



California Caucus of College and University Ombuds 44th Annual Conference

Transforming Challenges into Opportunities

November 12-15, 2017

Asilomar Conference Center, Pacific Grove CA

Overview and Historical Note

Welcome to Cal Caucus! The California Caucus of College and University Ombuds (Cal Caucus) is the longest standing professional gathering of and for academic ombuds, and esteemed colleagues from related fields. We have met at Asilomar since the first caucus in 1973. Forty-four years later, this California coast setting continues to feel like home. Don't let our name, origins, and California coast meeting site fool you -- we are colleagues from across the US, Canada, and beyond and hope to welcome you too into our community of ombuds practitioners.

Our annual conference brings together seasoned and new ombuds to learn, reflect, and address professional matters and topical subjects. We derive benefit from sharing our experience and knowledge, discussing concerns, and networking in a supportive environment with colleagues committed to professional skill development.

The Cal Caucus annual conference has a distinctive intimate feel, which allows for new and strengthened connections with other ombuds. At Cal Caucus we are able to forge deep bonds with each other by learning together, dining together, and networking together over the course of the two-and-a-half-day conference.

Our caucus sessions are intentionally grounded in real experiences and provide concrete tools and opportunities to develop and deepen skills. Time is consciously set aside to ask questions, test ideas, respectfully critique paradigms, and to share successes. This fosters a vibrant and relevant exploration of the art of ombudsing.

At Cal Caucus, we value our history of inclusiveness, and seek to solicit multiple perspectives and practice generous listening to all points of view. The Cal Caucus format honors the "caucus" concept, which can be traced back to Native American, First Nations, and other world traditions, which hosted gatherings of tribal elders to address concerns. We are a caucus and look forward to hearing all of your voices.

Asilomar is a calming, rustic conference center, nestled alongside the Pacific Ocean that provides a peaceful setting for deep reflection and learning. Asilomar has a 100-year history and it showcases the work of Julia Morgan, California's first female architect and designer of Hearst Castle. It is a wonderful place to unwind before and after sessions, with walks and runs on the beach, bird watching, or close encounters with the colony of wintering Monarch butterflies.

Asilomar means “Refuge by the Sea” and the location of Asilomar provides ready access to other very special areas of the California coast. Monterey is a nice walk or a five-minute drive away. The famed 17-mile Drive and scenic Carmel are nearby as well.

We are happy to answer any questions you have by e-mail or phone. You will find informational links and contact information on the last page.

Until we meet at Cal Caucus,

Marcia Gee Riley and Natalie Sharpe
2017 CCCUO Conference Co-Conveners



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44th Annual Conference**

November 12-15, 2017

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All activities will occur in the Kiln Room unless specified.

Sunday, November 12, 2017

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|----------------|---|
| 4:00 - 6:00 PM | Conference registration: Kiln room
Room check-in: Asilomar Front Desk
Registrar: Emma Williams |
| 5:00 - 6:00 PM | Welcome Reception |
| 6:00 - 7:00 PM | Conference Kick-Off Dinner
Welcome: Marcia Gee Riley and Natalie Sharpe, Co-Convenors |
| 7:00 - 8:00 PM | Welcoming New (or not so new) Ombuds
Presenters: Kevin Wiens & Laura Reid |

Monday, November 13, 2017

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|---------------------|---|
| 7:30 - 8:30 AM | Breakfast
Location: Crocker Dining Hall |
| 8:40 - 8:45 AM | Opening Remarks |
| 8:45 - 10:15 AM | An Introduction to Design Thinking for Ombuds
Presenters: Julie Showers & Jan Morse |
| 10:15 - 10:30 AM | Break |
| 10:30 - 11:15 AM | Questions and the Initial Visitor Meeting
Presenter: Tom Kosakowski |
| 11:15 AM - 12:00 PM | Making Your Office Indispensable by being identified as a key risk management resource
Presenter: Bruce MacAllister |
| 12:00 PM-1:00 PM | Lunch
Location: Crocker Dining Hall |
| 1:30 - 2:30 PM | Crucial Conversations for Ombuds
Presenter: Mary Beth Stevens |

2:30 - 2:45 PM	Break
2:45 - 3:45 PM	Borrowing from Therapeutic Perspectives: Theory and Skills for the Ombuds Presenter: Lauren Bloom
3:45 - 4:00 PM	Break
4:00 - 5:00 PM	Peer - to - Peer Case Studies Presenters: Patricia Ponce and Katherine Greenwood
5:00 PM	Dinner Location: Crocker Dining Hall
7:00 - 8:00 PM	Mindfulness for Ombuds Presenter: Chuck Sloane

Tuesday, November 14, 2017

7:30- 8:15 AM	Breakfast Location: Crocker Dining Hall
8:30 - 8:45 AM	Announcements
8:45 - 9:35 AM	Saving them before they get to the brink Presenter: Peter Hendriks
9:35 - 10:20 AM	The Ombuds Leans In: A Framework to Assist Challenging Leaders Presenter: Karen Peterson
10:20 - 10:35 AM	Break
10:35 - 11:25 AM	Campus Climate and Ombuds Challenges with A Dash of Student Development Theory Presenter: Marit Bessesen
11:25 AM - 12:15 PM	Finding Work-Life Balance in Academia: Lessons from Academic Leaders Presenters: Emma Phan and Marcia Riley
12:15 PM	Group Photo Lunch Location: Crocker Dining Hall
1:00 - 5:00 PM	Caucus and Small Group Discussions This session provides time for self- and small group reflection, and for networking. Groups form around shared interests in a topic and/or activity.
6:00 - 7:00 PM	Dinner Location: Crocker Dining Hall

7:30 - 9:00 PM

Gift Exchange

This Cal Caucus tradition provides an entertaining way to learn more about your colleagues. Bring a wrapped gift (to keep it a surprise) that represents a passion or interest in your life. *Maximum \$25.*

Wednesday, November 15, 2017

7:30 - 8:15 AM

Breakfast

Location: Crocker Dining Hall

8:30 - 8:45 AM

Announcements

8:45 - 9:05 AM

Triggers and Effective Communication

Presenter: Breanne Taylor

9:05 - 9:45 AM

An Ombuds Approach to Cultivating Cyber Kindness into Campus Culture

Presenter: Natalie Sharpe

9:45 - 10:30 AM

Creating a culture of dialogue: race, politics, and gender

Presenters: Teresa Ralicki & Lisa Neale

10:30 - 10:45 AM

Break

10:45 - 11:30 AM

Cal Caucus Debrief and Planning Meeting

Caucus content debrief - continuing the conversations ...

Please take advantage of this opportunity to share your ideas and shape the direction of the next conference.

11:30 AM - 12:00 PM

Cal Caucus Annual Business Meeting

(Includes voting for Board of Directors)

Everyone is welcome!

12:00 - 12:30 PM

Board of Directors Meeting

(final meeting for the 2017 board)

Session Descriptions

Welcoming New (or not so new) Ombuds

Kevin Wiens, Student Ombuds, University of Calgary, Canada
Laura Reid, Ombudsperson, Simon Fraser University, Canada

Cal Caucus draws seasoned practitioners with a wealth of knowledge and practice, who have experienced opportunities and challenges during their time as ombudspersons. Cal Caucus also attracts newcomers to ombuds roles, with the anxieties that accompany this stage of practice. This session is designed to harness Cal Caucus' wealth of knowledge and practice, and provide a resource for all. The presenters invite all to recall their initial period of growth and development in the ombuds role, identify lessons learned, and evaluate what information or advice would be helpful to other ombuds facing similar situations. Via guided discussion and reflection, Cal Caucus participants will share what they learned, and the information and advice will be compiled into a document to support new and current members.

An Introduction to Design Thinking for Ombuds

Julie Showers, Director, Office for Conflict Resolution, University of Minnesota, USA
Jan Morse, Director, Student Conflict Resolution Center, University of Minnesota, USA

This session is an introduction to Design Thinking as applied in a conflict resolution context, and introduces concepts of design thinking, a human-centered approach to problem-solving that removes barriers to innovation. Drawing from the work of d.school at Stanford University, design firm IDEO, and University of Minnesota design thinking initiatives, participants will be introduced to a new human-centered approach to creative problem solving that emphasizes empathy and innovation, can be practiced with groups or individuals, and provides a way to break through barriers when what had previously been "working " ... fails. While many of the concepts involved in design thinking are well-established, this application combines them into an effective and repeatable problem-solving process.

Questions and the Initial Visitor Meeting

Tom Kosakowski, Associate Director/Ombudsperson, UCLA, USA

Why do ombuds ask questions? What are different types of questions? Which are useful ... or not? This session will offer a guide for how to use questions during the first meeting with a visitor. The session will consider why ombuds ask questions, distinguish the types of questions, offer some sample questions, and explore issues related to the Ombuds role as questioner.

Borrowing from Therapeutic Perspectives: Theory and Skills for the Ombuds

Lauren Bloom, USA

Fresh perspectives from other disciplines help ombuds with conducting casework with individuals, dyads, and groups. Therapists rely on a large body of empirically-researched theory and practices as well as various techniques and skills. Like therapists, ombuds work with visitors to assist in transforming challenges into opportunities. Learning theories from therapeutic counseling can deepen an ombuds' understanding of relational dynamics. This workshop will introduce basic components of therapeutic approaches for ombuds to deepen understanding of relational dynamics and enhance in case and/or systemic ombuds work.

Crucial Conversations for Ombuds

Mary Beth Stevens, Ombudsman, Los Alamos National Laboratory, USA

In 17 years as an ombuds, I have read lots of books and attended lots of trainings on conflict resolution & high-stakes communication. I find the book *Crucial Conversations: Tools for Talking when the Stakes Are High* to be my single most useful resource. It's not that it has startling new material, but it takes all the best material and distills it in ways I can pass on to ombuds visitors, whether they've read the book or not. This presentation distills research from the subject book and other resources into communication strategies which are immediately applicable for organizational ombuds and their visitors. The focus is on creating interpersonal safety for problem-solving conversations and modifying the stories we and our visitors tell about conflict and each other.

Making the ombuds office indispensable by being identified as a key risk management resource

Bruce MacAllister, International Foundation for Online Responsibility, USA

The ombuds may be an extremely important warning resource for campus leadership, but do campus leaders understand how useful a resource the ombuds can be? What are risk issues? What is the ombuds' role? How to distinguish single issues from themes and trends? This interactive session is designed to prompt awareness and consider the role of the ombuds as an early warning resource. The presenter will share tips, examples, and lessons learned from managing corporate and higher ed ombuds programs, and serving as a key resource to provide early warning to incoming issues.

Finding Work-Life Balance in Academia: Lessons from Academic Leaders

Emma Williams, Associate Ombud, University of Washington, USA

Sunny Lee, Assistant Ombudsperson for Students, UC Berkeley, USA

More and more, visitors to the ombuds office are citing concerns of being overwhelmed, of not having enough time to do their best work. Is this a trend? Where does this trend emerge? Is this a top-down cultural understanding of work-life balance or it is coming from other aspects of work in higher education? Using a recently published dissertation focused on the challenges of creating work-life balance among women in higher education leadership, this session will examine the challenges found among women in leadership positions in higher education, consider whether this is part of a larger trend across academic leadership, and how ombuds can assist visitors bringing work-life balance concerns to the office.

Peer-to-Peer Case Studies

Patricia Ponce, Student Ombuds, Cal Poly, San Luis Obispo, USA

Katherine Greenwood, Ombuds and Director, UC Davis, USA

This dynamic session, focused on two challenging scenarios based on actual cases, is designed to encourage participants to reflect, analyze, evaluate, and articulate their various orientations and approaches to casework. Participants, working in small groups, will be invited to collaboratively test a variety of principles, ethics, and strategies shared by their table partners. Elements of suspense and surprise will be woven into this interactive and in-depth session to deepen connections between theory and practice.

Mindfulness for Ombuds

Chuck Sloane, Ombud, University of Washington, USA

As ombuds we sit with visitors who are struggling with stress, uncertainty, strong emotions, and a lack clarity about how to move forward. This session will cover how we can bring mindfulness into the room to expand our perspectives as ombuds and will also present useful mindfulness techniques that can help our clients steady their lives in the midst of challenge. In this session, the presenter reviews research into the efficacy of mindfulness and meditation, approaches used by professionals in other helping fields, and tips and techniques to enlist with visitors, and shares what he has learned through meditation practice and how it affects his work.

Saving them before they get to the brink

Peter Hendriks, Deputy Dean of Students, Australian National University, Australia

Some students come to university ill-equipped to deal with the culture and illiterate in the language of academic life, thus incapable of understanding the consequences of choices presented to them. How do we catch them before they fall; how do we save them from going over the brink? We sometimes meet with students for whom university has been thus far a series of challenges. Some of these challenges they have managed to get over, many have proved to be beyond their control and insurmountable. We often only get to meet with them after a string of poor choices and failures has brought them to our attention. This session explores how students' challenges can be turned into opportunities and even better, and how universities can identify and manage students' challenges so that students are not overwhelmed at the start and set on a path for failure even before they have been given the chance to show they can succeed.

The Ombuds Leans In: A Framework to Assist Challenging Leaders

Karen Peterson, Fred Hutchinson Cancer Research Center, USA

Some leaders have little idea of the negative impact their poor management style has on their group. Some ombuds cases result from leaders whose poor management style and murky expectations result in unhappy people who eventually visit the ombuds office. Ombuds may use a framework to help challenging leaders understand their impact and provide them with a road map to improve their employee recruitment and management style. By the end of this interactive session, we will have a basic understanding of how to use this framework to help leaders whose actions create numerous visitors for the ombuds.

Campus Climate and Ombuds Challenges with A Dash of Student Development Theory

Marit Bessesen, Ombudsman, San Diego State University, USA

In a time of national divisiveness and stress (Election Year!), campus climate reflected a microcosm of our national climate. When everyone (students, faculty and staff alike) is inclined to "retreat to their corners," how does an ombuds successfully mediate and seek resolutions for individuals whose mindset is mirroring these difficult times? How can student development theory inform our practice to increase our effectiveness? Utilizing Nevitt Sanford's student development theory of "Challenge and Support," participants will take part in an engaging dialogue around the unique challenges of ombudsing during a time of nationwide divisiveness. Case studies based on actual events will be presented for review and

discussion. This session will enable participants to identify their resources on campus and in the ombuds community, and new connections for support within Cal Caucus.

Advancing the Restorative Practices Initiative at the University of Alberta: Progress & Challenges

Brent Epperson, Graduate Ombudsperson, University of Alberta, Canada

Marc Johnson, Undergraduate Ombudsperson, University of Alberta, Canada

Is there a better way to address conflict and restore working relationships in graduate studies? Like all large research universities, interpersonal conflicts in the graduate student and post-doctoral fellow communities are pervasive. Power differentials make conflicts in these communities uniquely difficult. In consultation with concerned stakeholder groups, the Office of the Student Ombuds and campus partners identified systemic gaps in conflict resolution processes, as well as common commitment to finding a better way to address these issues. The Restorative Practices Initiative (RPI) has involved outreach to stakeholders across campus, and conferences and workshops to inform and engage the campus community. This presentation will outline the progress and challenges of the RPI, from its time as a nascent idea in late 2015 to plans for implementation in 2018.

Triggers and Effective Communication

Breanne Taylor, Associate Ombuds, Oregon State University, USA

Emotion and/or physical triggers may impact the way individuals communicate. How to recognize and respond when someone is experiencing a trigger? This brief session reveals the impact of triggers on communication and different approaches to responding in the moment for effective communication.

An Ombuds Approach to Cultivating Cyber Kindness into Campus Culture

Natalie Sharpe, Director

Office of the Student Ombuds, University of Alberta, Edmonton, Alberta, Canada

Cyberbullying cases are growing on postsecondary campuses, escalating rapidly from a single act to multiple acts of micro-aggression. The target of these acts feels stigmatized, isolated, fearful, and vulnerable. The target feels victimized and distrustful of an institution that does not quickly respond in a supportive role, and may stop attending classes or engage in self-harm and other destructive behaviours. Campus administration rarely has a clearly defined policy and/or procedures in place to act swiftly and supportively. Ombuds can play an important role in helping faculty and students to examine their social media behaviours and rebuild campus culture.

Creating a culture of dialogue: race, politics, and gender

Teresa Ralicki, Ombuds, University of Colorado Denver|Anschutz Medical Campus, USA

Lisa Neale, Associate Director, Ombuds Office, University of Colorado Denver|Anschutz Medical Campus, USA

Issues of structural discrimination and unconscious bias are on the forefronts of our minds, our media, and our tongues more than ever. We are faced with divisions of thought, understanding, and exposure across our country in new and poignant ways. How can we use our institutions as opportunities to design, encourage, and support dialogue to build awareness, build understanding, build relationships and to stay away from divisive labels and accusations? This session considers the issues we are facing as well as theories and techniques for addressing them through dialogue.

With sincerest thanks...

... and much gratitude to the people who worked hard over this last year on planning and producing this conference, and on supporting Cal Caucus. Also, we express deep appreciation to all our presenters (listed above), who come at their own, sometimes personal, expense, to share their expertise and engage our learning.

Conference Co-Conveners

Marcia Gee Riley, University of California at Berkeley
Natalie Sharpe, University of Alberta

Planning Committee Members:

Marcia Gee Riley, University of California at Berkeley
Natalie Sharpe, University of Alberta
Katherine Greenwood, University of California, Davis
Patricia Ponce, Cal Poly, San Luis Obispo
Breanne Taylor, Oregon State University
Jim Oldani, Lawrence Livermore National Laboratory
Emma Williams, University of Washington
Shawn Hutchens, University of California, Irvine
Hector Escalante, University of the Pacific

Asilomar Coordinator: Patricia Ponce, Cal Poly, San Luis Obispo

Registrar: Emma Williams, University of Washington

Program Committee:

Jenna Brown, University of Denver, Chair
Kelly Barrett, Lawrence Livermore National Laboratory
Hector Escalante, University of the Pacific
Jessica Kuchta-Miller, Washington University in St. Louis
Kevin Wiens, University of Calgary
Emma Williams, University of Washington, Planning committee liaison

Awards Committee:

Jan Morse, University of Minnesota, Chair
Karen Peterson, Fred Hutchinson Cancer Research Center
Patricia Ponce, Cal Poly, San Luis Obispo
Thomas Griffin, University of California, Los Angeles
Breanne Taylor, Oregon State University

Contact us with questions about the conference:

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Asilomar Services:
831.372.8016

Asilomar Conference Grounds, Monterey Peninsula's "Refuge by the Sea"

800 Asilomar Avenue, Pacific Grove, California 93950

www.visitasilomar.com

Telephone: 831.373.8016

Fax: 831.372.7227

Check-in: After 4:00 pm

Check-out: By 11:00 am

The rooms at Asilomar are rustically charming and do not have televisions or telephones. Complimentary in-room WiFi is available.

Getting to Asilomar:

Fly Monterey Peninsula, San Jose, San Francisco, and Oakland Airports

Ride Shuttles servicing Asilomar from the San Francisco and San Jose airports:

<http://www.montereyairbus.com/>

Note: be sure to indicate that you would like to be driven to the Asilomar property.

Drive Asilomar is operated by California State Parks, and is 71 miles south of San Jose and 120 miles south of San Francisco.