PROFESSIONAL EVENT PORTFOLIO

Submitted By:

Bruce A. Shank
3074 S. Glebe Road
Arlington, VA 22206

The George Washington University
Event Management Certificate Program

May 29, 2006
## Section 1

### Table of Contents

<table>
<thead>
<tr>
<th>Location</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practicum Summary</td>
<td>p-1 to p-3</td>
</tr>
<tr>
<td>Section 1- Table of Contents</td>
<td>1-1 to 1-2</td>
</tr>
<tr>
<td>Section 2- Executive Summary</td>
<td>2-1 to 2-3</td>
</tr>
<tr>
<td>Section 3- Research</td>
<td>3-1 to 3-6</td>
</tr>
<tr>
<td>Needs Assessment</td>
<td>3-4</td>
</tr>
<tr>
<td>SWOT Analysis</td>
<td>3-5</td>
</tr>
<tr>
<td>Feasibility Study</td>
<td>3-5</td>
</tr>
<tr>
<td>Section 4- Design</td>
<td>4-1 to 4-3</td>
</tr>
<tr>
<td>Section 5- Planning</td>
<td>5-1 to 5-4</td>
</tr>
<tr>
<td>Organizational Structure</td>
<td>5-2</td>
</tr>
<tr>
<td>Budget Discussion</td>
<td>5-2</td>
</tr>
<tr>
<td>Timeline Discussion</td>
<td>5-3</td>
</tr>
<tr>
<td>Vendor List Discussion</td>
<td>5-3 to 5-4</td>
</tr>
<tr>
<td>Section 6- Coordination</td>
<td>6-1 to 6-7</td>
</tr>
<tr>
<td>Arrival Discussion</td>
<td>6-2</td>
</tr>
<tr>
<td>Transportation</td>
<td>6-2</td>
</tr>
<tr>
<td>Section 7-</td>
<td>Evaluation</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------</td>
</tr>
<tr>
<td></td>
<td>Overview</td>
</tr>
<tr>
<td></td>
<td>Research</td>
</tr>
<tr>
<td></td>
<td>Design</td>
</tr>
<tr>
<td></td>
<td>Planning</td>
</tr>
<tr>
<td></td>
<td>Coordination</td>
</tr>
<tr>
<td>Section 8-</td>
<td>GAP Analysis</td>
</tr>
<tr>
<td>Section 9-</td>
<td>Personal Essay</td>
</tr>
<tr>
<td>Section 10-</td>
<td>Appendix</td>
</tr>
<tr>
<td>Section 11-</td>
<td>Student Affirmation</td>
</tr>
</tbody>
</table>
Section 2

Executive Summary
EXECUTIVE SUMMARY

The focus of this Professional Event Portfolio was a week long conference which supported joint talks between the United States and the Government of Tunisia. These discussions were labeled as the 21st annual Joint Military Commission, or JMC, between the two nations. This event served as a vehicle for the strategic goals directed by the Honorable Donald H. Rumsfeld, Secretary of Defense, and the Honorable Peter W. Rodman, Assistant Secretary of Defense for International Security Affairs. This Joint Military Commission was to serve the overarching goal of formulating U.S. Defense Policy and fostering support, throughout North Africa, for the Global War on Terrorism. The JMC was scheduled through an Office of the Secretary of Defense Memorandum, dated March 7, 2006 (Appendix A). Once approved, the JMC was assigned to me, as Executive Liaison Agent. I therefore, was assigned with the responsibility for all logistical planning, budgeting, protocol and execution. The assigned dates for the 21st annual U.S./Tunisia JMC were from 15-22 April 2006. The program began when the official delegation arrived at Washington-Dulles International Airport on 17 April, 2006, as described in Appendix B, (Support Itinerary). The event took place primarily within Washington, D.C. and billeting was provided by the Ritz Carlton, Pentagon City in Arlington, VA. Conference space was provided by the Department of the Navy which offered spaces within the Pentagon. There was also a one day trip from Washington, D.C. to Suffolk, Virginia in order to visit the U.S. Joint Forces Command and the Joint Warfighting Center. The focus of the program in Suffolk consisted of discussions, briefings and facility system tours centered on military transformation. The program concluded as scheduled when the foreign delegation returned to Tunis, Tunisia on the
evening of Friday, 21 April, 2006. The official party consisted of U.S. and Tunisian
Officials listed in Appendix C, *(Official Party)*. The overall support team which
contributed to the successful program completion, consisted of eight, federal
security agents from the Criminal Investigative Division of the United States Army, two
French speaking interpreters from the Department of State, four aircrew designated with
flying the delegates and support team from Washington, D.C. to Norfolk, VA,
and a myriad of drivers from various sources. As the assigned Executive Liaison Agent,
I was responsible for overall management and seamless execution of the program from
initial conception and planning, through its completion.
The research process begins when the overall concept of the program or event has been identified and approved by the U.S. Secretary of Defense. Once approved and assigned to the Office of International Engagement, an Executive Liaison Agent (ELA) is then selected to lead the overall event planning and coordination throughout execution. Upon receiving the authority to move forward with the development of the program, I begin researching the specific goals and requirements associated with the program. I work very closely with the Office of the Secretary of Defense for Policy representative who specializes in that region of the world. In this case Mr. Matthew Axelrod, North Africa, Tunisia Action Officer. When planning an event such as a Joint Military Commission (JMC), or Bi-Lateral Military Conference, many factors must be considered. This is true with any such meeting or conference which may be professionally coordinated. In the case of this JMC, the principal guest was the National Defense Minister of Tunisia, His Excellency Kamel Morjane. Simply by having a cabinet level minister as the principal guest of this commission creates many additional requirements not otherwise necessary. These include the requirement for a personal security detachment, 24 hour hotel surveillance and a level of protocol which is substantially different from that of the typical joint military conference.

The first area to consider was the venue for the official meetings associated with the JMC from the opening and closing plenary sessions, as well as the breakout subcommittee meetings also being conducted. Through discussions among the OSD Policy representatives and those at the U.S. Embassy in Tunisia the requirements were defined and prospective locations were evaluated. Available conference space was identified within the Pentagon within the U.S. Navy conference center. Fortunately there was no cost associated with the utilization of these rooms. Specific care must be given when coordinating meeting space with regards to the overall cost. All funds utilized are supplied from the Operational Representational Funds (ORF) within the annual U.S.
Defense Budget. When tax payer dollars are being utilized for any purpose, special care must be given to ensure that the research and contractual process eliminates wasteful spending of any kind. All processes, contracts and expenditures are open to public scrutiny, in a sense the” Washington Post Test” to ensure proper utilization of these funds.

Contractual obligations (Right of Refusal) as well as a proven historical record of success, commit our organization to using the Ritz-Carlton, Pentagon City when available, as long as the hotel can meet the needs of the program specifically. In the case of this JMC program, the Ritz was an appropriate fit. The requirements for this program were for seventeen rooms. One of these rooms would be a club level suite, and the sixteen others were standard club rooms. An additional requirement driven by our federal security was that all of the rooms must be on the same floor, the Personal Security Officer (PSO) must be billeted in the room next to the minister and the twenty four hour surveillance room must also be close to the minister’s room and the elevator for ease of monitoring. All of the requirements were attainable within this property.

The research function for required meals becomes a bit more difficult when considering all of the unconventional requirements many foreign delegations require when traveling outside their home nations. Many potential restrictions must be investigated and confirmed prior to any commitments can be made. In the case of the Tunisians, religious restrictions associated with their Muslim beliefs must be considered. One must not just assume that the minister and the group refrain from use of alcohol. In this case through detailed conversations with the U.S. Embassy in Tunisia, I was able to find out that the Minister in fact does drink alcohol. Muslim restrictions do not allow the eating of any pork products. This was something that would prove to be a potential for disaster, or international incident, if not planned for or handled properly. Additionally, any dislikes, allergies or dietary restrictions must be researched prior to coordinating any U.S. hosted meals.
Another area which must be fully researched concerns the logistical, or movement requirements supporting various aspects of the program. This JMC included thirteen foreign delegates arriving into Washington-Dulles International Airport from Tunis, Tunisia, as well as one U.S. Ambassador and two U.S. Embassy support personnel. Such requirements were that of moving the arriving delegation from Washington-Dulles to the hotel upon arrival, as well as to and from the Pentagon and any other required meetings throughout the Washington area during the week. Additionally, there would need to be U.S. Military, VIP aircraft support from Andrews Air Force Base in order to fly the Minister, plus nine members of the official party, to Norfolk, VA, and back on April 20th.

In order to research the appropriate requirements necessary to execute this program successfully, a “Needs Assessment” must be accomplished. The “Needs Assessment” is a method by which to properly evaluate specific needs or requirements of this Joint Military Commission Program. Several questions must be asked in order to assess the viability and requirements associated with any event. These questions are outlined below.
NEEDS ASSESSMENT

Who are the stakeholders for this event?

-The stakeholders for this particular event include those key participants in the JMC to include Secretary of Defense, Donald H. Rumsfeld, Assistant Secretary of Defense for International Security Affairs, Peter W. Rodman, Ambassador Mohamed Nejib Hachana, Tunisian Ambassador to the United States, Ambassador William J. Hudson, U.S. Ambassador to Tunisia and all other support personnel and policy specialists associated with the outcome of these talks. Externally, or in a more long term sense, are the people of the United States and Tunisia. They could be considered stakeholders when the safety and welfare of both cultures may depend on positive support in the War on Terror. Without allies within the region both governments could find themselves adversely affected.

What is the event that is being developed?

-The event which was developed was a series of joint talks, or a Joint Military Commission (JMC) between senior defense officials from the United States and the North African country of Tunisia. The event would run over the course of one week and would include meetings, plenary sessions, official dinners and social/cultural events.

Where is the event taking place?

-The JMC would be held primarily within the metropolitan Washington, D.C. area. The committee meetings, plenary sessions and office calls would be held at the Pentagon. A one day trip, via military VIP aircraft, down to Joint Forces Command in Suffolk, Virginia would also be conducted. Billeting would be supported by the Ritz-Carlton, Pentagon City in Arlington, Virginia.

When is the event to be taking place?

-The event begins when the foreign delegation arrives into the Washington-Dulles International Airport on 17 April 2006; and is considered complete when they depart for Tunisia the evening of 21 April 2006.

Why hold the event?

-The basis for this event is that it marks the 21st annual Joint Military Commission between the United States and the Government of Tunisia. Additionally there is a heightened importance concerning renewed support for the War on Terror from the countries throughout North Africa.

Once the needs of a particular mission have been determined it is necessary to assess the risk management considerations associated with an event of this type. A SWOT analysis can be useful to assess potential challenges as well as opportunities for the program to meet any and all expectations of the stakeholders. The SWOT Analysis analyzes potential strengths, weaknesses, opportunities and threats associated with this particular program. A detailed description of the SWOT Analysis follows.
SWOT ANALYSIS

Strengths associated with holding the U.S./Tunisian Joint Military Commission

- This event has the potential to foster additional support for the U.S. War on Terror
- This event continues a twenty-one year tradition of continued diplomacy between the U.S. Defense Department and the Tunisian Military

Weaknesses of executing the 21st annual U.S./Tunisian Joint Military Commission

- Cost expenditures in a time where Defense spending is continually scrutinized for justification and potential cuts. Ensuring that the outcome of these discussions fully supports the required costs is essential.
- The manpower necessary in order to support such an event remains at a critically low level throughout the Department of Defense. Manning the required billets to support this program may in fact pull assets from other missions.

Opportunities associated with holding the U.S./Tunisian Joint Military Commission

- Closer U.S./Tunisian relations
- Potential for increased military, intelligence and law enforcement support regarding location of terrorist cells and supporters throughout the region
- Potential for coalition support regarding Operation Enduring Freedom/ Operation Iraqi Freedom
- Potential for increased joint military training both in Tunisia as well as the United States
- Increased visibility and opportunities for the Tunisian/National Guard State Sponsorship Program

Threats associated with holding the U.S./Tunisian Joint Military Commission

- The potential for the Minister or his delegation to be the target of Jihadist/Muslim Extremist retribution, attack or demonstration
- Any civil unrest, political turmoil or national emergency within Tunisia could potentially change or cancel the event with little to no notice

FEASIBILITY STUDY

The Feasibility Study for this particular event was a relatively simple product to develop. Because the Department of Defense, and particularly the Secretary of Defense, initiated the concept and feasibility of this commission, only the most dire or politically devastating of circumstances would render this event unfeasible to execute. The directives that govern the expenditure of ORF funds and the protocols required to support a cabinet level program, afford the event planners and Executive Liaison Agent the direction and level of authority to counter any anticipated weaknesses or perceived threats.
Section 3

Research
DESIGN

The design, or theme of this program was based primarily on the strategic goals set forth by the Secretary of Defense and OSD Policy. The specifics of which remain classified; however, the general scope of these defines the basic direction of the Joint Military Commission, which was to promote positive diplomatic relations between the United States and Tunisia, as well as foster far reaching support for the War on Terror.

The specific areas of this JMC to design would include the fundamental aspects of the conference/meeting layout, design and requirements such as audio visual, interpretation and equipment, food and beverage and administrative support necessary. The approved concept was to have a large plenary room set up that could accommodate up to fifty people. This room would be set up in a horseshoe pattern to accommodate thirty, with seats around the perimeter of the room which could accommodate an additional twenty. A lectern would be placed forward near the screen in case the briefers felt it necessary during their particular programs. There would be a table set aside in the rear corner of the room to accommodate the interpretation booth. Two interpreters would alternate providing continuous interpretation during the events held in this room. Interpretation equipment such as microphones (one for each two people would be spaced along the horseshoe table. Two mikes would be available in front of each of the principal delegates. Two wireless mikes would be available for those attendees seated on the perimeter of the room in order to join in the discussion. The subcommittee breakout rooms would be set up in a conference room fashion capable of accommodating up to twenty-five. These rooms would be utilized as necessary throughout the two day commission. No interpretation would be necessary for the subcommittee meetings. Food and beverage requirements during the commission meetings would be minimal and quite easy to support. All that was required was to supply coffee and ice water within the rooms. The support would be covered by Pentagon executive services.

The other official JMC event not related to evening entertaining was the one day trip from Washington, D.C. down to Suffolk, VA to visit the U.S. Joint Forces Command and the Joint Warfighting Center. The scope for this visit falls directly in line with that of the
commission itself, “to promote positive diplomatic relations between the United States and Tunisia, as well as foster far reaching support for the War on Terror”. Only the U.S. Joint Forces Command and the Joint Warfighting Center base their entire mission towards military transformation and joint interoperability. This philosophy shifts the organization and equipment of these combat units from that of one with a very large footprint, and a very heavy, not so mobile fighting force, to that of a lighter, highly sophisticated, joint force that is extremely deployable on very short notice, and with far less resources logistically. These fundamental changes offer a far more capable force to fight in the War on Terror. The ease of having the delegation attend program elements at this command is due to a very experienced protocol staff that sees to every detail of design and coordination while the delegation is in Suffolk. This leaves very little of the design function up to the Executive Liaison Agent.

The third and final area to design within the program was that of the meals for the official party. Many of these meals were official U.S. hosted lunches, and dinners. In this case the U.S. was responsible to design, coordinate and fund them entirely. Others would fall into the category of Tunisian only meals or events. One specific event was an official dinner hosted by the Tunisian Ambassador to the United States at his home. In this case all planning and coordination was in the hands of the Tunisian Embassy.

The U.S. hosted functions were a series of five official lunches and three official dinners. All of these functions fell within the protocol requirements for hosting cabinet level foreign visitors. These included room layout, U.S. host and foreign principal seating location, and location of the security teams. Many of the meals designed by the U.S. had the same structure. Only the style of food and venue changed; all other design items were basically the same. Particular attention was paid to the Muslim restrictions observed by the delegates themselves.
Section 5

Planning
The execution of an event of this type requires some very specific planning considerations. Many of the details such as hotel, rate, amount and type of transportation, level or price range of particular restaurants and security are driven by various Department of Defense (DoD) Directives. These directives are intended to govern the proper employment of the taxpayer dollar. Also very specific authorization criteria must be met in order to approve any such expenditure.

One of the first things to do when planning the initial phases of an event of this magnitude both in scope, and political importance is gain a complete understanding of who the stakeholders are and where they fit into the equation. Appendix D (Organizational Chart) outlines the stakeholders for this event from the highest level (Secretary Rumsfeld), down to each of the vendors. Knowing where each stakeholder falls out in the hierarchy simplifies the planning and any subsequent functions throughout the event execution.

The Executive Agent Designation Memorandum (Appendix A), once signed, begins the basic planning process by serving as the authorization to formulate and submit a budget (Appendix E), sign contracts with vendors such as restaurants, hotels and transportation companies (Appendix J) and schedule official appointments with government officials such as senior members of the U.S. Congress, Department of State, White House Senior Staff and various other cabinet level officials. Many of these meetings or “Office Calls” are requested by the foreign embassy or by the DoD Policy stakeholders.

Once the Designation of Executive Agent Memorandum is signed and in hand, a formal budget must be formulated. The process by which we form the budget is first, by referencing Department of Defense Memorandum Number 7250.13 “Official Representational Funds” (Appendix F). This document gives us a guide for Executive Liaison Agent “Standard Practices” regarding DoD budgeting and expenditure. We also utilize an Excel spreadsheet, formatted in such a way that the individual days are represented by columns, and each category such as hotel room, transportation, breakfast, etc., are delineated by row. The totals are formulated using the
“Sum” function within the program and totals are displayed at the bottom of the spreadsheet for final reference. Additional information about each category expenditure is outlined in the notes below. The spreadsheet is attached to a cover letter, basic one page itinerary and a list of the official party (Appendix E). It is then submitted to the comptroller for approval. A “Chart of Accounts” per se, is not used. Once the event has concluded and the all the bills have been paid, a budget closeout is completed which is used to justify all expenditures. The budget closeout memo and spreadsheet have been incorporated as Appendix G, to aid in understanding the process. [Note: Some totals from the budget documents and receipts have been excluded due to DoD disclosure requirements]

The next major tool in used in planning such an event is a timeline or executive liaison bilateral conference checklist (Appendix H). This file is invaluable in making sure that no small item is missed or overlooked. The format of this checklist is based upon the start date, or arrival of the principal guest into the United States. The date of the delegation arrival is referred to as the “D” date. Therefore every milestone is based on a D- or D+ date. This timeline is used through all phases of planning through the evaluation once the event has concluded. Some of the crucial items which must be planned for in an event of this type include:

✓ Personal Security Detachment and identification of which Federal Law Enforcement Agency will support
✓ Hotel and Conference Spaces
✓ Coordination with the Department of State for “Courtesy of the Port Authorization” for the delegation upon arrival into the United States
✓ DoD Executive Motorpool Vehicle Support
✓ Contract Limousine Support
✓ Department of State Interpreters and Interpretation Equipment Rental
✓ Military District of Washington Support at Arlington Nat’l. Cemetery
✓ Restaurants- Supporting lunches and dinners when required
✓ Cultural Event Venues, such as the Smithsonian Air and Space Museum Staff
✓ VIP Aircraft Support from 89th Airlift Wing, Andrews AFB, MD

A vendor list also must be produced which shows a basis for the decision to contract with that particular partner. Many of the vendors used in the Department of Defense programs are set, either because a particular function is supported within DoD, or because of previous contracts/agreements allowing a particular vendor “Right of Refusal”. Other vendors, such as

5-3
restaurants are chosen based upon the type and quality of the food, reputation of the establishment, desires of the principal member of the delegation and cost. An all inclusive vendor list is included and labeled as Appendix I.
Section 6

Coordination
The coordination of an event of this type requires continuous follow-up beginning in the initial phases of the event, from its conception, through final execution and on to final evaluation. The coordination process is formulated upon a strict production schedule or timeline. This schedule follows a “by date” formatted checklist (Appendix H) that drives the overall production schedule for the event leading right up to its execution. Once the execution begins, an exhaustively detailed support itinerary drives all actions and responsibilities. This support itinerary is labeled as Appendix B. No script was necessary during the execution of this event.

The cabinet level programs, such as this Joint Military Commission, entail a series of extremely time critical movements in order to execute the program successfully. An ordinary event with an executive arriving at the airport may not have the level of protocol associated with it that a Foreign Defense Minister’s arrival may. All pieces must be in place from the Foreign Ambassador’s arrival at the airport and his or her accessibility to the U.S. Customs arrival area to the arrival and clearance of the Executive Liaison Agent, Foreign Defense Attaché and the personal security team. All must be executed “By the Numbers” or the result may be that a foreign cabinet level official arriving in the United States is not greeted appropriately, nor is expedited through the customs process. All of these potential scenarios could result in an international incident which would result in negative press for the Department of Defense and the U.S. Government. The Courtesy of The Port Request form is labeled Appendix P. Note: Certain items such as passport numbers and date of birth have been omitted.

Transportation and escort are key logistical elements necessary for the successful completion of any counterpart mission or program. The minister or principal guest must be met and transported to all official and unofficial events via either a Towncar or six passenger limousine. This affords the principal with the appropriate level of protocol for a cabinet level foreign guest within the United States. Additional support is afforded by a
luggage van and executive sedan as required. The request for the DoD supplied vehicles is labeled as Appendix K. Every movement must be choreographed in such a way that only the necessary vehicles are scheduled based upon the official attendees at each specific event location. Often times some members are attendees at one meeting and do not attend subsequent or follow-on meetings. Therefore the balance of vehicle support must be carefully coordinated so the principal guest, or Minister, is the focus of the support, but also that no member of the official delegation is subjected to unnecessary inconvenience. For example, a member of the delegation having to wait in the vehicle outside the gate of the White House during a meeting he or she was not involved in. An invaluable asset in the coordination or planning of this logistical dance is the contract driver. Many of these individuals have been employed in the program area for many years, and can help with travel routes, traffic patters and travel times that must be coordinated for. A perfect example of this level of required detail is laid out in the Support Itinerary (Appendix B).

The contract hotel is another specific area of required coordination throughout the planned event. The hotel houses all members of the traveling delegation as well as several support members who have specific duties directly affecting the execution of the event. The required members who must reside in the contract hotel are the Executive Liaison Agent, the Personal Security Agent (or Officer), and the Agents who man the 24 hour control (or surveillance) room. Important considerations when selecting this hotel are level of the accommodations, knowledge of the staff to the requirements that the Department of Defense requires as well as their attention to detail. Coordination must be made with the hotel prior to the arrival of the delegation. All rooms must be checked, key packets assembled, amenities placed in the rooms and an additional member of the Executive Liaison Staff must be on hand to present the key packets to the Executive Liaison Agent when the official party arrives at the hotel. The key to the Minister’s room is held by the advance security detail. Additionally the principal’s suite will have been
swept by agency canines, the elevator will have been blocked off/open for his arrival and the door to the suite will be held open when he arrives on the floor. All of these minute details exude a level of professionalism and protocol which has become a personal signature of these foreign counterpart missions. The hotel rooming list is labeled as Appendix L.

All meals, as mentioned in the previous section, must be meticulously planned and coordinated once on site. Details to consider include: table arrangement, seating plan, table cards/place cards/menus/seating chart, interpretation requirements, serving order and protocols concerning toasts, billing arrangements and location of support members and security team. All of these details must be coordinated for each meal scheduled throughout the week long event. Much of this coordination is outlined within the Support Itinerary and Executive Liaison Bilateral Conference Checklist, labeled as Appendices B and H. Additionally the Vendor list is incorporated into Appendix J.

Justification for the choices of the vendors is based upon historical data retained within the International Engagement Office as well as personal experiences within the division. Factors considered when selecting vendors included the level of professional service, protocol training of employees, familiarity with our security procedures and requirements, comfort, and reputation for quality of food. These locations chosen are contained within the Vendors List (Appendix I).

The coordination of the conference spaces was handled by one of the key stakeholders of the event from OSD Policy, Mr. Mathew Axelrod. A horseshoe, or U-shaped table orientation was chosen in order to facilitate the ease of conversation throughout the commission meetings. The necessity for interpretation was identified for many of the attendees. The method for requesting interpretation and funding is coordinated through the Department of State, Interpreter Services. The required paperwork is incorporated in Appendix N. The interpreters are stationed in the rear corner of the room. Two individuals would be assigned the interpretation duties during
The plenary sessions only. The style of interpretation used during the Joint Military Commission would be simultaneous interpretation. Coordination for refreshments, breaks every 30 minutes, or continuous alternation of interpreters must be made, otherwise the average DoS interpreter wouldn’t be able to sustain the proper pace and consistency for the delegates and their needs. Interpretation equipment and installation was scheduled and coordinated by the DoS Interpreting Services. The subcommittee meetings would be held in smaller rooms adjacent to the plenary room and no interpretation would be available. Additionally, refreshments were coordinated through the Executive Services at the Pentagon during all scheduled meetings. The site plan for the Pentagon, location of the rooms and the plenary room floor plan are incorporated in Appendix M.

Aviation support was coordinated through CVAM (Vice Chief Air Missions), Office of the Vice Chief of Staff United States Air Force, 89th Air Wing, Andrews Air Force Base, Maryland. The confirmed data sheet for the designated CVAM support flight is labeled Appendix O. Due to the size of the traveling party only a C-20 (Gulfstream III) was required for the transportation of the eight members of the official party, plus 2 members of the support team, to Norfolk, VA and back to Washington. Very detailed coordination must be made with the aircrew regarding departure, arrival, routing, refreshments and protocol during these two, very short, 30 minute flights. If any portion of these details are missed or misjudged it could be catastrophic to U.S. Tunisian relations. One misjudgment with regards to the arrival time could have the Minister and delegation arriving early with no four-star general awaiting their arrival planeside. Conversely, if the greeting officer is briefed on an arrival time and the plane arrives late, a Major Combatant Commander of The U.S. Military is occupied and not addressing the official responsibilities he otherwise would be.

The wreath laying ceremony at Arlington National Cemetery (ANC) is designed as a tribute to all fallen American service members during times of conflict. The
dignitaries qualified, or those invited to lay a wreath at the “Tomb of the Unknowns” are those counterparts to the Secretary of Defense, Deputy Secretary of Defense, Chairman Joint Chiefs of Staff, and Vice Chairman Joint Chiefs of Staff. Minister Morjane (Secretary of Defense Counterpart) opted to attend the ceremony and lay a wreath at the tomb. The support itinerary outlines when the ceremony took place and the site plan of the ceremony location is outlined in Appendix Q. All coordination and follow-up is done with the Military District of Washington and “The Old Guard” the U.S. Army Third Infantry Regiment at Ft. Meyer, VA. The ceremony consists of a Wreath laying, the playing of Taps and the National Anthems of both nations followed by a personal guided tour of the Arlington National Cemetery Museum by Mr. John Metzler, ANC Superintendent. Of all the events that make up the Pomp and Circumstance within Washington during the execution of these counterpart programs, this is the most heartfelt and impressive.

Two separate tours were coordinated within the Pentagon. These official guided tours are orchestrated with the Pentagon Tours Office and are personally led by junior members of the various Armed Forces. The coordination paperwork for the two arranged tours is labeled as Appendix R. Constant coordination was needed to ensure that the guides knew where and when to meet the various groups prior to the tour.

The final coordination piece is to coordinate the luggage pull from the hotel, transportation and check-in at Washington-Dulles International Airport prior to the Minister’s departure. Extra care must be given to the time of the luggage pull and how this fits in with the itinerary that day, the number of bags and destination of those bags. There is nothing worse than having the luggage on the way to the airport and a delegate who needs to change into travel clothes prior to departing. If, as in this case, delegates are departing at separate times, have different destinations, or are traveling to the airport separately, extreme care and continuous follow-up are a necessity for any possibility of mission success. Meticulous coordination is required to manage the transportation needs.
of the departing delegates, including type and number of vehicles, routes, arrival and
planned departure times. Coordination at the airport is made with representatives
assigned to protocol duties with Air France, TSA and Airport Police.

Once the delegation departs a sigh of relief is always appropriate and only the safe
transit of the support team remains before mission completion. The final phase
“Evaluation” will be covered in the following section.
Section 7

Evaluation
EVALUATION

The evaluation of an event of this type can be somewhat difficult to evaluate. When dealing with such high ranking officials within our government, as well as those from foreign nations, utilizing a quantitative method such as a written evaluation form quantifying each specific objective numerically, or a qualitative method such as a comment card can be awkward if not totally inappropriate. Instead, it makes far more sense to have the OSD Policy stakeholders evaluate their own professional objectives of the content and political outcomes of the conference or “commission”. They in turn would report those findings up their respective chain of command. In the same, it is pertinent to have the event professional or “Executive Liaison Agent” evaluate the event or programs’ logistical flow, organizational leadership, protocol and professional “sense” of the event as a whole. This would be debriefed at a weekly operations meeting within the Executive Liaison Branch. The input could then be put to immediate use for future events planned through our respective division.

One basic method to evaluate the mission or event, from the foreign guests perspective, is to do the “Smile Check” or to make basic perceptions on the over all demeanor of the foreign Principal, in this case Minister Morjane, as well as the Tunisian Ambassador and the remaining delegates in the official party. This can be done during a particular event, or after the event has concluded. Much can be determined by the mood or demeanor of the Minister upon his departure from the United States as to how the mission or program went as a whole. Also analyzing each phase of the event planning process can be helpful in reconstructing a reasonable evaluation of the program as a whole.
Research- The research process consisted of discussions and collaboration with OSD Policy, Tunisian, desk officers and members of the Tunisian Embassy to accurately paint a picture of what the goals were, from both that of the U.S., as well as the guest nation. Likes and dislikes were considered and planned into each facet of the program. Feedback throughout the program suggests that both the U.S. and the Tunisians were extremely happy with the level of research that was done prior to execution. The Minister particularly enjoyed a trip to the Smithsonian Air and Space Museum and the choice of restaurants throughout the week.

Design- The design of the program itself was fairly generic due to the protocols and budgetary demands set by the Department of Defense for these foreign counterpart programs. Feedback from delegates from both nations were extremely positive with respect to the set up for the meetings, the interpretation during those meetings and the theme carried by all of the meals and supplementary events.

Planning- The planning function satisfied all those who work on the support staff at the U.S. Embassy in Tunis, to include the U.S. Ambassador and U.S. Defense Attaché. All of their expectations were met for the entire week long conference. There were no gaps in information flow and awareness as to how the program and plans were unfolding. I gained the knowledge of this from personal conversations with those individuals prior to their departure back to Tunisia.

Coordination- The coordination piece of this program was fairly systematic of any of these counterpart events. So much of the event management process seems to be 10 percent planning and 90 percent dowsing the fires as they appear throughout the event. Although many fires did arise, none became apparent to the principal, or the hosted
foreign delegation. The coordination was assessed to be very successful following an after-action review which incorporated the management of the restaurant venues, hotel, transportation companies, and security personnel.

Final analysis of the program suggests that both the U.S. members attending the Joint Military Commission as well as the foreign guests from Tunisia were thoroughly satisfied with the forethought, planning and execution. Feedback from the Minister and his delegation upon their departure from Washington-Dulles International Airport substantiate this, and the “Smile Test” was confirmed successful.
Section 8

GAP Analysis
GAP ANALYSIS

The gap analysis is a comprehensive assessment of any details, or aspects of the planning/coordination process that may have been lacking in the formulation or execution of the event. These “Gaps” once corrected, or filled, would or effectively “should” facilitate a model program.

One area in which I would have changed elements of the program fell with the planning and one-on-one coordination with the Department of State, Office of Near Eastern Affairs. By not meticulously coordinating with these offices, the delegation was faced with numerous meeting schedule changes and meeting durations that extended thirty to forty-five minutes beyond the times previously allotted for. A far better job could have been done of informing the DoS planners of the Minister’s very tight meeting schedule. Once a principal is in an office call with a Deputy Secretary of State, it can become difficult to explain why a meeting must be cut shorter than expected.

Another situation which could have been easily avoided regarded the coordination with Arlington Nation Cemetery (ANC) prior to the wreath laying ceremony. Normally very detailed instructions are conveyed to ANC staff concerning the principal, staff members, mementos and any other details which may affect the event. For this particular event, I failed to ask the delegation if a memento presentation was planned during the museum tour. Therefore, no notification was made to ANC staff about a memento from Minister Morjane. Normal procedure is to coordinate with ANC several days prior to the wreath laying ceremony and relay the event specifics, to include the issuance of a memento during the museum tour. The result in this case was that the display case within the museum was not opened and an area was not cleared within it for the Tunisian memento. The consequence was a somewhat awkward moment when the group had to return to the case, open it and make room for the gift. A possible fix to this would be
incorporating a line item into the checklist for memento coordination with ANC staff.

One event which could have been disastrous for the entire program occurred when the OSD Policy representatives arranged the lunch for the delegates from Tunisia and The United States who remained in Washington when the Minister and several others flew to Norfolk, Virginia on the 20th of April. The planning for the meal was initiated and executed solely by members other than Executive Liaison Branch staff. Due to lack of follow-on coordination the main course was changed and none of the attendees were aware of it. The original menu featured Filet Mignon. The resultant main course miraculously became Chicken Cordon Bleu. The problem here lies with the Muslim dietary restrictions for all Tunisian representatives. This dietary restriction prohibits all pork, to include the ham that is found in Chicken Cordon Bleu. Because of the positive attitude and sense of humor of the senior Tunisian guest all that was required was a written apology from the senior OSD Policy official attending the function. The proper way to alleviate such social faux pas would be to closely monitor all aspects of the event coordination. By accepting ownership of the entire program and all events therein, many unforeseen problems could be avoided.

The final problem area which arose during this otherwise smooth program concerned the luggage pull from the hotel and transportation of that luggage to Washington-Dulles International Airport. The final adjusted plan allowed for the delegation members to have all of their luggage packed and placed just inside the doors or their hotel rooms no later than 1230. The delegation in its entirety would then proceed to lunch within the hotel. The bags would be pulled by me and the hotel staff, transferred to an awaiting luggage van and escorted to the airport for processing. The result was far less organized. When I went to the hotel rooms with the porter many of the bags were
not packed. As a result I left the unpacked luggage in the rooms for the delegates themselves to attend to. However, this change affected the time it took to retrieve the bags, complicated the leisurely lunch which was planned prior to departure and severely affected the departure time for the principal members. A very specific departure time from the hotel was necessary because of an impromptu meeting at the State Department prior to the Minister’s departure. All of this could have been avoided if lunch had been delayed until all bags were packed and downstairs. More stringent oversight could have been maintained with the embassy staff that was assigned that function.

Many such details can slip from an event planner’s observation, potentially resulting in negative influences on the event as a whole. By analyzing the pluses and minuses of each program, and reviewing those results with co-workers in a timely fashion, many future mistakes can be avoided. The results of such critical assessment could be far more effective, or positive events.
Section 9

Personal Essay
PERSONAL ESSAY

My event management career seemed to be anything but deliberately planned. In a sense it was almost fate that determined where and how I would enter this diverse field. There are not many Marine Corps Officers that have had the experience or the opportunities in event management and coordination field that I have. As they say timing is everything.

Early in 1987 I found myself with a bachelor’s degree in Aviation Transportation Logistics from The Ohio State University, a new commission as a Second Lieutenant in the United States Marine Corps and a flight guarantee, ensuring my acceptance to flight school just a few short months down the road. My passion at the time was tactical jet aviation. All I wanted to pursue at the time was the shortest path to flying the F/A-18 Hornet for the Marines.

Luckily everything went well through the course of my training and I was able to operationally fly the Hornet for over 12 exhilarating years, and log over 2400 flight hours. The direction seemed to turn somewhat when I applied, and was accepted as the Events Coordinator for the 1999 U.S. Navy Flight Demonstration Squadron, “The Blue Angels”. This two year assignment, as Blue Angel #8, was a very unique position for a Marine aviator to find himself in. On one hand, I had been flying tactical aircraft for nine years and had earned virtually every conceivable qualification in the aircraft. Now I found myself with the opportunity to influence young men and women about the opportunities offered within the United States Navy and Marine Corps by virtue of the most coveted job in Navy and Marine Corps Aviation. The aviation and recruiting aspects of the job were both enlightening and rewarding; however, the most challenging portion of the job was the assignment as the squadron’s Events Coordinator.

The Events Coordinator job consists of the scheduling, planning, and logistical execution of 32 to 36 different show sites annually, and over 200 practice demonstrations
each year. The specific details which were necessary to coordinate included, site selection, aerial demonstration box location and its adherence to all FAA regulations, vehicle requirements, hotel coordination, detailed itinerary formulation, high school guest speaking appearances for up to six separate locations each week, weekly “Make a Wish Foundation” appearances, and every other minute detail necessary to involve the Blue Angels in a major airshow event. Each week from mid March through mid November found us in a different event venue with different support staff and major event planners. The instantaneous increase in work load once the season begins was staggering. The scale of these airshows was immense, reaching upwards of 3.2 million attendees at such events as the Fort Lauderdale, Sea and Air Show or the Chicago Air and Water Show. One of the most challenging aspects was that each of these events was held every weekend. Therefore, the planning cycle was greatly reduced, from that of a more conventional event which may have allowed for the planning to begin months prior to its execution. Although challenging, the assignment with the Naval Flight Demonstration Squadron was one of the highlights of my military career.

After departing the Blue Angels I was assigned back in Southern California flying the Hornet and deployed various times to Iraq and Southwest Asia. It was not until after four deployments and two combat tours on the ground in Iraq, that I would find myself back in the event business. My next event management position, which is where I have been assigned for the last twenty four months, is as an Executive Liaison Agent for the Secretary of Defense (SecDef) and the Chairman, Joint Chiefs of Staff (CJCS). My job is planning and executing SecDef and CJCS foreign counterpart missions within the United States, such as the event highlighted in this event portfolio. This position will be the last in a military career that will have spanned 21 years and numerous, highly sought after
assignments.

My aspirations within the event field fall into the large defense contracting field, with corporations like Boeing or Northrop Grumman, organizing such events as the corporate involvement in the Paris, Farnborough and Dubai airshows, unveiling of various new aircraft and products, and associated events that the corporate hierarchy may be involved in. Another facet of my desires to peruse an Event management career may be involved in more of a non-military corporate event management job. An example may be with an automotive/motorcycle manufacturer such as Daimler-Chrysler or Harley Davidson, coordinating large events, rallies and product unveilings. I plan on joining several professional event management associations such as International Special Events Society (ISES), Society of Government Meeting Professionals (SGMP) and any other appropriate organizations within the Washington metropolitan area. Wherever my career may lead in Event Coordination, I can be rest assured that my experience and recent educational accomplishments will set me apart from much of the competition.
Section 10

Appendix
Appendix | Label

APPENDIX A:  SecDef Memo dated March 7, 2006
APPENDIX B:  Overall Support Itinerary
APPENDIX C:  Official Party List
APPENDIX D:  Organizational Chart
APPENDIX E:  Event Budget
APPENDIX F:  DoD Directive 7250.13, Official Representation Funds
APPENDIX G:  Event Budget Expenditure
APPENDIX H:  Executive Liaison Bilateral Conference Checklist
APPENDIX I:  Vendor List
APPENDIX J:  Vendor Contracts
APPENDIX K:  Request for DoD Executive Motorpool Support
APPENDIX L:  Hotel Rooming List
APPENDIX M:  Pentagon/Room Layout (Site Plan/Floor Plan)
APPENDIX N:  Request For Interpreters
APPENDIX O:  Special Air Missions Confirmation
APPENDIX P:  Department of State Courtesy of the Port Auth.
APPENDIX Q:  Arlington Wreath Laying Ceremony Site Plan
APPENDIX R:  Pentagon Tours Request
APPENDIX S:  Event Photos
VENDOR LIST

Hotel:

The Ritz-Carlton, Pentagon City
1250 S. Hayes St. Arlington, VA, 22202
Ph.: (703) 415-5000
Point of Contact: Iman Aboulhosn, Director of Diplomatic Sales

Rationale: The Ritz-Carlton, Pentagon City was selected as the hotel for this particular event due to the fact that it is the hotel under contract with the Executive Liaison Branch, International Engagement Office, DIA for all of these types of events. The Ritz-Carlton, Pentagon City retains “Right of Refusal” and is established as the designated vendor unless they are unable to meet our requirements due to availability.

Support: Billeting Rooms, The Grille Restaurant

Contract Transportation:

Manhattan International Transportation
528 Gibbon Street Alexandria, VA 22320
Ph: (703) 683-2248
Point of Contact: Jannen Golubin, Owner

Rationale: Manhattan International has been the contract transportation company utilized by the Executive Liaison Branch, International Engagement Office, DIA for the last several years. Manhattan International retains “Right of Refusal” and is established as the designated vendor unless they are unable to meet our requirements due to availability. The only caveat to this is when DoD transportation assets can support the event at no cost.

Support: 6 Passenger Limousine and 12 passenger VIP Surrey each day

Restaurant: Lunch on 18 April, 2006

The Old Ebbitt Grille
675 15th Street, NW Washington, D.C. 20005
Ph: (202) 347-4800
Point of Contact: Ms. Janine Ollarek

Rationale: The Old Ebbitt Grille has an exceptional private room and it happened to be available on the required date. Additionally the Old Ebbitt Grille is a perfect example of American Fare. It has been utilized many times for functions where foreign delegations are introduced to casual American food and local seafood.
**Restaurant: Dinner on 18 April, 2006**

Mr. K’s Restaurant  
2121 K St NW Washington, DC 20037  
Ph: (202) 331-8868  
Point of Contact: Robert, Head Waiter

**Rationale:** Mr. K’s has an exceptional reputation for some of the finest Chinese Food in the Washington, D.C. Metro Area. They had availability on this particular evening and a specific request came from the Tunisian Ambassador to the U.S. as to the dinner location.

**Pentagon Dining Facility: Lunch on 19 April, 2006**

Senior Leadership Dining Facility One- The Pentagon  
The Pentagon, Washington, D.C.  
Ph: (703) 693-9650  
Point of Contact: Sergeant First Class Kelson, Staff Non-Commissioned Officer in Charge

**Rationale:** The location was at personal request from Assistant Secretary of Defense Rodman

**Restaurant: Dinner on 19 April, 2006**

Morton’s The Steakhouse- Georgetown  
3251 Prospect Street, N.W. Washington, D.C. 20007  
Ph: (202) 342-6258  
Point of Contact: Ms. Laura Lim, Sales and Marketing Manager

**Rationale:** Morton’s Steakhouse has an exceptional private room and a reputation for some of the finest steaks in the world. It had the availability on the required night and was chosen to highlight American fare such as our beef and Prime Steaks.
Area of impact

The plane appeared to hit the Pentagon midway between corridors 4 and 5. Eyewitnesses report that the plane cut a wedge that extended past the C, D and E rings of the building into the B Ring.
Section 11

Student Affirmation
MEMORANDUM FOR GWU EVENT MANAGEMENT CERTIFICATE PROGRAM

FROM: Lieutenant Colonel Bruce A. Shank, USMC

SUBJ: PROGRAM AFFIRMATION

1. I affirm that the information contained in this portfolio represents my original work, except where such items belong to the event or event organizer (such as a conference program, photos taken by the organization's photographer, etc.). Any use of other people's property is indicated by attribution.

2. I hereby grant permission for the GW Event Management Certificate Program to retain my portfolio and to make it available to students or researchers.

BRUCE A. SHANK
Executive Liaison Agent,
Executive Agent Branch, IE-O
8 May 06

MEMORANDUM FOR GWU EVENT MANAGEMENT CERTIFICATE PROGRAM

FROM: Chief, Executive Liaison Branch, Office of International Engagement

SUBJ: Minister of Defense Tunisia, Foreign Counterpart/Joint Military Commission, April 2006

1. I affirm that Lieutenant Colonel Bruce A. Shank performed key planning and execution functions of the Secretary of Defense Counterpart Program/U.S. Tunisian Joint Military Commission 17 - 21 April 2006. If you have any questions, please contact me at (703) 614-5151, or via e-mail at ernest.shepard@misc.pentagon.mil.

E. ALLEN SHEPARD
Chief, Executive Agent Branch
OSD(P) NESA