

EVENT PROTOCOL WORKSHOP

Office of Community Relations, Protocol and Special Events



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SECTION I

FIU PROTOCOL WORKSHOP

Purpose of workshop presentation:

- Go over some basic event practices that are common across all units at FIU
- Discuss President-specific event questions that have been raised by many units over the last year
- Offer some tips and tricks that we hope will help you manage your events more effectively and efficiently

Definition of Protocol:

1. The customs and regulations dealing with diplomatic formality, precedence, and etiquette.
2. The Protocol School of Washington's definition:

"The fine art and science of facilitating events for people of different cultures to find common purpose, engage strategic and sensitive issues, and create relationships and memories of a lifetime."

What are the functions of a protocol officer?

According to the President of the Protocol School of Washington, Pam Eyring, they define the functions as:

- Advise in the fulfillment of his or her obligation relating to community, state, national, and international protocol and cultural concerns.
- Plan and host special events and socials.
- Plan and orchestrate meetings, conferences, ceremonial events and functions.
- Represent organization at events.
- Utilize the organizational order of precedence for proper seating, introductions, drafting of speeches and testimonials.
- Travel locally and abroad with client or executives, when necessary.
- Greet and escort visitors.
- Research and manage overall selection of gifts.

- They serve in government, associations, academia, institutions, hospitality, healthcare, tourism, and corporations. They work in public relations, public affairs, marketing, event planning, trade development, executive offices, and customer relations.

Quality Matters

Offer a clean and safe environment.

- **Safety:** Our first duty is to keep our guests' safety in mind. This is inclusive, but not limited to: taping down loose wires to the floor, having police presence, if needed, knowing the appropriate seating capacity, knowing who to call in case of an emergency, if serving food, knowing food allergies, etc.
- **Cleanliness:** Not only are the event space and outside surrounding areas clear of dirt/mess, but details are also considered (e.g. garbage cans are not over-flowing, glass walls, windows are smudge-free, etc.)

Take time to work on the details.

- **Details:** Check spelling. Practice speeches. Make checklists. Brief your event staff. Details will go a long way!

Ensure you are meeting your goals.

- **Goals:** Each event is unique and may have specific goals in mind (i.e. fundraising, appreciation, etc.) Keep this in mind and meld them into your logistics planning (e.g. speeches, images, tag lines, etc.) to ensure an effective event.

"Inspect what you expect and expect the unexpected!"

In other words, if you fail to plan, you plan to fail!

Service Excellence

- Remember to treat every guest like they are important, regardless of their status.
 - It does not matter if you are dealing with students, visitors, alumni, elected officials or donors. Everyone that walks into your room should be treated fairly, respectfully and politely.
- Create memorable experiences.
 - National protocol expert Diane Brown, says: “Don’t just set a room, set an experience.” From the moment a guest enters an event/meeting, to the moment they leave, their experience should not only have special touches (i.e. warm welcome, gifts, photos, etc.) but should also be consistent (i.e. their entire time in the room should be positive and enjoyable).

Your front line is your bottom line.

- Regarding *big personalities*: “It is important for all event staff to know that we are there to serve them, not to be a servant.” — Diane Brown, Protocol Expert.
- Any staff who may have direct interaction with your guests (greeters, VIP escorts, tour guides, drivers, etc.) should be polite, dressed professionally, cheerful and knowledgeable about your department/institution.
- Though we should always strive for excellent service, especially to VIPs, it is important to remember that you should never be belittled as a person. Sometimes, in a simple miscommunication an apology takes you a long way. However, it is perfectly acceptable to hand off your more challenging guests to another staff member if you feel you cannot handle that specific situation.

We should always strive to be **Worlds Ahead** in our events.

EVENT PROTOCOLS

The following section will cover basic protocols at FIU as well as event standards across the globe.

Definitions

- Agenda — Program order
 - Normally prepared for the public or speakers (order of speakers and their titles/topics)
- Timeline — Timed program order (with cues)
 - Minute by minute outline of the event (speakers, A/V cues, stage direction, etc.) — normally for event coordinators
- Script — Timeline and Remarks together
 - Timeline inclusive of what the speakers will say — normally for event coordinators and speakers/MC
- Remarks — Talking points or speech for speakers
 - Speech — Normally for speakers

Event Checklist

- For a comprehensive outline, please see the addendums section in the back of this workbook. For a more detailed explanation, please email a request to Claudia Gonzalez (clgonzal@fiu.edu).

Event Timing

- When setting the day/time for your event, remember to consider the following:
 - Holidays
 - Annual community events
 - Work schedules
 - City traffic
 - Road closures due to construction or on-campus events
 - Sunlight direction (if event is outdoors)
 - Seasonal weather (if event is outdoors)

- Remember to plan your dissemination schedule.
- When picking day and time of your event, look at what key constituent group you are targeting. Decide what potential conflicts they may have (e.g. Downtown employee making a 4 p.m. event, Board member for FIU and a community foundation who has their annual event the same night you want to host, etc.) and set your schedule accordingly.
- A few industry standards of invitation timing protocols:
 - Standard practice for dissemination schedules for larger gatherings (50+) with mainly external constituents:
 - min of 8 weeks: save the date
 - min of 4 weeks: invitation (if no save the date)
 - min of 3 weeks: invitation (post save the date)
 - For mostly internal constituents:
 - usually a save the date is not necessary
 - you can stretch invitations to a minimum of 2 weeks
 - For smaller gatherings:
 - usually a save the date is not necessary
 - min of 3 weeks out from event to send the invitation

Invitations

- Key items to include:
 - Approved Logo
 - Invitation Line
 - Request Line
 - Occasion Line
 - Date Line
 - Time Line
 - Location Line
 - Special Instructions
 - Reply or RSVP Information
 - Other

- Logo – Use requesting departmental logo or university’s logo
 - You may find these at **logos.fiu.edu**
 - When departments/organizations are co-sponsoring, logos should be placed on the same line — unless there is a sponsorship level attached that requires a specific order and size.
- Invitation Line — Hosted by
 - Listed in precedence order — unless host yields his precedence (ex. President Mark Rosenberg and Dean John Rock invite you to...)
 - If invitees are of relatively equal rank, then list alphabetically
- Request Line: Invite phrase
 - Ex. “cordially invites you”
- Occasion Line: Type/Purpose of event
 - Type: Is it a meal, ceremony, announcement, etc.?
 - Purpose: To celebrate, to announce, in honor of
 - Date Line: The date the event will be held
 - Use day and date (ex. Monday, July 1, 2013)
 - Do not abbreviate the month (i.e. Say August, not Aug.)
 - Do not use ordinal indicators when using the year (i.e. July 1st, 2013 should be written as July 1, 2013) — if not using the year, ordinal indicators are appropriate to use
- Time Line: When will the event be held
 - Spell out the time (informal - 6:00 PM / formal – six o’clock)
 - For structured programs, we suggest including end times (6:00 – 8:00 PM)
- Location: Where will the event be held
 - Placement on the invitation is up to the department
 - However, it should be in Micro-Macro order, or vice versa (ex. Room, Building, Campus, University ... OR ... University, Campus, Building, Room)

- Special Instructions: Any important notes your guests should be made aware of
 - Ex. Attire, Transferability of invitation, Driving/Parking information, etc.
 - Reply Information: How should your guests confirm/decline their attendance
 - Recommendation is to list a direct contact (staff member's name) with email and phone number
 - Other: Any special information you would like guests to know
 - Ex. Institutional boilerplate, Honoree bio blurb, etc.

It is important that all units/persons named on an invitation approve the mock-up PRIOR to it being disseminated. Examples:

- If the Dean of the College of Arts, Sciences and Education is hosting the event, he or his designee should approve.
- If a speaker is coming for a lecture, they or their PR team should approve.

See an example of an invitation in the addendum section.

Precedence

There is an official precedence for all events, but it is important to know that each guest also may have “relative precedence” at a given event.

- This is important to know for proper seating arrangements, but more so for remark recognitions.
- One's position in an order of precedence is not necessarily an indication of functional importance, but rather an indication of ceremonial or historical relevance. In other words, official precedence means the standard order of rank of the group in question. Relative precedence, on the other hand, is conferring a higher precedence to a person than their current position dictates — or their order of importance related to the specific meeting/event.
 - Examples:
 - Recognizing alumni at an event is rarely needed, but at Torch Awards, alumni honorees and donors are always recognized.
 - In some cases, a donor may trump an elected official.
- Rules of thumb:
 - For recognitions, keep similar groups together (e.g. elected officials should be recognized at the same time, etc.)
 - Always go macro to micro or vice versa; do skip around with who is being recognized.

- Examples that we are most asked about (in precedent order):
 - U.S. Federal Government
 - President
 - Vice President
 - Governor of the State (when in that state)
 - Speaker of the House of Representatives
 - Former Presidents
 - American Ambassadors
 - Secretary of State
 - Foreign Ambassadors
 - Widows of Former Presidents
 - Members of the Cabinet
 - Senators
 - Governors (of other States)
 - Former Vice Presidents
 - Members of the House of Representatives
 - Mayors
 - State Senators and Representatives
 - U.S. State Government
 - Governor
 - Lieutenant Governor
 - Speaker of the House
 - U.S. Senator
 - State Cabinet Members
 - Member of the House of Representatives
 - Mayor of the City (when in own city)
 - State Senator
 - Mayor of the City (when outside their city)
 - State Representatives

- Business/Corporate
 - Chairman of the Board
 - President
 - CEO
 - Executive Vice President
 - Senior Vice President
 - Regional Vice President
 - Director
 - Manager
- FIU
 - President
 - Provost/Executive Vice President
 - Senior Vice President
 - Vice President
 - Vice Provost
 - Associate Vice President
 - Assistant Vice President
 - Deans
 - Executive Directors of Programs
(ex. School of Environmental Arts and Society)
 - Department Chair
 - Director

Board Members

- FIU has four main boards:
 - Board of Trustees (BOT)
 - Milly Bello (bellomi@fiu.edu)
 - Board of Directors (BOD)
 - Christy Martinez (chrmarti@fiu.edu)
 - President's Council (PC)
 - Barbie Galvez (bagalv@fiu.edu)
 - Alumni Association Board of Directors (AABOD)
 - Simone Worsdale (sworsdal@fiu.edu)

Invitations should be approved by the Office of the President (Claudia Gonzalez) before they are sent to the boards.

Board liaisons should always be notified if their members (specifically the officers and/or the entire board) are invited to events.

Though we realize our board members can hold multiple roles on campus, out of courtesy, we ask that you at the very least send the board liaisons your event flyer/summary. Board members are often used to going to them for everything. It shows lack of communication when they cannot appropriately respond to their members.

Building Maintenance

- Event Managers should be in communication with Building Manager (if applicable), or with Facilities Management directly, at all times, to ensure the upkeep of any event space under their purview.
- Event spaces should be ready to host an event at all times.
- Walkthroughs should be scheduled with Claudia Gonzalez for any event at which you expect the President to attend.
 - First walkthrough should be held a minimum of ten (10) business days prior to event.
 - Upon set up completion, Claudia Gonzalez should be contacted for the final walkthrough.

Facilities Checklist

- The Office of the President has a checklist that can be useful in the routine maintenance of event spaces.
- To receive checklist, please email a request to Claudia Gonzalez.

Seating Protocol:

Theatre Style:

- Reserved Seating
 - Speakers/Platform Party
 - VIPs (donors, board members, community leaders)
 - University Administration, when applicable
- If anyone is to be recognized from the audience, ensure that the speaker knows where they are seated ahead of time.
- Ensure that all speakers have the appropriate briefing on stage management.
- As mentioned already, precedence matters!!!
- For the seating area: make sure placards say “Reserved”. However, if there are guests who need to be placed in a specific seat for the event, then we highly suggest that you use their last names on the placards so no one takes their seats.
- Speaker should be made aware of this so they can point them out during their speech.
- Stage management includes: how to enter/exit stage, how to use audio/visual equipment, where beverage will be located at/near podium, etc.

Podiums NOT to use:



DO NOT use the podiums in the pictures. Since banner flags can be easily damaged/wrinkled, we are moving away from this look as a university.

DO use the ones shown in the upcoming slides (“staging protocol”)

- Clear Acrylic with logo engraved
- Wood with logo placard

Important Notes:

- Podium should include a microphone with stand, unless otherwise requested by the speaker(s) — e.g. lapel, hand-held, etc.
- Podium should have light — either connected, or overhead.
- There should be nothing placed on the podium except the script (i.e. No notebooks, laptops, glasses, etc.) unless specifically requested/approved by the speaker.
- A tall glass/bottle of water should be provided (preferably in a shelf inside podium, or table near podium, or at his/her seat).

Staging Protocol Example with Approved Podium



Example: Outdoor event (clear podium).

You will note...

- Draping around/behind the riser
- Stair rails to the side of riser for safety purposes (even if it is low to the ground)
- Plants around stage fill space and add simple decor

Staging Protocol

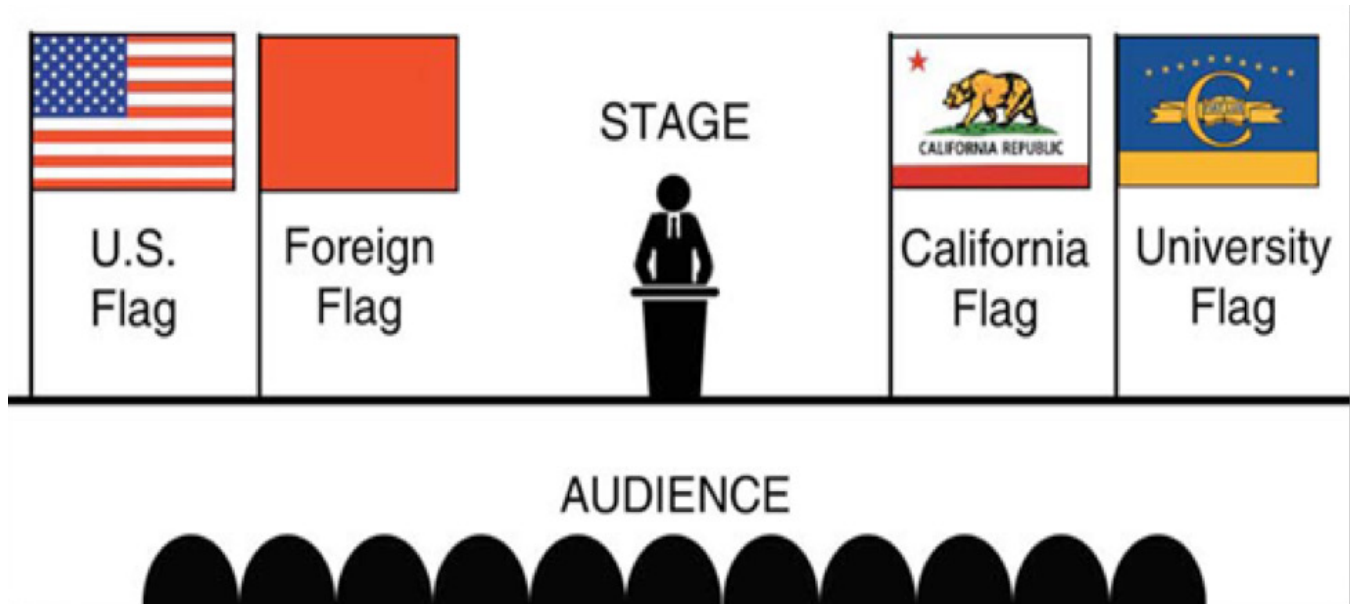


Example: Indoor event (wood podium)

You will note...

- Draping behind stage and around panel table
- Water is at each seat
- Flags are in proper order
- Projection is showcasing event flyer/summary
- Stair rails to the side of riser for safety purposes

Flag Protocol



Standard protocol stipulates:

- That the national flag stand alone to the audience's left.
- It is still appropriate to bunch the flags together, but they must (a) still be in precedence order and (b) the national flag must showcase the eagle top, and/or the national flag must be higher than the others.
- Poles, bases, finials and fringes should all match (Ex. If there is a silver base on the national flag, all other flags should also be on silver bases).

Regarding the photo:

- If no foreign flag is necessary, U.S. flag stands alone — or all three are bundled together (in rank order).
- If there is a visiting state/agency/organization flag to be showcased, that will go next to that flag's level (ie. State next to state, university next to agency, etc).

Official Backdrops



Though not necessary, backdrops are great for official event photos — and can liven up a dull corner of a room!

If you are planning to purchase one, we do suggest that you purchase a matte finish (less glare in photos) and ensure you can properly store it after each use (so that it does not get wrinkled/damaged).

You will note the framing of this photo does not cut anyone off, or shows the ends of the backdrop. This is especially important when you are considering mailing the guest of honor photos or promote the photos in marketing materials. Think: Can this photo be framed?

Seating Protocol:

Dining (Event Venue)

- Pre-determine table arrangements as well as seating charts (if necessary).
- President's table should always have tent cards with guest names.
- For buffet style service, ensure that event coordinator and catering staff have agreed on the best location and line management.
- Menu cards should always be included to ensure guests are aware of potential food allergies.
- Make sure your table assignments are in a logical order.

For table assignments:

- If your tables are numbered, the table layout should be in numerical order.
- If they are NOT in numerical order, or if you are using non-numerical names, ensure you have a table schematic available at each entrance to your event room — and/or staff stationed at each entrance with the schematics to help guide guests to their tables.

Additional notes:

- For plated service, ensure that guest of honor is served first.
- For buffet of 200+, we recommend setting up to allow for double lines per station (i.e. Guests can plate themselves from each side of the table).
- For plated service, ensure candid conversations are had with catering team and how serving/pick up will affect your program (Ex. No service while speakers at podium, pre-plating salad and/or dessert, etc).

Seating Protocol:

Dining (Event Venue)



In this picture you will note:

- The low centerpieces, which allows for conversations across the table and easy sight to the stage.
- Since this was a large event, pre-plated salads are acceptable.
- Sponsor recognition was on the table but not overstated.
- Table number was visible ← **Note:** Your table numbers should be in order!! When numbers skip around in the room, makes it very hard for your guests to find their seats.

Hints on how to remember which glass is yours:

- Make a “b” with your left hand, and “d” with your right hand. If looking at the plate, “b” is for bread (left hand, means left side of plate) and “d” is for drink (right hand means right hand of plate).
- If you don’t want to make hand signs at the dinner table, you can also use the acronym BMW: bread, meal, water.

Parking & Signage

- Full considerations should be made for all types of guests when designating parking for events (i.e. disabilities, VIPs, distance from event, etc.)
- Directional signage should be coordinated through the Office of Parking & Transportation. Signage should be placed along all routes from each point of entry (regardless if directions were sent to guests prior).
- If attendants are needed, please work with the Office of Parking & Transportation to discuss expectations.

Additional Notes:

- Last year, official signage policies were released, so ensure you review them.
- Always be clear about your expectations with signage and parking instructions (i.e. event name, specific space for them to block for parking, greeting for attendant to give guests, etc.)
- For events with parking lists, always ensure parking attendants have the most accurate list of names for potential guests who will be using that area. Best to email their supervisor a copy the day prior as well as hand-deliver a copy to the attendant just prior to your event.

Nametags

- Should be professionally printed.
 - By professionally printed, we mean not hand-written.
- Magnet tags are expensive but preferred by guests as they do not put holes in their clothes.
 - Clip tags are an acceptable alternative, BUT are usually difficult for women to wear as they rarely have lapels or shirt pockets.

- Details on the tags vary event to event. There are two common practices:
 - Line 1: Logo
Line 2: First name (large print)
Line 3: Last name (small print)
 - Line 1: Logo
Line 2: Full name
Line 3: Affiliation
- Be careful with guests who have honorific titles or nicknames.
 - Honorific titles are those given by office or education (Senator, Dr., Reverend, etc.) Some guests are very particular on how they are addressed by others, so always check how they prefer to write their nametags.
- Check your spelling!!
 - Typos are easy to overlook, especially if you are handling the tags and all other event details (your brain can only handle so much information). Take the time to double check all spelling, or ask someone to double check your work with fresh eyes.

Escorting VIPs

- Always open the door for your guest, and allow them to enter first.
- If directing them to a location, it is appropriate to walk a ½ step in front of them. Never walk in front or block them; always walk to their side.
- If you are also with an administrator who knows where to go, allow them to lead the VIP.
 - Rule of thumb: If you need to get the VIP/administrator to their set location, but they are amidst conversation, stand in their view and allow them 1 minute to wrap up on their own before interrupting.
- Respect their personal space.
- It is ideal to stand behind the person your VIP is speaking to and make eye contact. It is important to give them the opportunity to wrap up the conversation ON THEIR OWN. However, if you are pressed for time, give them at a minimum 1 minute before politely interrupting the conversation. These cues should always be discussed with your VIP so that they are aware as to why you may be doing this.
- Do not be too pushy or territorial with VIPs. Give them the respect of being self-sufficient while still offering guidance and assistance.

Additional notes:

- Be prepared to answer any questions in regards to the event or university.
- If asked a question to which you do not know the answer, let them know you will find out the information and get back to them immediately.
- Have research on who the VIPs are at the event, including photos, so staff who may not be familiar with the VIPs will be able to spot them.
- Always ensure your VIP has what they need for their event (e.g, names of who they will be seated next to, event program, remarks, etc.)

Audio/Visual

- Always check with your speakers on their preferred A/V needs.
- Produced videos should always be high quality.
 - Video production: Because videos appeal to multiple senses, your guests are more likely to remember this aspect of your event. Therefore, it is imperative to produce good quality pieces (e.g. sound, high-res images, listing names of speakers, smooth transitions, etc). In other words, if you are going to do it, do it well.
- All A/V should be tested prior to each event using the equipment on site.
 - Testing: Just because it worked in your office, does not mean it will work at the event site. This is even truer if you are doing a presentation abroad!
- Never stream videos from websites such as YouTube.

**** Additional note on PowerPoint presentations:**

- When creating presentation slides, consider contacting the facility's audiovisual department to determine the aspect ratio (4:3, 16:9, or 16:10) so your presentation is optimized with the room's projector and screen capabilities. However, when converting to 16:9 from a presentation originally created in 4:3 there is stretching that occurs with graphics and pictures, making faces look fatter and charts or graphs appear incorrectly. It is best to start the presentation at the proper aspect ratio for the projected source.
- Also, you may want to consider projecting the FIU/Department logo along with the event name — AND/OR — adding it as a slide to the start and end of presentations.

Photography

- A run-through with your photography team is important to conduct prior to the event.
 - Run-Through: In order to get the desired photos, it is critical to let your photographer(s) know of your vision (i.e. how you will use the photos). This will help them choose the best lighting and angles.
- Respect guests' personal space and requests.
 - Personal requests: Guests in private conversation rarely like having photos taken of them. There will also be guests who prefer not to be photographed. Respect their personal wishes.
- Avoid drinks and nametags in photos.
 - Drinks: Especially for those events that will use photos as marketing materials, consider the message you are trying to portray.
- Many guests will often ask for copies of the photos taken. Have a plan!
 - Copies: Prior to the event, decide whether you will send out photos upon request or to all guests. Make sure your staff is aware of the method so that, if asked, they can respond and take action accordingly.

Gifts

- When gifts will be provided to a guest of honor, be cognizant of:
 - Culture
 - Example — Chinese culture considers clocks a sign of death.
 - Religion
 - Example — Do not give a person of the Jewish faith a crucifix.
 - Gifting history
 - Gifting History: Have other university officials given your VIP a gift? Ensure no double-ups occur!
 - Advancement units: this can be easily tracked via actions in Raiser's Edge.
 - Travel requirements
 - Do they have space in the bags? If international, do they have customs requirements? Are the items perishable?
 - Ethical restrictions
 - Most elected officials can only receive gifts under a certain price point or have to return it/report it/pay for it. Know the rules!

- For a state-by-state breakdown, you may go to ncsl.org/legislatures-elections/ethicshome/50-state-table-gift-laws.aspx
 - If you have any doubts, contact Governmental Relations.

Attire

- For guests:
 - It is important to let your guests know how to dress for your event.
 - Do NOT assume they all share the same definitions as you!
 - Examples:
 - Formal — To some this means business, to others this means ball gowns and tuxedos.
 - Gala — To some this means ball gowns and tuxedos, to others it means cocktail attire and sports coat.
- This is especially important when inviting guests from other nations/cultures.
- If there is something you specifically do NOT want them wearing (e.g. casual, but no jeans) then make it known to your guests. You should never make any of your guests feel uncomfortable — this is especially true for women!!
- For staff:
 - Dress for the occasion, but always professionally.
 - Always wear your nametags (right side).
 - FIU pins should be worn.
- 55 percent of a first impression is based on the way you look. Looking professional does not mean wearing a suit. This means that even if it is a BBQ, your team should still be put together (i.e. shirts ironed, well-fitted bottoms, event-appropriate shoes, etc.)
- Industry standard states that nametags are worn on your right side for two reasons: (1) logos are often worn over your heart — left side (2) when you shake someone's hand, it is normally with the right — the line of vision automatically goes up to the other person's name, which is on their right side, and therefore the name tag is easily viewed.
- Pins could be the university one or departmental. But remember that you are our brand ambassadors so it is important you showcase your pride! It is also nice to have pins available for guests at the event.

Staffing/Volunteers

- A full run-through with your staff is always recommended.
- Entrances and registration tables are normally where most questions are asked.
- Know who the points of contact are.
- Consider their well-being.
- I know we all love being in charge, but we have to trust our team members!! Bring them into the fold. Let them understand the purpose for the event, what the program is, who the important guests are, etc.
- Staff assigned to registration/entrances MUST know the event basics:
 - Know where bathrooms/exits/smoking areas are.
 - Know seating arrangements.
 - Know who your speakers/VIPs are that may need assistance upon arrival.
- Everyone working the event (staff, volunteers, vendors, etc.) should know who to call if they are asked a question they don't know the answer to, or need assistance in troubleshooting. Emergency contact cards, text groups, and walkie-talkies are just a few examples of how to inform your staff of where to go if they need help.
 - Make sure your staff is given appropriate breaks (including restroom and meal breaks).
 - If your event is longer than 3 hours, you should definitely be providing your team something to eat/drink. Out of courtesy and good business practice, this includes your vendors (if not already included in their contracts).

PRESIDENT'S OFFICE EVENT PROTOCOLS

Presidential Request Forms

(An example of each request form is provided in the addendum in the back of this workbook.)

- Form A — Presidential Approval
 - Utilized for: letters, note cards, press releases, invitations, e-mails
 - This form requires two signatures — the initiator as well as a Dean/VP (note, academic units often need to get provost approval unless they are annual/semester documents and have already had templates pre-approved). If Dr. Rosenberg has a question, he will often contact a direct report or administrator so we like to ensure they are not caught off guard by our calls.
 - 10 business days minimum are required for any approval.
 - The President only reviews and signs items at Signature Meetings, which take place on a bi-weekly basis.
- Form B — Event Request
 - University-hosted speaking engagements (on or off campus).
 - Please note that his schedule fills up months in advance. It is important all requests are sent to our office in a timely manner.
 - Please note that just because a request was submitted and you are notified that he is available — does NOT mean the President is confirmed. Remember that he has many conflicting events, and last-minute changes can occur (though we promise to avoid them as much as possible). His scheduler will advise if/when a request is confirmed.
 - **Note** — Advancement units: you have your own request form. Contact Cathy Torres (ctorres@fiu.edu) if you do not have the correct form.
- Form C — RH Event Request
 - Events co-hosted by the President at the Ronald W. Reagan Presidential House.
 - Same notes listed above regarding scheduling apply.

Presidential Briefings

- Preparation/Approval Meetings
 - To be conducted with key Presidential staff (i.e. Chief of Staff, RH House Manager, Assistant Chief of Staff, etc.).
 - The purpose of these meetings (if necessary) is to get final approval on any questions/concerns you may have about your event.
 - **Note:** President may request this meeting to occur directly with him, but those will be scheduled upon his request only.
- Briefing Meetings
 - Scheduled no less than one month out.
- Briefing Documents
 - Please refer to sample Briefing document in the addendum section in the back of the workbook.
- De-Briefing Meetings
 - **Note:** President may request this meeting to occur, but those will be scheduled upon his request only. However, department heads and event coordinators should meet collectively to discuss the event that occurred for best practices for next planning.
- Walkthroughs
 - At minimum, the participants should be: event coordinators for requesting department and key Presidential Staff (Chief of Staff or Assistant Chief of Staff)
 - Where necessary, you may also need to include: External Relations protocol team (university-wide event), Donor Relations event team (donor naming, recognition or stewardship event), Logistical support staff (as needed), and Catering (if necessary)
 - For off-campus events — Schedule no less than a month out.
 - For on-campus events — Schedule no less than a week out.

Budgets

- All requesting departments are responsible for all expenses related to the event.
- Any quality control or quality enhancement requests from the President that require funds are also the responsibility of the requesting departments.
- These are inclusive of events at the Reagan House, unless otherwise agreed to by the President.
 - Examples of budget items include but are not limited to catering, floral, rentals, A/V, gifts, police, parking, etc.
 - Examples of “quality control” and “quality enhancements” include but are not limited to A/V (staging, lighting, video production, etc.), signage (directional, greeting, etc.), painting/cleaning of surrounding areas, Safety, etc.
 - To avoid any unforeseen budget expenses, we highly recommend following our approval/briefing timelines.

Room Ambiance

- Centerpieces (if used) should allow for visibility across the table and to all speakers.
- Events should be inviting, yet festive. Special touches are always appreciated by your guests!
 - Special touches: an example was the HWCOT Inaugural Celebration Reception where photo frames of the history of the college were placed on each table, including targeted photos with VIPs we knew would be in attendance at the event.
- Plants and floral arrangements can always help fill up a room, if needed.
- Music should always be part of your program.
 - Music: not necessarily a performance, but at the very least background music to go with whatever mood you are trying to set.
- You do not have to overdo FIU colors.
- Room temperature should be comfortable.
 - Temperature: If you have a large event, the air conditioner should be lowered at least 1 hour prior to event start. It will be cold for those first few guests, but by the time the bulk of your guests arrive, it will be the right temperature for the event.

Event Staffing (non-RH)

- Regardless of Presidential Staff attendance, the President requests that a member of the requesting department be assigned to him.
- This person should be prepared to greet him upon arrival, brief him on the event (timeline, site check, etc.), and support him as needed throughout his time at the event.
 - This staff member should have the authority to make any desired changes the President may request on-site and day-of.
 - Staff member should have a checklist of VIPs with whom the President would need to meet and mingle. A schematic of the room and where they will be seated is essential to be able to take the President to those locations.
 - Staff member should also carry bios/research of the VIPs in case further information on the guest is required. This is often coordinated through the Advancement research team.
- Corresponding Dean and VP should also be appropriately briefed and staffed in the event that Dr. Rosenberg needs them.

Event Staffing (RH)

- All Reagan House events are managed by House Manager Olga Hernandez (hernando@fiu.edu).
- For larger events (i.e. receptions, salons, recognition events, etc.), staff from the requesting department is required to work the event as determined by the house manager.
 - Roles include but are not limited to greeting guests, guest registration, catering management, set-up, and program management.
 - We ask that all staff helping the house manager discuss attire. We now have official event jackets.

Dining Protocol (non-RH)

- Easy access to the podium is critical.
 - This does not necessarily mean the table closest to the podium. Considerations like how tight the tables are and whether he is leaving early should be made in order to make a decision on best placement.
- For round tables: Guest of Honor should be seated to his right. Mrs. Rosenberg should be seated to his left.
- For rectangular/square tables: Guest of Honor should be seated directly across. Mrs. Rosenberg should be seated to his left.
- The President's table should have assigned seating-name cards (even if others do not).
- Ensure food is served hot.
- Seating chart:
 - A final chart must be provided with the briefing document.
 - Tents cards should be printed and placed prior to event start.

Dining Protocol (RH)

- Maximum capacities
 - Dining room — 18 (including Dr. and Mrs. Rosenberg)
 - Courtyard — 150, standing/cocktail tables
 - Living room — 40, rounds (not preferred, must have presidential approval)
- Seating charts can be recommended to House Manager, but the President will approve final seating.
- Menus are set according to presidential preferences. If your guest of honor has any dietary restrictions or preferences, we need to be made aware within 1 week of the event.

RSVP Lists

- We must receive RSVP lists for all events in which he is participating.
- Lists should have the following elements:
 - Full Name
 - Guest Name
 - RSVP
 - Affiliation
 - Title (when possible)
- Sometimes, we may ask you to include guest “blurbs”

For guest blurbs: This means 2-5 sentence summary on who they are.

- Reasons for blurbs — (1) he may not know much about the audience; (2) they may be donors; and (3) he may need talking points to help carry the conversation.
- Exception — Student Events — For them, we generally ask for major, year, expected graduation date.

Scripting Remarks

- President’s remarks are drafted by the requesting department or Media Relations. If using the President’s speechwriter, please ensure they receive at least one month’s notice of the request with appropriate event details.
- Special requests
 - A minimum of size 16 type size; Comic Sans Font; 1.5 spacing.
 - Talking points should be in bullet form while speeches should be broken out by the natural pause of each sentence.
 - Phonetic spellings of uncommon names must be included.
 - Drafted remarks must be consistent with the message you are trying to evoke at your event.

Note: Speechwriter is Madeline Baro (mbaro@fiu.edu).
In her absence, please contact Angela Nicoletti (anicolet@fiu.edu).

Please recall the earlier note on scripts — if you are asking him to recognize people in the audience, it is imperative for the script to include where they are seated so that he may point to them as he speaks.

- Similarly, the President should only recognize key VIPs — he should not be assigned to make all the recognitions (donors, honorees, etc.) for the event ... that should be assigned to a VP, Dean or MC.
- If he is asked to do so, a real-time recognition list should be provided to him prior to program start (based on actual attendance). The precedence order is as follows:
 - Elected officials (Federal, State, then Local)
 - Key community leaders (business, donors, etc.)
 - Board of Trustees members
 - Chairmen of any other FIU boards
 - ** Remember that “relative precedence” may change this order. The university’s protocol officers can assist with this if needed. **

WHO TO KNOW

University Protocol Officers

- Dania Pearson-Adams (daniapa@fiu.edu)
- Breny DaParre Garcia (daparre@fiu.edu)

Office of the President

- Event Protocol, Walkthroughs, and Final Approvals — Claudia Gonzalez (clgonzal@fiu.edu)
- Scheduling & Briefings — Valeria Espina (vespina@fiu.edu)
- Signature Events & Top Donors — Breny Garcia (daparre@fiu.edu)
- Ronald Reagan Presidential House — Olga Hernandez (hernando@fiu.edu)

Notes:

- Before contacting the President's office, your scheduling request **MUST** be vetted through your corresponding department head (i.e. Dean or VP) **AND** any applicable event-specific department (i.e. Donor Relations, External Relations, etc.) first.
- Some units (like Advancement) have strict pre-approval processes. Please follow any internal processes that are deemed necessary by your unit.

Community Relations, Protocol and Special Events — External Relations

Points of Contact:

- Protocol Management — Dania Pearson-Adams (daniapa@fiu.edu)
- Institutional Events — Sandra Utset (utsets@fiu.edu)
- Signature Events — Jehnny Rivera (jprriver@fiu.edu)
- Commencement & Ceremonies — Lynda Rodriguez (romaguel@fiu.edu)
- Community Relations — Ayxa Vecino (avecino@fiu.edu)

Events they assist:

- University-wide events (e.g. commencement, lectures, etc.)
- Building-related events (e.g. groundbreaking, namings, etc.)
- Institutional lectures/forums/panels
- Large-scale retirement festivities (e.g. Rosa Jones)
- Large-scale signature events (e.g. Sapphire Celebration)

External Relations

- Media Relations
 - Maydel Santana (santanam@fiu.edu)
- Marketing & New Media
 - Eddie Merille (emerille@fiu.edu)
- Design Services (printing, design)
 - Yessenia Abolila (yabolila@fiu.edu)

Donor Relations and Stewardship

Points of contact:

- Frances Alonso (falonso@fiu.edu)
- Amanda Santa Cruz (asantacr@fiu.edu)

Events they assist:

- Recognition events (e.g. dedications, plaque unveilings)
- Stewardship events (e.g. University Wide Donor and Scholar Recognition Breakfast)
- Cultivation events (e.g. VIP reception, donor-hosted events at their home)

Note: Sometimes Advancement & External Relations will work on the same event (ex. naming of a building is an official university event, but involves a donor).

Alumni Relations

Points of Contact:

- Paulina Muñoz (munozpau@fiu.edu)

Events they assist:

- Alumni reunions (e.g. Silver Pride)
- Alumni recognition events (e.g. Torch Awards)
- Alumni chapter relations (in and out of Miami)

Governmental Relations

- Ana Herrera (herra@fiu.edu)
- Inviting elected officials to your event:
 - Invitations must be sent to Governmental Relations' office and they will forward to their appropriate contacts.

Should be notified if elected officials are attending your event & may assist in staffing. To learn more about our state and federal priorities, please visit government.fiu.edu.

Spirit Teams/Rentals

- For Cheerleaders, Dazzlers, the Band, and Roary
 - Athletics Marketing handles all reservations for spirit teams.
 - Please fill out the “Mascot and Spirit Appearance Request Form” on the athletics website and email it to Karina Saud (ksaud@fiu.edu).
 - Please note that depending on the requested length of time and/or time of day of performance, your unit may be asked to provide food and beverages to team members. These requests will normally come via the team and not Athletics.
- Panther Arch — Rumor Has It Party Rentals, Giovanni Fernandez, owner, or Krysten Gonzalez, 305-265-2002 info@rhirental.com.

Logistical Support: U-wide & MMC

- **University Police**
 - Event request form located on **police.fiu.edu** in the special events section.
 - Questions related to MMC can go to Lt. Michael Gonzalez (mgonza@fiu.edu).
- **Parking & Transportation**
 - Event request form: **parking.fiu.edu/permits/information/events**.
 - Additional questions can go to Travis Stokes (tstokes@fiu.edu).
- **Environmental Health & Safety**
 - Key policies: **ehs.fiu.edu/Programs/General%20Safety/Pages/Policies.aspx**.
 - Additional questions can go to Wilfredo Alvarez (wjalvare2@fiu.edu).
- **Emergency Management**
 - Ruben Almaguer (rdalmagu@fiu.edu).
- **Facilities Management**
 - Event request form: **myfacilities.fiu.edu/events/EventRequest.aspx**.
 - Contact information: Jimmy Almansa (almansaj@fiu.edu).
- **Custodial Services**
 - Requests can be sent to **custodial@fiu.edu**.
- **Media Technology Services**
 - Services request form: **mtshelp.fiu.edu**.
 - For general questions (estimates, invoices) contact Lisette Hernandez (lisette@fiu.edu).
 - For photography, questions should go to Hilda Aguilera (aguilera@fiu.edu).

Logistical Support – BBC

- **Wolfe University Center:** Details on this facility can be found on their website. For specific questions, you may contact Director Scott Jones (scojones@fiu.edu).
- **Kovens Center:** This facility has a very detailed website that can assist you in planning your events. For specific questions, you may contact Tiffany Pendlebury (tpendleb@fiu.edu).
- If you are unsure about how to address an issue, you can contact Director of Operations Julissa Castellanos (castellj@fiu.edu).

Logistical Support - MBUS

- Website: **mbus.fiu.edu**
- To schedule an event or visit event spaces, contact Liane Sippin (lsippin@fiu.edu)
- Special notes: Closest parking is the Park@420 Garage (16th and Drexel Ave).

Logistical Support – JMOF

- Website: **jmof.fiu.edu**
- Space and functionality of this building is limited. Therefore, it is best to directly contact Jo Ann Arnowitz, Executive Director/Chief Curator (director@jewishmuseum.com) who can best offer you advice on whether your event can be successfully coordinated on this site.
- **Special Notes:** If you choose to have a valet service, you must use Double Park. Know that they must pull permits with the city, which takes 2-4 weeks.
 - For valet services to use at JMOF, contact Daniel Radrizzani (DOUBLEPARK) P: 305-932-8600 ext. 206 | M: 95-444-7835 | F: 305.704.8171 (danny@doublepark.org).

Logistical Support – Wolfsonian

- Website: **wolfsonian.org**
- The museum has an online reservation system for space rental and tour requests.
- **Special notes:**
 - Closest parking is the Pelican Parking Garage (1027 Collins Ave).
 - They utilize a preferred in-house caterer.
- Rates are \$7 for up to 3 hours and \$12 for 3 to 5 hours.

Logistical Support – FIU @ I-75

- Website: **broward.fiu.edu**
- For questions about the center, you may contact Director Marisa Salazar (msalazar@fiu.edu).

FIU Properties

- Modesto A. Maidique Campus: 11200 SW 8 St.
- Biscayne Bay Campus: 3000 NE 151 St.
- Engineering Center: 10555 W. Flagler St.
- FIU @ I-75: 1930 S.W. 145th Ave.
- Downtown: 1101 Brickell Ave.
- Miami Beach Urban Studios: 1618 Washington Ave.
- Wolfsonian Museum: 1001 Washington Ave.
- Jewish Museum of Florida: 301 Washington Ave.

Event Spaces

- MMC – Graham Center
- MMC – Frost Art Museum
- MMC – Wertheim Performing Arts Center
- MMC – CBC Special Events Room
- MMC – Stadium Club
- MMC – MARC Pavilion
- BBC – WUC Ballrooms
- BBC – Kovens Center

These are not all the event spaces available on campus, but the most commonly used by units.

SECTION II

The Principles of Professionalism

The following are your presence power points. They do not show up on standard tests measuring intelligence or technical expertise, but they identify you to everyone you meet:

- Your eye contact
- The entrance you make
- The way you shake hands
- Your posture
- The way you introduce yourself
- The way you introduce others
- Your people skills

*“There is only one rule for being a good communicator: Learn to Listen.”
— Christopher Morley*

Eye Contact

Your Eye Contact:

- Tells the other person you are listening
- Actually makes you a better listener
- Focuses attention on the individual and makes him or her feel important while you look in control.

Direct eye contact should be made in the range of **40 to 60 percent** of the time. Less than that and a person is seen as shy, shifty, hiding something, or lacking self-confidence and authority.

If the eye contact is more than 60 percent, a person will feel put on the spot, examined, or under a microscope, so to speak.

If you sometimes get feedback that you are coming across as critical or in a negative manner, and you don't mean to do that, check your eye contact. You may be looking more than 60 percent and people see this as being pinned down. When you are talking, watch your listener's eyes to see if you are holding his or her attention. It does not matter what you say if the person you are speaking to is not listening.



Business



Social



Intimate

Improve Your Mingling Proficiency

Small talk:

- Breaks the ice
- Establishes a connection
- Doesn't require original or profound conversation
- What persons say to each other to be polite

Practice these tips to improve your small talk ability:

- Be well-informed
- Focus on the other person and less on yourself
- Don't interrupt
- Do listen
- Think before you speak
- Always close a conversation before walking away from the other person

Avoid these subjects with others you don't know very well:

- Your health or diet habits
- The cost of things
- Personal questions such as, "How much money do you make?"
- Mean gossip
- Off-color jokes
- Controversial issues

HANDSHAKING: THE ULTIMATE GREETING

Handshaking is a form of communication that needs no explanation and one that is never misunderstood.

Always be ready to initiate or receive a handshake in business and social arenas.

- The right hand should always be free.
- The left hand should hold only one item.
- The name badges should be on the right side as that is the line of vision your eyes go to when shaking hands.
- Extend your hand with the thumb up and fingers out.
- Don't extend your hand with the thumb down and fingers curled.
- Web-to-web.
- Shake from the elbow, not the wrist or shoulder.
- Two smooth pumps.
- Shoulder-to-shoulder stance.
- Avoid fragrance on hands.
- Avoid large rings on right hand.



*Handshaking Is
Non-Verbal Communication*

Always shake hands:

- When introduced to a person and when you say good-bye.
- When someone comes into your home or office to visit you.
- When you meet someone outside of your home or office.
- When you enter a room, are greeted by friends or business associates.
- When you are congratulating someone who has won an award or given a speech.
- With those nearest you, your host, and with whomever you meet as you move around the room.
- When you are consoling someone.

Handshaking Internationally

Enhance your international perspective by following these hints and tips:

- A world-class competitor is aware and at ease in any arena.
- In the U.S. business arena, it doesn't matter who offers a hand first. The person who extends a hand first has an advantage. They are establishing pluses in the business arena such as: control, taking the initiative, and being direct. The woman who extends her hand immediately eliminates any hesitation a man might have in offering his hand.
- Throughout the world, a handshake is appropriate in a business relationship.
- In certain cultures (Arab), a handshake may progress to embraces and kisses on both cheeks with men.
- Protocol dictates that you shake hands with everyone in a group. Even in a crowded room, don't stop halfway through with a "hello everyone" wave to the rest. This is considered a rejection of those you omitted, and everyone takes notice.
- Shake hands on arrival and departure. The grip is firm, never hard. In some cultures, it will be lighter, but avoid the dead fish fingertip handshake, which is internationally unpopular.

Handshaking Styles Around the World

Western and Eastern Europeans reshake hands whenever they are apart for a period of time. It is polite to shake hands when you leave for lunch and when you return. Shake hands with the oldest person or the one of senior rank and on down the line. The ranking person extends his or her hand first. Women shake hands with each other and with men. It is up to the woman to initiate the handshake with a man. When a woman fails to extend her hand to a European man, she loses credibility.

The **French** shake hands in one brisk stroke. **Europeans and Latin Americans** execute a light handshake that lingers twice as long as an American handshake. Pulling the hand away too soon is interpreted as rejection.

In the **Middle East**, a handshake is rather limp and lingering. Do not pull your hand away. Take your time. Shake hands with everyone on arrival and departure.

In **Eastern Asia**, you will encounter variations in handshakes from country to country. Some countries incorporate bows, others shake both hands at once, others have a longer pumping style.

In **Japan**, a light handshake and a nod of the head are appropriate. Shake a woman's hand in the **USA** and abroad just as firmly as you would a man's hand.

PROTOCOL: No matter where your business takes you, here or abroad, make sure every meeting or social begins and ends with a handshake.

INTRODUCING YOURSELF

Introducing yourself is how you make yourself known to others. How to introduce yourself with confidence and authority. It is your duty to introduce yourself.

When do you introduce yourself?

- When you recognize someone and he or she does not recognize you.
- When attending a gathering, business or social.
- When seated next to someone.
- When the person introducing you does not remember your name.
- A friend of a friend.

PROTOCOL: Never give yourself an honorific when introducing yourself to a peer.

Webster's Dictionary defines honorific as “conferring honor; showing respect; as an honorific title.” Don’t introduce yourself and use an honorific such as Mr., Ms., Dr., etc.

Formula for Introductions

KEY: Greater Authority RECEIVES Lesser Authority

Persons of greater authority receive persons of lesser authority, regardless of gender.

PROTOCOL: The name of the person of **greater authority** is always spoken first. The name of the person of **lesser authority** is always spoken last.

Do not reverse the order.

CORRECT: “*Mr./Ms. Greater Authority, I would like to introduce Mr./Ms. Lesser Authority.*”

EXPLANATION: If you introduce Greater **TO** Lesser, you reverse the order of precedence.

INCORRECT: “*Mr./Ms. Greater Authority, I would like to introduce YOU TO Mr./Ms. Lesser Authority.*”

SITUATION: President of the United States receives a private citizen.

CORRECT: *“Mr. President, I would like to introduce to you Mr. John Doe, legal correspondent for The Wall Street Journal.”*

NOTE: You may also use a more formal phrase, *may I present*.

PROTOCOL: The President’s surname is never mentioned. He is spoken to and addressed as Mr. President or Sir.

Never **YOU TO**, but **TO YOU**

Formula Regarding the Order of Precedence

KEY: Senior Executive RECEIVES Junior Executive. **A senior executive receives a junior executive.**

PROTOCOL: The name of the person of the **Senior Executive** is always spoken first. The name of the person of the **Junior Executive** is always spoken last.
Do not reverse the order of precedence.

CORRECT: *Mr. Senior Executive, I would like to introduce to you Mr. Junior Executive, from the accounting department. Mr. Senior Executive is our Director of Public Relations.*

KEY: Official RECEIVES Nonofficial. **An official person receives a nonofficial person.**

PROTOCOL: The name of the **official** is always spoken first The name of the **nonofficial** is always spoken last.
Do not reverse the order of precedence.

CORRECT: *Senator Warner, may I introduce Ms. Doe, president of Doe Exports? Ms. Doe’s firm is one of our state’s leading exporters.*

KEY: Client **RECEIVES ANYONE** from an organization that provides services to the client. **A client receives a fellow executive.**

PROTOCOL: Clients are considered more important than anyone in your organization, even if your department manager is a vice president and your client is a junior associate.
Do not reverse the order of precedence.

CORRECT: *Mark Hopkins, I would like to introduce Jim Smith, my department manager. Jim, Mark is our customer from Chicago, and he is doing very well with our new paper line.*

SOCIAL INTRODUCTIONS

Formulas for Formal Introductions:

The first name spoken is of the more distinguished person. The second name spoken is of the person being introduced (or presented) [to] the more distinguished person.

EXAMPLE: “Mr. Ambassador, may I present Mrs. Hill. Her husband is CEO of Sky Corporation. His Excellency is the Ambassador of the Federal Republic of Germany.”

Introduce a man **TO** a woman.

EXAMPLE: “Mrs. Doe, may I introduce Mr. Jones. His wife is chairing tonight’s event. Ms. Doe’s company donated the flowers.”

Introduce a younger person **TO** an older person. In this case you are presenting a child to an adult.

EXAMPLE: “Mr. Smith, I would like to introduce Mary Johnson, my daughter.”

Formulas for Informal Introductions:

To introduce two persons in a group where everyone is on a first-name basis, just say “ Mary Smith, I want to introduce Tom Jones.”

If you know only one of the two persons by his or her first name, then introduce both as Ms., Mrs., or Mr. to be consistent.

EXAMPLE: “Mrs. Smith, I want to introduce Mr. Jones.”

TIP: Always add some information that will launch others easily into conversation.

EXAMPLE: “Ann Smith, I want to introduce John Hills. John and I were classmates in college, and he is here on business. Ann and I share an office.”

Fine Points

- Don't use expressions such as "shake hands with," or "make the acquaintance of."
- Don't tack on "my friend" when introducing two persons. It implies that the other person is not a friend.
- If you are introducing new arrivals at a party, a round-the-room tour is not necessary. Introduce the newcomers to the closest group of persons, and check from time to time to make sure they are circulating. **It is the guest's duty to circulate and introduce himself or herself when the host is busy.**
- A host might add a conversation starter such as, "Mary has just returned from London," or "Al is an attorney."
- One doesn't give a lavish biography for one guest to impress others.

Addressing Officials in Conversation

- **King or Queen** "How do you do, Your Majesty?" or "Good morning/afternoon/evening, Your Majesty."
Conversation: "Your Majesty," "Sir/Ma'am/Madam"
- **The President** (Head of State, e.g., of the United States) "How do you do, Mr./Madam President?" or "Good morning/afternoon/evening, Mr./Madam President."
Conversation: "Mr./Madam President" or "Sir/Madam"
- **Prime Minister**, (Head of Government, e.g., of Canada or the United Kingdom) "How do you do, Prime Minister?" or "Good morning/afternoon/evening, Prime Minister."
Conversation: Prime Minister"
- **A Justice of an Appeals Court** (e.g., of a supreme court of court of appeals) "How do you do, Justice (Surname)?" or "Good morning/afternoon/evening, Justice (Surname)."
Conversation: "Mr./Madame Justice," "Justice (Surname)," "Justice," or "Sir/Madam"
- **A Judge** (of a lower court, not a supreme court) "How do you do, Judge (Surname)?" or "Good morning/afternoon/evening, Judge (Surname)."
Conversation: "Judge (Surname)" or "Judge"

- **Speaker of the House** “How do you do, Mr./Madam Speaker?” or “Good morning/afternoon/evening, Mr./Madam Speaker.”
Conversation: “Mr./Madame Speaker”
- **Governor-General** (e.g., the Governor-General of Canada) “How do you do, Your Excellency?” or “Good morning/afternoon/evening, Your Excellency.”
Conversation: “Mr./Madam Ambassador,” “Sir,” or “Ma’am”
- **Ambassador of a Foreign Nation to your Country** (a current ambassador) “How do you do, Your Excellency or “Mr./Madam Ambassador?” or “Good morning/afternoon/ evening, Your Excellency” or “Mr./Madam Ambassador.”
Conversation: “Your Excellency,” or “Mr./Madam Ambassador,” “Sir,” or “Ma’am”
- **Ambassador of Your Country to Another Nation** “How do you do, Mr./Madam Ambassador?” or “Good morning/afternoon/evening, Mr./Madam Ambassador.”
Conversation: “Mr./Madam Ambassador,” “Sir,” or “Ma’am”
- **All Other Embassy Personnel** (Other than the currently accredited ambassador) “How do you do, Mr./Mrs./Ms./etc. (Surname)?” or “Good morning/afternoon/evening, Mr./Mrs./ Ms./etc. (Surname).”
Conversation: “Mr./Mrs./Ms./etc. (Surname)”
- **A Mayor of a City** “How do you do, Mr./Madam Mayor or Mayor (Surname)?” or “Good morning/afternoon/ evening, Mr./Madam Mayor or Mayor (Surname).”
Conversation: “Mr./Madam Mayor,” “Mayor (Surname)” or “Mayor”
- **Chairman or Member of City Council** “How do you do, Mr./Mrs./Ms./etc. (Surname)?” or “Good morning/afternoon/evening, Mr./Mrs./ Ms./etc. (Surname).”
Conversation: “Mr./Mrs./Ms./etc. (Surname)”
- **Military Personnel** “How do you do, (Rank) (Surname)?” or “Good morning/afternoon/evening, (Rank) (Surname).”
Conversation: “(Rank) (Surname)” or “(Rank)”
- **Detectives, Police Officers and Fire Fighters** “How do you do, (Rank) (Surname)?” or “Good morning/afternoon/evening, (Rank) (Surname).”
Conversation: “(Rank) (Surname)” or “(Rank)”
- **Private Citizens** “How do you do, Mr./Mrs./Ms./Dr./etc. (Surname)?” or “Good morning/afternoon/evening, Mr./ Mrs./Ms./Dr./etc. (Surname).”
Conversation: “Mr./Mrs./Ms./Dr./etc. (Surname)” **Note:** Wait to be invited to use first/given names in situations where difference in age, rank or cultural traditions may call for formal forms of address in conversation.

NOTE: For forms of address for additional officials or dignitaries, refer to The Protocol School of Washington’s *Honor & Respect* or the embassy or consulate in your area.

Remembering Names

Use these easy formulas to remember names.

- Stop telling yourself you don't remember names and start telling yourself, "I'm good at remembering names." **Note:** This statement, repeated often enough, can counteract any negative message about not remembering names.
- Slow down, listen carefully, and pay attention when you meet a new person. Deliberately take the time for more than an exchange of names.
- Use the person's name in conversation. Use it often. Repetition builds memory. "There's a coat rack just inside the door, Jim."
- Look at the person's face. Most of us can recall faces better than names. Associate the name with the face. Use a personal connection such as someone else you know with the same name. "That's my middle name."
- Ask the person to spell his or her name. "Is that Steven with a 'v' or Stephen with a 'ph'?" This additional focus on the name helps you remember it.
- Focus more on the person and less on yourself. Focus when you meet someone and when you say good-bye.
- If someone doesn't remember your name, come to the rescue immediately. Extend your hand, smile, and say your name.
- If you can't remember someone's name: Extend your hand, smile, and say your name. It's the best way to get the other person to say his or her name. It is better to act and put him or her at ease rather than to focus on your own embarrassment. As a last resort you can say "Please (*remind me of/tell me*) your name again?"

Also try:

- Tell the person what you have heard about him or her. Acknowledge talents or specific contributions. "I understand that this Business Protocol Workshop was your idea, Mark."
- Show enthusiasm. Let your tone of voice and body language indicate a degree of happiness that you have met this person.
- Use memory techniques. A ringing bell, or a spider web, or a cake-making baker.

Business Card Protocol

Your business card is part of your visual communications package. It should be given to someone in such a way that the recipient remembers the giver.

- Present the card with the print facing the recipient so the recipient will not have to turn it around to read it.
- Carry cards in a card case to keep them fresh and protected such as in a handsome card case. Do not give out a business card that is defective, out of date, or soiled.
- Before attending an event, always put a supply of cards in your suit pocket for easy access.
- Don't pass out your cards like flyers at a hardware store opening. Handing your card out indiscriminately will make you appear pushy and unprofessional.
- Carry business cards in the evening at social events in case a good business contact presents itself. But be very careful, especially in a private home. If cards are exchanged, both parties should be very discreet.
- Never produce a card during a private luncheon or dinner where you run the risk of your host seeing the exchange.
- Present your business card to the receptionist each time you visit a company. It helps the receptionist announce you.
- Giving & Requesting: Don't force your card on anyone or offer it early in a conversation. Junior executives don't give or request cards from senior executives. Let the senior executive request your card, and only then should you present it.

ADDENDUM

(SAMPLES)

EVENT PLANNING GUIDELINE & CHECKLIST

This is a guideline for any department who is requesting President Rosenberg’s attendance at an event. All coordination will be handled through the Office of the President (OOP), and when deemed appropriate External Relations’ Office of Community Relations, Protocol, and Special Events (CRPSE) as well. Though every event may require different protocols, the following is a standard guideline for events.

Schedules

- Event should be held on a date that is mutually beneficial to the requesting department, the President, and any other key members of the university community.
- **Note:** Confirmation of calendar availability does not mean the President has agreed to participate.
- Once a date is held, an Event Request Form (ERF) must be submitted to the Office of the President for approval. See attached.
- If the event is requested at the Reagan House, please use the RH Event Request form. See page 65.
- The OOP will email a confirmation notice to the requesting unit once the President has approved his participation.

Invites

- The text and design of all invitations must be approved by OOP Assistant Chief of Staff (ACOS).
 - If the event involves the community at large (FIU or Miami-Dade), the invitation must then be pre-approved by the Office of External Relations before the President reviews.
 - For events of 20 and under, invites should go out no later than 3 weeks prior. For large-scale events, invites should go out 4 weeks prior.
- The President’s name should appear as “Mark B. Rosenberg” (no titles, unless it is going out to external constituents).
- The requesting department is responsible for taking RSVPs. This tracking system should include: Full Name, Guest Name, RSVP, Affiliation, Title, and Contact Information (including email and assistant info when appropriate).

Event logistics

- When planning your event, review attached Event Planning Checklist on page 55.
- For events at Reagan House see pages 64-65.
- The requesting department is responsible for ALL expenses related to the event, unless otherwise agreed upon by the President and/or other units.
- A detailed timeline/program (including a description of the venue and its layout, sequence of the event, order of speakers, etc.) must be submitted for approval by OOP at the start of the planning process.
- Walk-throughs are also recommended with OOP ACOS (President, when appropriate) in order to make needed changes prior to the event.
- Staff from the requesting department must be assigned to work the event. Duties will be assigned as agreed upon during the planning process (i.e. registration, greeter, etc.).
- **Note:** The OOP, with consultation from External Relations (Community Relations, Protocol and Special Events) and/or the requesting department, has the final say on all event timelines and logistics.

Briefing document

- A draft briefing packet should be submitted for the President's review 1 week prior to the event.
- Final draft is due no later than 24 hours prior to each event unless otherwise specified by President.
- Extra copies of final document should always be printed for the event in case the President needs one.
- The following items (when applicable) are included in the briefing document:
 - Final Program/Timeline
 - Final RSVP list
 - Bios on speakers, honorees, VIPs, and donors
 - Event background (especially if it entails a conference or project)

EVENT PLANNING CHECKLIST

Confirming Event Date, Venue, & Principals

- Determine desired possible dates & times for your event.
- Determine Event Principals (who needs to be present) & place a hold on their calendars.
- Determine venue according to event needs.
 - **NOTE:** If your venue is NOT a customary FIU event site, you must secure OOP approval before signing a contract with the desired venue.
- For list of FIU venues see “FIU Venues” section below.

High-Level Visit Or Official University Event

- When planning a Ground Breaking, Ribbon Cutting, Dedication (or similar official event,) you will need to consult with FIU’s Office of Community Relations, Protocol and Special Events at the start of the planning phase.
- When planning a visit by a head-of-state (or similar high-level leader,) you will need to consult with FIU’s Office of Community Relations, Protocol and Special Events at the start of the planning phase.

Donor Related Event

- When planning a donor related event, you should contact Donor Relations Department in the Division of University Advancement and plan the event with their guidance.

Event Planning Group Or Committee

- Determine person(s) that will be assigned to work on this event, create timeline, distribute tasks. If needed, create a small and efficient planning committee.

Budget

- Determine who is paying for the event and confirm availability of funds
- Request Quote from vendors
- Prepare Proposed Budget

Event Design

- Event needs to meet FIU's standard of quality
- Establish the set-up and room ambience for the event
- Follow the proper staging and seating protocol
- Determine the materials needed and use the FIU logo prominently on all event signage

Timed Event Program

- Create the appropriate agenda or script for event (order of speakers and activities)
- Create the timeline for the event (minute by minute outline of the event)
- Prepare remarks for speakers

Event Planning Timeline

- Establish and event planning timeline to determine dates for vendor selection, confirmations, delivery, set-up, rehearsal, breakdown, etc.

Invitation

- Prepare Invitation List
- Determine the dates for design and sending Save-the-Date, Invitation, Reminder, RSVP Deadline, etc.
- Design Save-the-Date or Invitation with RSVP Link and send to External Relations or OOP for approval

Event Staffing

- Determine the staffing needed before, during, and after the event — Prepare event staff training and walk-through at event site
- All event staff should dress in a similar fashion that is appropriate for the type of event. For university ceremonies and official events, it is recommended that staff wear black or dark blue-colored suits.
- Event staff should wear the FIU insignia at all times and appropriate identification (Nametag with FIU logo and/or FIU pin.)

VIP Management

- Inform the appropriate FIU offices (Office of the President, Governmental Relations, University Advancement, External Relations) of the expected attendance of any high-level VIP, such as elected officials, donors, government and business leaders, foreign government representatives, etc.

Vendors & Service Providers

- Determine and contract vendors and service providers you will need for the event:

FIU External Relations

- Community Relations, Protocol and Special Events
- Marketing and New Media
- Media Relations
- News and Communications
- Design Services
- Web Communications

FIU Environmental Health And Safety

- Key policies: ehs.fiu.edu/Programs/General%20Safety/Pages/Policies.aspx
- Contact Person: Wilfredo Alvarez (wjalvare2@fiu.edu)

FIU Emergency Management

- Contact Person: Ruben Almaguer (rdalmagu@fiu.edu)

FIU Facilities Management

- Event request form: myfacilities.fiu.edu/events/EventRequest.aspx
- Contact Person: Jimmy Almansa (almansaj@fiu.edu)
- Custodial Services requests can be sent to custodial@fiu.edu

FIU Parking And Transportation

- Event request form: parking.fiu.edu/permits/information/events
- Contact Person: Travis Stokes (tstokes@fiu.edu)

FIU University Police

- Event request form: police.fiu.edu in the special events section
- Contact Person: Lt. Michael Gonzalez (mgonza@fiu.edu)
- The Office of the President (OOP) reserves the right to determine if police presence is needed at any event.

FIU UTS

Media and Technology Support Services

- Event request form: mtshelp.fiu.edu

FIU Venues

- MMC — Graham Center
- MMC — Frost Art Museum
- MMC — Wertheim Performing Arts Center
- MMC — CBC Special Events Room
- MMC — Stadium Club
- MMC — MARC Pavilion
- BBC — WUC Ballrooms
- BBC — Kovens Center

Catering

Panther Catering

- Other approved vendors

External Vendors

You can contact external vendors for additional services:

- Flowers and Décor
- Production Company
- Rental Company — tables/chairs/tents
- Sound and Lighting Company

For additional questions or concerns, please contact:

Office of the President: 305-348-2111

Office of Protocol and Special Events: 305-348-2231



President Mark B. Rosenberg
cordially invites you to the

Student Academic Success Center Ribbon Cutting Ceremony

**Friday, August 19, 2016
2:00 - 4:00 p.m.**

**FIU Modesto A. Maidique Campus
11200 SW 8th Street
Miami, FL 33199**

(located east of the Barnes and Noble Bookstore)

The Student Academic Success Center (SASC) will be the focal point for student services on campus, including admissions, student orientation, advising, registration, student financial services and career and talent development services. Additionally, the SASC will give physical realization to the university's commitment to students thinking about their career objectives even before their first day at FIU.

Please **[click here](#)** to RSVP by Monday, August 15, 2016.





Office of the President

FLORIDA INTERNATIONAL UNIVERSITY

PRESIDENTIAL APPROVAL FORM

To be the cover sheet to any and all contracts, Univmail messages, letters and any document(s) requiring the President's signature and/or approval

DATE: _____

INITIATING DEPARTMENT: _____

CONTACT PERSON: _____

EXTENSION: _____ FAX: _____ EMAIL: _____

NUMBER OF ITEMS: _____ DATE NEEDED: _____

DOCUMENT DESCRIPTION: _____

I have reviewed and approved the attached document(s) for the President's signature and/or approval. I accept full responsibility should there be any error in the content, syntax, or form of the document. I am responsible for the editing and/or reformatting of this document if any changes are needed.

I understand that the President and/or his designee will retain the right to review any document that he/she chooses, and to request changes where deemed appropriate.

INITIATOR SIGNATURE: _____ DATE: _____

APPROVED BY VICE PRESIDENT: _____ DATE: _____

APPROVED BY DEAN (WHEN APPLICABLE): _____ DATE: _____

Once this request has been approved, your office will be notified that the document(s) are ready for retrieval.

OOP USE ONLY

APPROVAL: _____ DATE: _____

This form should be duplicated for further use.

FLORIDA INTERNATIONAL UNIVERSITY · OFFICE OF THE PRESIDENT
MODESTO A. MAIDIQUE CAMPUS · MIAMI, FL 33199

Event Protocols

The following protocol will be used when President Rosenberg’s participation is requested at any university event:

- The department requesting his participation should first contact the Assistant Director of Administrative Services in the Office of the President (ADAS), in order to select dates(s). Once chosen, the department must complete the attached **Event Request Form (ERF)**.
 - **NOTE: Though dates are held, the President’s participation is not confirmed until the ADAS emails you confirmation.**
- The initiating department will incur ALL expenses for the event. These include, but are not limited to, catering, linens, flowers, police, parking and photography.
- The initiating department will draft the invitation and guest list. Proposed invitation and guest list should be emailed to the **Assistant Chief of Staff (ACOS)** for review and approval by the both the ACOS and the President.
 - For events of 20 and under, invites should go out no later than 2 weeks prior.
 - For large-scale events, invites should go out 4 weeks prior.
 - Please allow at least ten (10) business days for the ACOS and President to review and approve the draft invitation.
- If applicable, the ACOS should be contacted to schedule an Event Walkthrough at least seven (7) days before date of event.
- The initiating department **must** designate a contact person and provide necessary support staff to work prior, during and after the event.
- President Rosenberg will be briefed internally approximately 7 days before event. As such, we will require you to provide the following a week prior to event: an event program, guest list, bios for VIPs on guest list, background on the event (ex. purpose or goal), and if the President is requested to speak, detailed speaking points. If updates to the original submission occur, a final version of all documents should be received electronically by Valeria by close of business the business day prior to event.

ADVANCEMENT UNITS: For Advancement areas, including Development Officers, this form should be submitted to Cathy Torres and Amber Rodriguez.

Office of the President Contact:

For Scheduling and Briefings

Valeria Espina

AD of Admin Services

Ph: 305.348.2111

Fax: 305.348.3660

E-Mail: vespina@fiu.edu

For Event Protocol/Invitations/Final Approvals

Claudia Gonzalez

Assistant Chief of Staff

Ph: 305.348.2111

Fax: 305.348.3660

E-Mail: clgonzal@fiu.edu

Event Request Form (ERF)

Event Name: _____
Event Date: _____ Event Location: _____
Event Start/End Time: _____ Requesting Department: _____
Contact Person (Name and Title): _____
Telephone: _____ Fax: _____ E-mail: _____

Approximate Number of Guests: _____ Approximate Number of VIP Guests: _____

Name and Affiliation of Participants:

President's Role at Event:

Person Preparing President's Remarks: _____

Note

- **Kindly remember that you are required to provide the following a week prior to event: an event program, guest list, bios for VIPs on guest list, background on the event (ex. purpose or goal), and if the President is requested to speak, detailed speaking points. If updates to the original submission occur, a final version of all documents should be received electronically by Valeria by close of business the business day prior to event.**

Upon action on this request, the Office of the President will contact the Contact Person designated on this ERF via e-mail to confirm/deny/change event date.

Ronald W. Reagan Presidential House Event Protocols

Event Name: _____

Requesting Department: _____

Event Date: _____ Event Start/End Time: _____

Contact Person (Name and Title): _____

Telephone: _____ Fax: _____ E-mail: _____

The following protocols and guidelines will be used when an event is to take place at the Ronald W. Reagan Presidential House:

- The department requesting his participation should first contact, Valeria Espina, Assistant Director of Administrative Services (ADAS) in the Office of the President, in order to select dates(s). Once chosen, the department must complete the attached **Event Request Form (ERF)**.
 - **NOTE: Though dates are held, the president's participation is not confirmed until the ADAS emails you confirmation.**
- Once confirmed, the final ERF will be forwarded to Olga Hernandez, the Manager of Operations & Events at Reagan House (House Manager), who will reach out to discuss logistics.
- The initiating department will incur **ALL** expenses for the event. These include, but are not limited to, catering, linens, flowers, police, parking and photography. Note: All catering – despite funding source – must be provided by one of the Reagan House's preferred caterers.
- The initiating department will draft the invitation. *Please email Claudia Gonzalez, Assistant Chief of Staff (ACOS) for approved invitation template.* Thereafter, the proposed invitation should be emailed back to her for review and approval prior to dissemination. The initiating department is responsible for sending invitation, follow-up invitations and confirmation emails (to include directions to RH) to all confirmed guests.
 - For events of 20 and under, invites should go out no later than 2 weeks prior.
 - For large-scale events, invites should go out 4 weeks prior.
 - Please allow at least one week for the President to review and approve the draft invitation.
- The initiating department must put together the proposed guest list, with all fields filled out, for the ACOS and President to approve. *Please email ACOS for approved guest list template.*
- The initiating department is responsible for creating nametags for all confirmed guests. Please note that we have the inserts at RH for the cards to be placed in. *Please email ACOS for approved nametag template.*
- The initiating department **must** designate a contact person and provide necessary support staff to work prior, during and after the event. Required staffing roles (i.e. greeter, registration, etc.) will be provided by the House Manager. Corresponding staff assignments will be up to the requesting department, but a final list of assignments must be provided to the House Manager no later than 2 business days prior.
- President Rosenberg will be briefed internally approximately 7 days before event. As such, we will require you to provide the following a week prior to event: an event program, guest list, bios for VIPs on guest list, background on the event (ex. purpose or goal), and if the President is requested to speak, detailed speaking points. If updates to the original submission occur, a final version of all documents should be received electronically by Valeria by close of business the business day prior to event.

ADVANCEMENT UNITS: *For Advancement areas, including Development Officers, please use the Advancement request form and submit to SVP Howard Lipman's office for approval.*

Office of the President Contacts:

- *For Scheduling and Briefings:* Valeria Espina, Assistant Director of Administrative Services (vespina@fiu.edu)
- *For Invitations/Presidential Approvals/Protocols:* Claudia Gonzalez, Assistant Chief of Staff (clgonzal@fiu.edu)
- *For Logistics:* Olga Vázquez, House Manager (hernando@fiu.edu)

Ronald W. Reagan Presidential House Event Request Form (ERF)

Event Name: _____

Requesting Department: _____

Event Date: _____ Event Start/End Time: _____

Contact Person (Name and Title): _____

Telephone: _____ Fax: _____ E-mail: _____

Purpose of Event: _____

Approximate Number of Guests: _____ Approximate Number of VIP Guests: _____

Budget Provided by: _____ Max. Budget: _____

Name and Affiliation of Participants:

President's Role at Event:

Person Preparing President's Remarks: _____

Note

- **Kindly remember that you are required to provide the following a week prior to event: an event program, guest list, bios for VIPs on guest list, background on the event (ex. purpose or goal), and if the President is requested to speak, detailed speaking points. If updates to the original submission occur, a final version of all documents should be received electronically by Valeria by close of business the business day prior to event.**

Upon action on this request, the Office of the President will contact the Contact Person designated on this ERF via e-mail to confirm/deny/change event date.

Please check only those items that apply to your specific event:

Invitations

- Date sent: _____
- Specifications: _____

Catering

- Approved Vendor: _____
- Specifications: _____

Alcohol

- Specifications: _____

Flowers

- Specifications: _____

Photography

- Specifications: _____

Entertainment

- Specifications: _____

Public Safety:

- Specifications: _____

Parking and Transportation:

- Specifications: _____

Audio/Visual

- Specifications: _____

Other

- Specifications: _____

Note

- **Kindly remember that you are required to provide the following a week prior to event: an event program, guest list, bios for VIPs on guest list, background on the event (ex. purpose or goal), and if the President is requested to speak, detailed speaking points. If updates to the original submission occur, a final version of all documents should be received electronically by Valeria by close of business the business day prior to event.**

Upon action on this request, the Office of the President will contact the Contact Person designated on

Mark B. Rosenberg

President

cordially invites you

to join him for a

Reception/Dinner/Type of Event honoring _____

Title and/or Special Role

INSERT PHOTO HERE

on

Day of the Week, Month Day, Year

start time p.m. – end time p.m.

Ronald W. Reagan Presidential House

10777 SW 16 St., Miami, FL

Modesto A. Maidique Campus

Florida International University

~~

Business casual attire

~~

Please confirm your attendance

via email to president@fiu.edu

or by calling 305-348-2111.

CRPSE EVENT STANDARD OPERATING PROCEDURES

Planning Meetings

- Initial Planning Meeting
 - Meeting should at a minimum include: members of the unit hosting event and a CRPSE representative, if applicable
 - Budget should be determined at this time and method of payment (who will process and/or activity number for vendor requests). Vendors **cannot** be contacted without this information
- Walk-through
 - Should be held minimum of 3 weeks prior to event
 - Must include members of the unit that is hosting event, all vendors, representative of CRPSE if applicable, and a member of the Office of the President (if President is attending)
 - All building/event space maintenance should be completed prior
- Set-up
 - Should take place day of event or day before depending on event time
 - A run through of the program should take place after set-up to mitigate possible issues
- Briefing
 - A briefing meeting with the team members working the event should be scheduled 5-7 business days prior
 - If the event requires a briefing meeting with the President, it must be scheduled a minimum of three weeks in advance with his office
- De-briefing
 - A de-briefing may be scheduled with team members
 - If the meeting must include President Rosenberg, follow the same procedures for scheduling as above. The President's office will be able to provide a date post-event.

Logistics

Design Services

- Services include: html invitation design, printed programs, flyers, retractable banners, step and repeats, etc.
- Contact information: Aileen Solá-Trautmann, (sola@fiu.edu) & Yessenia Albolila, (yabolila@fiu.edu)

Venue

- Selection of location should be done at the initial planning meeting. This can vary depending on event and needs, i.e. ribbon cutting

FIU Facilities Management

- Online request form: **facilities.fiu.edu** -> Event Support Request
- They can be contacted for numerous services such as: chairs, tables, stage, plants, etc. Check form for a complete list of services
- Main event contact person: Jimmy Almansa (almansaj@fiu.edu)

FIU Media Equipment Services

- Online request form: **mtshelp.fiu.edu**
- They can be contacted for numerous services: AV support, photography, video streaming, videoconferencing, etc. Check form for a complete list of services
- General questions (confirmations, invoices) contact person: Lisette Hernandez (lisette@fiu.edu)
- Video contact person: Hilda Aguilera (aguilera@fiu.edu)
- Photography contact information: (academicimaging@fiu.edu)

FIU Parking and Transportation

- Online request form: **parking.fiu.edu** -> Events ->Event Request Form
- Services include reserving parking spaces, directional signage, bus rentals, etc. Check form for a complete list of services
- Main contact person: Travis Stokes (ptevents@fiu.edu)

FIU Environmental Health & Safety

- Key policies: **ehs.fiu.edu/Programs/General%20Safety/Pages/Policies.aspx**
- Contact Person: Wilfredo Alvarez (wjalvare2@fiu.edu)
- Should be contacted for walk-throughs or general questions regarding safety especially if event is outdoors

- FIU University Police
 - Main contact: Lt. Michael Gonzalez (mgonza@fiu.edu)
 - FIU PD Special Events Form can be found on **police.fiu.edu**
 - Should be contacted if you expect high level of VIPs, event is taking place at an external venue in the evening, or there will be students attending event
- Panther Catering
 - Website: **pantherdining.catertrax.com**
 - Contact people: Erika Chavez (Chavez-Erika@aramark.com)
- Staff and Volunteers
 - Prior to event, ensure that you have sufficient staff to assist with registration, ushering, and other duties needed
- Signage and Supplies
 - Place clear directional signage directing guests to venue location, if needed
 - Step and repeat & retractable banners should be used to market event/unit
 - Reserved seating for program participants and VIP guests should be used
 - Other supplies as needed

Invitation/RSVP

- Invitation
 - Must go through the appropriate approval channels (Dean, AVP, SVP, OOP)
- Invite List
 - Determine target audience (FIU leadership, FIU Boards, faculty, students, etc.).
- Save the Date
 - Depending on the timeframe, can be sent to notify guests of upcoming event
- RSVP List
 - Can be managed using Qualtrics, Google Docs, or other appropriate online method
 - Using an e-mail address should be the last option as it is more difficult to manage or reflect most current responses
 - Gather appropriate information: First/Last Name, E-mail Address, Title, and Affiliation

- Email Confirmation to guests containing additional event details such as
 - Parking instructions, campus map,
 - Attire (if event is outside, you will want to let your guests know to dress accordingly) and other event details should be sent one business day prior to event
 - Should be sent a day or two before event

Program

- Program
 - Should include timing, speakers, and flow of event.
 - For example, if there are refreshments served before/after program, how are speakers being introduced, and if there a designated Emcee.
- Remarks
 - Unit should work with Media Relations to draft President's remarks. They should provide all necessary background information and message they wish to convey.
 - All other remarks should be developed by unit, i.e. Deans and other speakers
- Research/Data
 - If needed, unit should work with Research and Prospect Management in the division of University Advancement for information such as bio profiles, alumni statistics, and etc.
- President's Briefing Document
 - Send to Valeria Espina (vespina@fiu.edu), and should be sent in accordance to deadline on the **Upcoming Speeches** document (minimum 24 hrs.).
 - Should include:
 - Event information such as date, time, location, and who will be staffing the President
 - Final Program
 - RSVP list with VIPs highlighted
 - Other background information pertinent to event such as statistics or bios, etc.
 - Additional copies should be available at event site

***This checklist is to serve as a guideline and is not an exhaustive list of all event needs and requirements. If you have questions or need further clarification, please contact CRPSE or the Office of the President.**

RECOGNITION LIST



Name

Affiliation

FIU's Beyond Possible Strategic Plan 2020: Transportation Challenges and Opportunities

Friday, July 10, 2015

9:00 a.m. - 11:00 a.m.

MARC Pavilion

Agenda

9:00 a.m. **Registration / Breakfast**

9:30 a.m. **Program Begins**

- **Introductions**

FIU Strategic Plan, Growth and Infrastructure

- *Mark B. Rosenberg*, President, FIU

Open Discussion

FIU Leadership

- *John Cal*, AVP, Facilities Management
- *Nicole Kaufman Glasgow*, AVP, Academic Affairs
- *Sandra Gonzalez-Levy*, SVP, External Relations
- *Thomas Gustafson*, Director, Government and Transport Policy
- *Mohammed Hadi*, Assistant Director, Lehman Center for Transportation Research
- *Thomas Hartley*, Executive Director, Parking and Transportation
- *Kenneth A. Jessell*, SVP and CFO
- *Ranu Jung*, Professor and Chair, Biomedical Engineering
- *Javier I. Marques*, Chief of Staff, Office of the President
- *Pablo Ortiz*, AVP, Admin & Institutional Development
- *Michelle Palacio*, VP, Governmental Relations
- *Steve Sauls*, former VP, Governmental Relations

Local Transportation Leadership

- *William L. Cross*, Manager, Planning and Capital Development, South Florida Regional Transportation Authority
- *Fausto Gomez*, President, Gomez Barker Associates Inc.
- *Jesus Guerra*, Interim Executive Director, Miami Dade MPO
- *Albert Hernandez*, Assistant Director, Engineering, Planning and Development, Miami Dade Transit
- *Ysela Llord*, Director, Miami Dade Transit
- *Kevin T. Lynskey*, Deputy Director, Port of Miami
- *Gus Pego*, District Secretary, FL Department of Transportation
- *Javier Rodriguez*, Executive Director, Miami Dade Expressway Authority
- *Charles D. Scurr*, Executive Director, Citizen's Independent Transportation Trust

Next Steps

11:00 a.m.

Program Ends

Event Name Here				
Reagan House				
Day of the Week, Month Day, Year - 00:00 pm - 00:00 pm				
Last updated by on @ 00:00 AM				
First Name	Last Name	Affiliation	Email	RSVPs
Total Attending				0



Office of the President

FLORIDA INTERNATIONAL UNIVERSITY

Presidential Briefing Document

Date: Tuesday, October 29, 2013

Time: 9:00AM - 4:00 PM

Location: Graham Center Ballrooms (Plenary) and Faculty Club (Lunch)

Attendees: FIU Community

Staff: Dania Rivero and Sandra Jimenez

Transportation: Javier Marques

Purpose of meeting/event: Geopolitical Summit

Additional information:

- Plenary 1 - Guest Speaker: Moises Naim
- Plenary 2 - Guest Speaker: Vali Nasr

Attachments:

- (1) Program
- (2) Remarks - Summit
- (3) Remarks - VIP Luncheon
- (4) VIP RSVP List
- (5) Guest Speaker Bios

PROGRAM

9:00 a.m. Doors Open

- Registration takes place at lobby
- Seating begins

Provost Wartzok, Moisés Naím and Panel Members proceed to Faculty Club for brief review of program.

- Book signing and media interviews with guest speaker
- Light refreshments available

9:25 a.m. Panel Members proceed to reserved seating on floor.

Provost Wartzok and Moisés Naím, prepare to enter stage when introductions take place.

9:30 a.m. PLENARY 1

GUEST SPEAKER: Moisés Naím

TITLE: The End of Power: From Boardrooms to Battlefields and Churches to States, Why Being In Charge Isn't What It Used to Be

FORMAT:

- 3-5 min. Welcome remarks by Provost Wartzok
- 45 min. Lecture by Guest Speaker
- 15 min. Panel Discussion by FIU Faculty Members
- 30 min. Question & Answer Session with Guest Speaker and Panel Members
- 2 min. Closing Remarks by Dr. John Stack

MODERATOR: John F. Stack, Jr., Executive Director, School of International and Public Affairs; Associate Dean, College of Arts and Sciences

FIU PANEL MEMBERS:

- Jose M. Aldrich, *Former Area Managing Partner, Latin America Tax, KPMG*
- Jennifer Gebelein, *Associate Director of Online & Web Engagement; Visiting Faculty, Department of Earth & Environment*
- Frank O. Mora, *Director, Latin American and Caribbean Center; Professor, Department of Politics and International Relations*
- David Wernick, *Senior Lecturer and R. Kirk Landon Teaching and Student Engagement Fellow, Department of Management & International Business, College of Business*

Dr. John Stack goes to podium and delivers announcements.

Dr. John Stack exits stage and takes his assigned seat on floor.

Provost Wartzok goes to podium, delivers welcome remarks, introduces Moisés Naím, exits stage and takes his assigned seat on floor.

Moisés Naím enters stage, goes to podium and prepares to deliver lecture.

At conclusion of lecture, **Moisés Naím** takes his seat on panel table on stage.

PANEL DISCUSSION

Panel Members proceed to stage and take their places on the panel table according to signage.

Dr. John Stack goes to podium, prepares for Panel Discussion and remains at podium until the end of the Question and Answer Session.

- Introduces panel members (from audience's left to right)
- David Wernick, Senior Lecturer and R. Kirk Landon Teaching and Student Engagement Fellow, Department of Management & International Business, College of Business
- Frank O. Mora, Director, Latin American and Caribbean Center; Professor, Department of Politics and International Relations
- Jennifer Gebelein, Associate Director of Online & Web Engagement; Visiting Faculty, Department of Earth & Environment
- Jose M. Aldrich, Former Area Managing Partner, Latin America Tax, KPMG LLP
- Initiates start of Panel Discussion

Panel Members remain seated at panel table and deliver brief remarks. (5 min. each)

Sandra Jimenez provides timing cues. (1 min. and End)

At conclusion of Panel Discussion, **Dr. John Stack** thanks panel members and prepares for Question and Answer Session.

QUESTION AND ANSWER SESSION

Dr. John Stack at podium, provides instructions to audience and initiates Question and Answer Session.

Question and Answer Session takes place with **Guest Speaker and Panel Members**.

Sandra Jimenez provides timing cues. (Last and End)

Dr. John Stack announces last question and ends Questions and Answer Session.

At conclusion of Questions and Answer Session, **Dr. John Stack** gives closing remarks.

Dr. John Stack, Guest Speaker and Panel Members exit stage and proceed to Faculty Club.

12:00 p.m. **VIP LUNCHEON**
Location: FIU Faculty Club

Guests proceed to Faculty Club for luncheon.

President Rosenberg goes to podium, welcomes guests, delivers brief remarks, and takes his seat.

Luncheon takes place.
After luncheon, **guests** proceed to Graham Center Ballrooms for Plenary 2.

President Rosenberg, Vali Nasr and Panel Members remain inside Faculty Club for brief review of program.

- Book signing and media interviews with guest speaker
- Light refreshments available

1:55 p.m. **Panel Members** proceed to reserved seating on floor.
President Rosenberg and Moisés Naím, prepare to enter stage when introductions take place.

2:00 p.m. **PLENARY 2**
GUEST SPEAKER: Vali Nasr

TITLE: The Dispensable Nation: American Foreign Policy in Retreat

FORMAT:

- 3-5 min. Welcome remarks by President Rosenberg
- 45 min. Lecture by Guest Speaker
- 15 min. Panel Discussion by FIU Faculty Members
- 30 min. Question & Answer Session with Guest Speaker and Panel Members
- 2 min. Closing Remarks

MODERATOR: John F. Stack, Jr., Executive Director, School of International and Public Affairs; Associate Dean, College of Arts and Sciences

FIU PANEL MEMBERS:

- Maya Boutaghou, *Assistant Professor, Department of Modern Languages and Women's Studies Center*
- Thomas A. Breslin, *Associate Professor, Department of Politics and International Relations*
- Cyra Akila Choudhury, *Associate Professor, College of Law*
- Shlomi Dinar, *Associate Director, School of International and Public Affairs*

Dr. John Stack goes to podium and delivers announcements.

Dr. John Stack waits for cue by Sandra Jimenez and introduces President Rosenberg.

Dr. John Stack exits stage and takes his assigned seat on floor.

President Rosenberg goes to podium, delivers welcome remarks, introduces Vali Nasr, exits stage and takes his assigned seat on floor.

Vali Nasr enters stage, goes to podium and prepares to deliver lecture. At conclusion of lecture, **Vali Nasr** takes his seat on panel table on stage.

PANEL DISCUSSION

Panel Members proceed to stage and take their places on the panel table according to signage.

Dr. John Stack goes to podium, prepares for Panel Discussion and remains at podium until the end of the Question and Answer Session.

- Introduces panel members (from audience's left to right)
- Shlomi Dinar, *Associate Director, School of International and Public Affairs*
- Cyra Akila Choudhury, *Associate Professor, College of Law*
- Thomas A. Breslin, *Associate Professor, Department of Politics and International Relations*
- Maya Boutaghou, *Assistant Professor, Department of Modern Languages and Women's Studies Center*
- Initiates start of Panel Discussion

Panel Members remain seated at panel table and deliver brief remarks. (5 min. each)

Sandra Jimenez provides timing cues. (1 min. and End)

At conclusion of Panel Discussion, **Dr. John Stack** thanks panel members and prepares for Question and Answer Session.

QUESTION AND ANSWER SESSION

Dr. John Stack at podium, provides instructions to audience and initiates Question and Answer Session.

Question and Answer Session takes place with **Guest Speaker and Panel Members**.

Sandra Jimenez provides timing cues. ([Last and End](#))

Dr. John Stack announces last question and ends Questions and Answer Session.

At conclusion of Questions and Answer Session, **Dr. John Stack** thanks Guest Speaker and Panel Members and leads round of applause.

Dr. John Stack, Guest Speaker and Panel Members exit stage.

GEOPOLITICAL SUMMIT ENDS

**Proposed remarks for President Rosenberg
2013 Geopolitical Summit Plenary 2: “The Dispensable
Nation: American Foreign Policy in Retreat”
October 29, 2013**

Summary of Remarks

- Welcome
- Recognize special guests
- Recognize sponsors
- About the Geopolitical Summit
- Introduce Vali Nasr

- Good afternoon.

As president of FIU,

it is my pleasure to welcome you

to this afternoon's plenary session,

"The Dispensable Nation:

American Foreign Policy in Retreat."

- Before we begin, I would like to recognize some of our special guests:

[List of recognitions will be provided]

Thank you all for being here today!

- I would like to give a special thank you

to our corporate sponsors:

- The Betsy South Beach
- and Citibank.

And I also would like to recognize our FIU sponsors:

- the College of Business
- the College of Arts and Sciences
- the School of International and Public Affairs
- and the Ruth K. and Shepard Broad Distinguished
Lecture Series.

- Today's panel discussion goes hand in hand with FIU's commitment to research, engagement, and academic and creative endeavors that help us understand the forces that shape our world.

The Geopolitical Summit also underscores FIU's commitment to educating engaged global citizens and to serving as a forum for the exchange of ideas.

The Summit exemplifies how FIU's colleges and schools are Worlds Ahead.

Today's panelists, from the School of Environment, Arts and Society in our College of Arts and Sciences, the Department of Management and International Business in our College of Business, and our College of Law, represent the hard-working, Worlds Ahead faculty who are preparing our students for 21st century careers.

- This afternoon we have the pleasure of welcoming Vali Nasr.

Vali Nasr is
Dean and Professor of International Relations
at Johns Hopkins University's
Paul H. Nitze School
of Advanced International Studies.

He is the author of the groundbreaking book
"The Dispensable Nation,"
which takes a hard look at the strategic risk
of a shrinking American role
on the global stage.

He is a member of the State Department's
Foreign Affairs Policy Advisory Board
to advise the Secretary of State on global issues.

Dr. Nasr is also a non- resident fellow
at the Brookings Institution
and a contributor to "Bloomberg View."

Between 2009 and 2011 he served as Senior Advisor
to U.S. Special Representative for Afghanistan
and Pakistan,
Ambassador Richard Holbrooke.

Dr. Nasr is one of our country's leading experts
on the Islamic world and Middle East politics.

We are excited to have him with us today
to share his unique insight
on American foreign policy.

Please join me in giving a warm welcome
to Dr. Vali Nasr.

RSVP List

FIRST NAME	LAST NAME	TITLE	ORGANIZATION

SAMPLE MENU CARD AT REAGAN HOUSE



Ronald W. Reagan
Presidential House

*Professor Asad M. Madni - SCIS Distinguished Speaker
Lunch*

hosted by

President Mark B. Rosenberg

Menu

Basket of Bread

Salad

*Bibb Lettuce, Yellow and Red Tomatoes, sliced Radishes, Comté Cheese
with a preserve Lemon Dressing*

Entrée

Vegetarian Option

Portobello stuffed with Quinoa

Dessert

Fruit Terraine with a Raspberry Coulis

Café Cubano, Cortadito or American Coffee

*Florida International University
Ronald W. Reagan Presidential House
10777 SW 16th St.
Miami, FL 33165*

SAMPLE MENU AND THANK YOU CARD FOR A SIGNATURE EVENT



PROGRAM

Welcome

Willard Shepard, JD '10, WTVJ Investigative Reporter
Michelle D. Mason, Senior Associate Dean

Dinner Service

Video Presentation

President's Remarks

Mark B. Rosenberg

Honoring the Florida Judiciary

The Honorable R. Fred Lewis
The Honorable Peggy A. Quince
The Honorable Barbara J. Pariente

Dean's Remarks

R. Alexander Acosta

Upon Program Closure

Join us in the foyer for coffee & desserts

MENU

Salad

Bow Tie of Baby Greens, Caramelized Apples and
 Brie Tartlet with Balsamic Dressing

Entrée

Charred Tenderloin and Gulf Corvina,
 Red Peppercorn Demi-Glace Rainbow Carrots,
 Chive and Corn Risotto

Dessert & Coffee Station

Miniature Chocolate Napoleon
 Red Velvet Tres Leches
 Key Lime Tartlet with Brunoise Garnish

Thank You To Our Generous Supporters



SAMPLE ROOM SCHEMATIC FOR A SIGNATURE EVENT

Client:
 Location:
 Room: Four Seasons Miami Grand Ballroom with Foyer
 Prepared On: 09/26/12 12:22:51

Event Name:
 Date:
 Time:
 Prepared By: FourSeasons Hotel Miami

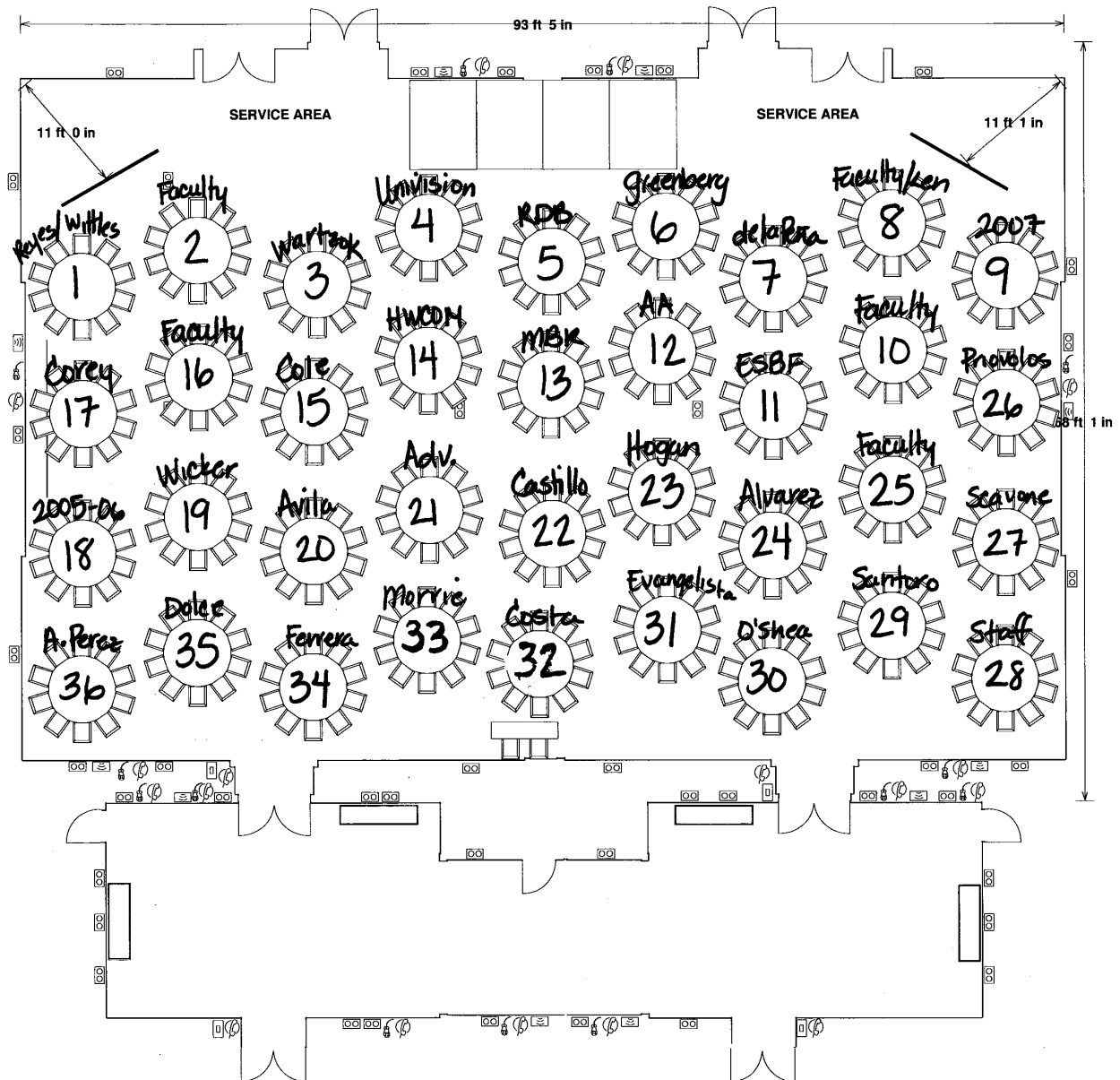


Diagram created using Room Viewer®.

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Dania Pearson-Adams

Associate VP Public Affairs

Community Relations and Special Events

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