/or Thursday – includes lunch, and refreshment breaks		
	On or before August 30	After August 30
Member	\$225/day	\$250/day
Non-Member	\$250/day	\$275/day

Single-Day Conference Registration Fees		
October 6, 2017		
Single-day registration for Friday – includes morning refreshment break.		
	On or before August 30	After August 30
Member	\$100	\$125
Non-Member	\$125	\$150

**On-Line Registration Link: <http://www.usombudsman.org/>**

## Pre- Conference Fees #1

Pre- Conference Registration Fees		
<i>“New Ombudsman Training”</i>		
October 2 <u>AND</u> October 3, 2017		
The pre-conference registration fee – includes lunch and refreshment breaks on Monday and Tuesday		
	On or before August 30	After August 30
Member	\$375	\$425
Non-Member	\$475	\$525
Student*	\$350	\$350

\*Proof of full-time enrollment is required.

## Pre- Conference Fees #2

Pre-Conference Registration Fees		
<i>“Dealing with Unreasonable Complainant Conduct”</i>		
October 2, 2017 <u>OR</u> October 3, 2017		
<u>This is a one-day workshop. Attendance is capped at 40 each day so register early!</u>		
The pre-conference registration fee – includes lunch, and refreshment breaks		
	On or before August 30	After August 30
Member	\$275	\$325
Non-Member	\$325	\$375

## Reception and Banquet Fees for SINGLE-DAY REGISTRANTS AND/OR GUESTS

Reception and Banquet Tickets	
Reception - Tuesday Evening, October 3	\$25
Banquet - Thursday Evening, October 5	\$60

Contact [usoa@assocserv.com](mailto:usoa@assocserv.com) for information on group rates and registration assistance.

**On-Line Registration Link: <http://www.usombudsman.org/>**

# GENERAL CONFERENCE INFORMATION

## DRESS/ATTIRE

The dress/attire for the conference is business casual

## HOTEL ACCOMMODATION

### **Drury Plaza Hotel San Antonio Riverwalk**

105 South St. Mary's Street, San Antonio, TX 78205

Hotel Number: 210-270-7799

Hotel Reservation: 800-325-0720

[www.druryhotels.com](http://www.druryhotels.com)

The Drury Plaza Hotel San Antonio Riverwalk is located on the San Antonio River, walking distance from shops, restaurants and entertainment. Relax in the sun on the deck of the rooftop pool, which also has two whirlpools! Formerly the Alamo National Bank, this 24-story renovated skyscraper features 50-foot ceilings, travertine flooring and stained glass windows.

## HOTEL RESERVATION LINK

<https://druryhotels.com/bookandstay/newreservation>

The negotiated group rate is **\$121 per night plus 16.75% tax**. The group rate number is **2276373**. When you get to the reservation webpage, click on "**Enter a group Number.**" The link is underneath "About your stay" in the upper left corner. Subject to availability, the group rate is effective three days prior and three days after the conference. **Please book directly with the hotel no later than Wednesday, August 30, 2017.** This is the cut-off date for the USOA room block. After the cut-off date, the hotel will release unused rooms to the public. All reservations received after August 30 will be accepted on a space availability basis only.

### **Group room rates include the following for overnight guests:**

- **HOT Breakfast** – Including Belgian waffles, fruit, biscuits & gravy, sausage and more (M-F 6 a.m. to 9:30 a.m.).
- **5:30 KICKBACK®** – Each evening from 5:30 p.m.—7:00 p.m. kick back, relax and enjoy free hot food and cold beverages.
- **Free Long Distance** – One hour every room every night.
- **Wireless Internet Access** – High speed Internet in all rooms and in the lobby.
- **Soda and Popcorn** – From 3:00 p.m. to 10:00 p.m. every night in the lobby.





## **AIRPORT & GROUND TRANSPORTATION**

**Transportation Costs between airport and hotel – Go Shuttle: \$18 per person 1-way, Taxi: \$25 1-4 people 1-way.**

**Traveling North on I-35:** Take the César E Chávez Downtown Exit (155B) and turn right on W César E Chávez Blvd. Turn left on S Flores St., right on W Houston St. and right on N St Mary's Street

**Traveling South on I-35:** Take I-37 South to the Commerce Exit (141A). Turn right on E Commerce St and right on Navarro St. Turn left on College St and left on N St. Mary's Street.

**Traveling from San Antonio International Airport:** Take Highway 281 S to the Commerce Exit (141A). Turn right on E Commerce St. and right on Navarro St. Turn left on College St. and left on N St. Mary's Street.

## **POINTS OF INTEREST & NEARBY ATTRACTIONS**

Six Flags Fiesta Texas, Brackenridge Park Conservancy, The DoSeum, and San Antonio Riverwalk, Alamodome, Amtrak Station, AT&T Center, Aztec Theater, Buckhorn Museum, Empire Theatre, La Villa, Majestic Theatre, Market Square (El Mercado), Municipal Auditorium, River Center Mall, Henry B. Gonzalez Convention Center, San Antonio International Airport, San Antonio Symphony, San Antonio Zoo, San Antonio Cathedral, Sea-World San Antonio, and The Alamo.

[HTTP://VISITSANANTONIO.COM/](http://visitsanantonio.com/)

## **CONFERENCE RESERVATION CANCELLATION & REFUND POLICY**

**Notice of cancellation must be made in writing.** Cancellation by telephone will not be accepted. Notice of cancellation may be e-mailed to [usoa@assocserv.com](mailto:usoa@assocserv.com). If you cancel your reservation, we encourage you to send a substitute to take your place. Please contact the USOA Business Office @ [usoa@assocserv.com](mailto:usoa@assocserv.com) of any changes so we can arranged for a correct name badge and certificate.

**If you cannot find a replacement, the following cancellation policy will apply:**

Cancellation on or before August 30	100% refund, less \$25 cancellation fee
Cancellation from August 30 to September 29	50% refund, less \$25 cancellation fee
Cancellation after September 29	No refund

USOA reserves the right to change programs and conference offerings at any time as warranted and without prior notice.

## **QUESTIONS?**

E-mail [gerald.papica@tn.gov](mailto:gerald.papica@tn.gov) or [kristie.hirschman@legis.iowa.gov](mailto:kristie.hirschman@legis.iowa.gov)