



INTERNATIONAL PROTOCOL EDUCATION FORUM

2021 - VIRTUAL FORUM

Agenda as of 10 June 2021

PDI-POA 2021 Virtual Education Forum

19 July, 2021

09:00 - 15:00 **Virtual Forum Check-in**

14:00 - 14:45 **Orientation - new members or first time attenders**

15:00 - 15:15 **Forum Begins**

15:15 - 16:00 CONCURRENT SESSIONS

1. A Shy Person's Guide to Networking: In a Room or in Zoom

Speaker: Anne Blackburn, Social Etiquette and Protocol Consultant, Blackburn Etiquette

Moderator: Crystal Bailey, Director, The Etiquette Institute of Washington

Description: How to work a room at an industry mixer! It is important in today's world to have strong personal skills. They prepare us to be confident and achieve success in our personal, professional, team and global relationships. This session is perfect for new professionals, managers, and even seasoned leaders who need to represent themselves or their organizations.

2. The Power of Ritual: Turning Everyday Activities into Soulful Practices

Speaker: Casper ter Kuile, Author | Co-founder, The Power of Ritual | Sacred Design Lab

Moderator: Eric Dicken, Assistant Vice President of Development for Programs, Events, and Protocol, Case Western Reserve University

Description: How we find connection today has changed. We no longer seek purpose and community within traditional religious spaces, but rather in secular ones: CrossFit, book clubs, and yoga studios have become our new congregations. Gratitude journals now fulfill the role of traditional prayer. And tech breaks have become the new sabbath. Yet in a climate of social isolation

and a new era of seekers, how do we make the things we do every day fulfill our age-old search for meaning? This is where the ancient wisdom of ritual comes in. Sponsored by the Protocol & Prose Book Club

16:00 - 17:30 **Networking Opening Gathering**

20 July, 2021

08:30 - 09:00 **Day Two Forum Check-in**

09:00 - 09:30 **Day Two Opening**

09:30 - 10:30 PLENARY

Covid Lessons Learned in International Diplomacy

Speaker: Stewart Wheeler, Chief of Protocol, Canada

Speaker: Asel Roberts, Acting Chief of Protocol, U.S. Department of State

Moderator: Kim Starfield, Senior Protocol Officer for Visits, Office of the Chief of Protocol of the United States, U.S. Department of State

10:45 - 11:45 CONCURRENT SESSIONS

1. Adapting to Virtual Visits and Tours

Speaker: Evren Essner, Head of Protocol, Lawrence Berkeley National Laboratory

Speaker: Kevin Gifford-Tinker, Protocol Officer, Lawrence Berkeley National Laboratory

Moderator: Kellie Robinson, Freedom of Information Act (FOIA) Program Manager/FOIA Public Liaison, U.S. Department of State

Description: When the pandemic began, all in-person visits and tours at Berkeley Lab, a U.S. Department of Energy National Laboratory, were cancelled. In order to adapt to the changing time, we adjusted our in-person tours to be entirely virtual. We've now designed tours of 10 scientific facilities to be entirely virtual and increased our outreach three fold. This session will go through a background of our in-person visits/tours and how we transitioned to show our facilities virtually.

2. Preserving Academic Traditions & Embracing Inclusivity

Speaker: Liz McMahan, Manager of Convocation & Special Projects, York University

Description: Academic ceremonies are steeped in tradition and history, and the symbols that are included in them offer a way for institutions to communicate their values. From ceremonial maces to regalia and beyond, do these symbols always say what we intend for them to say? Learn how York University identified gaps in accessibility and inclusion at their ceremonies and has taken steps to address them.

3. Cross Cultures in Iraq

Speaker: Jwan Sofi, Director General, Iraqi President Office

Moderator: Lanie Denslow, Principal, World Wise Intercultural Training & Resources

Description: Jwan Sofi will discuss her experience dealing with cultural issues.

Topics will include: Iraqi customs and traditions, best practices for international interactions, understanding differences, finding solutions and dealing with difficult situations.

4. Chinese Tea Etiquette

Speaker: Otto Wen Quan, Vice President, Professional Committee of Protocol and Etiquette Culture, China

Moderator: Nicole Krakora

Description: Tea is an authentic Chinese beverage. Chinese people drink tea everyday and almost everywhere. Tea is also served in official ceremonies, meetings and business occasions. As a matter of fact, in many Chinese cities, business deals, agreements and consuses are actually negotiated and reached at tea sessions. Therefore, it is important to observe the Chinese Tea Etiquette in China. This presentation will introduce the tea etiquette which one should observe at different occasions for different teas in China. It will also make attempts to show audiences on how to appreciate Chinese tea and tea ceremonies.

13:00 - 13:45 CONCURRENT SESSIONS

1. The Journey to Building Ceremonies

Speaker: Bryn MacPherson, Assistant Vice-President, Office of the President & Chief of Protocol, University of Toronto, Canada

Speaker: Ian Smith, Protocol Advisor, Office of Protocol and Intergovernmental Affairs, City of Ottawa, Canada

Speaker: Richard Berthelsen, Senior Project Manager, Office of Strategic Protocol & External Relations, City Clerk's Office, City of Toronto

Moderator: Sherine Daryanani, Special Events & Protocol Officer, Office of the President, University of Toronto, Canada

Description: As protocol professionals, we all have checklists covering the basics – from flags to seating. But as you ‘build’ a memorable ceremony, what are the underlying principles you wish to express and achieve? This session focuses on key concepts of “anatomy”, “journey” and “takeaway” in building a ceremony.

2. Success as a Corporate Protocol Officer

Speaker: Wendy Jones, Protocol Consultant

Moderator: Lindsay Kirchinger, Chief of Protocol, Michigan

Description: Different from protocol in government agencies, academia and diplomatic circles, corporate protocol is defining the role and value of the protocol officer on its own terms. One must be fully knowledgeable of key customers, business goals and objectives, the Board of Directors, nuances of key leadership, as well as embodying time honored international protocol and business etiquette practices. Working successfully within the C-Suite takes talent, knowledge, personality, a vast network of valuable colleagues, and guts to make it work. I will gladly share what it takes to get to the top, with humility, knowledge and tips. Thirty years working with senior leadership within the aerospace and defense industry and I am honored to mentor the next group of talented professionals working up the corporate ladder, and to help corporate leaders recognize who to add to their team and promote.

3. Avoiding Verbal Hazards and Making a First Impression in Proper English

Speaker: Kerry Rice, International Protocol Officer, US Army Europe and Africa Headquarters

Moderator: Colleen Rickenbacher

Description: A fun and lighthearted look at English, word origins, common pronunciation and grammar pitfalls -- with some easy tips to avoid them. Can a grammar bomb undermine that tailored suit, confident stance and firm handshake? Avoid some common grammar pitfalls. Speak with a little more polish for a good first impression. Explore the quirky history of the English language and word origins.

4. Protocol Adapts: Inclusion of Indigenous Elements

Speaker: Eilis Courtney

Speaker: Lucy Lobmeier, Chief of Protocol & Executive Director in the Intergovernmental Relations Secretariat, Office of the Premier with the Province of British Columbia

Speaker: Chris Morriss

Speaker: Stewart Wheeler, Chief of Protocol, Canada

Description: The panel will discuss the importance of the recognition of Indigenous peoples and the need to adapt current practices and protocols in Canada and the United States to include Indigenous elements and recognition. The panel will also share ways they are adapting ceremonies, events and visits to have increased recognition of Indigenous leaders/elders, symbols and traditions, in a meaningful effort towards reconciliation.

13:45 - 14:00 **Day Two Wrap Up**

14:00 - 15:30 **Networking Closing Gathering**

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12:00 - 12:15 **Day Three Opening**

12:15 - 13:15 PLENARY

Kiss, Bow, or Shake Hands®: Best Intercultural Practices for Protocol Engagement

Speaker: Terri Morrison, Author, Kiss, Bow, or Shake Hands®

Moderator: Sonia Garza-Monarchi, Founder, Garza Protocol Associates

Description: Protocol professionals specialize in the details of diverse engagements – both domestically and internationally. But intercultural business and social practices can be incredibly complex. Whether in Riyadh, Rio, or Rome, your success at making contacts, negotiating, and understanding who is actually in charge can depend upon your research. Terri Morrison, author of the Kiss, Bow, or Shake Hands® series will share her best practices in this interactive dialogue with our members.

13:30 - 14:15 CONCURRENT SESSIONS

1. Working with Embassies and Consulates

Speaker: Harlan Lee

Speaker: Larry Mandel, Chair, Foreign Service Grievance Board

Description: Two veteran American diplomats, Larry Mandel and Harlan Lee, will discuss how embassies and consulates are organized and staffed to handle the work of international diplomacy. Their presentation will cover the rules of diplomatic and consular relations, how embassies and consulates are

structured and where they are located, personal ranks and functional titles, precedence and immunity. They will discuss how embassy and consulate staffs interact with host country officials, other members of the diplomatic and consular corps, and the general public. They are also happy to answer questions about joining the Foreign Service

2. The Protocol at Royal Weddings

Speaker: Jean Paul Wijers, Executive Director, Protocolbureau and the Institute of Strategic Relationship Management

Moderator: Tye Thede, Director of University Visits, Protocol Officer, Arizona State University

Description: Television mostly focusses on the glamour and glitter at Royal Weddings but this presentation will give you a unique insight in to the royal operations behind the screens. We will focus on how to properly welcome Kings, Queens, Presidents, Ministers and other VIP's at these large-scale prestigious events, and how to seat a large number of guests in a very short time. This presentation is led by Jean Paul Wijers, the former Head Ushers at three of the Royal Weddings of the Dutch Royal Family. At these weddings, Jean Paul worked with 35 ushers, who were given the task to welcome, inform, direct and seat the guests, among them many dignitaries. The main challenge was to seat everybody in the right seat on time; punctuality is important at Royal Weddings. The way of working explained in this presentation is also of value outside the world of Royal Weddings. Jean Paul will explain how this method can be used at any large-scale event with VIP's. He and his Protocolbureau have successfully applied the same approach at many other events.

3. How Culture and Tradition Affects Protocol in Nigeria

Speaker: Olusegun Feyisola Adetunji

Moderator: Bert Gillot

Description: Nigeria as a country has a lot of culture and tradition which, in so many ways, affect protocol. As a protocol officer, you are expected to be in constant contact with people of different backgrounds. In Nigerian context, you have to be well informed to be able to carry out your responsibilities. There are different ways of greeting, sitting, eating and gifting as a result of cultural differences. As a protocol officer, you have to understand the terrain of your responsibilities so as not to commit blunders in the course of delivering your job. The culture of Nigeria is therefore every bit as diverse as you would expect from a country which is a melting pot of people from so many different backgrounds. This presentation is going to focus on those differences as it relates to protocol practices.

14:30 - 15:15 CONCURRENT SESSIONS

1. Diplomatic Protocol Gone Wrong: Lessons Learned

Speaker: Valentina Kecman

Description: Protocol establishes a set of standards and guidelines that both parties in a bilateral relationship must adhere to and follow. Diplomatic protocol is all about preparation and planning but it seems that it's importance is fully understood once things go wrong and it's happened many times in the recent years.

2. China's Diplomatic Protocol from the Perspective of Cross-Culture

Speaker: Julie Zhou, Associate Professor, China Foreign Affairs University (CFAU)

Moderator: Lisa Mirza Grotts, Etiquette Expert, Golden Rules Gal

Description: Diplomatic communication is essentially a kind of foreign-related communication. Diplomatic protocol is affected by cross-cultural factors, especially the communication between countries with different cultures. This session will analyze how cross-cultural factors affect diplomatic protocol through the negative and positive cases in diplomatic protocol.

3. Virtual Presence: Tips for Putting Your Best Face Forward.

Speaker: Jacqueline Whitmore, Founder, The Protocol School of Palm Beach
Moderator: Irma Vartanian Balian, Founder, ProtocolWise™

Description: In the protocol world, it's crucial that we present ourselves as we would like to be perceived: trustworthy and credible. Meetings are mostly virtual now and, whether we like it or not, we are forced to consider what we look and sound like on camera. Learn the do's and don't's of virtual etiquette as well as some tips and tricks that news anchors use when it comes to lighting, audio, and backgrounds.

4. Handling Gender-Neutral Pronouns With Style

Speaker: Janika LeMaitre, Founder, The Better Professional
Moderator: Catherine Wilson, Protocol, Stewardship & Partnerships Program Director, Notre Dame International

Description: The gender pronoun movement in the United States is here to stay. Keep one step ahead: Become knowledgeable about how to use gender pronouns in a range of business scenarios.

15:30 - 16:30 PLENARY

Selling the Value of Protocol: Your Boss, Your Colleagues, Your Organization

Speaker: Ron Karr, Velocity Mindset®
Moderator: Melissa Stires, CEO and Founder, Stires Consulting

Description: You are the one tagged with ensuring everyone follows the protocols critical to the organization's success. Yet not everyone buys into the need for protocol or the need to get you the information you need so you excel in your position. In this session, the outcomes you can expect are:

- Eliminate resistance
- Gain Buy-In
- Achieve Better Results- FASTER!

How will you do this? By living and leading life with The Velocity Mindset. I look forward to seeing you in this highly interactive session!

16:30 - 17:00 **Closing Ceremony**

17:00 - 19:00 **Closing Gathering**