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**PAN AMERICAN ROUND TABLES OF TEXAS**

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**PROTOCOL MANUAL**

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**2020**

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## **PROTOCOL MANUAL**

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# **PROTOCOL**

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**According to Webster, Protocol is the code of ceremonial forms and courtesies, of precedence as proper and correct in official dealings. Another definition found in the Oxford English Dictionary states that Protocol is the formulary of the etiquette to be observed by the Head of the State in official ceremonies. Basically, it is an act of graciousness and hospitality to visiting dignitaries and in accordance with designated guidelines. It is how you would treat a guest in your home.**

**For the female members of the Pan American Round Table (PART), these definitions govern the actions applied in conducting meetings and in recognizing and addressing dignitaries who attend meetings or ceremonies of the Table. The term as used in most societies includes not only the courtesies but also the amenities and rules of etiquette used in the official life of the organization. In observing Protocol, honor is accorded the OFFICE not the individual. Each Table should appoint a Protocol Chairman with a committee, if necessary, to perform these duties when dignitaries are present. The following pages are intended to serve as guidelines for PART Tables.**

**One of the cardinal rules in Protocol is the observance of the order of precedence at all functions. Failure to recognize the precedence and proper rank of a guest is equivalent to an insult to the official's position. Just as parliamentary procedure indicates the correct way to conduct a business meeting, Protocol provides guidelines for the proper etiquette in recognizing and honoring those positions of leadership. Good Protocol leads to good relations at all levels.**

**Protocol in reference to meetings usually embodies the principles that govern...**

- a) the relative importance of persons;**
- b) their position at a table or in a receiving line;**
- c) their precedence for recognition and introductions; and**
- d) the courtesies to be extended to prominent persons before, during, and following a meeting.**

## **INVITATION TO DIGNITARIES AND GUESTS**

Verbal invitations for speakers, dignitaries, or guest should be confirmed on the organization's official stationery. Check for the correct spelling of the full name, title, and address. The State or Table Corresponding Secretary should send the invitation as early as possible. The invitation should include the following:

- Full details of the event including the date, place, time, type of meeting, and number of attendees.
- Directions to the meeting site with parking information.
- Dress code: Formal, cocktail, or business attire.
- Confirmation that the guest may bring a travel companion.
- Reason for inviting the guest and if appropriate, topic to be presented.
- The amount of time provided for the presentation/speech.
- Agreement about the honorarium or fee.

Written invitations should request a response by a certain date so that the Hospitality Committee can plan for seating and dining. If no response is received by the requested date, follow up with another letter or phone call. Never assume no response means the acceptance of the invitation. Instead of using "R.S.V.P." on the invitation, use "*A Response is Requested by*" (date) or "*Please Respond by*" (date.)

## **STATE DIRECTOR'S VISIT**

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**A visit by the State Director to a local Table should be viewed as a special event. After the biennial State convention, the State Director and the Corresponding Secretary should be invited to visit each Table. The Associate Director from that Table's area should also be invited to visit but at a different time. The Table Director should contact the official and designate dates that she may consider for a visit. Once a date has been scheduled, the Table Director should inform the dignitary about the format of the meeting and the final arrangements for her visit. The Table Director should also inquire if the State Director would prefer a receiving line in order to meet more members of the Table.**

**If the visit of these officers requires an overnight stay, the host Table assumes the responsibility for providing overnight accommodations. The host Table also is responsible for the cost of the dinner and /or luncheon at the meeting she attends. If the official stays overnight, the Host Table should entertain her with a dinner whether it's at a restaurant or one of the Table member's home.**

**Gifts for the visiting officers, although a gracious gesture, are not required. If the Table decides to gift the officer, consider a donation to the State Scholarship Fund.**

**If the State Director is arriving by air, she should be met at the airport by the Protocol chairman or by a committee member. Transportation should be provided to and from the meeting. If she**

**is traveling by car, she should have directions to the meeting and to her accommodations if she stays overnight.**

**The State Director should be given an opportunity to address the members of the Table. If she is to be the featured speaker, she should be advised of this in advance in order to give her time to prepare. As she is introduced to the assembly, all members should stand.**

**The courtesies extended to the State Director should also be extended to the Area Associate Director.**

**The Protocol Chairman should assist the Table Director when State officers and Alliance dignitaries attend Table functions.**

## **INTRODUCTIONS AND PRESENTATIONS**

- 1. Persons not known to the assembly are introduced.**
- 2. Persons known to the assembly are presented.**
- 3. An "introduction" is generally more informative than a "presentation." When guests of honor are merely to bow and not speak, they are introduced from the highest ranking down to the lowest. When guests of honor are to say a few words, introduce them from the lowest ranking guest to the highest. When the State Director and the Alliance Director General are introduced, the entire membership rises in recognition of the office. Beware of saying "*introducing the head table*". It is always stated as "*those seated at the head table*" or "*Head Table Guests*."**
- 4. Learn to control and invite applause at appropriate times. One can control the applause by asking people to hold their applause until all the guests have been recognized. At other times, one can signal applause by their phrasing, inflection, and by leading the applause.**

### **THE ACCEPTED ORDER OF PRECEDENCE FOR INTRODUCTIONS IS:**

- 1. Religious Dignitaries**
- 2. Government Officials (federal, state, city)**
- 3. Guest Speaker if a non-member**
- 4. International Officers**
- 5. Past International Officers**
- 6. State Officers**



## **INTRODUCING THE SPEAKER**

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- 1. Ensure that your introduction answers these four questions:**
  - a. Why this subject**
  - b. Why this speaker**
  - c. Why this audience**
  - d. Why this time**
- 2. Present the speaker**
- 3. Lead the applause and continue until the speaker arrives at the lectern. Greet the speaker and return to your seat.**
- 4. Return to the lectern as the speaker concludes her program.**
- 5. Express appreciation to the speaker.**
- 6. If a recognition item is to be presented, do it now.**

## **GENERAL SEATING ARRANGEMENTS**

**Balance is the policy for seating arrangements. At all meetings the number of persons to be seated at the head table is determined by:**

- **-The purpose of the meeting**
- **- The size of the room;**
- **-The anticipated audience ; and**
- **- The number of persons to be honored.**

**If there are many to be recognized and the group is relatively small, a head table of five to eight would be appropriate (not to exceed 13 persons.)**

**Others to be introduced may be seated at side tables immediately adjacent to the head table or placed directly in front of the head table. This arrangement is practical if the room is long and narrow.**

**At large meetings, a second head table may be used. This table may be in front and below the head table.**

**The presiding officer sits at the center if an uneven number is to be seated. If there is an even number, she is seated to the right of the center as she faces the audience.**

**An acceptable way is to seat the highest ranking person to the right of the presiding officer and those of lesser rank to the left. This makes it possible to introduce all on the right side of the presiding officer and then all on the left.**

**When in her own state, the State Director outranks all other guests present and sits at the right of the Table Director. Any other guests of honor are placed in order of office to the State Director's right.**

**The remaining Table officers and/or Honorary members fill the available seats to the right and to the left of the Table Director.**

If two guests of equal rank are present, the one who traveled the farthest distance is honored first.

Persons serving in office outrank past officers. Head table seating is for those presently serving in office.

An official representative of the PARTT organization is seated to the immediate right of the presiding officer if there is no higher ranked guest present from outside the organization. This seating is used during the Opening Ceremony of a State Convention and not for the Business Meetings.

A speaker who is not a member of the organization outranks state officers and national representatives. This is a courtesy due to a guest.

#### **LATE ARRIVAL:**

If the speaker is late, wait only fifteen minutes before proceeding to the next order of business. If a speaker is exceeding her allotted time, slip her *a note that indicates how much longer ... one or two minutes is a good rule to follow.*

(When thanking a speaker, never recap the speech; a simple thank you is sufficient.)

Any past or presently serving national, state, or other official, who appears late with no reservation or previous announcement of arrival or attendance is seated as close to the head table as possible. The presiding officer is notified by note (discretely) and may then acknowledge the guest when the agenda permits.

Always remember that we honor the *office* and not the *person*.

**Special Chairman:** If she is to present a program at the meeting, she is usually seated to the left of the presiding officer when there is an honored guest at the right of the presiding officer.

Local members who serve on the State or Alliance Board are treated as regular members. The Table Director introduces the Board member at special celebrations, seminars, etc.

Seating arrangements may be as follows:

<u>Left</u>	<u>Podium</u>	<u>Right</u>
1. Chairman of event		1. Table Director
2. Honored guest or speaker		2. State Director
3. Elected State Officers		3. Director General or her representative
4. Appointed State Officers		4. Elected Alliance Officer
5. Local elected officer (if space is available)		5. Appointed Alliance Officer

Use place cards at the head table. This will facilitate the seating of dignitaries on the dais.

The presiding officer presents members and guests seated at the head table. Never use the phrase "Introduce the Head Table." Say "Those seated at the Head Table are." The presiding officer should have a seating chart with the names and titles of those she is going to introduce.

When the introduction of the State and/or Alliance Director is completed, the audience should stand and applaud in recognition of the office. The presiding officer may indicate this by turning to the one so honored, gesturing slightly to the audience to rise and leading in the applause.

**Introduce the highest ranking guest first and go down the list. If they are each to say a few words of congratulations, etc., introduce the lowest ranking first and go up the list. Then the last expression comes from the highest ranking officer or guest.**

**When the State Director and the Alliance Director General attend a PARTT function together, it's a courtesy to invite both dignitaries to say a few words. The Alliance Director General is the first to address the assembly followed by the State Director. They are always introduced by the presiding officer and NEVER by the program chairman or someone else.**

**When time for the program, the presiding officer presents the program chairman who will introduce the program speaker. The presiding officer never says "and I now turn the meeting over to ..." when presenting the program chairman.**

**The presiding officer should decide before the meeting who is to introduce the speaker and who will thank the speaker. This may be noted on the agenda. The speaker should be informed, in advance of the meeting, how long has been allowed for the presentation.**

**When thanking a speaker, a simple "thank you" or "thank you for that fine message" is sufficient. Never recap the speech. This tends to upstage the speaker.**

**By being relaxed yourself, you'll relax others around you and everyone will be assured of an enjoyable time!**

## **STATE CONVENTION INFORMATION**

**-The State Convention Chairman will send invitations of their convention to the following: Alliance Director General, Zone Director, Pan American Woman, and other Alliance Board members. If possible, they will include the Convention Program, lodging details, registration procedures, and other special events where her presence is required.**

**-Once attendance is confirmed by the Alliance officers, the Chairman of the Convention Courtesy Committee will ascertain time and place of each guest's arrival and make arrangements for meeting them and transporting them to the hotel.**

**-The State Director presides over the State Convention. The Alliance Director General will be treated as a Guest of Honor and will be seated at the dais only during the Opening Ceremony. She should be asked to deliver a brief greeting with advanced notice. During the Convention Business meetings, the Alliance Director General will be assigned a reserved seat.**

**-Other Alliance Board members who are present should have reserved seats in the first rows of the audience. It would be a courtesy by the State Director to introduce those Alliance Board members by name and position during the Opening Ceremony.**

**-The Alliance Director General and Alliance Board members present should abstain from raising issues or commentaries during the state convention's business meetings.**

**The State Director can chose to recognize them if it pertains to the item being discussed. Otherwise, the State Director can visit with them and their concerns during recess.**

**-When convention registration occurs, it would be helpful to have a special registration table for the Alliance and State officers. The registration fees for the State Director and the Alliance Director General are paid by the State Convention.**

**-The Convention Courtesy Committee should provide transportation to all events for the State Director, the Alliance Director General, and the Pan American Woman and upon arrival at the event, they should be escorted to their respective seats.**

**-If the Pan American Woman attends the State Convention, she should be asked to say a few words during the Opening Ceremony. Her registration and lodging will be paid by the State Convention.**

**-When the State Convention concludes, the Courtesy Committee offers transportation to the airport to the State Director, the Immediate Past State Director, the Alliance Director General, and the Pan American Woman.**

## **STATE BOARD MEETING SEATING**

The setup is a square table with a hollow center. Designate the top of the square with Podium in the center. Have a small set of OAS flags in front of the Podium. If needed, you may set the flags on a smaller table in front of the Podium.

**TOP**

**LEFT**

**HOLLOW CENTER**

**RIGHT**

**BOTTOM**

**TOP ROW**

**Left to Right**

- 1. Corresponding Secretary**
- 2. Scholarship Chairman**
- 3. Parliamentarian**
- 4. PODIUM**
- 5. State Director**
- 6. Recording Secretary**
- 7. Treasurer**
- 8. Historian**



### **LEFT ROW**

- 1. First Associate Director**
- 2. Second Associate Director**
- 3. Third Associate Director**
- 4. Fourth Associate Director**
- 5. Nominating Committee Chairman**

### **RIGHT ROW**

- 1. Archives Chairman**
- 2. Electronic Communications Chairman**
- 3. Long Range Planning Chairman**
- 4. Publications Chairman**
- 5. Resolutions Chairman**

### **BOTTOM ROW**

**All Past State Directors are seated in this row in the order of the year in which they served. The exceptions are the Past State Directors that are seated as Board Members.**

**In the room have extra chairs available for any Committee Members and Pan American Members who wish to attend the State Board meeting.**

# **STATE CONVENTION OPENING CEREMONY**

## **HEAD TABLE SEATING**

**OPENING CEREMONY:**  
**Facing the audience:**

### **LEFT**

**Table Director**  
**Speaker**  
**Honored Guest**  
**Convention Chairman**

### **PODIUM**

### **RIGHT**

**State Director**  
**Alliance Director General**  
**Pan American Woman**

The remaining Past State Directors, Past Alliance Director Generals, Elected State Officers, Elected Alliance Officers, and Special Guests are escorted to reserved seats. If a dinner is provided after Opening Ceremony, the officials and guests from the dais should be escorted to reserved seats. Be sure to inquire if the dignitaries and their guests are staying for dinner. If a dignitary is bringing a guest, the guest should be escorted to the reserved table before Opening Ceremony. Seats at reserved tables should also be included for husbands/guest of the officers from the dais.

# **STATE CONVENTION BUSINESS MEETING**

**Facing the audience:**

## **LEFT**

**Recording Secretary  
Treasurer  
Corresponding Secretary  
Historian  
Scholarship Chairman  
Immediate Past State Director**

## **PODIUM**

## **RIGHT**

**State Director  
Parliamentarian  
First Associate Director  
Second Associate Director  
Third Associate Director  
Fourth Associate Director  
Convention Chairman**

**To the right side of the Head Table, the Advisory Committee is seated. On the opposite side, tables are set for Committee Chairmen followed by Table Delegates in alphabetical order.**

## **PAST STATE DIRECTORS' LUNCHEON**

**If you have a Head Table, the seating arrangement follows this format.**

### **LEFT**

- 1. Luncheon Chairman**
- 2. Program Speaker**
- 3. Table Director**
- 4. Alliance Representative**

### **PODIUM**

### **RIGHT**

- 1. State Director**
- 2. Past State Directors  
(in order of service)**

**If you do not have a Head Table, designate 2 round tables for State Director, Board and Committee Chairmen. In addition, reserve a table for the Past State Directors and another reserved table for Alliance Dignitaries.**

## **STATE CONVENTION INSTALLATION CEREMONY**

**If there is room for only one group of officers, the retiring officers are honored for their two year's work and are seated at the head table.**

**Facing the assembly, the order of seating is the following:**

### **LEFT**

**Recording Secretary  
Corresponding Secretary  
Treasurer  
Historian  
Parliamentarian  
Scholarship Chairman**

### **PODIUM**

**State Director  
Immediate Past State Director  
First Associate Director  
Second Associate Director  
Third Associate Director  
Fourth Associate Director  
Table Director**

### **RIGHT**

**In a larger setting, a longer head table may be used with outgoing officers seated to the right of the presiding officer and the incoming officers to the left. The installing officer is seated to the immediate right of the presiding officer unless a public official is in the honor seat. In this case, the installing officer is seated to the immediate right of the public official.**

**At the conclusion of the installation ceremony, the outgoing State Director receives her permanent State Director's pin and passes the gavel to the newly elected State Director. The incoming State Director will address the assembly and adjourn the convention.**

## **FLAG PROTOCOL**

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**At Opening Ceremony, the flag of the United States is always presented first followed by the flag of the Alliance Director General's country. If your Table owns a collection of full-size flags of the Pan American countries, an entire "Massing of Colors" should follow the flags of the USA and the Alliance Director General's country in alphabetical order. If the Alliance Director General represents another country, regardless of the nation of her birth, then the flag of that country she represents will be used. Facing the assembly, the United States flag is placed to the right of the Head Table and the Alliance General's flag is placed to the left side of the Head Table. The Texas flag is placed to the right side of the United States flag.**

**As a courtesy to any invited guests from Consuls of Pan American countries, you would present the flags of their countries starting with the highest ranking official and then alphabetically.**

- Consul General**
- Consul**
- Assistant Consul**
- Honorary Consul**

### **Cuban Flag:**

**Since the United States does not have diplomatic relations with Cuba, the Cuban flag is not presented at the State Convention. However, at an Alliance function like Pan American Day, the Cuban flag would be presented.**

**The flags should be brought before the membership and then placed in a stand behind the head table. The flag of the United States holds the position of honor at the presiding officer's right facing the audience. The Alliance Director General's flag will be posted to the left of the presiding officer.**

**If the flag is not displayed while the national anthem is being played, all present should stand and face toward the music. If the flag is displayed, all present should face the flag and place their right hand over their heart. This gesture is used upon the first sighting of the United States flag. Upon the reciting of the Pledge of Allegiance, the correct manner is standing with your hand over your heart.**

## **PROTOCOL COMMITTEE GUIDELINES**

- 1. During the State Convention, the committee members should wear an article of clothing (like a scarf) to identify themselves.**
- 2. Assign a committee member to tend to the needs of the State Director and the Alliance Director General.**
- 3. Escort the Alliance Director General to all the meetings.**
- 4. Provide private transportation for the State Director and Alliance Director General to all evening events.**
- 5. Escort Alliance Director General to breakfast and then to the meeting room. If the Director General wishes to leave the meeting, provide a door monitor for easy departure.**
- 6. If there are no bellboys at the hotel, have a committee member help with the luggage.**
- 7. When driving the State Director and Alliance Director General, always confirm the destination before leaving.**
- 8. Protocol Committee should remain in attendance until the State Director and the Alliance Director General leave the venue. If any of the officials need assistance in carrying meeting materials, a committee member should offer to help.**
- 9. The Protocol Committee is responsible for setting up the meetings, refilling the water glasses or bottles on the dais,**



**and checking that the microphones are in working order. The Convention Chairman and her committee should help with the setup of the meeting rooms. The Protocol Committee should arrange the place cards at the meetings of the State Board and State Convention.**

**10. Church service information and transportation, if requested, should be provided for the State Director and Alliance Director General.**

**11. When the State Director and Alliance Director General are present and group photographs are taken, they should be placed in the front row, in the middle with honored guests to either side.**

**12. If the Pan American Woman attends the State Convention or a Table meeting, she receives the same courtesies as the Alliance Director General.**

**13. Upon the Alliance Director General's arrival, she is met by the Table Director, Protocol Committee member, Zone Director, State Director, and other Alliance members if possible. A corsage may be given upon her arrival. In her room, Hospitality should arrange for flowers and/or a fruit basket.**

**14. The Alliance Director General should have a detailed itinerary of the State Convention/Table events before she arrives and an extra copy upon her arrival.**

**15. A departure gift to the Alliance Director General is a gracious gesture. When purchasing a gift, consider her travel agenda and luggage capacity.**

## **CHECKLIST FOR VISITING STATE DIRECTOR, ALLIANCE DIRECTOR GENERAL, AND PAN AMERICAN WOMAN**

**Name:**

**Date:**

**Event:**

### **ARRIVAL:**

- 1. Welcoming Committee**
- 2. Hospitality**
  - a. Corsage or Flowers/Fruit**
  - b.**
- 3. Transportation**

### **EVENT:**

- 1. Transportation**
- 2. Flags**
  - a. U.S. Flag**
  - b. Alliance Director General**
  - c. Subject Country (if on program)**
- 3. Receiving Line**
- 4. Recognition of Dignitary (Membership stand up for State Director, Alliance Director General, Pan American Woman)**
- 5. Greetings by Dignitaries**
- 6. Assigned Seating**
- 7. Transportation**

### **SPECIAL PLANNED EVENTS:**

- 1. Meals (as invited guests)**
- 2. Shopping/Tourism (as invited guests)**
- 3. Transportation**

### **DEPARTURE:**

- 1. Transportation**
- 2. Departure Gift**
- 3. Thank You Note to Table with copy to Dignitary**

**This Protocol manual was compiled from several sources. The following names and sources contributed to the completion of this manual.**

**Elsie Perez's "Boot Camp Training Handbook"**

**Olivia Lopez's Protocol Training Session - August 23, 2003**

**Protocol Red Book: Mary Jane McCaffree, Pauline Innis, and  
Richard M. Sand**

**PARTT Present and Past State Directors**

**Protocol Committee Members: Geri Rice, Carmen R. Guerra, and  
Gloria Riddle**

# NOTES

