

Conference Ombuds Charter

CERF Charter for CERF 2025 Conference Ombuds

I. INTRODUCTION

To support CERF's commitment to ensuring that CERF 2025 is safe and welcoming for all, consistent with the principles outlined in CERF's policy in the CERF Event Code of Conduct, CERF will provide organizational conference ombuds services in connection with its CERF 2025 Conference taking place in Richmond, VA, during November 9-13, 2025 ("Conference Ombuds Program"). CERF's goal is to have a conference that is as inclusive and accessible as possible for attendees, staff, exhibitors, and anyone else participating in CERF 2025, regardless of gender, sexual orientation/identity, race/ethnicity, religion, employment status, or status in the field. In addition, CERF desires to improve the conduct and climate at future conferences with aggregate data and feedback on trends from the ombuds.

II. PURPOSE AND SCOPE OF THE CONFERENCE OMBUDS

The Conference Ombuds Program is designed to be an independent, impartial, informal, and confidential channel for conference attendees, staff, exhibitors, and anyone participating in CERF 2025 to discuss any issues they may have concerning conference-related activities. The ombuds selected to provide these services ("Conference Ombuds" or "Ombuds") will be available to provide information confidentially and will provide a safe place for people to discuss such issues as safety, actions from overly-friendliness to harassment, micro-aggressions, free speech, integrity, privacy, conflicts of interest (including accessibility, lodging, and food), alcohol consumption and conference cliques. The Ombuds is a resource to informally discuss any of these or other conference-related concerns and help inquirers develop options, problem-solve, create paths for self-advocacy, and make informed choices about the best path forward.

This Charter sets forth the operating principles under which the Conference Ombuds Program will operate and reflects CERF's commitment to the Conference Ombuds and the role of this position.

III. STANDARDS OF OPERATION

The CERF Conference Ombuds is a member of the International Ombud Association (IOA) and shall adhere to IOA's Code of Ethics and Standards of Practice in performing ombuds services for CERF. See <https://www.ombudsassociation.org/standards-of-practice-code-of-ethics>. These tenets require organizational ombuds programs to be independent, neutral, informal, and confidential:

1. Independence

The Conference Ombuds is an independent contractor and not a CERF staff member. The ombuds functions outside existing administrative structures pursuant to a Contract between MWI and CERF.

2. Impartiality

The Conference Ombuds provides impartial assessments of concerns. As a neutral third party, the ombuds is a resource for an equitable and fair process and the fair administration of the process. The ombuds does not, however, provide legal or other kinds of advocacy or enforce CERF's Event Code of Conduct. The Conference Ombuds does not render services or become involved in any matter that would be a conflict of interest for the Conference Ombuds to do so.

3. Informality

The Conference Ombuds provides a means for off-the-record discussions of concern. The ombuds is empowered to provide only informal assistance and does not conduct or participate in investigations, make or override decisions, determine policy, testify or participate in formal or administrative proceedings with respect to confidential communications, provide legal advice, or accept legal notice of claims against CERF or any other organization, entity, or person. For those wishing to assert claims or have on-the-record communications, the Conference Ombuds can identify resources to appropriate formal channels so that individuals may make informed choices about which process they decide is best for them to pursue.

4. Confidentiality

Communications with the Conference Ombuds are confidential to the maximum extent permitted by law. This principle of confidentiality helps the Conference Ombuds provide a safe place for conference attendees, staff, exhibitors, and anyone participating in CERF 2025 to voice concerns, evaluate issues, and identify options for possible further action. The Conference Ombuds is a purely voluntary resource. No one is required to use it, but those who do will be deemed to have agreed to respect and abide by the above principles on which it was created and not to call the ombuds to testify or produce documents related to confidential communications in any administrative or legal proceeding. CERF has also agreed not to call upon or attempt to have the Conference Ombuds disclose confidential communications or to testify or produce documents relating to confidential communications in any administrative or legal proceeding.

Consistent with the International Ombuds Association Code of Ethics and Standards of Practice, the only exceptions to this confidentiality principle are: (a) when, during

the course of communications with the Conference Ombuds, an inquirer gives the ombuds permission to make a disclosure, and the ombuds agrees it is appropriate to do so, or (b) when the Conference Ombuds determines that there is an imminent threat of serious harm.

IV. SCOPE OF SERVICES

The Conference Ombuds will be available to consult with conference attendees, staff, exhibitors, and anyone else participating in CERF 2025 concerning any conference-related issues identified above. The Conference Ombuds will be available based on the schedule found online at www.mwi.org/cerf-ombuds, and conference attendees, staff, exhibitors, and anyone else participating in CERF 2025 will be advised on how to contact the ombuds as well as times and places where the ombuds may be found.

As a neutral third party, the ombuds is an advocate for a fair and equitable process. The ombuds does not, however, provide legal or other kinds of advocacy or enforce the CERF Event Code of Conduct.

The Conference Ombuds has been authorized to continue to assist inquirers after the conference for a limited period when continuing consultation has yet to be concluded or when an issue is raised in a reasonable time following the conference.

V. ACCOUNTING AND REPORTING

The Conference Ombuds reports to the Executive Director. The ombuds may also meet with and alert other senior leadership of CERF of any systemic issues or trends the ombuds believes may help the organization address identified or potential issues, improve the climate for membership or future conferences, or improve its policies and practices. Even when reporting issues to senior leadership, the Conference Ombuds will do their best to protect the confidentiality of those using the ombuds' services.

VI. RECORD-KEEPING

The ombuds provides only informal assistance, and although informal notes may be temporarily created only as needed, the ombuds does not retain permanent records containing personally identifiable information or confidential communications. Any post-conference reporting to senior leadership will have only aggregate data and the ombuds insights and observations on the types of issues raised and any organizational recommendations.

**VII. INQUIRY ABOUT THE USE OF THE CONFERENCE OMBUDS IS INAPPROPRIATE;
RETALIATION FOR DOING SO IS PROHIBITED**

CERF supports efforts to manage and resolve conflicts informally to preserve collegial and effective working relationships and avoid the time and expense required for formal proceedings or litigation. Because the Conference Ombuds Program is intended to be a confidential resource, it is not appropriate for anyone at CERF to inquire about an individual's use of it or any communication that may have occurred there. Furthermore, discouraging or preventing eligible visitors from using the Conference Ombuds Program is inappropriate because it is contrary to the organization's intent of providing a Conference Ombuds Program as a resource for early and informal management and resolution of conflicts.

While the organization supports and encourages using the Conference Ombuds Program for conflict management, an individual's use of the ombuds resource must always be entirely voluntary. Reminding individuals that the Conference Ombuds Program is available as an option or a resource is acceptable. However, no one may be ordered or required to visit the ombuds, nor may an individual be punished for not engaging in the Conference Ombuds Program.

All attendees, staff, exhibitors, and anyone participating in CERF 2025 shall have the right to consult the ombuds without fear of retaliation or reprisal. Retaliation against any attendee or staff for consulting with the ombuds or against the ombuds for actions within the legitimate scope of her duties as described in the Charter is prohibited.

VIII. PROCEDURE FOR REVISION OR REVOCATION OF THIS DOCUMENT

This Charter remains in effect unless otherwise revoked by CERF, and such revocation shall be provided in writing to MWI's Director of Ombuds Services. Any revision to this Charter shall be jointly agreed to in writing by both CERF and the ombuds representatives from MWI and shall be appended to this document.

CERF

Signed: Susan Park
Susan Park (Jul 2, 2025 11:09 EDT)

Name: Susan Park

Title: Executive Director

Date: 02/07/2025

Duly Authorized Hereunto

MWI

Signed: Charles P. Doran

Name: Charles P. Doran

Title: Executive Director

Date: 02/07/2025

Duly Authorized Hereunto

Conference Ombuds Charter - CERF 2025

Final Audit Report

2025-07-02

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