

Tips for

Planning

District Conferences
and Conventions

including Protocol

This brochure is designed to aid District Officials and Convention Committees in the planning of District Conferences and Conventions.



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District Conferences

District Conferences are normally held in conjunction with meetings of the District Board of Directors, and attendance is open to all Optimists. They are usually designed for the benefit of Club officers and Committee Chairs as well as District officers and Committee members. Former District officers and old timers often like to attend.

These Conferences, particularly ones held in the first quarter, provide a platform for the Governor and District Chairs to introduce programs and objectives for the year and to promote Club participation. A representative of Optimist International, usually the Vice President of the Region, is normally present. Workshops and discussions on Club activities and administrative techniques may be incorporated into the program.

District Conferences have no legislative authority and conduct no business, other than the election of Lieutenant Governors in the spring. The Conference program should not be confused with the business agenda of the District Board. Minutes of conferences are not required, though records of programs and key presentations may be useful.

If maximum attendance is desired, expense and time away from home must be held to a minimum. The purpose of most District conferences can be accomplished in a half day, perhaps including a luncheon or dinner. The desire of some members for a weekend of fellowship should not cause a conference to be lengthened.

The planning and conduct of these Conferences are responsibilities of the District administration, which must budget and account for them. Since Conferences are not profit-making ventures, registration fees may be superfluous unless meal service is involved. For reporting, auditing, and budgetary purposes, the District Secretary-Treasurer is responsible for a statement of receipts and disbursements on all Conferences. Conferences may be preceded by a meeting of the District Board of Directors, Executive Committee, or both.

However, agendas and programs should not be intermingled because different groups are involved.

There are two District Conferences each year which are of special importance. These are:

1. **Fall Conference:** Held early in the first quarter, featuring in-service leadership training and providing opportunity for the District administration to unveil District goals and objectives to Club Presidents and other Club representatives. Here the Governor and the District Chairs may inspire Club participation in programs advanced by Optimist International and build esprit de corps. CPA judging for projects completed during the previous year is held at this conference.
2. **Spring (May) Conference:** The third quarter Conference features the annual election of Lieutenant Governors. Club Presidents, or their official representatives, cast the number of votes to which their Clubs are entitled under Bylaws Article X. Most Districts conduct Oratorical, CCDHH and Tri-Star Sports Contests.

District Conventions

The District Convention is held during the fourth quarter each year. The Bylaws require that it **must convene no earlier than August 1 and adjourn no later than September 30**. The exact dates are determined by the District Board of Directors, and the city is selected by delegates of a previous Convention.

The following points should be considered in planning the District Convention:

1. The Convention is the District's Convention, not a "host" Club's convention.
2. The District must maintain complete control and authority over Convention planning and conduct.
3. Preliminary planning should occur as early as October or November of the administrative year.
4. Convention finance must be sound and adequate.
5. The most equitable method of financing the Convention is by dues allocation (details and a sample budget are provided in this manual).
6. Although fellowship plays an important role, the basic reasons for the Convention are the business program and Leadership Development events.
7. A percentage of attendees will be first-timers.
8. Success is determined not by the number of persons in attendance, but by the number of Clubs represented by full delegations, preferably including their officers-elect.
9. Cost to the individual will have a great effect on attendance.
10. Attendance must be aggressively promoted if the Convention is to accomplish its purpose.
11. Nothing about the Convention should be left to chance or the last minute.

The Governor should realize that the Convention is the administration's "parade." There is no greater opportunity for the exchange of information, ideas and experiences by members. To the conscientious delegate, the Convention offers an opportunity to learn how to do things that will strengthen the Club, the District and Optimist International.

Bids should be solicited and sites selected three years in advance. This will reduce problems of finding adequate facilities. Most hotels and motels book space years in advance.

Timetable

OCTOBER

- Governor and Convention Chair have initial meeting and adopt a plan of action and the theme for the year.
- Draft Convention Budget based on previous years' experiences and financial statements for approval as supplement to general District Budget at first meeting of District Board of Directors.

NOVEMBER

- At District and Zone Meetings, and in District Bulletin, urge Clubs to inaugurate plans to help finance Delegations to District Conventions.
- Ask Lieutenant Governors to aid in promotion.

DECEMBER- JANUARY

Governor and Committee Chair should do the following:

- Draft tentative Convention Program.
- Select operating Committee Chair.

The following are essential. Some can be performed by the Convention Chair, Sub-committees or appointed personnel:

Finance	Program
Meeting	Publicity/Promotion
Training	Spouse or Partner/ Guest Activities
Housing	Information
Reception	Decorations
Transportation	Printing

- Have initial meeting with Convention Hotel management.

FEBRUARY

- Governor should meet with general Convention Chair and all operating Committee Chairs for general discussion of planning and assignments.
- Second mailing to Clubs to promote adequate Club representation.

MARCH-APRIL

- Convention Chair should request aid of Lieutenant Governors in promoting
- Continue to urge financial aid to Delegation.

MAY

- Report of Chair to District Board of Directors.
- Convention Business Committees should be appointed by Governor.
- Governor-Elect should begin planning Club President-Elect and Lieutenant Governor-Elect workshops with assistance of Leadership Development Committee.

JUNE

- Official notice of Convention mailed to all Clubs by District Secretary-Treasurer at least 60 days prior to Convention.
- Convention Committee should direct attendance promotion to Club Presidents-Elect and Secretary-Treasurers-Elect.

JULY

- Final pre-Convention meeting of Governor, Governor-Elect, District Convention Chair, District Leadership Development Chair and all Convention operating Committee Chairs.
- Review all plans and assignments.
- Final check with Convention Hotel management.

Location of Conferences and Conventions

Choosing the right location and property depends on a thorough understanding of goals and objectives, group demographics and meeting specifications.

To begin the process of selecting a facility, compile a request for proposal. Once you've narrowed down the list of possible sites, a thorough site inspection should be scheduled.

Request for Proposal

The next step is to put together a request for proposal (RFP) to send to hotels, resorts, conference centers or other venues under consideration. The RFP should be tailored to your needs, but include the following:

- Your name, title, address, phone, fax numbers and e-mail address.
- Details on the type of meeting you are planning, as well as the purpose of the meeting or other event.
- Meeting or exhibit program history for the last five years.
- First, second and third choices for program dates
- Number of attendees expected
- Number of guest rooms, number and types of meeting rooms, setups and audiovisual equipment needed
- Food and beverage requirements for meals, breaks and functions
- Special requirements, such as speaker-ready rooms, special storage needs, etc.
- All relevant details about your exhibit program and requirements.
- Inquiries about whether space can be put on 24-hour hold, whether any construction or renovation work is planned for that period of time and the policies and procedures for group check-ins and departures.
- A deadline for the facility to respond, and a request of additional collateral materials (e.g., meeting room specifications, banquet menus, audiovisual price list.

Site Inspection

Once you have narrowed your choices down to a few properties, it's time to do a site inspection. A site inspection allows you to evaluate how well a destination and a facility will handle the needs of your group, and gives

you the opportunity to meet the key property personnel who will be involved with your program. The following checklist highlights factors to consider during the hotel site inspection.

General Information

- Obtain business card of the sales manager
- How old is the property?
- When was the most recent renovation completed and what did it entail?
- Are future renovations planned? If so, when?
- Ask for meeting planning kit to include, Meeting space dimensions and layouts, menus and audiovisual price list.
- It also is important to take into consideration if the food prices are reasonable and if the quality of the food is good.
- Is the general tone of the hotel/motel/conference center friendly and cooperative? This will make a lasting impression on your conference attendees.
- Is the room size adequate? Take the facility's recommendation on the suggested number of people who can comfortably fill the room and decrease it. No one like to be squeezed into cramped quarters. If in doubt, look for a bigger room.
- Is the location convenient? Is it easy to get to? Is it in a safe area?
- Does the place you selected have a good reputation? Ask around. Have others used it and been satisfied?

Accommodations

- How many sleeping rooms does the property have?
- What percentage is smoking vs. non?
- What types of suites are available?
- What is the sleeping configuration of each room category? King vs. Double/Double
- What is the number of rooms that meet the requirements of the American with Disabilities Act?
- What is the number and configuration of rooms on the concierge/club level?

- What is the policy on complimentary rooms?
- What are the in-room amenities? Coffeemakers, Hairdryers, iron with ironing board, refrigerators, minibars?
- How many telephones are in each room? Voicemail or speakerphones?
- How are phone calls billed? What surcharges or fees apply?
- Do guest rooms have data ports?
- Are there desks with lighting?
- What are the hours of room service?
- What is the additional cost for a rollaway?
- Are any of the couches sofa/sleepers?
- Are there additional costs for children staying in rooms?
- Will they waive a corkage fee in the Suites? (fee charged when food and beverage are brought in from an outside source)

Meeting and Banquet Space

- Can floor plans be provided with details on meeting room space, square footage, dimensions, ceiling heights, seating capacities and breakout configurations?
- Does each room have temperature and lighting controls?
- Is lighting adequate?
- Does each room meet the ADA's accessibility standards?
- Is there access to a banquet kitchen for meal functions?
- How many airwalls (single and double) does each room have and do they adequately block out sound?
- Is there a stage? What size is it?
- Is there a sound/projection booth?
- Are there hanging points in the ceiling? What is the cost to hang banners?
- Is there on-site audiovisual support? Can a list of equipment and pricing be provided?
- Can own Audiovisual be brought in?
- If bringing own microphones, what is the cost to connect into house sound system?
- Will the property provide security for meeting rooms?
- What is the drayage policy? (Drayage-handling of all boxes etc. by hotel)
- How many rest rooms are near meeting rooms?

- Where are the elevator banks?
- Will chef create special menus within budget?
- How much overage of meals provided is fixed?
- How many hours or days prior to event are food guarantees required?
- What types of theme parties are offered?

Other Information

- What time is check-in and checkout?
- What is the policy on establishing a Master Account?
- Are other groups booked for the same dates as the meeting? If so, what type of group(s)?
- What types of food do the on-site restaurants serve?
- What are the seating capacities and hours of operation of the on-site restaurant(s)?
- What is the distance to the airport, convention center and the nearest hospital?
- Are outdoor spaces or other areas available for special events?
- Is there a business center? What services are offered, and what are the hours of operation?
- Is child care available? What are the hours and fees?
- Does the hotel offer airport shuttle? Cost?
- Does the hotel offer transportation within a certain radius?
- Is on-site parking offered? What is the rate? Is it negotiable?
- Is valet parking offered? What is the rate? Is it negotiable?
- What sports and recreational facilities are on-site or nearby?
- Is there a deposit required for room reservations?
- Will you honor the rate 2 days before and after the meeting?
- Is there a swimming pool, sauna or Jacuzzi?
- Is there a Health club? What is the cost?

If possible, request bids from several hotels. Remaining flexible with dates and location can often result in lower room rates.

A visit to the hotel or hotels that are being considered as the site of the District Convention should be made eight to ten months in advance.

Contact the hotel sales department, request a site inspection visit and plan to discuss a large number of details with hotel staff members. Here is a list of suggested subjects for this preliminary discussion:

1. Arrival and departure dates
2. Number of sleeping rooms needed per night
3. Complimentary rooms and suites expected
4. Hotel rate structure
5. Arrangement for gratuities
6. Parking arrangements, special group rates
7. Convention registration facilities
8. Rooms and audio-visual equipment for sessions
9. Meal functions
10. Receptions
11. Check-out arrangements and times
12. Child care and facilities
13. Handling of hotel reservations
14. Table or other decorations and displays
15. Labor union requirements, if any
16. Establishing a master account

To avoid any unexpected problems, put all points of agreement worked out with the hotel in writing and have an authorized person from the hotel sign it.

Each meeting room to be used should be visited and seating and speaking arrangements checked. Check with the hotel to see if any other groups will be using adjacent rooms and determine if there will be a possible noise problem.

Hotels are accustomed to providing a certain number of guest rooms on a complimentary basis. Usually a hotel has a ratio which will be applied to the number of rooms required for the Convention. However, you should make an attempt to obtain the maximum number on a complimentary basis (e.g., 1 comp per every 40 "room nights"). Comp rooms or a suite are usually provided for the top administrative official and may well be offered to the Governor,

International President, International Representative or other VIP.

Complete and detailed plans for the handling of all room reservations should be completed early in negotiations with the hotel. The process of making reservations, and room deposits if required, must be clearly stated in advance convention promotion. Hotels should be required to guarantee the allotted number of rooms up to an agreed hour and day ("cut off date"). A hotel may provide a pre-printed reservation form that can be mailed with your registration form or you may develop your own housing form. Before you announce the hotel room rate, if your District adds room rebates to the cost of the room, it should be added to the rate.

The Budget

District Conventions should be planned and operated on a break-even basis, with some margin for safety, rather than with a profit motive. With any Convention, some expenses are fixed and others are variable, the variables depend largely on the anticipated number of attendees.

The following “model” budget assumes that a certain amount of money has been allocated to the Convention from District Members’ dues. This method allows registration fees to be kept as low as possible.

Model Convention Budget

Income

	Applies to Convention fund	Applies to Members’ registration	Applies to Guest registration	Total
Convention fund (3700 Members @ .80)	\$2,960			\$2,960
Registration fees (200 Members @ \$70/100 guests @ \$60)		\$14,000	\$6,000	\$20,000
TOTAL INCOME	\$2,960	\$14,000	\$6,000	\$22,960

Expenses

	Applies to Convention fund	Applies to Members’ registration	Applies to Guest registration	Total
Convention promotion (mailing, postage, etc.)	\$500			\$500
Printed programs	\$500			\$500
Printed tickets	\$150			\$150
Registration forms printed	\$125			\$125
Badges	\$125			\$125
Convention report (minutes)	\$125			\$125
Courtesies (Int. Rep, guests)	\$250			\$250
VIP Dinner (District officers, Int. Rep, etc.)	\$250			\$250
Decorations	\$250			\$250
Music (Divided: Members & guests)		\$250	\$250	\$500
Signs	\$100			\$100
Old Timers’ Breakfast (200 @ \$15)		\$3,000		\$3,000
Governors’ Banquet (200 Members/100 guests @ \$30)		\$6,000	\$3,000	\$9,000
Luncheon (200 @ \$15)		\$3,000		\$3,000
Guest Luncheon (100 @ \$22)			\$2,200	\$2,200
(Contingencies 10%)	\$238	\$1,225	\$545	\$2,008
TOTAL EXPENSES	\$2,613	\$13,475	\$5,995	\$22,083
Excess income over expenses	\$347	\$525	\$5	\$877

Format for District Conferences and Conventions

The following format outlines the agenda and activities which should be accomplished at District Conferences and Conventions during each quarter of the administrative year. Please note the separation of agenda and procedures for the Executive Committee, the District Board of Directors and District Conferences.

Group	Agenda or Program	Authority	
		Bylaws Article	Section
<u>First Quarter</u>			
Executive Committee (Members of Executive Committee) XII, 4	Approve minutes of previous Executive Committee meeting.		
	Fill vacancies in District offices, if any have occurred.	XII	5
	Authorize purchases, expenses, travel allowances, etc.	XIII	2
	Other functions delegated by Board of Directors or Convention.	XIII	2
	Review budget and audit if completed for recommendation to Board of Directors.	XIII	2
	Review District policies. Approve dates of its meetings. <i>Many District policies may require the Executive Committee and the Board of Directors to approve their Achievement and Awards Program</i>	XIII	2
<hr/>			
Board of Directors (Members of District Board of Directors) XII, 2	Official installation of District Board of Directors		
	Adopt District budget.	XI	5
	Approve Review of Financial Records.	XI	6
	Select depository for District funds and authorize signatures.	XI	7
	Approve minutes of previous meetings.		
	Select time and place of next meeting to announce.	XIII	1
	Act on reports of receipts and expenditures by Secretary-Treasurer.	XIII	1
	Act on reports of Lieutenant Governors and District Chairs when necessary.	XIII	1
	Approve District policies.	XIII	1
<hr/>			
Conference (All Club representatives and District officers)	Introduction and promotion of all programs and objectives by District Chairs.		
	Group round tables, buzz sessions and forums as time permits.		
	Brief Zone meetings, under Lieutenant Governors, as time permits.		
<hr/>			
<u>Second Quarter</u>			
Executive Committee	Same agenda as first quarter plus review District Secretary-Treasurer's statement of cash receipts and disbursements for previous quarter	XIII	2
<hr/>			
Board of Directors (No meeting required if all Zones hold meetings this quarter) XII, 1	Approve minutes of previous meeting.		
	Select time and place of next meeting to announce.	XIII	1
	Act on reports of receipts and expenditures by Secretary-Treasurer.	XIII	1
	Act on reports of Lieutenant Governors and District Chairs when necessary.	XIII	1
	Establish Zone alignments for following year.	IX	1,C
Conference (Not required)	Conduct round table and buzz sessions for Club officers and Chairs		
	Promote all programs and objectives.		

Conference
(Not required),
continued

If not otherwise conducted, judging of District Community Projects Awards entries by District awards jury.

Give Awards/Recognition earned in previous year (they have been announced and are usually shipped for this meeting).

Approve Review of Financial Records if not otherwise done at First Quarter should be done by now – remember to send to Optimist International.

Third Quarter

Executive Committee	Same agenda as second quarter.		
Board of Directors	Approve minutes of previous meeting.		
	Act on report of receipts and expenditures by Secretary-Treasurer.	XIII	1
	Act on reports of Lieutenant Governors and District Chairs.	XIII	1
	Act on plans, programs and budgets for District Convention.	XIII	1
Conference (Assembly of Club representatives for voting based on Club membership) X, 4	Election of Lieutenant Governors for following year.	XV	6
	Conduct District Oratorical and/or CCDHH Contest finals if not otherwise conducted.		
	Club President-Elect briefing		

Fourth Quarter

Executive Committee	Same agenda as third quarter		
Board of Directors	Approve minutes of previous meeting.		
	Act on reports of receipts and expenditures by Secretary-Treasurer.	XIII	1
	Act on reports of Lieutenant Governors and District Chairs when necessary.	XIII	1
District Convention (All Club delegates according to voting strength based on Club memberships) X, 4	Election of Governor-Elect	XV	5
	Selection of future Convention sites and dates to announce.	X	1
	Resolution to Optimist International Board re: District dues increase, if any.	XI	2
	District Convention program	X	8
	Lieutenant Governors-Elect Conference (One day prior to the Convention).		
	Club Secretary-Treasurers' Workshop.		
	Presidents-Elect Conference.		
	Decide whether to sponsor a CCDHH District contest next year.		
	Decide whether to sponsor a combined gender or separate gender Oratorical Contest.		
	Approve the tentative budget, calendar and Achievement and Awards for the next year.		

Program Structure

The following suggested convention program is based on a composite of the best District Convention Programs of recent years. It is actually a two-day event, usually a Friday and Saturday, though certain events involve fewer numbers of attendees may be scheduled the evening before or the morning after the Convention proper.

Every Delegate must be free to attend Leadership Development Workshops, which provide the greatest take-home benefit of the Convention. Delegates, particularly incumbent Officers and Officers-Elect, cannot be in two places at the same time. No Convention related event, social, sports or entertainment, should be scheduled during a Business Session or Leadership Workshop.

Suggested Convention Program

Pre-Convention

- All Day: Lieutenant Governors-Elect Workshop
District Executive Committee Meeting
- Evening: Reception or other social event

First Day

- Morning: Convention business committee Meetings:
- a: Nominating
 - b: Credentials
 - c: Rules
 - d: Resolutions
 - e: Convention Committee
- Presidents-Elect Workshop (1st Session)*
Board of Directors Meeting
(may be a luncheon meeting)
Luncheon: Optional
- Afternoon: Convention Business/Delegate Assembly
- a: Welcome/Opening remarks by Convention Chair and Governor
 - b: Report of Credentials Committee
 - c: Report of Rules Committee
 - d: Introduction of Lieutenant Governors
 - e: Introduction of District Committee Chairs
 - f: Report of District Secretary-Treasurer
 - g: Other Convention Business
 - h: Introduction of and greetings by International Representative
- Evening: Free time or social activity

Second Day

- Morning: Old Timers' Breakfast
Presidents-Elect Workshop (2nd Session)*
Club Secretary-Treasurers' Workshop
- Luncheon: Address by International Representative
- Afternoon: Convention Business/Delegate Assembly
- a: Report of Credentials Committee
 - b: Report of Resolutions Committee
 - c: Report of Nominating Committee
 - d: Report of Governor-Elect
 - e: Other Convention Business
- Evening: Governors' Banquet, Installation of Officers, Awards Presentations, Recognition of VIPs, etc.
- * The Presidents-Elect Workshop must not be scheduled to conflict with Convention Business Sessions.

Installation Ceremony

District Convention

(Title, Name) Presiding

Setting: *Large Meeting Room of Convention Hotel*

Note: Large pillar candle on table in front of speaker's table should be lighted BEFORE ceremony begins.

Presider: Ladies and gentlemen, as we once again move from one administrative year to the next in the _____ District of Optimist International, Governor _____ will now symbolically pass the leadership torch to Governor-Designate _____.

LIGHTS DOWN

(Governor lights his/her taper candle and walks from right side of speaker's table toward lighted large pillar candle on table in front.)

Presider: (As Governor walks) The large candle on the table in the front represents Optimism in the _____ District. Even though this candle will be extinguished tonight following this ceremony, we all know that Optimism will never fade as we continuously serve our youth.

_____’s (Governor’s first name) candle represents his/her term as Governor of our District. This candle has been burning brightly since October 1, _____.

(Governor Designate walks from left side of speaker's table toward lighted large pillar candle on table in front. He/she holds a taper candle that has not yet been lighted.)

Governor (Name) will now “pass the torch” of Optimist leadership to Governor-Designate (Name) by lighting his/her candle.

(Governor and Governor Designate stand on right and left sides of pillar candle. Governor lights Governor Designate’s candle immediately above the flame of the pillar candle.)

Presider: We have known for many years that the success of Optimist leaders depends to a large extent upon the support and encouragement of spouses and friends.

_____ (Governor’s spouse or partner), would you please join _____ (Governor); and _____ (Governor Designate spouse or partner), would you please join _____ (Governor Designate) at the front?

(Spouses or partners walk from behind speaker’s table and join spouse/partner. They bring unlighted candles with them. All face audience.)

Presider: At this time I would like to introduce other Members of the _____ (Years, i.e. 1999-2000)

Executive Board. Please come to the front, accompanied by your spouse or partner, when your names are called, and light your candles from the large Optimist candle on the table.

NOTE: Spouses/partners bring candles with them but do not light them at this point.

Secretary/Treasurer _____ and _____

Past Governor _____ and _____

Governor-Elect _____ and _____

Assistant Governor _____ and _____

Assistant Governor _____ and _____

Zone 1 Lt. Governor _____ and _____

Zone 2 Lt. Governor _____ and _____

Zone 3 Lt. Governor _____ and _____

Zone 4 Lt. Governor _____ and _____

Zone 5 Lt. Governor _____ and _____

Zone 6 Lt. Governor _____ and _____

Zone 7 Lt. Governor _____ and _____

Zone 8 Lt. Governor _____
and _____

Zone 9 Lt. Governor _____
and _____

Zone 10 Lt. Governor _____
and _____

Zone 11 Lt. Governor _____
and _____

Zone 12 Lt. Governor _____
and _____

Ladies and gentlemen, these are your leaders for the _____ Optimist year. Their candles symbolize their commitment, energy and willingness to spread Optimism and serve the youth of the _____ District.

At this time I would like to call upon our representative from Optimist International, _____, to deliver a charge and administer the Oath of Office.

(Officers and spouses/partners face podium. Officers hold candles with left hand, leaving right hand free for oath. Rep delivers charge and administers oath.)

Presider: Thank you, _____. Now I would like to ask spouses/partners of officers to place the pin of office on the clothing of the officers.

(Spouses/partners give their candles to officers, allowing both hands free to pin officers.)

The success of Optimism in our District depends upon ALL Members to live an Optimistic life by following our Creed and serving the youth of our communities. The _____ (Year) officers will now spread the glow of Optimism by lighting candles for everyone in the room.

(Soft music begins. Officers light candles of spouses/partners at front of room and then move quietly throughout room to light candles. Spouses/partners remain in front of speaker's table.)

Presider: (When all candles have been lighted and music has stopped) Now let us hear once again the words of George Bernard Shaw:

“I want to be thoroughly used up when I die, for the harder I work, the more I live. Life is no brief candle for me. It is a sort of splendid torch which I have got hold of for the moment, and I want to make it burn as brightly as possible before handing it on to future generations.”

As we conclude this installation ceremony, let us all commit to keeping an abundance of fuel in our Optimist torches. Let us also lift our torches high (Presider lifts his/her candle, followed by officers and all) and keep them burning brightly for the youth of our District, our nations and our world.

Presider: Thank you. You may now extinguish your candles; and officers, you may return to your seats.

LIGHTS TURNED BACK UP.

(Pause while officers and spouses/partners are being seated.)

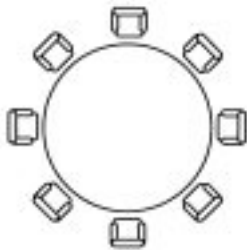
Presider: At this time I would like to invite our Optimist International Representative, _____, back to the podium for his address to our District.

Meeting Room Setups

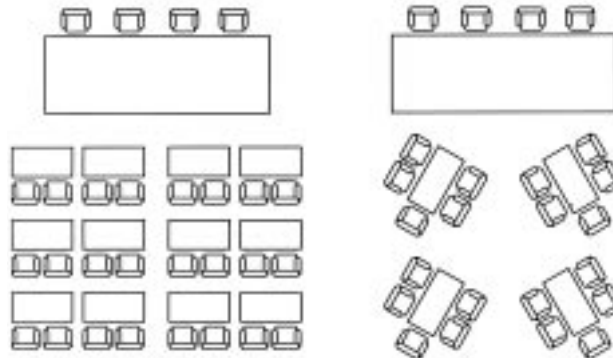
A meeting room should be selected with your event in mind, rather than your event being made to conform to a meeting room. Is the room size adequate? Take the facility's recommendation on the suggested number of people who can comfortably fill the room and decrease it. No one likes to be squeezed into cramped quarters. If in doubt, look for a bigger room. Following are five of the most commonly used configurations.

1. Banquet/Discussion: Seating with round tables that seat from eight to ten persons designed for meal events and are popular for networking sessions and small discussion groups.
- 2-3. Classroom Style: setups are the same as conventional theater-style setups, with the addition of narrow, draped tables in front of the chairs, which are used as writing surfaces. This setup is often used for large or lengthy seminars.
4. Conference Style: Seat attendees around rectangular table usually located in the middle of the room. This setup encourages interaction because attendees face each other. It is most useful for meetings of 20 people or fewer.
5. Square setups: Where draped rectangular tables are placed together to create a square, can be U-shaped or a hollow square. These configurations allow for dialogue and works well for meetings of 32 persons or fewer.
6. Theater Style: Have chairs set in rows facing the speaker, stage or the front of the room. This setup accommodates a maximum number of persons and works well for any size group.

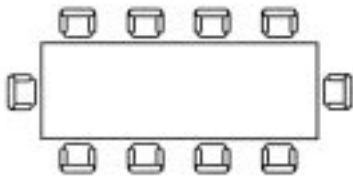
1. Banquet Style



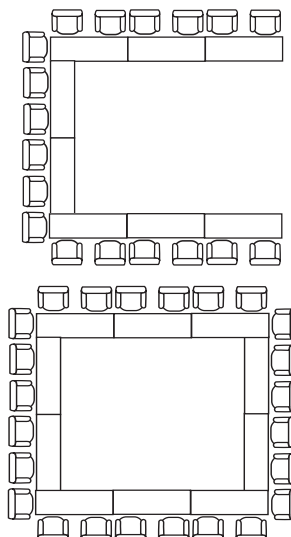
2/3. Classroom Style



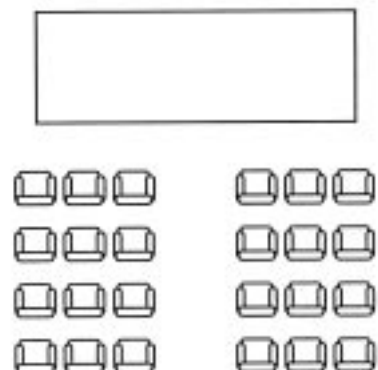
4. Conference Style



5. Square Style



6. Theater Style



The Do's and Don'ts of Technical Presentations

Do:

- Prepare slides as an aid to your presentation
- Put a heading on each slide
- Use short phrases for bullet items
- Keep your slides simple
- Leave a lot of “white space”
- Know your material and which slide is coming up next
- Discuss the slide being shown
- Talk to your audience
- Let the attendees know they will be given a handout of the slides
- Pace yourself through your presentation

- Define (and perhaps redefine later) your abbreviations
- Describe how your data leads to your conclusions
- Describe every slide when it first appears (at least, read the heading)
- Use the pointer judiciously

Do Not:

- Prepare too many slides for your allotted time
- Use all caps

Protocol

Protocol is proper etiquette for recognizing and honoring Optimists in leadership positions at the Club and District Meetings.

History of Protocol

Protocol and good order helps cultivate fellowship among Members. Our society has a reputation for being informal; however this does not mean that being familiar with and understanding protocol and customs is unnecessary. Protocol is a form of planned organization – a set of universally accepted rules and customs that help prevent tensions and chaos.

Protocol is from the Greek meaning “the first glue” – the glue that holds the official life together.

Times change and so, too, has protocol changed over the years. We adapt to changing and developing lifestyles. Customs and manners are often in flux due to the rapidly changing world in which we live.

Fellowship and Hospitality

Fellowship, hospitality, protocol and decorum help make Members and guests more comfortable and are important when planning social functions for VIPs.

It is a good idea to put yourself in guests' shoes, when making plans. Eliminate all

unknown surprises in advance. Make your guests' stay as pleasant as possible.

Welcome Letter

A welcome and informational letter should be sent at least two weeks prior to the visit. Include the following in the letter:

- Official Welcome
- City and Location of Meeting – include name, address, phone numbers
- Arrival and Departure Information
- Meal Functions — All guest meals are complimentary and paid for with District funds
- Travel arrangements (airport information, driving directions)
- Name of host providing transportation to and from the airport (if applicable)
- Attach detailed Agenda
- Appropriate Dress attire required for meeting (include any theme events)
- Local weather information to help them in packing
- A separate agenda for Spouse/Partner (if applicable)
- Notification of any speaking engagement you would like them to prepare – be certain to provide them with details on your District activities to announce

Hospitality Suite

When selecting a hospitality suite, be certain that the room is of adequate size to accommodate your needs. Visit the room in person in advance. Do not take the word of hotel sales people. You know how you are going to use the room. People are not going to feel comfortable in tight, cramped quarters. Inquire about policy regarding bringing in food and drink from outside the hotel into the suite.

Invitations

Invitations can be issued on the telephone or in writing. When inviting guests via e-mail and/or over the telephone it is nice to follow up with the invitation in writing. This way there will be no mix-up over the date, time or place.

All invitations should include the nature of the occasion, the day, date, hour, location, dress attire and who is giving the party.

If R.S.V.P (Repondez, s'il vous plait) appears on the invitation, respond promptly. This is important so your host or hostess can figure food counts, room requirements and all of the other details that go into making a successful party. Responding is important since it will save your host and hostess a lot of time or money.

You may use "Regrets Only" in place of R.S.V.P. If "Regrets Only" appears on an invitation you will track only those who will NOT attend. This is a great timesaver to handle invitations; however, this does not always allow for proper preparation.

If no mention is made of the dress for the occasion it can be taken for granted that dress is informal.

Gifts

Gifts make lovely remembrances. When selecting a gift, care needs to be taken with the amount of money spent on a gift; do not overextend yourself or your Club. It is the thought that counts when selecting gifts for others. Presenting gifts should be done tastefully. If a gift is to be presented in front of a large group, it is considerate to have the lid wrapped separately for easy opening and very little tape. You may want to have scissors available. If a guest is doing extensive traveling, offer to ship the gift to their home.

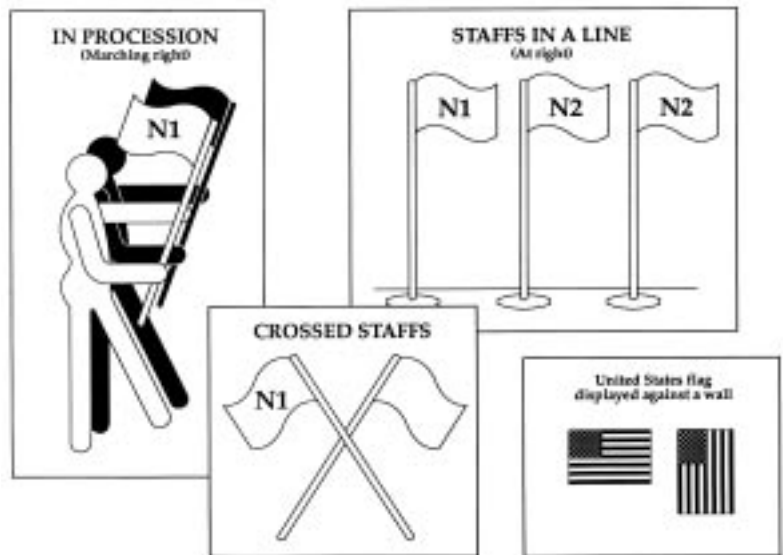
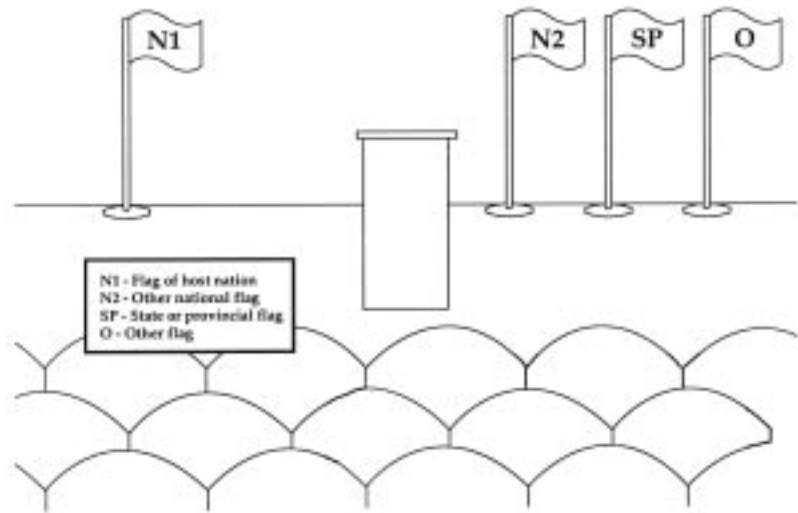
Optimist International maintains suggested gift lists on current and Past International Vice Presidents.

<i>President-Elect and Mrs. John Q. Smith Cordially Invite You and Your Guest</i>	_____	Who's making the invitation
<i>to the Social and Dinner for the Governors-Elect and Board of Directors of Optimist International</i>	_____	Occasion
<i>Thursday, July 15, 2004</i>	_____	Date
<i>Social – 6:30 p.m. Dinner – 7:30 p.m.</i>	_____	Time
<i>Adam's Mark Hotel (Grand Ballroom) St. Louis, Missouri 314.123.4567</i>	_____	Location Location phone
<i>Tickets – \$25 each RSVP Enclosed Black Tie Guest Speaker – Al Jones, Author and Lecturer</i>	_____	Special Instructions/ Information

Flag Display

The basic guidelines for flag display are these:

- Give the position of superior prominence to the national flag of the nation in which the meeting is being held. At no time should the flag of outside nations be given the position of superior prominence.
- Fly flags of outside nations at equal size and height to your national flag.
- State or provincial flags may be flown in size equal to national flags, however their position should be secondary to national flags. If you are using a group of state/provincial flags, arrange them in alphabetical order or in chronological order of admission to the union.
- The final position in order of prominence is given to personal or special flags, such as Optimist flags. These may be flown in size equal to or smaller than national and state/provincial flags.
- **Meeting Rooms:** The position of superior prominence is behind the speaker, to the speaker's right as the speaker faces the audience. Your national flag should always be placed on a staff alone at the speaker's right shoulder.
- All other flags, starting with the flags of outside nations, should be placed on staffs to the speaker's left shoulder as the speaker faces the audience. State and provincial flags should be placed to the outside of national flags. Special flags should be placed outside of state and provincial flags.
- **In Procession:** The place of superior prominence is on the marching right. If there is a line of other flags, your national flag also may be marched in front of the center of the line.
- **From Staffs in a Line:** Your national flag should be at the right (to the left of an observer facing the display). If no foreign



national flags are involved, the national flag may be placed in the center of the line provided it is displayed at a higher level.

- **Crossed Staffs:** When your national flag and another flag are displayed together from crossed staffs, your national flag should be on its right (to the left of an observer facing the display).
- **Attached to a Building Exterior:** Place your national flag to the right of the building entrance, from the perspective of the building. Place other flags to the left. If flagpoles are used, place them to the right of the entrance. State, provincial or special flags may be flown on the same pole below the national flag.

Head Tables and Receiving Lines

Giving prominence to ranking persons....

Many of the functions for which you will be responsible will require designing a head table. A head table is another opportunity for honoring those special guests you are hosting. The basic rules of precedence should be followed when seating guests at a head table. Precedence is based on one's official position or rank.

There are times when you may choose not to use a head table. In these instances you may have a few "reserved" tables toward the front of the room for special guests. You may want to combine people who have similar interests or associations so dinner conversation will be more enjoyable and pleasant for all concerned. When the time comes for introductions, the speaker moves to a standing podium and introduces those at the reserved tables in the same order as if they were seated at a head table.

Let your guests know ahead of time where they will be sitting at the head table. Use place cards to show their seats. If your guests will proceed into the banquet room, have them line up outside of the room ahead of time so they will be ready to enter when given the signal. The person of rank is on the left and the spouse or partner walks on the right. When approaching the head table the gentleman takes the lead and is the first to approach the table. This puts a gentleman at the end of the table.

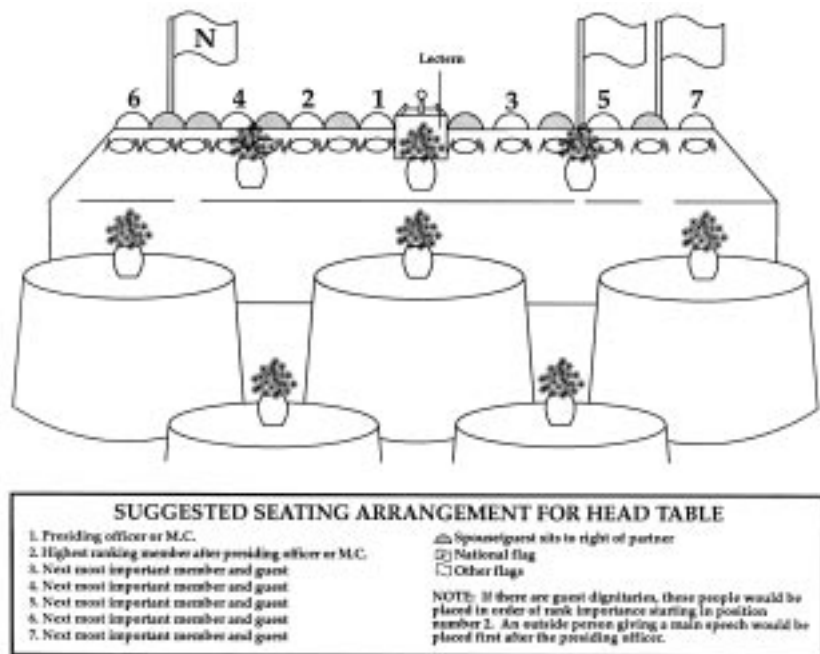
If possible avoid having a woman sit at the end of a table. It is perfectly acceptable to seat two women side by side at the head table to accomplish this. If your head table has an uneven number of people, spread apart the place settings on the short side to restore balance. (See diagram).

Pay attention to the portable steps that lead up to the head table. Be sure they are stable and are free of flags, wires or other obstructions which might cause your guests to trip. Station a sergeant-at-arms by the steps. Be sure the head table is large enough to accommodate the number of chairs you have placed at it.

Head Table Seating

The presiding officer takes the central position at the head table. The lectern should be to the presiding officer's left. NOTE: All directions refer to left or right as if you are seated at the head table – not looking on from the audience. If there is no lectern and the number of the head table guests is even, the presiding officer sits to the right of center. Alternate highest ranking guest right, left, right, left of the presiding officer. (See diagram). Spouses or partners belong to the right of the person of rank.

If you have a guest speaker who is not a member of the host organization, this person should sit to the right of the presiding officer. If the speaker is a Member you should place this person as close as possible to the presiding officer.



If an officer of a certain level is seated at the head table, include all the officers of that level. National flags should be placed so they do not obstruct anyone's view and are stable. The location's national flag should be placed to the speaker's right; other flags go to the left.

Watch for flower arrangements that obstruct views of people at the head table. Flowers can camouflage ugly podiums and mikes, but should complement the room décor and head table.

If flowers are going to be used for gifts or door prizes, consider using silk flowers.

Receiving Lines

Either of the following procedures is correct for setting up a receiving line:

- Host/Hostess, followed by guest of honor, followed by host's/hostess' spouse or partner, followed by guest of honor's spouse or partner, or
- Host/Hostess, followed by guest of honor, followed by guest of honor's spouse or special partner, followed by host's/hostess' spouse or special partner.

Receiving lines should be times for short greetings. They are NOT the place to hold long conversations. One should never go through a receiving line holding a drink or a cigarette.

Entrance



Host/
Hostess

Guest
of Honor

Spouse or
Partner of
Host/Hostess

Spouse or
Partner of
Guest of
Honor

Entrance



Host/
Hostess

Guest
of Honor

Spouse or
Partner of
Guest of
Honor

Spouse or
Partner of
Host/
Hostess

Introductions

Courteous people are concerned with addressing each other properly. Make an effort to concentrate and get the name of the person to whom you are being introduced. Nametags are really helpful. Use them often. They help everyone feel more comfortable.

The following simple guidelines should help when handling introductions. You'll find the more you follow these, the more automatic they will become:

- When introducing guests, start with the one of highest rank. The person of higher rank is introduced to the person of lesser rank. For example, "Mr. President, may I present John Smith." "Mr. Compton, I would like you to meet David Jones."
- When introducing speakers, introduce the one of the highest rank last.
- When introducing the head table, the presiding officer starts at his/her extreme left, then moves in toward center. He/she then starts again at the extreme right and moves in. If you will be handling introductions of the Members of the head table, be brief but be prepared. Do your homework. Take notes in case you have a slight memory lag. This is no time to stammer.

- A young person is introduced to an older person
- A man is introduced to a woman.
- A guest is introduced to the host or hostess
- A person without rank is introduced to one with rank.
- The presiding officer or the emcee will make the introductions. "I want to introduce the people at the head table." At this time make short introductions. Start at the extreme left and move to the center then extreme right. (Don't forget spouses and partners).
- If it is a Quarter Board meeting, all Lt. Governors and Past Governors in attendance should be introduced.

Special Notes on Introducing Your Speaker

At some time you will be responsible for introducing a guest speaker. True, you may know the speaker and may have heard the person speak many times before. But there are several reasons why introductions are very important:

1. No matter how well acquainted, well liked or well known your speaker is, the moment the speaker stands up, he/she becomes separated from the listeners. The introduction of the speaker serves as a brief ritual, a ceremony marking the speaker's transition from being another Member of the audience, to standing in front of the audience to lead its thinking.
2. Introductions help make listeners more perceptive and more appreciative.
3. Even though the speaker is well-known, the introduction can help clarify why the speaker is speaking and give us insight into the topic. A well prepared

introduction helps establish the speaker's authority.

4. The introduction serves as a bridge-from where the thinking of the audience is at the moment to where it will be led. Introductions help set the tone of the speech which follows.
5. K.I.S.S. (Keep It Short & Simple) No need to list all offices held, just those relevant to the occasion.

Carefully prepared introductions are an asset to the speaker; they also are signs of tastefully recognizing this honored guest.

Invocations and Toasts

Arrangements for invocations should be made well in advance. Never call someone out of the audience and ask them to give an invocation on the spur of the moment.

If you have been asked to do the invocation, BE PREPARED. You can find many helpful resources at the public library. Consider the audience to whom you will be delivering your invocation. Be acquainted with the nature of the event at which you are speaking. You may be asked to sit at the head table or may be called forward to deliver the message from the head table. Invocations are often referred to as inspirational messages or grace. Not knowing the make-up of your audience, you should use a generic prayer. (Avoid using the phrase "In Jesus Christ" etc. which could offend people of non-Christian backgrounds. Most likely, their background was listed in the Newsletter, Program, publicity, etc.). Remember, you are not giving the speech.

Toasts are recognizing special people or honoring nations. Again be prepared ahead of time. If you are toasting a special person, know what you are going to say well ahead of time. This is no time to embarrass or indulge in inside jokes. Usually a glass is raised when toasting followed by a sip of liquid.

Toasting Canada at official functions is done by raising a glass, and reciting "To Canada" while facing the Canadian flag. It is best to have liquid poured in the glasses you will be toasting with to avoid having to fill them quickly during the toast.

Toasting another country at official functions is done by raising a glass and reciting "To (and name of country)".

Recognizing the United States is done by the pledge while facing the flag or by singing the National Anthem.

Visitations By International Representatives

When an officer or official representative of Optimist International is scheduled to visit a District, the Governor should prepare well in advance and appoint a member to provide and oversee the customary courtesies of a host. A member with some experience in protocol in District or International affairs is recommended, perhaps a former Governor or a current or former International official. The individual should be from the area being visited and should share with the Governor the various responsibilities of a host. The visit may occur at a District Convention, District Conference, or a special gathering staged by the District administration or a Club or Clubs in the city being visited.

Assign a host couple to your VIPS. The host couple can fill in the awkward gaps when the main host and hostess (governor and spouse or partner at a district function) are needed elsewhere. The host couple could accompany your VIP to the meeting place, make introductions, answer questions about the agenda, and make sure the VIP's spouse or partner is not left sitting alone in the crowd.

An information kit on the guest may be obtained from the Leadership Development Department at the International Office if the Governor does not already have one. The kit will contain a biography and photograph for use in the news media. Publicity in local news outlets and Club and District Bulletins should precede the visit. The guest's advance permission should be obtained if a media appearance is planned. Following are some suggestions on handling such visitations.

Before the Official Arrives

1. Verify the dates of the visitation.
2. Determine arrival and departure times and mode of transportation.
3. Make hotel or motel reservations; select comfortable, not luxurious, rooms. Investigate the possibility of complimentary rooms.
4. Have recommendations of nearby restaurants.
5. Check with your guest before scheduling meetings or appearances other than the standard ones.
6. Advise the guest if meeting will be for members only or member and guests. If it is for members only, explain what activities are planned for spouses or partners/guests.
7. Arrange for the spouse or partner/guest to be entertained if meetings are for members only.
8. Advise the guest on formal or informal dress.
9. Give the guest the names of District or International officials who will attend.
10. Publicize the meeting well in advance. Use the biography and introductory material furnished by the International Office.
11. Arrange for someone (possibly a Committee) to meet the guest upon arrival.
12. Arrange local transportation.
13. Arrange for a token gift or memento if the occasion warrants one.
14. Arrange for a photographer - do not rely solely on newspaper coverage.
15. Invite a few important civic officials if the occasion is appropriate.

During the meeting

16. Be sure a lighted podium and public address system are available.
17. Advise the guest of the length of the speech and allow that much time on the agenda.
18. Make brief, pointed introductions.
19. If time is available, seek the guest's advice on any District problems.
20. Use proper protocol in seating arrangements at the head table. The presiding officer or Master of Ceremonies takes the central position at the head table. The lectern should be to the presiding officer's left. (Note: All directions refer to left or right as if you are seated at the head table—not looking on from the audience.) The highest ranking member after the presiding officer or Master of Ceremonies goes to the Master of Ceremonies right. Then alternate guests left, right, etc. of the

presiding officer. Spouses belong to the right of husbands or wives.

21. Introductions of civic officials and District officers should be held to a minimum.
22. Make a very brief statement of thanks to the visitor.
23. See that the guest is never stranded, but beware of scheduling too many additional meetings, sightseeing trips, etc.
24. Above all, be courteous and friendly.

After the meeting

25. Provide transportation to the airport.
26. Personally thank the visitor for time and efforts.
27. Send a copy of programs and any publicity received.
28. Send any publicity on the President to the International Office.
29. Send a brief note of thanks shortly after the visitation.

Responsibilities Of The Host:

1. Checks on the guest's general comfort during the meeting.
2. Accompanies the visitor to meetings.
3. Responsible for items numbered 2, 3, 5, 6, 8, 9, 11, 12, 13, and 23.

The host's and Governor's spouses should collaborate and assume similar responsibility for the spouse of the visitor. They would have special responsibility for item number 7.

Parliamentary Procedures

Robert's Rule's of Order advises on matters of parliamentary procedure. Parliamentary procedures help smooth the progress of more

formal meetings. Protocol helps make our business and social relationships easier, more pleasant and more profitable.