



# INTERNATIONAL PROTOCOL EDUCATION FORUM

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## 2021 - VIRTUAL FORUM

## PDI-POA 2021 Virtual Education Forum

All times listed are Eastern Daylight Time (Washington, D.C.).

This year, as a benefit of our fully virtual forum, we are pleased to offer registered attendees access to all of the forum content for up to 30 days. Please plan to join us live and rest assured anything that you miss, you'll be able to watch again.

### 19 July, 2021

- 14:45 - 15:00 **Orientation - New Members & First Time Attendees**  
April Harris, Vice President of Membership, PDI-POA  
Melissa Werner, President, PDI-POA
- 15:00 - 15:15 **Forum Begins**  
Mackenzie Wasilick, Day One Host  
Melissa Werner, President, PDI-POA
- 15:15 - 16:00 **CONCURRENT SESSIONS**  
**Breakout - Networking Success: In a Room or in Zoom**  
Anne Blackburn, Social Etiquette and Protocol Consultant, Blackburn Etiquette  
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.

15:15 - 16:00 **Breakout - The Power of Ritual: Turning Everyday Activities into Soulful Practices**  
Casper ter Kuile, Author | Co-founder, The Power of Ritual | Sacred Design Lab  
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

15:15 - 16:00 **Breakout - Protocol Will Never Be the Same: Hot Technologies 2021**  
Jim Spellos, President, Meeting U  
Saeed Alsalkhadi, Vice President and Managing Director - Middle East and North Africa (MENA) Region, The Protocol School of Washington  
**Description:**  
How are you keeping up with the technological advancements that impact your job and career? Do you find that you're barely able to keep pace with the latest developments? This session reviews what's new and way cool in technology for the protocol professional in this fun, fast-paced look at what's here for us to use now and what's coming in the near future. The session will include the latest information about virtual & augmented reality, artificial intelligence, and other important tech trends. After participating in this session:

- Be aware of the latest technology
- Understand and experience business changing technologies including mixed reality and artificial intelligence
- Identify how the rate of technological change is impacting your work
- Review the upcoming technological changes and how being a protocol professional will be impacted

*Session sponsored by The Protocol School of Washington.*

16:00 - 17:30 **Networking Opening Gathering**  
**Description:**  
*This session will be hosted in Zoom. Click "Join" to automatically be directed to the Zoom session.*  
Join fellow attendees in small room gatherings where you can connect with old friends and make new ones. Breakout Rooms include:  
PDI POA President's Corner  
PDI-POA Membership  
First Time to the Forum  
Long-Time Members  
Academic Protocol  
Government Protocol  
Corporate Protocol

Culture-Etiquette-Civility  
Self-Employed  
Come Chat with the PSOW Team  
and plenty of open networking rooms to explore!

## 20 July, 2021

- 09:00 - 09:30 **Day Two Opening**  
Melissa Werner, President, PDI-POA  
Katelyn Wilcox, Day Two Host | Assistant Chief of Protocol, Michigan Economic Development Corporation
- 09:30 - 10:30 **PLENARY**  
**Resiliency of Protocol and Diplomacy in a Pandemic**  
Stewart Wheeler, Chief of Protocol, Canada  
Victoria Busby OBE, Director of Protocol at the Foreign, Commonwealth and Development Office and Vice-Marshal of the Diplomatic Corps, United Kingdom  
Asel Roberts, Acting Chief of Protocol, United States  
Kim Starfield, Senior Protocol Officer for Visits, Office of the Chief of Protocol, U.S. Department of State  
**Description:**  
Three global Chiefs of Protocol will share their experiences and thoughts on how protocol has adapted during a global health crisis. They will share reflections and ideas on the tools that allowed them to continue their work during the pandemic, and discuss how lessons learned during this time will expand their ability to support international diplomacy moving forward.
- How have lockdowns and social distancing requirements affected the ability to create a conducive environment for international diplomacy?
  - As we hear frequently, many elements of virtual connections will be expected in the long term. How will the hybrid event model affect the work of protocol professionals?
  - What planning tools and new skills do we need in the industry?
- Learn about how to recover when things do not go according to the most carefully laid plans, and how the importance of protocol is even greater now than ever in our highly interconnected world.
- 10:45 - 11:45 **CONCURRENT SESSIONS**  
**Breakout - Adapting to Virtual Visits and Tours**  
Evren Essner, Head of Protocol, Lawrence Berkeley National Laboratory  
Kevin Gifford-Tinker, Protocol Officer, Lawrence Berkeley National Laboratory  
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.

- 10:45 - 11:45 **Breakout - Preserving Academic Traditions & Embracing Inclusivity**  
Liz McMahan, Manager of Convocation & Special Projects, York University  
Nancy Gordon, Executive Director of Protocol and Special Events, University of Maryland, Baltimore (UMB)  
**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.
- 10:45 - 11:45 **Breakout - Cross Cultures in Iraq**  
Jwan Sofi, Director General, Iraqi President Office  
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.
- 10:45 - 11:45 **Breakout - Chinese Tea Etiquette**  
Otto Wen Quan, Vice President, Professional Committee of Protocol and Etiquette Culture, China  
Nicole Krakora, President, Global Protocol and Event Strategies  
**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.
- 11:45 - 12:45 **Exhibition Hall: Chat with PDI-POA President Melissa Werner**  
Melissa Werner, President, PDI-POA
- 11:45 - 12:45 **Exhibition Hall: Come chat with the PSOW team!**  
Tiffany Rushton, Director of Client Relations and Marketing, The Protocol School of Washington
- 12:45 - 13:00 **Learn More: PDI-POA's Continuing Education and Professional Development Committee and PDI-POA Treasurer**  
Chris Young, Chair, Governance and Ethics, PDI-POA  
Darin Pfeifer, Vice President, Continuing Education and Professional Development Committee, PDI-POA  
Harlan Lee, Treasurer, PDI-POA  
**Description:** A conversation with PDI-POA's Vice President of Continuing Education and Professional Development
- 13:00 - 13:45 CONCURRENT SESSIONS  
**Breakout - The Journey to Building Ceremonies**  
Bryn MacPherson, Assistant Vice-President, Office of the President & Chief of Protocol, University of Toronto, Canada  
Ian Smith, Protocol Advisor, Office of Protocol and Intergovernmental Affairs,

City of Ottawa, Canada

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

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.

13:00 - 13:45

**Breakout - Success as a Corporate Protocol Officer**

Wendy Jones, Protocol Consultant

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.

13:00 - 13:45

**Breakout - Avoiding Verbal Hazards and Making a First Impression in Proper English**

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

Colleen Rickenbacher, Secretary, PDI-POA and trainer at the Global Protocol, Etiquette and Civility Academy

**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.

13:00 - 13:45

**Breakout - Protocol Adapts: Respect for Indigenous Protocols**

Stewart Wheeler, Chief of Protocol, Canada

Eilis Courtney, Liaison, Musqueam, The University of British Columbia (UBC) Special Projects

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

Chris Morriss, Former Chief of Protocol, State of Oklahoma

Leslie Lautenslager, Immediate Past President, PDI-POA

**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.

- 13:00 - 13:45 **Breakout - Return to Travel**  
Juanita Harvin, Owner & Founder, Eurway Tours  
Desmond Alufohai, Director of Protocol and International Affairs Division,  
Miami International Airport  
**Description:** More travelers screened by TSA, more hotels reopening, more insurance options and more COVID-19 rules. All of this means the travel industry is adjusting and is on its way back. In this session we will cover: the current rules; where you can travel to right now and where you can't; pandemic tips and guidelines; what's in store for the government/official/business traveler; what is discounted & what is not; domestic & international travel; tools & APPS.
- 13:45 - 14:00 **Day Two Wrap Up**  
Katelyn Wilcox, Day Two Host | Assistant Chief of Protocol, Michigan Economic Development Corporation  
Melissa Werner, President, PDI-POA
- 14:00 - 15:30 **Networking Closing Gathering**  
**Description:**  
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PDI POA President's Corner  
Come Chat with the PSOW Team  
Australia, Canada & the Caribbean  
Europe, the Middle East and Africa  
USA: Mid-Atlantic & New England  
USA: The South  
USA: The Midwest  
USA: The West  
and plenty of open networking rooms to explore!

## 21 July, 2021

- 11:45 - 12:00 **A Conversation with Long Time PDI Members**  
Chris Young, Chair, Governance and Ethics, PDI-POA  
**Description:** A conversation with long time PDI members.
- 12:00 - 12:15 **Day Three Opening**  
Melissa Werner, President, PDI-POA  
Mauri Earl, Day Three Host | Director, International Affairs, The Church of Jesus Christ of Latter-day Saints, Washington, DC
- 12:15 - 13:15 **PLENARY**  
**Kiss, Bow, or Shake Hands®: Best Intercultural Practices for Protocol Engagement**  
Terri Morrison, Author, Kiss, Bow, or Shake Hands®  
Diane Brown, Protocol Trainer, Matters of Protocol  
**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.

13:15 - 13:30

**Learn More: PDI-POA's Membership Committee**

Chris Young, Chair, Governance and Ethics, PDI-POA  
April Harris, Vice President of Membership, PDI-POA

**Description:** A conversation with PDI-POA's Vice President of Membership and Treasurer.

13:30 - 14:15

CONCURRENT SESSIONS

**Breakout - Working with Embassies and Consulates**

Harlan Lee, Treasurer, PDI-POA

Larry Mandel, Chair, Foreign Service Grievance Board

Sherry Dowlatshahi, Chief of Protocol and Head of International Relations, City of San Antonio

**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

13:30 - 14:15

**Breakout - The Protocol at Royal Weddings**

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

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.

13:30 - 14:15

**Breakout - More than Just a Flag!**

Charma Retherford, Chief of Protocol, Air Force Special Operations Command, Hurlburt Field, Florida

April Ripley, Director of International Affairs and Office of Protocol, Word of Life Ministries International

**Description:** Session description coming soon.



- 13:30 - 14:15 **Breakout - Creating the Flight Plan for Departure**  
 Pamela Eyring, President, The Protocol School of Washington  
 Mena Wendling, Government Affairs Manager, Gulfstream Aerospace Corporation  
**Description:** Are you tired of your job? Have you experienced poor leadership, and just can't take it anymore? Or maybe your job is not allowing you to reach your personal or professional goals. You're not alone. The COVID-19 pandemic has caused protocol professionals everywhere to reassess their career choices. Whether you're burned out, your career has stalled, or you simply want to make a change, you have the power to pilot your own professional journey. During this session, Pamela Eyring will share the tips, tools, and resources you need to navigate your career to the next destination. This session will help protocol professionals identify their career development goals and navigate a successful career transition. Attendees will receive a downloadable career development checklist exclusively for protocol professionals.  
*Session sponsored by The Protocol School of Washington.*
- 14:15 - 14:30 **Learn More: PDI-POA's Committees for Communications and Events**  
 Catherine Wilson, Protocol, Stewardship & Partnerships Program Director, Notre Dame International  
 Chris Young, Chair, Governance and Ethics, PDI-POA  
 Lydia DeAngelo, Vice President, Events Committee, PDI-POA  
**Description:** A Conversation with PDI-POA's Vice President of Communications and Vice President of Events.
- 14:30 - 15:15 CONCURRENT SESSIONS
- Breakout - China's Diplomatic Protocol from the Perspective of Cross-Culture**  
 Julie Zhou, Associate Professor, China Foreign Affairs University (CFAU)  
 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.
- 14:30 - 15:15 **Breakout - Official Gifts: Theory and Practice**  
 Keith Lipert Speaker, Owner, Keith Lipert Corporate Gifts, Washington, DC  
 Tiffany Rushton, Director of Client Relations and Marketing, The Protocol School of Washington  
**Description:** This session will cover the purpose and meaning of the official gift in business, military, political and diplomatic settings. Keith will discuss the processes involved in gift selection, the art and science of choosing official gifts, and the relevant United States and international legislation associated with gifting. Bring your questions. Attendees will receive as a handout Keith's Official Gifts for Protocol Professionals Checklist.  
*Session sponsored by The Protocol School of Washington.*
- 14:30 - 15:15 **Breakout - Virtual Presence: Tips for Putting Your Best Face Forward.**  
 Jacqueline Whitmore, Founder, The Protocol School of Palm Beach  
 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.

- 14:30 - 15:15 **Breakout - Handling Gender-Neutral Pronouns With Style**  
Janika LeMaitre, Founder, The Better Professional  
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.
- 14:30 - 15:15 **Breakout - Diplomatic Protocol Gone Wrong: Lessons Learned**  
Valentina Kecman, Trainer, International School of Protocol and Diplomacy  
David Attree, Lecturer and Presenter, Self-Employed  
**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 its importance is only fully understood once things go wrong, as they have many times in the recent years. This session will cover the most common protocol fails during state visits around the world. What happens when a protocol officer fails to prepare? Can a protocol fail be the cause of a diplomatic scandal? How did the officials react when the wrong anthem was played during the state visit? These all are very common questions, but there are also numerous examples that involve the highest state officials paying great importance to protocol.
- 15:30 - 16:30 PLENARY  
**Selling the Value of Protocol: Your Boss, Your Colleagues, Your Organization**  
Ron Karr, Velocity Mindset®  
Melissa Stires, CEO and Founder, Stires Consulting  
**Description:** The importance of protocol is not lost on any of us. It is always at the forefront of our minds. We understand that protocol matters and is imperative to our organization's success. But how do we gain our leader's and colleague's understanding and buy-in of the essential role protocol plays? How do we get them to respond and actively engage with the knowledge that our deadlines and what can sometimes seem like way too detailed questions or instructions are mission-critical? In this session, you will find out how!
- Eliminate resistance
  - Gain Buy-In
  - Achieve Better Results- FASTER!
- How will you do this? By living and leading life with The Velocity Mindset- a roadmap for leadership with a fresh, practical, and motivational perspective. I look forward to seeing you in this highly interactive session! I look forward to seeing you in this highly interactive session!
- 16:30 - 17:00 **Closing Ceremony**  
Melissa Werner, President, PDI-POA  
Mauri Earl, Day Three Host | Director, International Affairs, The Church of Jesus Christ of Latter-day Saints, Washington, DC
- 17:00 - 19:00 **Closing Gathering**

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Chat with Presenter Terri Morrison

Chat with Presenter Ron Karr

Quarantine Protocol Stories

Favorite Recipes; drinks & food

Long-time Members

First time at the Forum

and plenty of open networking rooms to explore!

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