

SPE Meetings Procedures Manual



Revised on 31 October 2007

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Revised March 2007

Amended and Approved Document

SOCIETY OF PETROLEUM ENGINEERS

Meetings Policy

1.0 Introduction

The Society of Petroleum Engineers (SPE)¹ is a global organization that promotes technology dissemination in the upstream oil and gas industry. Meetings and publications are the main SPE activities through which technology is disseminated. The SPE Board of Directors (Board) is committed to producing quality products for its members, at reasonable cost, while maintaining financial stability within the organization and providing for continued growth of programs and services. Financial stability is a multifaceted term that has components involving income, expenses, and liability issues, as well as protecting the tax-exempt, not-for-profit status of SPE. When issues involving technology dissemination and financial stability are combined, one of the most important functions is planning and conducting consistent quality meetings. To assure that SPE maintains quality, the SPE Board has adopted this policy governing the planning, conduct, and evaluation of any meeting where the SPE imprimatur (the SPE name and/or logo) is used or where SPE is otherwise associated, either directly or indirectly.

All SPE sections, regions, events, funds, contracts, and commitments are ultimately the responsibility of SPE. As such, SPE shall maintain reasonable control over the affairs that affect all of its members. In addition, SPE provides many non-revenue-generating services to its members. Revenue from SPE and Joint Meetings, plus revenue from exhibitions, provides almost 70% of SPE's revenue.

¹ SPE is registered in many countries around the world. The separate legal entity under which the global operations are legally and financially consolidated is the Society of Petroleum Engineers (SPE) Stichting a Dutch foundation. Collectively the organization is SPE, however for clarity; this document will refer to the employees of SPE in the various SPE offices as SPE Staff.

Section 1.0 of this Policy applies to all SPE meetings as defined in Section 2.0. Sections 3.0, 4.0, and 5.0 of this policy were written to allow for consistent administration of all SPE events. The details in Sections 3.0, 4.0, and 5.0 of this policy do not apply to section meetings; however local sections may use these as a guide.

SPE is an organization with worldwide operations. The SPE Board is the Society's governing body and has a fiduciary responsibility to generate revenue to support member programs that do not generate revenue and to manage costs so that SPE remains financially stable. The revenue for SPE is derived from the following sources:

Revenue Source	Approximate Percentage
Meetings	65%-70%
Publications	15%-20%
Dues	10%-15%
Others	0%-5%

Publication expenses normally offset the revenue generated from publications. The main sources of revenue to fund the worldwide operations of SPE are meetings and dues. Revenue at a section level is sourced generally from meetings and fund raising activities. SPE shall maintain a Meetings Policy that is fair, clear, and easy to administer and that will support generation of the revenue required for funding the worldwide operations of SPE.

1.1 Use of SPE Imprimatur

Substantial value and credibility is added to any meeting whenever the SPE imprimatur (the SPE name and/or logo) is used. The value and credibility of the SPE imprimatur has developed as a result of the unselfish efforts of thousands of volunteers over the past decades. As such, the Board has adopted this Meetings Policy to be certain that all SPE meetings are conducted to the standards set forth in this policy. The SPE imprimatur also has a financial worth and carries certain liability constraints. No member, section, or region is authorized to use the SPE imprimatur without following the guidelines in this Meetings Policy and in the Meetings Procedures Manual.

1.2 Purposes of Meetings

The members of SPE have multiple purposes and expectations when they are planning SPE meetings. Some of these purposes are as follows:

- Exchange technology;
- Promote volunteerism;
- Offer related short courses in conjunction with the meeting and provide CEU's for members and nonmembers
- Promote young professionals involvement and membership retention
- Provide professional development opportunities and special sessions
- Generate income for SPE's worldwide operations;
- Generate income for regional/section activities;
- Offer networking opportunities;
- Market industry products and services; and
- Increase SPE membership.

Involved Members shall determine the purposes for each meeting and plan the meeting to fulfill the stated purposes.

1.3 Objectives of Meetings Policy

The Meetings Policy has been adopted by the Board to ensure that all SPE meetings are conducted:

- With the highest possible level of quality and professionalism;
- With well defined technical and financial goals;
- In a manner that minimizes SPE liability;
- In a manner that protects the status of SPE as a tax exempt, not-for-profit organization, where applicable;
- In a manner that efficiently use SPE resources;
- In an orderly, consistent manner throughout the global organization, so that conflicts with other meetings and programs can be minimized;
- In a manner that complies with local legislative and cultural requirements, but not in anyway that detracts from SPE's Policies.

1.4 Underlying Principles to the Policy

The following principles form the foundation for the Meetings Policy:

- Any meeting where the SPE imprimatur is used shall be conducted in a manner that is consistent with the Meetings Policy.
- SPE should avoid scheduling conflicts among its sponsored meetings in order to maintain consistent quality and attendance levels.
- Contractual, legal, and copyright policies shall be considered in planning all meetings.
- SPE is ultimately liable for all SPE operations, including section activities.
- SPE shall provide a safe and secure environment for all meeting participants through distribution of proper meeting credentials, important facility specific safety and emergency procedures, as well as on-site security personnel, where applicable.

1.5 Procedures, Training, and Evaluation

For the Meetings Policy to be successfully implemented, both a Meetings Procedures Manual and training are required. Responsibility for developing and maintaining the procedures manual lies with SPE Staff. The Board Committee will review and approve the content of the Meetings Procedures Manual to ensure it appropriately reflects the procedures for implementing SPE meetings and the experience of the Membership. The Meetings Procedures Manual defines roles and responsibilities as well as helpful tips for the planning and conduct of meetings, conferences, exhibitions, Applied Technology Workshops, and Forum Series. To ensure the policy and procedures are understood and used by Involved Members, training sessions should be held, when possible and where applicable. These training sessions will be organized and conducted at the direction of the SPE Board.

For continuous improvement, it is important that all SPE Meetings be evaluated by the Involved Members and the participants of each meeting. The SPE Board Committee on Technical Programs and Meetings (or any subsequent Board committee responsible for Meetings) defines a procedure for quantitative evaluation of all aspects of every meeting. The data from the evaluation forms shall be stored in a database that can be used to inform the Board and Involved Members on the success or failures of individual meetings. By thoroughly evaluating all meetings, future meetings can be improved to provide increased value to all SPE members. The ultimate responsibility for the technical, organizational, and financial performance of all meetings lies with the SPE Board, in collaboration with the SPE Staff. The SPE Board Committee may choose to delegate the evaluation of certain meetings to the SPE Staff or other committees, as they deem appropriate in the best interest of the membership.

1.6 Volunteerism

A hallmark of a professional technical society is the efforts of members volunteering their services as authors, committee members, etc. SPE thrives on volunteerism. All activities at the section, region, society, or international level are successful only because of the volunteer efforts of SPE members. Thus, any section or region hosting a SPE meeting should apply the concept of volunteerism to assure the success of the meeting.

The SPE Board realizes, however, that certain tasks are best handled by professional meeting planners. Thus, for certain tasks the volunteers on the organizing committees will work with SPE Staff, or local contractors under the oversight of SPE Staff, to accomplish those tasks in the most efficient manner.

2.0 Definitions

To be certain all parties understand the terms used in the Meetings Policy, we have included the following definitions.

SPE Meeting

An SPE society level conference is one that is planned, organized, managed and implemented primarily by the SPE Staff, in cooperation with involved members.

Annual Meeting

The SPE Annual Technical Conference and Exhibition (ATCE), is the Society's flagship meeting of the year.

Regional Meeting

A regional meeting is one in which an SPE region or section is designated by the SPE Board to plan and manage an event under the SPE Board approved Meetings Policy and Meetings Procedures Manual. It is intended to provide for technical dissemination between the sections in a geographic region. A list of SPE regional meetings can be found in appendix A.

Topical Meeting

A Topical Meeting is targeted at individuals interested in a particular technical topic. Some topical meetings are organized by a SPE region or Section as designated by the SPE board.

Technology Workshops

Technology workshops are limited-attendance meetings that provide registrants with the latest applications of a specific technology. The focus is on sharing information on the chosen topic among individuals in an interactive setting without formal papers.

Forum Series

Forum Series meetings bring together experts in specific topics to focus on the future aspects of that technical area or industry topic. To encourage sharing on sensitive future issues, no formal papers are presented.

Section Meeting

A Section meeting is one that is held on a monthly or periodic basis primarily for the benefit of the SPE members who reside in a particular section. This meeting is planned, organized, managed, and implemented primarily by local section officers and other involved members. Such meetings may be arranged jointly with other societies' local sections.

Joint Meeting

A Joint Conference is typically on the SPE society level and is a co-sponsored by SPE and one or more other organizations. The SPE Board of Directors shall approve all joint meetings, including agreements with co-sponsors. Agreements are required to be submitted with the meeting request form, before joint meetings may be conducted.

Not-for-Profit Organization

A Not-for-profit organization is a tax-exempt organization (such as SPE) that operates under the provisions of Section 501(c)(3) or 501(c)(6) of the U.S. Internal Revenue Code. SPE also operates under similar not-for-profit provisions of tax laws in other countries whenever applicable.

Exhibition

An exhibition is an area in a meeting dedicated to vendors of products and services that area related to oil and gas exploration, drilling, and production.

Concurrent Meeting

A Concurrent (Co-Location) meeting is a meeting in which SPE joins with one or more organizations for the purpose of conducting independent meetings in the same location (city/facility). The SPE Board of Directors shall approve all concurrent meetings before any agreements may be made with other organizations.

3.0 Administration of Meetings

One objective of the SPE Meetings Policy is to provide a framework for administering meetings in an orderly, consistent manner throughout SPE's global organization. All policies and procedures are under the review and control of the Board Committee on Technical Programs and Meetings, which are then submitted to the SPE Board for final approval.

Section 1.0 of this Meetings Policy applies to all SPE meetings as defined in Section 2.0. Sections 3.0, 4.0, and 5.0 of this policy were written to allow for consistent administration of all SPE events. The details in Sections 3.0, 4.0, and 5.0 of this policy do not apply to section meetings; however, local sections may use these as a guide.

The SPE Board delegates some of its review and control responsibilities to individual members or SPE Staff. When planning or conducting a meeting, any deviation from the policies or procedures shall be approved by the Board, the Regional Director, or SPE Staff, depending upon the specific issue(s).

3.1 SPE Meetings

3.1.1 All SPE meetings shall be approved by the SPE Board Committee on Technical Programs and Meetings (BCTPM), or any subsequent Board committee responsible for Meetings. SPE's best business practices recommend that a Meeting Request Form be submitted to the BCTPM at least 18 months before the proposed meeting date. ATW's, which operate under shorter time constraints, are excluded from this 18 month requirement. This is particularly important for Regional and Annual Meetings; however, it is recognized that other meetings which operate under shorter time constraints may be excluded from this requirement. Once the meeting is approved by the BCTPM, the Meeting Request Form will be sent to the Board for final approval.

No SPE Meeting can be implemented without approval. Meeting requests may be denied if outstanding meeting paperwork (financial outcome, meeting evaluation, etc.) from beyond the last edition of the meeting remains delinquent or if the technical papers were not provided for inclusion in the SPE eLibrary.

3.1.2 Oversight of the Forum Series is delegated by the Board to the Forum Series Coordinating Committee. This committee maintains oversight of topic selection, frequency of repetition and balance of the topics in a regional and global manner. The Coordinating Committee delegates detailed supervision of individual Forum Series meetings to a number of regional Implementation Committees (currently Eastern and Western Hemisphere). These committees are responsible for performing the continuous evaluation of meeting performance to ensure these meetings remain consistent with SPE's policies and overall objectives.

3.1.3 Administration of ATW's is delegated by the Board to the SPE Staff. Member input is also essential to the success of these events. The technical program is planned and conducted by the ATW Program Committee. This committee is responsible for the overall technical agenda and ensuring the program is consistent with SPE's policies and overall objectives.

3.1.4 To maintain consistent quality at all SPE meetings, the SPE Staff is accountable for the following:

- Printing and distribution of the call for papers; posting on the web site;
- Printing and distribution of the Conference Preview; maintenance of the official web site providing updated information as the technical program and/or events/activities change;
- *Proceedings* production, including author instructions, reproduction of all papers (CD-ROM, etc.), and delivery to the meeting;
- Printing and distribution of the Conference Program; provided in PDF format for downloading from web site;
- Distribution of job responsibilities to all committees involved as well as specific job responsibilities/instructions for session chairpersons, etc.;
- Advance registration;
- Event marketing, publicity, and promotion;
- Exhibition sales;
- On-site registration;
- On-site conference management;
- On-site exhibition management;
- Support of technical session operations; and
- Final event wrap-up and analysis.

Depending on the type of meeting, certain responsibilities may be shared with an SPE Section or Region, provided there is an adequate number of volunteers to manage the specific responsibility.

3.1.5 If third-party contractors are to be used for any or all of the above tasks, the involved members may recommend whom to hire, but these contractors shall be approved by SPE Staff, and all contracts between the contractors and SPE shall be approved and signed by an SPE event

manager. All fees and invoices paid to outside planners shall be approved by the SPE event manager. Involved members seeking approval to manage and perform any of the tasks listed in section 3.1.4 shall declare and explain their intent in the meeting planning documents, and such exceptions shall require approval of the Board Committee on Technical Programs and Meetings.

- 3.1.6** Technical presentations shall be supported by written manuscripts by the presenting author(s). Substitutes for full papers, such as abstracts or PowerPoint Presentations, are not acceptable. The manuscripts will be assigned SPE numbers and included in the meeting *Proceedings* and subsequently in the SPE eLibrary. SPE will hold copyright to these papers. For a joint meeting, the Board may authorize joint publication rights with an official co-sponsor.

Formal manuscripts are not required for special presentations, such as keynote speeches, panel sessions, or plenary sessions, nor at ATW's and Forum Series. For keynote speeches and plenary sessions, however, organizers should try to obtain presentation materials, such as a speech transcript or PowerPoint presentation, and should seek permission for SPE to post the information on the SPE web site. These materials will not be copyrighted by SPE. Refer to the Meetings Procedures Manual for specific procedures regarding technical manuscripts, submission guidelines, etc.

Manuscripts submitted by the authors shall support technical paper presentations. Written manuscripts are key elements to fulfill SPE's purpose in holding conferences by capturing technology for dissemination beyond the conference attendees.

- 3.1.7** The Program Committee for each conference shall adopt a "no-paper/no-podium" policy for the conference or develop alternative policies, subject to Board approval, designed to enforce the importance of manuscript submittal.

No-paper/no-podium means that, with the exception of panel session participants and occasional special keynote speakers, authors who do not submit a manuscript, along with the associated required forms by the manuscript due date, will be withdrawn from the program and not allowed to present. Historically, 10 - 15% of papers accepted for meetings on the basis of the abstracts submitted are withdrawn, not submitted on time, or not presented at the meeting. The Program Committee should select 10 - 15% more papers than desired for the meeting, with the understanding that some papers will not be written nor presented. The no-paper/no-podium policy will ensure that all manuscripts will be included in the proceedings and the eLibrary.

The Program Committees may accept papers for publication in the meeting proceedings that may

not be included on the program for presentation. There are many reasons for doing this; for example: 1.) an author who has been a “no show” at several meetings but whose papers have generally been very good should be included in both the proceedings and the SPE eLibrary. 2.) Contingency papers to be “back-up” may be included in case another author is unable to present. Such cases should be the exception rather than the rule, comprising no more than 5% of the proceedings, and such papers shall be held to the same high standards as the papers that are presented. The papers will be copyrighted to SPE and included in the SPE eLibrary.

- 3.1.8** Various committees of SPE will be organized to assist in matters such as soliciting paper proposals and speakers, reviewing paper proposals, serving as session chairpersons, planning social activities, planning short courses, and evaluating the success of the meeting. See the Meetings Procedures Manual for descriptions of committee roles and responsibilities for meetings, Applied Technology Workshops, and Forum Series.
- 3.1.9** Regional and Topical Meetings are conducted as SPE meetings under the management of either SPE sections or SPE Staff. Historically, meetings that have been managed by SPE sections have been charged for direct costs (i.e., third-party costs) for activities conducted on their behalf by SPE Staff, but not for the cost of Staff resources themselves. Beginning in 2004, all meetings were charged for the cost of all Staff and services provided. A proposed budget, including all direct costs and Staff costs, will be prepared during the meeting planning process. For emerging SPE Regions conducting meetings, Staff costs and resources will be investigated and handled on a case-by-case basis.

3.2 Joint Meeting

The following policy applies to all SPE Joint Meetings. Special care shall be taken to be certain that Joint Meeting topics, agendas, and/or partner organizations do not jeopardize the SPE not-for-profit status and are in compliance with SPE policy.

- 3.2.1** The Board Committee on Technical Programs and Meetings shall approve any Joint Meeting. A decision shall be provided within 30 days unless any of the sponsors of the meeting is a commercial organization, in which case 60 days are allowed for review and approval.
- 3.2.2** SPE will support Joint Meetings for the primary purpose of technology dissemination. Support and involvement also helps ensure the consistency and branding of all SPE meetings. All meetings carrying the SPE logo need to use the SPE logo on all printed materials, and in the appropriate manner, and follow guidelines to ensure the integrity of SPE branded meetings. Due

to the substantial number of meetings SPE manages, SPE may be able to negotiate discounted rates for services with hotels, vendors, and suppliers, which in turn may have a positive economic impact on the budget bottom line, especially for smaller meetings. SPE support also brings marketing opportunities that the smaller meetings might not otherwise be able to afford.

- 3.2.3** A proposed agreement between SPE and any co-sponsor(s) shall be submitted in writing for Board approval, along with the Meeting Request Form, before a commitment is made. The agreement shall, at the minimum, include each co-sponsor's operational and financial responsibilities, any special meeting conditions (such as papers copyrighted in the name of the meeting for joint rights by the co-sponsors), and any proposed revenue and cost-sharing agreement. See the Meetings Procedures Manual for an example of a joint meeting agreement.

Proposed financial arrangements, delegation of responsibilities and copyright assignment shall be included in each agreement.

3.2.3.1 Intersociety Collaboration Procedures

The following procedures should be adhered to when SPE collaborates on a meeting with another organization or entity:

1. Once SPE and one or more groups or organizations has decided to attempt to collaborate on an event for the benefit of their joint societies' members, the groups shall exchange policies and meet to discuss areas of differences and of mutual agreements.
2. SPE shall also provide the other organization(s) with a proposed contract for review. The contract shall outline major protections and issues relating to the above, as well as:
 - Funding
 - Income and revenue sharing
 - Technical and volunteer input
 - Staff requirements
3. SPE Staff shall have the authority to negotiate with the other group(s) regarding any and all issues related to cost and revenue sharing, volunteer input, and/or staffing. However, Staff shall clarify that items related to ensuring protections as noted in Policy above are not subject to negotiation.
4. All negotiations are subject to the Board Committee on Technical Programs and Meetings (BCTPM) and subsequent SPE Board approval as outlined herein. Staff shall summarize the negotiation results in writing and recommend actions to the BCTPM.
5. The BCTPM shall review the recommendations and vote on them for concurrence and further recommendation to the Board. In addition, the appropriate Technical Directors and Regional Directors shall be consulted for their input and concurrence prior to BCTPM discussion. All comments from involved parties shall be included with the written recommendation.

6. The SPE Board has final approval authority on the recommendation. If there is any disagreement from an involved party, that party shall have the right to state his position at the Board meeting during the discussion phase, following the BCTPM motion.
 7. Results of the recommendation shall be referred back to the BCTPM, and to the appropriate Staff person. The Staff person shall subsequently contact the group(s) with the decision of the Board and/or any further required action in a timely manner. In addition, the BCTPM shall be kept informed of progress.
- 3.2.4 Except for special provisions made for certain Joint Meetings, as approved by the Board of Directors, SPE will maintain the copyright on all technical papers programmed by SPE.
 - 3.2.5 In Joint Meetings, the SPE Regional Director will be kept fully informed by the members planning the meeting, and shall be included in all negotiations with co-sponsors.
 - 3.2.6 When feasible, the SPE Staff shall plan, organize, conduct, and supervise the execution of Joint Meetings.

3.3 Concurrent Meetings

The following policy applies to all SPE concurrent meetings.

- 3.3.1 The Board Committee on Technical Programs and Meetings shall approve any Concurrent Meeting. A decision shall be provided within 30 days unless any of the sponsors of the meeting is a commercial organization, in which case 60 days are allowed for review and approval.
- 3.3.2 SPE will support Concurrent Meetings for the primary purpose of technology dissemination.
- 3.3.3 A proposed agreement between SPE and any co-sponsor(s) shall be submitted in writing for Board approval, with the Meeting Request Form, before a commitment is made. The agreement shall outline all reciprocal arrangements, registration fees, etc., between all Concurrent Meeting sponsors. See the Meetings Procedures Manual for an example of a Concurrent Meeting agreement.
- 3.3.4 SPE will maintain the copyright on all technical papers programmed by SPE for the Concurrent Meetings.
- 3.3.5 When feasible, the SPE Staff shall plan, organize, conduct, and supervise the execution of Concurrent Meetings.

4.0 Administration of Exhibits

An exhibition is often held in conjunction with SPE conferences. The primary purpose of the exhibition is to exchange technical information on products and services related to oil and gas exploration, drilling, completions, facilities, HSE, and production. The technical program (sessions) and exhibition are complementary and planned to further SPE's mission. They are consistent with SPE's policies and objectives. The policy regarding management of exhibitions considers that:

- The exhibition will have expenses that need to be included in the overall budget;
- The cost to exhibitors can be substantial;
- Excessive exhibitions can be detrimental to exhibiting companies;
- The SPE database of exhibitors is a valuable asset that requires protection, especially when conducting Joint Conferences; and
- The database of exhibitors contains confidential information.

The following policy applies to exhibitions at Joint Meetings:

- When feasible, all exhibitions at any SPE Joint Conference shall be administered by SPE Staff;
- If the SPE Board determines it is not feasible to have SPE Staff administer the exhibition, then the SPE host region or section may organize and operate the exhibition using volunteer SPE members or, with SPE Board approval, contractors under the advice of SPE Staff.
- Due to the proprietary nature of the SPE data, SPE Staff shall handle any use of names/companies in the SPE database for purposes of mailing associated materials to potential exhibiting companies.

5.0 Financial Policy

Certain SPE meetings and exhibitions are conducted to both disseminate technology and to generate revenue for SPE. Other events may not have revenue generation as a goal. The goals for each SPE event are set by the meeting organizers and planners and approved by the SPE Board.

Revenues and expenses for all SPE meetings are the responsibility of the SPE Board. However, the Board may delegate administration of revenues and expenses to SPE Staff or a host section or region.

It is recognized that historically some meetings were not billed Staff costs. Currently all meetings will be provided with direct and Staff allocated charges. In fairness to all members, the value of services provided by SPE Staff shall be recovered for all meetings in which such services are used. Therefore, all SPE meetings shall be planned and budgeted to at least break-even.

Staff allocation rates will be periodically reviewed by the Board Committee on Finance and Administration and approved by the Board of Directors. Exceptions to the policies in section five must be recommended by the Board Committee on Technical Programs and Meetings and be ratified by the Board. The SPE Board may grant approval upon request for certain meetings to be allowed to pay for services at a reduced rate approximating the variable/marginal Staff rate, as determined by the SPE accounting Staff, and approved by the Board Finance and Administration Committee. Should a section or region seek to host a meeting and coordinate its planning, setting the fee, and making all arrangements, that section or region is then accepting the financial responsibility for paying SPE for services rendered, as they would with any other vendor. It is understood that such payment shall be made whether or not the meeting makes a profit.

Questions about any other financially-related situations should be expressed in writing and submitted to the appropriate SPE Staff. SPE Staff will work with the involved party to satisfactorily resolve the issue. If the situation cannot be resolved by this method, then the situation will be brought to the BCTPM for final resolution.

Other SPE Policies and Information

Other SPE Policies and Information

SPE Editorial Policy

SPE encourages open and objective discussion of technical and professional subjects pertinent to the interests of the Society and its publications. Society publications shall not contain judgmental remarks or opinions as to the technical competence, personal character, or motivations of any individual, company, or group. Any material which, in the publisher's opinion, does not meet the standards for objectivity, pertinence, and professional tone will be returned to the contributor with a request for revision before publication. SPE publications accept advertising for goods and services which, in the publisher's judgment, address the technical or professional interests of its readers.

Statement of Antitrust Compliance Policy

The Society of Petroleum Engineers Inc. (SPE) is a professional organization formed for the purposes of providing the means for the collection, dissemination, and exchange of technical information concerning the production of energy sources through wellbores and of providing opportunities to interested individuals to maintain and upgrade their competence for the public benefit.

In carrying out these objectives, it is SPE's firm and resolute policy that all SPE activities shall be conducted in strict conformity with applicable antitrust laws.

The above stated purposes of the SPE also serve the goal of promoting competition. To this end, SPE has adopted an Antitrust Compliance Policy that specifically requires observance of the following principles.

Matters Involving Prices and Terms of

Competition. No SPE activity can be used as a means for affecting or discussing any understanding or agreement, written or oral, formal or informal, express or implied, among competitors or potential competitors with regard to such competitors' prices, terms, and conditions of sale or purchase, marketing, distribution, production, consumption, market territories, or customers.

No effort will be made by any SPE body or member on behalf of SPE to collect information from or disseminate information to SPE members concerning prices, terms and conditions of sale or purchase, marketing, distribution, production, consumption, market territories, or customers, without prior clearance from the SPE Finance and Administration Committee. In any event, no such effort will be made in regard to future or planned prices, terms and conditions of sale or purchase, marketing, distribution, production, consumption, market territories, or customers of members' services or products.

No SPE activity can be used as a means for affecting or discussing any understanding or agreement, written or oral, formal or informal, expressed or implied, to boycott or to exclude from competition any person, company, or other legal entity.

Matters Affecting Participation. No person can be unreasonably excluded from participating in SPE activities. Efforts will be made to ensure that interested persons will have access to SPE activities.

Suggestion of Standards. No effort will be made by any SPE body or members on behalf of SPE Finance and Administration Committee to formulate any recommended industry standards without prior clearance from the SPE Finance and Administration Committee.

All industry standards recommended by SPE will be nonbinding suggestions of the SPE only, and no sanctions will be imposed by SPE for noncompliance with or failure to adopt such standards. Each member of SPE is expected to exercise independent judgment in using or not using the standards suggested by SPE.

All industry standards recommended by SPE will be fair and equitable, will be in the public interest rather than any narrow or partisan interests of any SPE member(s), and will be adopted only after a full opportunity to comment on the proposed standards has been afforded to all interested persons.

Fairness of SPE Activities. All activities of SPE are to be conducted fairly, responsibly, and in good faith, and with the intent, purpose, and desire to further the above stated purposes and goals of the SPE. To ensure compliance with this Antitrust Compliance Policy, the member in charge (usually the Chairperson) of any meeting of any SPE body shall normally endeavor to prepare and to distribute, in advance, an agenda for the meeting and to prepare summary minutes of the meeting, copies of which shall be sent to the SPE Executive Director. For any matters to be considered which are outside the scope of that body's normal activity, a written agenda for the meeting of that body shall be prepared and mailed, in advance, to the members of the body and to the members of the SPE Finance and Administration Committee.

Any SPE body or member having any questions or concerns regarding the propriety of any activity being conducted by or on behalf of SPE in light of this Antitrust Compliance Policy is encouraged to contact the SPE Executive Director. It is the intent and policy of SPE to encourage such inquiries so that compliance with this policy may be ensured.

Public Interface/Political. The SPE Board of Directors, as the policy-making and governing body of the Society of Petroleum Engineers, has endorsed participation by SPE members, sections, and committees in programs that seek to enhance the public's understanding of the technical and economical issues that are involved in the exploration, drilling, and production segments of the oil, natural gas, and related energy industries. However, caution shall be exercised by SPE members participating in

these programs that no impression of attempting to influence legislation exists. Laws in countries where SPE sections operate govern section activities in such countries. SPE, which is incorporated in the U.S., is subject to U.S. rules and regulations on all matters.

As a practice, no section or committee of SPE shall undertake programs of a public or national policy nature without first advising the SPE Board of Directors. Laws and regulations governing public information programs change frequently, and the SPE Board, which has responsibility for actions of all SPE units, including sections and committees, is the only SPE body authorized to approve programs in the public policy area. Inquiries and/or comments regarding this Antitrust Compliance Policy shall be directed to:

Society of Petroleum Engineers
ATTN: SPE President
222 Palisades Creek Drive
Richardson, TX 75080
Telephone: 972/952-9393
Facsimile: 972/952-9435
E-mail : president@spe.org

SPE International Meetings

Administration

For SPE International Meetings, management responsibilities for the following activities are normally delegated to the SPE staff:

- *Planning, Coordination, and Execution:* Including site and date recommendations.
- *Budget:* Preparation of both the preliminary budget and final outcome for SPE Board approval; administration of income and expense items during the planning and conduct of the meeting.
- *Call for Papers:* Production and mailing.
- *Conference Preview:* Production and mailing.
- *Marketing:* Planning and conduct of marketing efforts.
- *Proceedings:* *Proceedings* production, from sending acceptance letters to authors through delivery of the *Proceedings* to the meeting.
- *Final Program:* Production and delivery to the meeting.
- *Exhibition:* Exhibition sales and on-site management.
- *Reporting:* Post-event evaluation.

General Chairperson

For most SPE International Meetings—most notably the Society's Annual Technical Conference and Exhibition—the SPE Board appoints a General Chairperson. The General Chairperson for an SPE International Meeting works with meeting committees and SPE staff in overall planning and conduct of the meeting.

Program Committee

The Program Committee is responsible for arranging the technical program for the meeting. Program Committee members are selected for their knowledge of the technical area(s) to be covered and their associations with individuals and organizations that would be valuable contributors to the program. Responsibilities include the following:

- Establishing the program goals.
- Determining the key areas to be covered by technical sessions.
- Directing the paper solicitation effort, including defining topics to be listed in the Call for Papers, recommending SPE technical interests for development of the mailing list, and direct contacts to

companies, government agencies, and universities.

- Selecting papers for the conference program.
- Selecting and inviting plenary session speakers and panelists with consultation for the Steering Committee.
- Serving as session Chairpersons during the conference.
- Coordinating with authors and speakers.

The technical program serves as the most important aspect of any SPE meeting, setting the standard for the purpose of such events. With that principle, the Program Committee focuses its efforts on planning and implementing an innovative, relevant program. This may require supplementing the traditional Call for Papers solicitation with an assertive, personal approach of invited presentations from key individuals.

More importantly, technical papers become part of the Society's permanent literature and online archive—the eLibrary—and is the foundation of the SPE mission. They are the SPE members' legacy to future generations of engineers.

Steering/Advisory Committee

The Board may appoint a Steering Committee for some SPE International Meetings. When a Steering Committee is in place, it provides overall direction and support for the meeting. The committee's responsibilities include the following:

- Ensuring commitment for participation and continuity of the meeting, including conduct of any sponsorship program.
- Encouraging executives and managers to support their employees attendance at the meeting.
- Hosting important guests at the meeting.
- Soliciting sponsorships or other special support for the meeting.
- Advising the Program Committee on nomination and invitation of special speakers (industry notables; luncheon, keynote, and plenary session speakers; etc.).
- Directing the performance of meeting conduct subcommittees and on-site operations.

SPE Regional Meetings

Administration

For SPE Regional Meetings, committees of SPE members are generally organized to carry out the planning and conduct of the meeting. However, for Regional Meetings, SPE staff is available for support, coordination, or implementation of the following:

- Printing and distribution of the call for papers; posting on the web site;
- Support of technical-session operations
- Printing and distribution of the Conference Preview
- Production of *Proceedings*, including, session Chairperson instructions, reproduction of papers, and delivery to the meeting
- Printing and distribution of the final technical program
- Exhibition sales
- Advance and on-site registration
- Marketing (*JPT*, SPE.org etc.)
- On-site conference and exhibition management

Occasionally, contracted meeting planners may be required to carry out some activities. Sections may have recommendations of local individuals with whom they have worked previously. Such contractors shall work under the direction of SPE staff, who will approve the contractor recommended, and negotiate and execute any agreements or contracts.

Meetings Research Services

It is common practice following a meeting to assess the opinions of attendees and/or exhibitors to learn what they liked and didn't like about the event and to get their suggestions as to what they would like to see at future meetings. The SPE Research unit has been providing this service to many conferences since 1999 and has the full capability to design and administer surveys and to provide the analysis and reports, including recommendations, for any meeting event. The level of reporting can be tailored to the needs of the event and range from a report that includes only raw results, to one with full analysis and cross-tabulations. The SPE Board Committee on Technical Programs and Meetings has issued a directive for all meetings to conduct a survey and someone from the Research staff will contact you. The

committee will need to provide a spreadsheet containing email addresses for attendees.

Committee Overview

In planning an SPE Regional Meeting, the first step is to appoint a general Chairperson. He/she will be responsible for overall coordination of the meeting planning and conduct and is usually appointed by the Section Chairperson.

The general Chairperson names committee Chairperson, who will in turn invite their committee members. The number of members of each committee will be determined by the work to be done by the committee, but usually shall range from three to eight persons. *All committees shall be composed of SPE members.*

SPE Regional Meeting committees include the following:

Arrangements Committee—Secures and coordinates the audio visual and other mechanical features of the technical session meetings. Also coordinates directional sign copy needs for the event.

Short Course Committee—Coordinates appropriate short courses.

Entertainment Committee—Plans and conducts any social functions, luncheons, receptions, dinners, and spouses' activities.

Exhibits Committee—Organizes and operates the exhibition (including logistics, and on-site service). SPE sales staff is available for guidance and assistance.

Finance Committee—Prepares the total meeting budget, handles all financial affairs related to the meeting, and reports financial outcome.

Housing Committee—Secures hotel accommodations for those who attend the meeting; arranges for transportation to and from hotel and meeting facility and/or social functions, if necessary.

Membership Committee—Promotes membership in the Society.

Program Committee—Develops the technical program, including solicitation and selection of papers.

Marketing/Public Relations Committee—Promotes the meeting through trade

announcements, invitational brochures, press releases, and local community relations. Also gathers and organizes text for the Conference Preview and on-site program.

Registration Committee—Coordinates registration (advance and on-site) for all persons attending the meeting.

Spouses Activities Committee—Coordinates optional entertainment for spouses.

General Chairperson

The General Chairperson of an SPE Regional Meeting is responsible for the overall coordination, planning, and conduct of the meeting. His/her first priority is to select satisfactory meeting dates. The dates shall not conflict with any other major E&P industry meeting that is:

- related to the technology to be treated
- scheduled within two weeks from the dates of another meeting in the region.
- likely to attract the same registrants.

Note: Meeting dates do not include pre- or post-meeting events, such as short courses.

When meeting dates have been confirmed, function space shall be explored. In preparing a proposal, consider the following elements:

1. **Facilities**—Selection of acceptable and affordable facilities is critical. Meeting rooms and exhibition space shall be of adequate size to accommodate expected attendance and shall be situated in proximity to each other to ensure good traffic flow between the areas. Other factors to consider are room acoustics, ceiling height, and room layout. If necessary, contact SPE staff for further guidance.

2. **Accommodations**—Hotels/motels with acceptable, affordable guest rooms shall be nearby.

The General Chairperson works with SPE staff

to prepare the Meeting Request Form (see **Appendix A**) for submission to the Regional Director 18 months prior to the desired meeting date. The SPE Board of Directors approves scheduling of all meetings. All joint meetings must submit an agreement with the Meeting Request Form (**see Appendix B**).

Historically, meetings that have been managed by SPE sections have been charged for direct costs (third party costs) for activities conducted on their behalf by SPE staff, but not for the cost of staff resources. Beginning in fiscal year 2004, all meetings have been charged for the cost of all staff and services provided.

Once the Meeting Request Form has been approved, the selection of committee Chairperson is the next step. To ensure the overall success of the meeting, the committee Chairperson shall reflect the geographic and technical interests and the demographics of the region. Once committee Chairpersons have been selected, the General Chairperson shall call an organizational meeting. The local section Chairperson, the SPE Regional Director, and an SPE event manager shall be invited to attend this meeting. The agenda shall include a review of committee assignments and responsibilities, policies and procedures, projection of attendance, potential speakers, housing and exhibition requirements, and anticipated expenses for preparation of the preliminary budget. At this meeting, the General Chairperson shall also establish a regular schedule of planning meetings.

After committee responsibilities have been established, the General Chairperson shall keep in regular touch with the committee Chairperson to ensure that their responsibilities are being discharged on schedule.

Sample General Chairperson Timetable

The following is provided as a guide

<u>Timetable</u>	<u>Responsibility</u>
18 months before the meeting	Select meeting sites and dates. Submit Meeting Request Form (Appendix A) to the Regional Director and SPE Board Committee on Technical Programs and Meetings.
12 months before the meeting	Appoint committee Chairpersons. Call organizational meeting and plan subsequent meetings.
11 months before the meeting	Determine meeting planning time schedule and establish registration arrangements and policies. With committee members, decide the projected attendance so income and expenses can be budgeted accordingly.
10 months before the meeting	Call meeting of all committee Chairpersons to review and approve budget.
7 to 8 months before the meeting	Review committee member appointments.
6 months before the meeting	Submit Meeting Budget to SPE Board Committee on Technical Programs and Meetings.
5 to 6 months before the meeting	Review and approve budget revisions. Send invitations to SPE Officers expected to attend.
3 months before the meeting	Finalize conference liability insurance with SPE staff. The meeting liability insurance shall cover any unaffected liability during the meeting. Conference insurance fees are included in the staff allocations.
2 months before the meeting	Finalize any luncheon arrangements and send confirmation to guests.
1 week before the meeting	Hold a final committee meeting to review all arrangements.
1 week before the meeting	Arrange a pre-convention meeting with facility staff to discuss overall arrangements.
During the meeting	Preside at luncheon and introduce speakers. Be available throughout meeting to counsel Chairpersons and resolve any issues.
Following the meeting	Submit a thorough report of the meeting, including a financial outcome, to the SPE Board Committee on Technical Programs and Meetings and to section Chairperson. Send thank you letters to committee Chairperson, speakers, and special guests.

Program Committee

Structure

The Program Committee usually consists of a Chairperson and sufficient members to handle the review and selection of paper proposals and development of any plenary sessions planned.

Program Chairperson

The Program Chairperson shall have a strong and respected technical reputation that extends beyond the local area. Recognition of the Program Chairperson as a leader in the technology covered by the program enhances the appeal of the conference to potential attendees and encourages higher attendance.

Responsibilities

- Appoints members to the Program Committee.
- Educates and enforces the “No-Paper, No-Podium” policy.
- Directs the operations of the Program Committee. The Chairperson works with SPE staff to develop a timetable for Committee activities. The timetable shall result in program selection and notification of authors at a date sufficiently ahead of the conference to allow authors adequate time to prepare and submit their papers by the manuscript due date. SPE sets the manuscript due date according to the time required to receive and process the manuscripts and produce the proceedings for delivery to the conference. Once the timetable is established, it is the Chairperson’s responsibility to ensure that key deadlines are met.
- Initiates and organizes Program Committee Meetings. Committees usually hold an organizational meeting to discuss what topics to cover in the program and to develop the Call for Paper Proposals, and a selection meeting at which the paper proposals that will be included in the program are chosen. Other meetings may be necessary.
- Prepares material to be included in the Call for Paper Proposals. If SPE is preparing and distributing the Call for Paper Proposals, the Chairperson submits this material to SPE. However,

some regional and topical meeting organizers elect to produce their own Call for Paper Proposals. Most Call for Paper Proposals include a brief message from the Chairperson, a list of technical topics on which the Program Committee would like to receive paper proposals, and a submission form. An online Call for Paper Proposals is also produced.

- Reports the decisions of the Program Committee to SPE. The Chairperson is responsible for providing SPE staff with the final technical program determined by the Committee at the selection meeting so that SPE can notify authors of the Committee’s decision. This program includes the list of accepted and declined papers, the sessions in which the accepted papers will be presented, the order for the papers within each session, and Session Chairperson’s names for each session.
- Attends the conference to oversee implementation of the program.

Program Committee Members

The Program Committee shall include members who represent a cross section of the technical topics and geographic areas to be covered by the program. Members from different organizations and companies shall also attend in order to provide a broad spectrum of viewpoints.

Responsibilities

Program Committee members assist the Program Chairperson to (1) solicit paper proposals for the conference, (2) select the papers to be included in the program, and (3) to develop any plenary sessions desired. Program Committee members review and rate paper proposals received for the conference and assist with the development of sessions. Many Program Committee members also serve as Session Chairperson.

Process

The Program Chairperson arranges an organizational meeting of the Program Committee to discuss the technical theme and scope for the conference, topics that need to be covered, the target audience for paper proposal solicitation, and the process for developing the program.

Paper Proposal Solicitation

After the organizational meeting, the Program Chairperson works with SPE staff to develop a Call for Paper Proposals. This brief document usually features a solicitation letter from the Chairperson encouraging authors to submit paper proposals, an outline of the topics of interest to the Program Committee. Submissions are made online.

The Program Chairperson works with SPE staff to determine which SPE members will receive the Call for Paper Proposal directly. SPE collects information from its members on their technical specialties and maintains a database of the information. The Program Chairperson will determine which of the technical specialties align with the planned content of the conference's technical program and identifies geographic areas to be targeted. The conference budget shall include funds to send the Call for Paper Proposals. The Program Chairperson works with SPE staff to refine the number of members who fit his criteria to a number that can be handled within the conference budget. SPE staff then sends out the Call for Paper Proposals and post on SPE web site.

Program Committee members shall actively solicit paper proposals for the conference. A supply of Call of Paper Proposals is usually provided to each Committee member for distribution to his/her colleagues who may want to submit a paper proposal.

Development of Technical Program

For a regional/topical meeting, the technical program might consist of a 2-day symposium on a single phase of the technology, or it might consist of papers covering several technical areas that are of particular interest to the region. Either approach can be successful if the material presented is of the *highest technical quality*.

The general solicitation of paper proposals represented by the Call for Paper Proposals distribution brings in many papers, but the Program Committee shall also proactively seek good papers for the program. A technical program is developed (1) by selecting a specific field of technology and then inviting individuals recognized in that field to contribute papers on the subject, or (2) by soliciting papers from various companies, research laboratories, and universities known to be involved in technology

targeted by the Program Committee. Although the first approach requires more time and effort than the second, it is more likely to produce a good program that will encourage good attendance. The best technical papers will be offered by qualified engineers who are interested in writing on specific topics. Therefore, requests to companies or to individuals shall state as specifically as possible the subject(s) that the committee would like to see addressed in a paper.

Program Selection

While some technical presentations are specially invited, most are selected from the abstracts submitted following the Call for Papers. Technical sessions are usually 1-1/2 to 2 hours long. This allows for six papers per session, with each paper allotted 15 to 20 minutes for presentation and 10 minutes for discussion. A specific time shall be assigned to each author.

Most Program Committees hold a selection meeting at which sessions are developed and decisions are made about which papers will be included in the program. The paper proposals are rated by the committee online.

After the papers are accepted and technical sessions are organized, the Program Chairperson shall write letters of acceptance or rejection to all authors who have submitted paper proposals. The SPE staff can provide sample letters. At the same time, the Program Chairperson shall submit copies of the accepted paper proposals to SPE staff. Staff will assign SPE paper numbers to the paper proposals and will send each corresponding author, detailed information on manuscript preparation and deadlines.

Proceedings

Proceedings (a collection of the technical papers presented at the conference) are a well-established requirement of SPE meetings. SPE provides copies of the meeting *Proceedings* to registrants at the meeting.

The complete technical program shall be posted on the web site in a printable format if the committee elects to provide the *Proceedings* after the meeting. The CD *Proceedings* shall be mailed to attendees as soon as they are available.

Authors participating in the technical program will provide a manuscript for inclusion in the

Proceedings and will transfer copyright for their papers to SPE. Direct any questions about copyright to SPE Technical Publications at the SPE Americas Office. Plenary session speakers and keynote speakers are usually not required to submit a written manuscript. For these presentations, the Committee shall obtain a right of first refusal for a speaker's comments to be published in an SPE publication.

“No-Paper, No Podium” Policy

SPE has a no-paper/no-podium policy for SPE conferences. This means that authors of SPE-numbered paper who do not submit a written manuscript in time to be included in the conference *Proceedings* will not be allowed to present their papers at the conference. An exception to this policy for the conference can be requested from the SPE Board of Directors during the meeting approval process.

After acceptance for the program, SPE staff will send each corresponding author an Author Kit, which includes manuscript-preparation instructions and deadline information. As the deadline approaches, SPE staff will notify the Program Chairperson and Session Chairperson of any withdrawals or problems encountered by authors that would affect the program. Refer any author with questions about the *Proceedings* deadline to the SPE Conference Programs Department.

Costs. All *Proceedings* are produced on CD under the direction of SPE staff. (Suggestions for cost-effective CD replicators in the local area are welcome.) *Proceedings* costs depend on the number of papers and the number of CD's to be produced. SPE staff will provide cost estimates and a *Proceedings* production schedule from the Call for Papers through delivery of *Proceedings* to the meeting.

Copyright. In accordance with SPE policy, the Society copyrights all papers produced for SPE meetings. This is to protect the author(s) and SPE. The international copyright symbol, the year of the copyright, and the words “Copyright Society of Petroleum Engineers, Inc.” shall appear conspicuously on all papers produced for SPE meetings (assuming they have not been copyrighted previously or are government exempt). Further information regarding publication rights may be obtained directly from any SPE office.

Session Chairpersons

Each technical session shall have two presiding Chairperson, designated as co-Chairperson. Session Chairperson may be Program Committee members or individuals who have helped to plan the meeting, such as committee Chairperson, section officers, or members of the profession who are well known in the session's technical area. The choice of Session Chairperson is usually delegated to the Program Chairperson.

Responsibilities

Session Chairpersons have four main responsibilities:

- To monitor the authors of accepted papers in the session to promote the preparation and submission of their manuscripts by the due date and their presence at the conference to present.
- To review the presentations of the authors in the session to ensure they meet SPE standards for quality and non-commerciality.
- To review the papers in the session before the conference and prepare comments or questions to stimulate the question-and-answer session.
- To attend the conference to conduct the session.

The first of these duties is particularly important to the success of the program. Under the no-paper/no-podium policy, manuscripts not submitted by the manuscript due date cannot be presented and drop out of the program. Experience has shown that early and frequent contact with the authors by the Session Chairperson can reduce the number of authors who withdraw or do not meet the manuscript due date.

A Session Chairperson shall contact the corresponding authors in his/her session about two weeks after notifications of acceptance have been sent to verify that the authors received notification of acceptance and the Author Kit, to ensure that the authors still intend to write the paper and attend the conference to present, and to remind the authors of manuscript and presentation deadlines. The Session Chairperson shall remain in contact with the corresponding authors in the session from acceptance of the paper proposal until the manuscript due date to check on progress and to ensure that the session remains intact.

Frequent reminders of the due date and the time likely to be required for company approvals may be needed.

If a Session Chairperson discovers that an author does not intend to submit a paper and present, he/she shall notify the Program Chairperson and SPE immediately.

SPE staff will send Session Chairpersons a list of the papers to be presented during their session, as well as the time allotments. About three weeks before the meeting, SPE staff will notify each Session Chairperson that copies of the papers in his/her session are available on the Internet and where to locate them. SPE staff will also provide information on the authors' audio-visual requirements.

Advance Meeting of Session Chairperson and Arrangements Committee: It is desirable for all persons serving as session Chairperson and members of the arrangements committee to

meet before the meeting begins, or to meet briefly at the beginning of each day. Such meetings will be designated, and the time and place for them published by the Arrangements Committee Chairperson. The purpose of such meetings is to discuss arrangement features and to be sure that every person is acquainted with procedures. An authors' breakfast is a good time to bring these people together. A final check on visual aids required by the authors can be made at that time.

Miscellaneous

The Program Committee may consider giving presenting authors a small gift. The cost of these will need to be included in the meeting budget. Other considerations are special registration rates for presenting authors and/or session Chairperson and an author's social function (such as a breakfast). The Program Chairperson shall notify authors of any special functions and/or registration procedures.

<u>Sample Program Committee Timetable</u>	
<i>Timetable</i>	<i>Responsibility</i>
12 months before the meeting	Formulate solicitation plans and target areas for proposed program.
10 months before the meeting	SPE to distribute Call for Papers. Program Committee initiates contacts.
6 months before the meeting	Paper Proposals due.
5 months before the meeting	Program selection meeting. Authors notified and provided with Author Kit for manuscript preparation.
2 months before the meeting	Manuscripts due at SPE. Determine number of CDs to be replicated
3 weeks before the meeting	Copies of papers provided to Session Chairpersons. <i>Proceedings</i> shipped to meeting site.

Sample Manuscript Timetable

<i>Process</i>	<i>Calculation</i>								
Solicitation mailing (Call for Paper Proposals)	9 months from conference date								
Abstract deadline	2 months from solicitation mailing								
Program selection meeting	1 month after abstract deadline								
Author notifications (author kits)	2 weeks after selection meeting and/or 3 months prior to manuscript due date								
Manuscript deadline	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">0-50 papers</td> <td>6 weeks prior to ship date</td> </tr> <tr> <td>50-100 papers</td> <td>8 weeks prior to ship date</td> </tr> <tr> <td>100-200 papers</td> <td>12 weeks prior to ship date</td> </tr> <tr> <td>200-plus papers</td> <td>16 weeks prior to ship date</td> </tr> </table>	0-50 papers	6 weeks prior to ship date	50-100 papers	8 weeks prior to ship date	100-200 papers	12 weeks prior to ship date	200-plus papers	16 weeks prior to ship date
0-50 papers	6 weeks prior to ship date								
50-100 papers	8 weeks prior to ship date								
100-200 papers	12 weeks prior to ship date								
200-plus papers	16 weeks prior to ship date								
Vendor press date	4 weeks prior to ship date								
Session copies available on Web site	3 weeks prior to conference								
CD Proceedings ship date	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">If local</td> <td>1 week prior to the conference</td> </tr> <tr> <td>If U.S.A.</td> <td>2 weeks prior to the conference</td> </tr> <tr> <td>If international</td> <td>4 weeks prior to the conference</td> </tr> </table>	If local	1 week prior to the conference	If U.S.A.	2 weeks prior to the conference	If international	4 weeks prior to the conference		
If local	1 week prior to the conference								
If U.S.A.	2 weeks prior to the conference								
If international	4 weeks prior to the conference								

Arrangements Committee

The Chairperson of the Arrangements Committee is one of the meeting officers and works closely with the Program Chairperson. He/she may appoint as many committee members as needed to carry out the committee's tasks. The committee works with the session Chairperson to ensure smooth operations of technical paper presentations.

The Chairperson of the Arrangements Committee shall be authorized to commit the host section for equipment and services needed to execute the committee's responsibility.

Finances

At the first meeting of the committee, a preliminary budget shall be developed for the Finance Chairperson. This shall take place approximately 10 months before the meeting, with a revised budget submitted six months before the meeting. The Chairperson shall instruct vendors to send invoices to him/her immediately after the meeting. He/she shall review the invoices for accuracy and then forward them to the Finance Chairperson.

Audio-Visual Equipment

The primary objective is to permit the speaker to be heard clearly and to allow his/her illustrations to be seen easily by the entire audience. Standard visual equipment includes one data projector, lavalier microphone, laser pointer, standing lectern, one computer, and one screen. The Arrangements Committee shall use its discretion in ordering such equipment because of the expense.

Ensure that screens are sufficiently large for the room. When in doubt, remember that it is always better to have a screen that is too large than one that is too small.

Recommendations follow:

Size of Audience	Minimum Screen Size
10 to 50	5 ft (1.5 m) wide, 3 ft (0.9 m) high
50 to 75	6 ft (1.8 m) wide, 3.5 ft (1.1 m) high
75 to 100	7 ft (2.1 m) wide, 4.25 ft (1.4 m) high
100 to 150	8 ft (2.4 m) wide, 5 ft (1.5 m) high
150 to 500	10 ft (3.1 m) wide, 6 ft (1.8 m) high
500 to 1,000	12 ft (3.6 m) wide, 7.5 ft (2.3 m) high

Standard audio equipment includes a table microphone for the Session Chairperson's table timer, and standing or portable microphones in the audience.

The facility where the technical sessions will be held usually has a sound system. This saves the cost of renting sound equipment. However, these systems are sometimes not adequate and shall be checked carefully.

It is important that a technician be available at all times to adjust the sound and to make emergency repairs to the system. If the facility's system is used, a member of the facility staff usually is available for this purpose; if the equipment is rented, it probably will be necessary to employ a technician through the vendor. There may be a charge for this service.

The SPE Technical Programs staff works with the Program Committee to determine speaker audio/visual needs.

Other Equipment

Coordinate with other committees to determine equipment needs. Other equipment needs may include computers and printers for on-site registration and short course audio-visual needs.

Procurement of Equipment

Students and SPE members sometimes can serve as projector operators to save the expense. While the Chairperson may assign committee members to arrange for borrowed equipment, he/she shall personally contact vendors and shall select the firm to be used on the basis of price, reliability, and quality of equipment. Rental rates and conditions for all equipment shall be agreed in writing, and the committee Chairperson shall give precise written instructions to the vendor as to the times and locations for delivery of the equipment.

Signs

The Arrangements Committee is also responsible for securing adequate directional signs to ensure smooth flow of attendees to technical sessions, registration, exhibits, social functions, etc. Be certain to check the meeting facility rules for placement of signs. All signs shall be professionally prepared.

Meeting Rooms

Attendance at the meeting will vary, depending on the type and strength of the technical program for the meeting, but it shall be recognized that attendance is usually drawn from those who live near the meeting location. This manual includes information on calculating the necessary rooms for housing and the adequacy of rooms for sessions. A good rule-of-thumb for determining the size of a meeting

room is to allow 10 square feet per person expected to attend. Auditorium or theater seating is customarily followed for this sort of planning and adequate space for aisles is included in the 10 square foot figure. When in doubt, it is better to have a larger room than to have one too small.

A good meeting room shall have the following features:

- Good acoustics, free from exterior noises, such as traffic.
- An adequate sound system or clearance from hotel management to bring in an outside PA system.
- Black-out drapes to darken the room during visual presentations.
- Appropriate ceiling height and few posts or columns that would obstruct the view of the speaker or screen.
- Easy access (rooms on ground or mezzanine floors preferable).

Room Furniture

The facility generally will furnish the speaker's lectern, tables for session chairperson, and chairs for the audience. Facility staffs will arrange this furniture beforehand according to your specifications. The Arrangements Committee is responsible for providing the specifications to the facility. The committee member assigned to the facility shall discuss requirements personally with the facility representative. The Arrangements Committee also shall provide the facility with an explicit written statement of the schedule of sessions and furniture requirements for each before the meeting begins. A check system then shall be established to ensure that the schedule is carried out.

Typical Meeting Room Layout

Generally, platforms are not necessary unless room capacity exceeds 200 people. At an appropriate location in the room, the meeting facility will erect a platform for the session Chairperson and authors and will place the speaker's lectern and the screen. The Arrangements Committee shall ensure that the platform is of sufficient height to permit easy viewing of speakers but not so high as to obscure the audience's view of the screen. Portable or standing microphones shall be located at several points in the audience.

The session chairperson table shall include water service, timer, and the table microphone. The lectern shall be illuminated and shall hold a microphone and laser pointer.

Typically, the audience seating shall be “theater style.”

The Arrangements Committee shall discuss this layout with the facility before the meeting and shall check a day or so before the meeting begins to ensure the set-up is appropriate.

Panel Discussions

Panel discussions involve different platform arrangements and can vary somewhat in requirements. Generally, they will require a long table at which panel members can be seated comfortably, with a table microphone in front of each and possibly a speaker’s lectern to one side. Portable or standing microphones shall be located at several points in the audience.

Advance Meeting of Session Chairperson and Arrangements Committee

It is desirable for the Program Committee Chairperson, all session Chairperson, and Arrangements Committee members to meet before the meeting begins and/or briefly at the beginning of each day to discuss arrangements and to be sure that every person is acquainted with procedures. A final check on visual aids required by the authors can be made at this time. Room monitors shall be introduced to the

appropriate person involved with room layout and audio/visual. The Arrangements Committee Chairperson shall schedule these meetings.

How a Technical Session is Conducted

SPE meetings usually involve concurrent technical sessions held during each half day of the meeting. This section covers the conduct of one such technical session of the traditional type, where papers are presented by the individual authors. However, the procedures outlined can be modified to fit the needs of other types of sessions, such as panel discussions and informal presentations.

Usually, one member of the Arrangements Committee is assigned to each session. Session Chairperson, authors, A/V technician, and the Arrangements Committee members shall meet in the designated room 30 minutes before the session begins. Arrangements for introduction of authors and presentations are finalized at that time. One of the session Chairperson will call the session to order at the designated time and will introduce the first author. Each author receives a specific amount of time (generally 20 minutes) for his/her presentation; the Session Chairperson control this with a timer. After his/her time has elapsed, the Session Chairperson will call for discussion of the paper. After a reasonable discussion time (generally 10 minutes), the Chairperson calls for the next presentation.

Sample Arrangements Committee Timetable

<i>Timetable</i>	<i>Responsibility</i>
11 to 12 months before the meeting	With Program Chairperson, select appropriate room(s) for technical sessions and social functions.
10 months before the meeting	Submit budget to the Finance Chairperson.
7 to 8 months before the meeting	Organize the committee and secure audio-visual equipment bids (submit final bid to SPE staff for approval before signing).
3 to 4 months before the meeting	Arrange for A/V technician and order audio-visual equipment.
1 to 2 months before the meeting	Give facility specifications for setting the session room(s). Secure professional-looking directional sign copy for the meeting.

1 day before the meeting	Test audio-visual equipment to ensure it works properly.
During the meeting	Committee members check assigned session rooms for physical arrangement and audio-visual equipment; confirm that the A/V technician is present; ensure the air conditioning or heating equipment is working properly; check for unnecessary noise; assist session Chairperson with miscellaneous errands; control lights as required by each speaker.
Following the meeting	Approve audio-visual bills and give them to the Finance Committee Chairperson for payment.

Entertainment Committee

The Entertainment Committee is responsible for planning and conducting the entertainment and social functions to be held during an SPE Regional Meeting. Other responsibilities include arranging for speakers and/or other entertainment for functions, and providing decoration and set-up instructions to the hotel or facility. Spouses' activities are generally included in the committee's work, but may be handled by a separate spouses' activities committee if desired.

Guarantees

One of the most important considerations in planning a social function is the guarantee of attendance that shall be given to the hotel or caterer. A working figure shall be given to the hotel or caterer approximately three months in advance. The final guarantee usually has to be given 72 hours before the function. The committee shall verify the facility's policy before submitting a guarantee. This figure will be the number charged for the event, unless the actual number is greater than the guarantee.

Conflict of Room Requirements for Meetings and Social Functions

It is preferable to hold luncheons in rooms other than those in which technical sessions are held. If this is not possible, it will be necessary to end the technical session at about 11 a.m. to allow the hotel time to set up for the luncheon, and the technical session shall not be reconvened before 2:45 or 3 p.m. The hotel will advise

requirements needed to make room changes. For outdoor parties, alternative plans shall be made in case of inclement weather.

Menus

The Entertainment Committee is responsible for selecting the menus for food functions. These selections shall be made at the time of initial planning because they will determine the cost of the function. The hotel shall be informed of menu selections when they are made. Most catering departments will confirm menu prices six months before the function.

Ticket Collection

The Entertainment Committee is responsible for collecting tickets to social functions at the room entrance or head of the food line. Members of the caterer's staff may be available for ticket collection; arrangements shall be made in advance by the Entertainment Committee. At seated luncheons or dinners, waiters can pick up the tickets at the tables. If attendance is over the guarantee, payment shall be made on the number of people served.

Tickets

The Entertainment Committee shall coordinate printing of function tickets with the Arrangements and/or Registration Committee Chairperson(s). Tickets to all social functions shall clearly show date, time, place, and any arranged transportation. Tickets shall be numbered sequentially to keep track of sales for guarantee purposes. Refund policies shall be printed on the ticket.

Sample Entertainment Committee Timetable

<i>Timetable</i>	<i>Responsibility</i>
10 to 12 months before the meeting	Submit room requirements to the Arrangements Committee.
10 months before the meeting	Submit budget to the Finance Chairperson.

9 months before the meeting	Select menus and arrange for speakers and/or other entertainment.
7 to 8 months before the meeting	Organize the committee.
5 to 6 months before the meeting	Finalize social function costs and set ticket prices after the budget has been approved. <i>Social functions shall be self sustaining financially.</i>
5 to 6 months before the meeting	Provide the Marketing Chairperson with details of social functions for Conference Preview.
3 months before the meeting	Have social function tickets printed. Provide facility with working guarantee. Submit sign requirements to the Arrangements Committee Chairperson.
2 months before the meeting	Obtain a list of head table guests from the General Chairperson and write to the guests advising them of the place and time for gathering before the luncheon(s).
1½ months before the meeting	Arrange for introducers and write scripts for luncheon.
1 month before the meeting	Provide decoration and set-up instructions to hotel or appropriate facility. Give initial social function guarantees to facility personnel.
During the meeting	Check meeting room to make sure room will be ready by the time the function begins. Give guarantee updates to facility personnel as ticket sales are made during the meeting. Oversee social functions.
Following the meeting	Approve social function bills and give them to the Finance Committee Chairperson for payment.

Exhibits Committee

The Exhibits Committee is responsible for the marketing program; budgets for services; the exhibit space sales brochure; invitational mailings and telephone sales campaigns; mailings of newsletters and bulletins as a follow-up to invitational brochure; news releases and advertisements directed to certain interest areas; and program ad sales.

The SPE staff has extensive experience in planning and managing exhibitions. Exhibition sales and management at SPE Regional Meetings may be under the management auspices of SPE staff. Exhibition sales are managed by the SPE staff, if desired, at a fee. If it is determined that it is not practical for staff to administer the exhibition, the host section shall form an Exhibits Committee. Contracted

consultants (e.g., decorators, freight operators, etc.) may be used for conference; such consultants are contracted to SPE.

The Exhibits Committee of an SPE Regional Meeting is responsible for administration and conduct of the exhibition, including exhibit-related arrangements with the exhibition hall or hotel manager, exhibit service contractors, and representatives of exhibiting companies. All contracts, however, shall be reviewed and executed by SPE staff. The General Chairperson for the meeting may appoint three or four persons to the Exhibits Committee, with one designated as Chairperson.

An Exhibition at an SPE meeting shall be an integral part of the event. Revenues generated from the sale of exhibit space typically match or exceed the meeting's registration income. Therefore, the exhibit arrangements are of great importance to the success of the meeting itself.

The SPE staff can provide the Exhibits Committee with the following information:

1. A list of potential decorators and contractors to be considered for solicitation of proposals.
2. Samples of exhibit space applications used for solicitation of space requests; exhibit space invoices and contracts with standard clauses and terms; exhibitor registration materials and procedures; SPE Invoices and Contracts; and exhibit rules and regulations that set forth the objectives of the exhibition, the hours of the exhibit operation, move-in, and move-out, announcement of officially appointed contractors, items included in the cost of exhibit space fees, contractor provisions, and fire regulations for the contracted facilities.

Marketing the Exhibition

Effective promotion of the exhibition can be accomplished through an organized marketing effort. The keys to the marketing success are planning, scheduling, and follow-up, all of which require time and attention.

Organizing the Exhibition

When properly implemented, the following procedures ensure the smooth functioning of the exhibition, from move-in through move-out.

The Exhibits Committee is responsible for:

1. Conduct site inspections.
2. Submit budget.
3. Contact contractors and secure bids/cost quotes for exhibitor services.
4. Negotiate contract for services of exhibition decorator, transfer and storage contractor, and other exhibition related contractors.
5. Design layout of exhibit space.
6. Prepare exhibition regulations and exhibitor contracts. Contact SPE for standard forms.
7. Communicate with appointed exhibition contractors for preparation of an Exhibitor Services Manual and in assignment of move-in date/times.
8. Prepare and provide the exhibitor lists for convention promotion and for the

program.

9. Attend committee meetings as required.
10. Develop guest-card program for exhibition, if desired.
11. Manage Exhibitor Appointed Contractor Program.
12. Floor management -- supervise exhibits set-up and tear-down and, during the exhibition, assist representatives from exhibiting companies.
13. Conduct post-meeting exhibitor survey.

Site Selection

The first step in organizing an exhibition concerns the meeting facility. Ideally, the meeting site shall have an area where exhibits may be erected close to technical sessions, registration, etc. In hotels, a ballroom or large foyer adjacent to or very near meeting rooms or the registration area are typically suitable spots for exhibits. Convention centers tend to allow greater flexibility for the most ideal layout. The decision to use a convention center instead of a hotel shall be weighed carefully, as in most cases, the use of a convention center will be costly.

Premises Liability Insurance

SPE carries liability insurance that provides premises liability coverage for all SPE-sponsored meetings, including Regional Meetings. Regional Meetings are not billed for insurance. The cost is covered in the staff allocations charges. Coverage includes move-in, show, and move-out days.

Floor Plan

Once the exhibit location has been selected, a floor plan showing how the area may be laid out for exhibit space shall be developed. Many hotels have sample exhibit floor plans for ballrooms, meeting rooms, etc. If no floor plan is available, one shall be prepared by the facility manager or by an exhibit service contractor before contracting the facility. The Exhibits Committee shall obtain floor weight, ceiling height restrictions, and fire regulations from the exhibition facility.

Selection of Service Contractor

The Exhibits Committee shall carefully select exhibit service contractors to help provide labor, freight services, signs, divider drapes, audio-visual equipment, etc. The SPE staff can recommend competent contractors. The contractor will work closely with the Exhibits

Committee through all stages of planning and conducting the meeting.

Promotion

Once the facility has been contracted and the exhibits floor plan has been prepared, the Exhibits Committee will be ready to promote the meeting to prospective exhibitors. Prime prospects are local service and supply companies with whom SPE members work during the course of business. Generally, a suitable prospect list can be compiled by Exhibits Committee members with a small amount of effort.

After the prospect list has been developed, the Committee is ready to invite companies to participate in the exhibition. An "Exhibitor Prospectus," developed by the Marketing/Publicity Committee, shall include, but is not limited to, meeting site and date, sponsor organization information, purpose of the exhibition, benefits of exhibit participation, application procedures and exhibit application, booth assignment procedures, policy information, exhibit floor plan showing sizes and locations of various booths, and exhibit space prices. It is of special importance to advise prospective exhibitors of the size of the basic unit of space for which he/she may apply and what is included in the booth price (electrical service, cleaning, etc). If booth sizes vary, include a price list showing the cost for each size.

The application procedure for booth space shall be outlined in the Exhibitor Prospectus. An exhibit space application, to be completed by the exhibitor and returned to the Exhibits Committee, shall be included in the mailing. Allocation of exhibit space is usually on a first-come, first-served basis, among qualified companies, but the Committee may use other guidelines if it wishes. Exhibitors shall meet SPE exhibit criteria, and are required to exhibit products or provide services that contribute to the scientific and engineering aspects of oil and gas exploration, drilling, or production.

Space Confirmation

After the committee receives signed contracts from exhibiting companies, space assignment is made and confirmation mailings are sent to each exhibitor. The confirmation mailing shall include an exhibit space invoice and the exhibit space contract, (both of which reflect the exhibitor's

assigned booth number), and an exhibit floor plan showing space as allocated.

The SPE staff can assist the Exhibits Committee in designing contracts and invoices.

Exhibitors' Service Manual

Participating exhibitors will want to know about the availability of utilities, ceiling heights, weight limitations, rental furniture, etc. The exhibit service contractor will be of great assistance in these matters and can provide each exhibitor a manual that contains order forms for various exhibit services. The committee also might elect to include exhibitor advance registration information and materials with the exhibitor's manual.

Exhibitor Registration

It is important that the Exhibits Committee decide in advance whether complimentary registrations will be allotted to exhibiting companies and, if so, the quantity to be allotted. The most frequently allotted number of complimentary registrations is two or three for each 100 net square feet of contracted exhibit space. Complimentary exhibitor registrations shall not include *Proceedings*, social functions, etc., that may be included in the paid meeting registration fee. A copy of the *Proceedings* is usually sent to the contact name

Registration instructions shall include arrangements, dates, and location for exhibitors to pick up registration badges before the exhibition begins; the fee for each registration after complimentary allotment is depleted; and information on the handling of badges (i.e., the exhibits coordinator to pick up and sign for badges for all company personnel and/or that each individual will be responsible for his/her badge). These instructions are vital to the exhibits coordinator planning the company's participation.

Final Pre-Meeting Instructions

The Exhibits Committee shall ensure that, at some time before the meeting, exhibitors are made aware of when shipments of exhibit material will be accepted at the exhibit site, when exhibits move-in shall be completed, the hours of exhibit operation, when move-out may start, and when move-out is to be completed. It is important that arrangements for badges for everyone have been made to ensure that

security is not a problem.

Security

A security force shall be on 24-hour duty from the beginning of move-in, during the exhibition, and until move-out is completed. In addition to badge checkers and/or armed guards, the presence of Exhibits Committee members is recommended. Much of the equipment being displayed is very expensive and security is the committee's responsibility. Most exhibition theft occurs during the night before the event closes. Security personnel shall be especially watchful during the night hours.

At the Meeting

A member of the Exhibits Committee shall be on hand or readily accessible during the move-in and move-out periods, as well as throughout the exhibition. The exhibit service contractor will establish a service desk in the exhibit area where exhibitors may place and/or confirm orders. The service desk is an ideal position for the committee member on duty. The Exhibits Committee is responsible for resolving any

problems that may arise. During the last half day of the exhibition, the committee shall express its appreciation for each exhibiting company's participation in the exhibition.

An exhibitor feedback survey shall be distributed at this time.

Meeting Follow-Up

After a successful SPE meeting and exhibition, it is good practice for the Exhibits Committee to write to each exhibiting company thanking them for their participation and support of the meeting. The letter might also contain information concerning registration and attendance for the meeting, as well as other meeting statistics, such as number of papers presented. Also, if known, mention shall be made of the next SPE meeting scheduled in the area. A final report, including the number of exhibitors, net square feet (NSF) or meters of exhibit space sold, and income/expense data shall be submitted to the Meeting General Chairperson for inclusion in the final meeting report to be submitted to the SPE Board.

Sample Exhibits Committee Timetable

<i>Timetable</i>	<i>Responsibility</i>
18 months before the meeting	Select space to be used for exhibition. Request service contractor proposals.
14 months before the meeting	Information about exhibit spaces, exhibit services, etc., developed for Exhibitor Prospectus
12 months before the meeting	Exhibitor Prospectus mailed to potential exhibitors
11 to 12 months before the meeting	Select exhibit services contractor to provide labor, drayage (movement of freight to/from exhibit hall), signs, divider drapes, etc.
11 months before the meeting	Request service contractor to prepare exhibit floor plan. Compile exhibitor prospect list. Set exhibit space price.
10 months before the meeting	Submit budget to Finance Chairperson.
7 to 8 months before the meeting	Organize committee, promote exhibition, and invoice exhibitors as space is sold.
5 to 6 months before the meeting	Submit preliminary list of exhibitors to Marketing Chairperson for use in the Conference Preview.
3 to 4 months before the meeting	Have service contractor distribute exhibitor kits. Arrange exhibition insurance through SPE.
3 to 4 months before the meeting	Prepare exhibitor advance registration forms and instructions and send to the exhibit coordinator for each company. Make arrangements for security service; prepare security schedule.
1 month before the meeting	Write to exhibit coordinators reminding them of move-in and move-out times and other pertinent details.
1 to 2 days before the meeting	Supervise move-in.
During the meeting	Solve any exhibit problems that arise.
Following the meeting	Supervise move-out. Provide Finance Chairperson with exhibit statistics. Send thank-you letters to exhibitors. Submit final report to Meeting General Chairperson, including number of exhibitors and exhibit space sold, income, and expense.

Finance Committee

The Finance Committee is responsible for preparing the total meeting budget (preliminary and final) and handling all financial affairs related to the meeting. Sections shall ensure that they have adequate financial resources to conduct a meeting and ensure its success.

Regional Meetings shall be planned so that a

reasonable surplus is anticipated from registration fees, exhibition space sales, social functions, or other sources of income.

Budget

The initial step in planning the financing for a meeting is to prepare a budget of anticipated expenses and then to determine ways in which income may be secured to meet these expenses.

The general principle adopted for all SPE

meetings is that adequate income be budgeted to meet all expenses. Income may be provided from registration fees, exhibition sales, and sale of tickets to social functions.

The registration fees shall be planned to offset the major part of the general meeting expenses. Reduced registration fees are a benefit of SPE membership, so the nonmember registration fee shall be significantly more than the SPE member fee, thus encouraging nonmembers to join SPE. Spouse and student registration is complimentary and does not include any social functions. Social functions shall be planned so that the ticket price will cover the cost of the function for each individual.

A Meeting Budget Template has been established to document reporting of income/expense on a consistent basis for all SPE meetings. SPE staff will e-mail the template to the Finance Chairperson who will use the template to prepare the preliminary budget and to report the financial outcome to SPE. Upon request the SPE Board may review the financial documents. **Appendix C** shows the template and includes some explanatory remarks about many of the items. The Meeting Budget Template is designed for use with Excel for Windows software.

Entertainment Functions and Expenses

One of the first steps in planning the budget is to determine what social functions will be held and

their approximate cost. It then can be determined whether money shall be allocated from registration fees to supplement the income.

If the prices for tickets are set so they will cover the cost of social functions, then the general meeting expenses can be met from the registration fees.

Hotels usually do not charge for meeting room space if at least one of the food functions for a meeting is placed with the hotel. Without a food function, the hotel may charge a substantial fee for rental of meeting rooms.

Local companies sometimes will sponsor cocktail parties and light buffets. A typical social program for a 2-day regional meeting might be as follows:

Day 1: Welcoming Luncheon for registrants
Evening Cocktail party

Day 2: Breakfast or Closing Luncheon
Luncheon costs usually are confined to the cost of the plate plus a tax and gratuity and any miscellaneous expense such as flowers. Ticket prices for luncheons usually can cover the expense.

Note: Volunteerism is the basis for all SPE programs, including meetings, so no cost associated with volunteers' time or travel shall be expensed to the meeting.

Sample Finance Committee Timetable

<u>Timetable</u>	<u>Responsibility</u>
11 months before the meeting	Advise each committee Chairperson to prepare a budget and advise the date it is due.
10 months before the meeting	Organize Finance Committee.
6 months before the meeting	Prepare a budget when all committee budgets have been received and submit to the General Chairperson for review and approval. Then submit to SPE Staff. Once the budget is completed, it will be necessary to maintain all financial records of the meeting.
3 months before the meeting	Review budget to establish financial controls. If necessary, revise the budget and notify the various committees of expense reductions that must be made.
1 month before the meeting	Forecast the attendance and project the outcome of the meeting so committee Chairperson can adjust plans for supplies and personnel in order to conduct the meeting.

1 week before the meeting	Coordinate with the Registration Chairperson to secure necessary currency for registration during the meeting. Make arrangements with the Registration Chairperson for the safeguarding and deposit of monies received from registration at the meeting.
Immediately After the meeting	Pay all bills.
Within 3 months following the meeting	Using the meeting budget template, record the budget outcome in the outcome column and the Variance for each item with supporting remarks. Submit a Financial Report to the General Chairperson for forwarding to SPE staff for presentation to the SPE Board.

Housing Committee

The Housing Committee shall be appointed during the initial planning. The committee is responsible for making hotel arrangements and ensuring that satisfactory accommodations are available to all persons desiring to attend the meeting. The committee also arranges for any transportation required between the hotels and the meeting facility and/or social functions. These responsibilities may be combined with those of the Arrangements Committee.

The committee shall first reserve a number of sleeping rooms sufficient to serve the anticipated number of registrants from outside the local area and negotiate room rates. The committee shall inspect each hotel to ascertain the quality of guest rooms to be secured. Sometimes the necessary number of rooms will have to be assembled among several different hotels. A good rule-of-thumb in estimating requirements is to allow 1.5 persons per room for all expected to attend the meeting. Thus, if 500 meeting registrants from outside the local area are expected, approximately 350 rooms will be required. It is helpful to obtain room block history from prior meetings to help determine current needs.

At this time, the committee also shall review the hotels' complimentary-room policy (usually one complimentary room night per 50 room nights sold). The proposed contract shall then be sent to SPE Staff for review and signing. This process shall be undertaken at least 12 months before the meeting.

In negotiations with the hotel(s) the Chairperson establishes a cutoff date for reservations. On that date (usually two to three weeks before the meeting), the hotel has the option of releasing the unused block of rooms to the general public.

Note: Some hotels may penalize for unsold rooms.

Once these items are completed, a preliminary budget can be submitted to the Finance Committee. This budget includes housing and transportation costs, taking into account any guest rooms for VIPs that may have to be paid for by the meeting. SPE visiting officers (e.g., President, President-Elect, Past President, and Treasurer) shall always receive complimentary rooms. SPE staff will inform the committee about the visiting officer who will attend.

Before the cutoff date, the Chairperson shall review with the hotel the number of rooms that registrants have reserved. As the cutoff date approaches, the Chairperson will need to decide whether unreserved rooms shall be released to the public or if arrangements can be made to hold all or part of the remaining block beyond the cutoff date.

During the meeting, committee members shall assist any registrants who have not secured a room. Following the meeting, committee members shall contact each hotel to determine the total number of rooms used and shall submit a final report to the Meeting General Chairperson, who in turn will submit this report to SPE Staff.

Reservation Process

Registrants shall make their reservations directly with the hotel of their choice and the hotel shall confirm receipt of the reservations directly to them. Information about each hotel including room and tax rates and relative location to the principal meeting site (if other than hotel), shall be included in the Conference Preview. This information shall be submitted to the Marketing Chairperson five to six months before the meeting. Many hotels provide online housing

registrations and links to those pages often can be added to the meeting's presence on the Section web site.

Most major cities have a Convention and Visitors Bureau. The bureau can be very helpful in securing hotel room commitments. When several hotels are being used, they may handle receipt of reservations from registrants and assign them to available hotels. Note that a cost may be incurred with this option.

Special Guests

The Housing Committee Chairperson shall reserve a limited number of suites and rooms in his name in the primary hotel and hold them for

the following purposes:

- Visiting Society Officers
- Luncheon or Dinner Speakers
- Important Latecomers -- Industry executives or other supporters of the Society who can determine their ability to attend the meeting only at the last minute.
- Hospitality -- If an exhibition is being held with the meeting, companies may request suites that would be used to entertain. The Housing Chairperson shall control all or some suites for this purpose and these requests shall come directly to him/her.

<u>Sample Housing Committee Timetable</u>	
<u>Timetable</u>	<u>Responsibility</u>
18 to 12 months before the meeting	Reserve sleeping rooms and negotiate room rates and complimentary room policy with hotel. Have hotel hold dates until the SPE Board approves the meeting. To finalize content, SPE staff is required to review and sign all contracts.
10 months before the meeting	If necessary, determine transportation needs and options. Submit a preliminary budget to the Finance Chairperson. Organize a committee.
5 to 6 months before the meeting	Finalize transportation arrangements. Give information for the housing reservation form to the Marketing Chairperson.
1 month before the meeting	Review number of rooms reserved at hotel and make needed adjustments.
2 to 3 weeks before the meeting	Release unused rooms to hotels on the cutoff date. Arrange to have nightly occupancy reports during the meeting.
During the meeting	Attempt to assist anyone without a room. Collect occupancy reports from hotel on a daily basis.
Following the meeting	Determine the total number of guest rooms used each night and advise the Meeting General Chairperson.

Membership Committee

SPE meetings provide an excellent opportunity to recruit new SPE members and to inform current members about the services SPE provides. Therefore, an SPE membership booth shall be a part of all SPE meetings. The meeting's Membership Committee handles the SPE membership booth, works with the SPE membership Chairperson and staff, and the

membership Chairperson of the host section(s).

The Membership Committee Chairperson first meets with his/her committee to decide what information they want to display in the membership booth and how they want to display it. At minimum, the booth shall be staffed at all times by an SPE member who invites prospective members to join and provides written material about SPE and its services.

A more elaborate booth will include an extensive display about SPE services and programs, including periodicals, books, software, continuing education, and short courses. SPE staff can be of assistance in planning the booth and providing materials; the Chairperson shall contact SPE staff before conducting the first meeting of the membership committee. Once the purpose and size of the booth is

decided, a budget shall be determined and submitted to the Finance Chairperson. This shall be accomplished six months before the meeting. A location for the membership booth shall be determined three months before the meeting and assignments made to designate which committee members will work the booth and when.

Sample Membership Committee Timetable	
<i>Timetable</i>	<i>Responsibility</i>
10 months before the meeting	Contact the SPE staff to find out what assistance is available for the SPE booth. Select membership committee members (three or four members are usually sufficient). Have first meeting of committee to determine materials to be displayed and the budget to setup and operate the booth. Submit a preliminary budget to the Finance Chairperson.
6 months before the meeting	Submit a budget to Finance Chairperson.
3 months before the meeting	Appoint members to work at the membership booth. Submit a revised budget to the Finance Chairperson. Advise Arrangements Committee Chairperson of desired location of the membership booth. Advise the Arrangements and/or Exhibits Chairperson of set-up needed (tables, chairs, lights, carpet, drapes, etc.).
1 month before the meeting	Check with Arrangements and/or Exhibits Chairperson to ensure all arrangements are taken care of for the operation of the membership booth. Check with SPE staff on shipment of any booth materials to be provided from SPE office.
3 weeks before the meeting	Remind all people working in the booth of times they committed to work.
3 weeks before the meeting	Meet with all people who will be working in the booth to orient them about the various SPE services available and what procedures will be followed in operating the booth during the meeting.
1 day before the meeting	Set up the booth.
During the meeting	Recruit new members and supply information to existing members.
Following the meeting	Send completed membership applications to SPE for processing as well as critique of members about SPE and/or its services.

Marketing/Public Relations Committee

The Marketing/Public Relations Committee's responsibility is to communicate and market the meeting to an identified audience (SPE members, community leaders, news media,

other industry groups, etc.). SPE will publicize the meeting in the *Journal of Petroleum Technology* and on the SPE website (www.spe.org). Other communication vehicles the committee can consider include direct mail, newspapers and magazines, local radio and

television stations, and the trade press. Marketing and communications efforts create awareness that SPE is active in the area and helps enhance the Society's image. Branding and identity standards for SPE meetings and conferences can be found in **Appendix D**. Effective marketing and communications that reach a target audience can positively impact the bottom line by helping draw more paid registrants to a meeting.

Marketing Plan

The first step in effective marketing of an SPE meeting is a marketing plan. The essential elements include:

Attendee promotional plan

1. Establish the target audience (SPE can provide a list).
2. Select the appropriate media for presenting the message/promotion.
3. Implement promotion through print advertising in trade magazines, use of the SPE and section websites, broadcast emails or faxes to the specific audience, ideally beginning six months before the meeting. Other vehicles include postcards and posters at similar meetings/tradeshows and other SPE meetings.
4. Development of a Conference Preview.

Exhibitor promotional plan

1. Establish the target audience (past, current, and potential exhibitors).
2. Develop an exhibitor prospectus at least one year before the meeting.
3. Post exhibitor information on the SPE website or section websites.
4. Promote exhibiting opportunities via direct mail, ads, website, etc.

On-site promotional plan

1. Use of the Conference Program
2. Use on-site advertising/signage promoting next year's meeting.

Other promotional opportunities

The meeting can receive coverage from SPE through the *Journal of Petroleum Technology*, and the SPE website. Each issue of *JPT* includes a Meetings section where SPE meetings are listed. SPE meetings also have their own pages on the SPE website (www.spe.org). For more information, contact the SPE marketing and communications department.

Conference Preview

An important element in the marketing plan for an SPE meeting is the Conference Preview (see **Appendix E**). This provides an advance look at the meeting's technical presentations and will be the key to attracting attendees to the meeting. SPE staff can manage production and distribution of the Conference Preview for the Marketing/Public Relations Committee. To reduce printing and mailing costs the trend is to eliminate the technical program from the Conference Preview. Instead the complete technical program shall be posted on the website and updated frequently.

Conference Program

The final Conference Program will be the registrant's on-site guide to the meeting. It includes the final list of presentations, as well as general information about the meeting and related activities. SPE staff is available to manage production and delivery of the final Conference Program to the meeting. The Conference Program shall include a welcome message, schedule of events, exhibition floor plan, program highlights, technical program, special events, committee rosters, sponsor listing, and exhibitor directory, as well as information about the host city, transportation, and the site of the meeting.

Direct Mail

In any direct mail marketing program, the first step is to establish a set of objectives and deadlines and identify the target audience. The most interested potential audience for SPE Board-Endorsed Meetings is Society members residing in the region and/or having an interest in the meeting's technical focus. The most effective way to promote a meeting to these members is through direct mail of an invitational brochure (Conference Preview). The Marketing Chairperson is responsible for gathering all relevant meeting information and provides this information to SPE five months prior to the meeting. SPE can furnish, at cost, disks with contact information, including addresses of members of participating sections and/or with specific technical interests.

Other potential direct mail audiences are professional or trade groups in the oil industry, such as the local geological society and oil and gas associations. Labels on disk are usually available from such organizations.

Specific details and expenses for printing, postage, and labels of a direct mailing shall be included in the meeting budget. Use of a mail house often can reduce costs associated with direct mail and can assist in the process.

Newspaper and Magazine Coverage

Press releases (**Appendix F**) convey the most newsworthy information about the meeting. To call the meeting to the attention of an editor or reporter, press releases might be sent over a two- to six-month period before the meeting. Each press release shall be sent to SPE for approval by staff before it is distributed. Because personal contact is an important aspect of Marketing, the Marketing Chairperson might appoint committee members from cities and towns where potential meeting registrants reside. These members shall receive copies of press releases sent and personally contact local editors or reporters to build support and answer questions.

The SPE marketing staff can provide a mailing list of newspapers and magazines.

Radio and Television

When approaching the media, have a list of the top three or four meeting activities or papers, as well as keynote speakers and other panelists who have the greatest general news value and interest. If media representatives attend the meeting, strongly encourage them to visit the exhibition, if one is being held, for possible stories. Also, offer a list of exhibitors who might have newsworthy demonstrations or new technology.

Press Registration

Offering complimentary press registration to the conference increases your chance of generating news coverage and attendance by the press (especially the trade press). This can be done by coordinating with the Registration Committee and creating either a separate press registration form or adding a contact person for press registrants who could, in turn, forward approved complimentary registrations to the appropriate locale.

Sample Timetable for Press Releases	
<i>Timetable</i>	<i>Responsibility</i>
2 to 6 months before the meeting	General press release: gives all available details of the meeting. Obtain biographical info on speakers and other VIPs. Describe individual papers to be presented at the meeting if they seem to be interesting and significant. Trade journals enjoy the technical aspects of papers, whereas local press is interested mainly in non-technical news with a local angle.
2 to 3 weeks before the meeting	Media advisory: invite press to attend the meeting and include days and times of special events and technical and panel sessions. Offer the press an opportunity to interview key speakers/panelists and the conference chairperson(s) on-site.
Post-meeting	Write a press release that summarizes the success of the meeting. Include the final number of attendees, the number of exhibitors, and summaries on the panel and technical sessions.

Sample Marketing/Public Relations Timetable

<i>Timetable</i>	<i>Responsibility</i>
12 months before the meeting	Announce meeting (general information)
10 months before the meeting	Submit a budget to Finance Committee Chairperson
8 months before the meeting	Organize the committee and notice to news media. Select areas to receive the Conference Preview to be produced and the press run (number to be printed). Also choose production options for brochure: (1) SPE staff directs design, layout, and printing or (2) committee arranges to have it produced locally
5 months before the meeting	Conference Preview information is due from all committee chairpersons Provide SPE staff with brochure information for layout and production, if applicable Create email list of potential press, including trade press and local print and broadcast press.
3 months before the meeting	Mail the Conference Preview to selected audience
2 to 6 months before the meeting	General announcement to trade press: program, time, and place of the meeting, and other information
2 to 3 months before the meeting	Provide information to SPE liaison for <i>JPT</i> .
1 to 2 months before the meeting	Company notifications: gives names of authors to editors of their company magazines, urging company recognition Send periodic broadcast emails to target audiences: email topics can include an advance registration deadline reminder (if applicable), special panel sessions/speakers, technical sessions, networking events, and short courses offered.
1 to 4 weeks before the meeting	Encourage local news coverage through visits and phone calls. Schedule press conference if newsworthy speakers are available. Coordinate activities with SPE liaison, if appropriate.
1 week before and during the meeting	Coordinate any press conferences and interviews; distribute media kits.
Following the meeting	Send thank-you notes to news media.

Registration Committee

The registration committee is responsible for (1) securing the names, employment affiliations and contact information (including e-mail addresses) of all persons attending on the registration forms, whether SPE member or not, collecting the appropriate registration fees, and preparing badges; (2) distributing programs and meeting *Proceedings*, and (3) selling tickets

to any entertainment and social functions of the meeting.

Budget

The Registration Committee Chairperson shall identify the items needed for the Preliminary Budget for the Finance Committee Chairperson. This budget needs to be submitted six months before the meeting. Some items to consider include data processing equipment and operators,

printing of registration badges, supplies from SPE, office equipment rental, personnel costs, and freight and shipping costs.

Advance Registration

Most sections that are staging a Regional Meeting plan for advance registrations. A standard advance registration form is posted on the section web site. When the registration form is returned, the Registration Committee processes the ticket orders, types the badge insert, and places the insert in the badge holder. A day or so before the meeting, all the completed registrations shall be alphabetized and placed in boxes. One or two members of the committee shall be assigned to distribute the envelopes when on-site registration opens. A special "Advance Registration" counter in the registration location usually is provided and a supply of technical papers (i.e., *Proceedings*) shall be available for distribution along with the envelope of tickets and badges.

Location and Layout of Registration Counters

The Registration Committee Chairperson determines the location for the registration area, in consultation with the General Chairperson, 11 to 12 months before the meeting. Selection of the area for the counter depends on availability of space in a location suitable for easy traffic flow to the counter and proximity to the meeting area.

An efficient layout for the registration area is important. It is desirable for the registration counter to be 42 inches high. A counter can be erected by or rented from a local decorator and/or the facility where the meeting is held by using standard hotel tables 6 to 8 feet long and 30 inches high. The Registration Committee Chairperson shall arrange for counters and their operation during the meeting.

On-Site Registration Procedures

Registration for the meeting requires that each person attending the meeting be processed at one of the registration counters. Each pays the required registration fee (member or nonmember) to secure a badge and to purchase *Proceedings* and social function tickets. Additional *Proceedings* shall be available for

purchase by registrants.

On-Site Registration Equipment and Materials Available From SPE

The Society can furnish the following registration materials at cost:

- The on-site meeting registration form. If this form is to be printed locally by the host section, the form shall be sent to SPE Staff for review before printing.
- Badge holders and inserts.
- Ribbons for committee members and authors.

SPE will ship these meeting supplies to the individual designated by the General Chairperson about three to four weeks before the meeting. The meeting assumes the cost of supplies and shipment.

Registration Supplies

The Registration Committee are to secure locally the following equipment:

- a sufficient supply pencils/pens in the registration area
- two computers/printers
- one cash box
- credit card imprint machine and charge slips

The Registration Committee Chairperson shall have full authority to commit the host section for the funds necessary to rent equipment. He/she shall coordinate with the Arrangements Chairperson who is responsible for renting a/v equipment. Also, he/she shall instruct vendors about invoicing of the equipment and make arrangements for payment of the invoices by the Finance Chairperson.

Personnel Required for Operation of Registration Counters

The Registration Committee is responsible for arranging for the necessary registration personnel approximately three to four months before the meeting.

Plan for one counter for advanced registration and one counter for on-site registration.

The individuals who are managing the registration counters shall always be SPE members (part of the Registration

Committee) or SPE staff. The persons handling the mechanics of registration usually can be secured through the local Desk and Derrick Club, the convention and visitors' bureau, or members' companies.

Spouse/Guest Registration

If spouses are expected to attend, some provisions shall be made for welcoming them to the meeting. This can be done by having spouses register at the main registration counter, having a spouses' registration counter, or simply by having an information booth and reception point for spouses without the formality of registration.

Instructions to Personnel Operating Registration Counters

Detailed, written instructions shall be given to each person working on the registration counter before he/she begins work.

Handling of Cash and Receipts

The Finance Chairperson or a section officer shall provide the Registration Committee Chairperson with a cash advance of U.S. \$150 to U.S. \$250 (or equivalent local currency) each day for operating the registration counter. Registration receipts will be added to this and at the close of business each day. The Registration Committee Chairperson shall deposit the money for safekeeping in the hotel box or in the bank, or shall make arrangements with the Finance Chairperson for this to be done.

Personal checks or credit cards for the amount of tickets and registration may be accepted from registrants. Checks for amounts greater than the registration and tickets shall not be accepted.

Numbering and Sale of Tickets to Social Functions

Either the Arrangements and/or Registration Committee Chairperson is responsible for the printing of social function tickets.

An accurate running count of the number of tickets sold to each social function is essential because it is used to give attendance guarantees to the caterers.

The attendance at some social functions will be limited to the capacity of the room in which the function will be held. In this case,

only the capacity number of tickets will be printed; when they are gone, it will be necessary to stamp "**SOLD OUT**" on the registration forms for these functions before they are distributed to registrants.

Preparation of Registration List

Many people who are attending a meeting desire a list of registrants. This list can be prepared from the registration forms, either by the host section or by a contracted firm. Various service firms in the industry are usually interested in preparing such a list and printing the required number of copies for the privilege of placing some advertising on them. Plans for producing the list shall be made before the meeting so that the registration forms can be turned over to the printer or service firm responsible for producing the list. This is an optional service.

Complimentary Registration

The host section normally distributes a limited number of complimentary registration and tickets to various SPE officers, contributors, and exhibitors. This is best accomplished by stamping "COMPLIMENTARY" on the appropriate number of registration forms and distributing these forms to the proper people. Plans for this shall be made before the meeting. The decision shall be made by the General Chairperson well in advance of the meeting, including how to distribute complimentary registrations.

Responsible Charge

The Registration Committee Chairperson is requested to keep notes on committee operations and report to the General Chairperson after the meeting. Any suggestions for improving the registration operation shall be included in the report.

Instructions for Distributing *Proceedings* and Program

1. Give registrants one CD of *Proceedings* and a program.
2. Give registrants as many extra *Proceedings* as they have purchased.
3. Give nonmembers materials that might be supplied for distribution to nonmembers.

Instructions for Distributing Social

Function Tickets

1. Give registrants the number of tickets they have ordered for each function.

Instructions for Cashiers

1. Check each registration form to ensure that the registrant has the correct subtotal. Add individual costs and check the result against the registrant's total. Collect the proper amount of money from the

registrant.

2. Accept personal checks for the amount of the registration and tickets only. Do not accept a check for an amount more than the total due. Suggest that the registrant go to the hotel cashier instead.
3. At the end of each day, total cash and checks on hand, and turn all funds over to the Registration Committee Chairperson.

Sample Registration Committee Timetable

<i>Timetable</i>	<i>Responsibility</i>
11 to 12 months before the meeting	Determine the location for the registration area in consultation with the General Chairperson.
10 months before the meeting	Organize the committee and secure quotations from SPE staff for badge holders, inserts, ribbons, and registration forms. Determine desired Advance Registration program. Submit budget to Finance Chairperson.
3 to 4 months before the meeting	Arrange for the personnel necessary to register meeting attendees.
3 to 4 months before the meeting	Prepare Advance Registration Form. Submit it to the Marketing Chairperson for inclusion in the Conference Preview. Advise Arrangements Chairperson of any signs
1½ to 2 months before the meeting	Secure computers/printers, cash boxes, registration forms, social function tickets, pencils, receipt books, badge inserts, holders, and ribbons.
1 month before the meeting	If registration list is desired, make arrangements for its production.
2 to 4 weeks before the meeting	Process all advance registrations.
2 days before the meeting	Coordinate with Finance Committee Chairperson to secure necessary cash for registration.
During the meeting	Supervise registration during the meeting and deposit registration receipts daily in bank or hotel box. Check registration equipment daily to ensure it is in proper working order.
Immediately after the meeting	Provide the General Chairperson and Finance Committee Chairperson with a registration report, including daily registration figures, for submission to SPE staff. Provide SPE with e-mail addresses of attendees for survey.

Short Course Committee

Continuing education programs provide a special service to attendees at SPE meetings. A wide variety of courses approved by the SPE Continuing Education Committee is available. Options for course administration facilitate implementation under a variety of circumstances and available resources.

With careful planning and implementation, pre- or post-meeting short courses offer these important benefits:

- Prepare participants for more in-depth comprehension of technical program presentations.
- Provide unique opportunities for continuing education to meeting participants from remote locations.
- Provide an opportunity for individuals and companies to economize by combining continuing education and meeting attendance in one trip.
- Provide the opportunity to receive Continuing Education Units (CEUs) to meet professional development requirements. Continuing education programs are a complement to the meeting, rather than a part of the meeting. Thus, while meeting information may publicize these programs, their dates are not part of the meeting's dates.

SPE Policy

The SPE Board of Directors encourages the practice of offering continuing education programs in conjunction with SPE meetings. Any SPE Board-approved meeting may sponsor a short course (or program of courses) to complement the meeting, provided that the following conditions are met:

1. The program is administered under one of the SPE Board-approved options (stated below).
2. Close coordination is maintained between a non-SPE sponsoring organization and SPE meeting organizers.
3. Course offerings are selected from a list of SPE Short Courses or **reviewed and approved** by the SPE Continuing Education Committee for presentation at the

meeting.

Continuing Education Sponsorship

Several alternatives are available for sponsoring/hosting continuing education programs. The General Chairperson may assign planning responsibility to the Program Committee or appoint a subcommittee specifically for continuing education programs. SPE sections or student chapters (individually or collectively) and SPE standing or ad hoc committees also may ask for the opportunity to sponsor a course.) All requests for sponsorship shall be sent to the SPE Professional Development Manager at professionaldevelopment@spe.org.

Option A: The sponsor assumes all administrative responsibility for conducting the short course. SPE provides a reproducible set of course notes and confirms instructor availability on the date requested by the sponsor. The sponsor is responsible for all expenses associated with conducting the course and retains all registration revenue. To compensate SPE for expenses incurred during course development, upon completion of the course, the sponsor will pay to SPE, for each paid course registrant, 10% of the standard registration fee set for similar length courses.

Option B: Under Option B, courses and workshops are administered solely by the Society. Any host organization, such as an SPE section, an SPE Board-approved meeting planning committee, or a corporation/company outsourcing its technical training, may request that SPE conduct courses. SPE retains all registration income and provides all support for offering the course(s). A variety of courses are scheduled throughout the year, as requested by host organizations, in addition to SPE's regularly scheduled continuing education programs.

Contact SPE professional development staff for detailed procedures for conducting a short course program using Option B. Regardless of the selected option, however, all of the steps listed in the procedures guide shall be completed to ensure the program's success, with the only variation being assigned responsibility for completing

the procedural steps.

Scheduling Requirements

Key scheduling factors include Marketing deadlines and decision dates for course cancellation due to insufficient pre-registration.

Financing and Accounting

The SPE Board of Directors has charged the Continuing Education Committee to administer the Society's continuing education programs so that they are financially self-supporting. In keeping with this goal, the Committee structures registration fees for courses conducted under Option B to recover direct and administrative costs and course development costs.

Under Option A, the sponsor sets registration fees but they may be no less than standard SPE fees. SPE invoices the sponsor 10% of the standard fees for equivalent-length courses on a per-participant basis. Because of costs (especially in the areas of Marketing, course-note preparation, and registration processing), unless a sponsor elects to substantially subsidize a course conducted under Option A, it is likely that registration fees under this option will be higher.

Items that can have a significant impact on expenses include (1) instructor travel—local instructors incur minimal travel and lodging expenses; (2) facilities—use of complimentary classrooms and/or audio-visual equipment loaned by companies or schools greatly reduces costs; and (3) Marketing—if sufficient Marketing is included in meeting brochures, additional promotions may not be needed.

SPE Short Courses

Contact the SPE Professional Development Manager for a current list of courses approved by the SPE Board of Directors. CEU's may be awarded only for SPE short courses. The SPE Professional Development Manager can provide further information about the Society's CEU program.

Non-SPE Courses

If a sponsor wants to conduct a non-SPE

course, Continuing Education Committee approval is required. A detailed outline of the course, sample course materials, and instructor's biography shall be sent to the committee at least 30 days before the first Marketing copy deadline. Continuing Education Committee approval will permit inclusion of the course in the meeting's Marketing materials, including the Preliminary Technical Program.

Coordination and Communication

The importance of effective planning, coordination, and communication in conducting a successful continuing education program cannot be overemphasized. Virtually every committee involved in planning for the meeting needs to be kept informed of decisions and actions regarding continuing education events. The SPE Professional Development staff can provide assistance and will serve as a focal point for information dissemination regarding course arrangements.

Spouses' Activities Committee

This committee is responsible for planning and conducting spouses' activities held during a SPE Regional Meeting. A planned program of events for spouses is not required for any meeting, but will be a decision made by the host section. Financial aspects of the activities shall be self-sustaining.

The General Chairperson appoints the Chairperson of the Spouses' Activities Committee. The committee Chairperson may select several committee members to assist in planning and execution of the spouses' activities.

This committee shall be organized 10 to 12 months before the meeting. The committee shall develop a list of possible activities that may be of interest to all spouses' during their stay. Some activities may include sightseeing tours, shopping excursions, seminars, and luncheons, and/or fashion shows.

Guarantees

One of the most important considerations in planning a social function is the guarantee of attendance that has to be given to the hotel or caterer. A working figure shall be

given to the hotel or caterer approximately three months in advance. The final guarantee usually is given 72 hours before the function. This figure will be the number charged for the event, unless the actual number is greater than the guarantee.

Conflict of Room Requirements for Meetings and Social Activities

It is preferable to hold luncheons in rooms other than those in which technical sessions are held. If this is not possible, it will be necessary to end the technical session at about 11:00 a.m. to allow the hotel time to set up for the luncheon, and the technical session shall not be reconvened before 2:45 or 3:00 p.m. The hotel will advise its requirements. For outdoor activities, alternative plans shall be made in case of bad weather.

Menus

Menu selections shall be made at the time of initial planning because they will determine the cost of the function. The hotel/facility shall be informed of menu

selections when they are made. Most catering departments will confirm menu prices six months before the function.

Ticket Collection

The Spouses' Activities Committee is responsible for collecting tickets at the room entrance or head of the food line. Members of the caterer's staff may be available for ticket collection; arrangements shall be made in advance for this service. At seated luncheons/brunches, the waiter may collect tickets at the tables. If attendance is over the guarantee, payment shall be made on the number of tickets collected.

Tickets

Printing of tickets shall be coordinated by the Arrangements Committee and/or Registration Committee Chairperson(s). Copy for the tickets shall be provided by the Spouses' Activities Committee and shall include date, time, place, and information about any arranged transportation.

Sample Spouses' Activities Committee Timetable

<i>Timetable</i>	<i>Responsibility</i>
10 to 12 months before the meeting	Develop schedule of events. Organize committee.
10 months before the meeting	Select tour operators, if applicable. Submit room requirements (if needed) to the Arrangements Committee. Submit budget and ticket prices to the Finance Chairperson.
9 months before the meeting	Select menus and/or other entertainment.
5 to 6 months before the meeting	Provide the Marketing Chairperson with details of social functions for the Conference Preview.
3 months before the meeting	Have tickets printed. Submit sign copy requirements (if needed) to the Arrangements Committee Chairperson.
1 month before the meeting	Provide set-up instructions to hotel or appropriate facility (if applicable). Order any necessary flowers or gifts.
1 week before the meeting	Give initial guarantees for activities to appropriate personnel.
During the meeting	Check room on the day a function is planned to make sure room will be ready by the time function begins. Give guarantee updates to facility personnel as ticket sales are made during the meeting.
Following the meeting	Approve activity/function bills and give them to the Finance Committee Chairperson for payment. Provide General Chairperson with final report on planned activities.



Meeting Request Form

Please complete the following information regarding your proposed meeting. This request form must be filed with the SPE Board Committee on Technical Programs/Meetings at least 18 months in advance of your proposed meeting dates. Please return the form to:

SPE Board Committee on Technical Programs/Meetings

SPEI

Dallas Office
PO Box 833836
Richardson, Texas
75083-3836 U.S.A.

SPEU

London Office
Part Third Floor East
Portlandhouse
4 Great Portland Street
London, W1J8QJ, U.K.

SPEM

Kuala Lumpur Office
Suite 23-02, Level 23
Centerpoint South
Mid Valley City,
Lingkar Syed Putra
59200 Kuala Lumpur
Malaysia

MIDE

Middle East Office
Ofc S07-S09, 2nd Floor
Blk 17, Knowledge Village
TECOM Free-zone
PO Box 502217
Dubai, UAE

Proposed date of Meeting:

Date Submitted:

Meeting Title:

Meeting Location (City/ State/Country):

Meeting Frequency:

Annual Biennial Current Year

Other

Will the Meeting utilize SPE Staff resources?

Yes

No

Historically, meetings that have been managed by SPE Sections have been charged for direct costs (i.e. third party costs) for activities conducted on their behalf by SPE Staff, but not for the cost of staff resources themselves. Beginning in 2004, all meetings were charged for the cost of all staff and services provided.

Designate what technical discipline this meeting should be listed under on the SPE Website.

Management & Information

Production & Operations

Reservoir Description & Dynamics

Drilling & Completions

Projects, Facilities & Construction

Health, Safety, Security, Environment & Social Responsibility

Potential audience:

Section

International

Regional

Other

Total anticipated attendance:

Host Group:

General Chairman of meeting:

Is this a jointly sponsored or organized meeting?

Yes

No

If yes, attach a copy of the proposed agreement.

Is this a revenue-sharing agreement?

Yes

No

Will professional organizations other than SPE participate in some manner other than as a co-sponsor? Yes No

Name of Organization?

Type of participation?

- Sponsor Organizer Endorser
 Supporter Corporate Sponsor

Sponsor - Organization that is recognized as SPE's partner in an event, as approved by the SPE Board of Directors.

Organizer - Group whose responsibility it is to organize and conduct an event; responsible for all logistics.

Corporate Sponsor - Company that provides financial support for an element of a meeting, or for the entire event, in return for acknowledgement/recognition.

Supporter - Group that provides no financial support but takes an active role in promoting/advocating the event (for example, runs advertising in its publications) without compensation.

Endorser - Group that provides no financial support and takes a passive role in promoting/advocating the event (for example, does not run gratis advertising in its publications but does allow use of its name/logo on promotional materials).

If copyright on technical papers is proposed to be held by other than SPE, name proposed copyright holder and reason:

Is exemption to no-paper/no-podium requested? Yes No

SPE meetings operate under a “no paper, no podium” policy. With the exception of panel session participants, luncheon speakers and special keynote speakers, authors who do not submit a manuscript and the associated required forms by the manuscript due date will be withdrawn from the program and not allowed to present. Meeting sponsors who are seeking an exception to the policy must file a written request, with reasons for the variance, along with this form.

Technical topics to be covered:

Anticipated number of Technical Sessions:

Anticipated number of papers?

What is the most significant contribution of this meeting to SPE's technology-transfer efforts?

How does this meeting differ from similar events?

Conference/exhibition details:

Proposed conference facility:

Proposed exhibit facility (if applicable):

Number of exhibit booths:

Suggested booth price:

Proposed Hotels:

Number of guest rooms required:

Are you interested in having an attendee and/or exhibitor survey done following the meeting?

Yes

No

ADMINISTRATIVE USE ONLY (to be completed by Staff)

Name and date of related **SPE** conferences/exhibitions scheduled within the same 12-month period:

Name and date of **other related industry** events scheduled within the same 12-month period:

What other SPE or industry events currently cover this technology?

Contact:

Location:

Responsible SPE Staff Liaison:

Attachments: Past financial and statistical reports (preferably the past three years) and proposed agreements with other organizations.

Board of Directors

Approved ____ Declined ____

Date: _____

Joint Meeting Agreement

Society of Petroleum Engineers (SPE) And (Cosponsors) For (Meeting Name)

The following sets forth the principal terms of our agreement by which the Society of Petroleum Engineers Inc. (SPE) will organize (Meeting Name) through its host group (Name of Group). (Name of Group(S)) are recognized as "Cosponsors", SPE will be recognized as sponsor of the meeting, as well as "Organizer", with responsibility for all aspects of the conference and exhibition planning, logistics and implementation. SPE will negotiate and execute any and all contracts with suppliers or contractors providing accommodations and services to the conference, exhibition and registration.

The basis for this agreement is the terms outlined in the "SPE Policy on Meetings and Exhibitions" dated February 2003. This agreement shall constitute a binding agreement between Organizer and Cosponsors.

Organizer and Cosponsors hereby agree as follows:

1. Objective of the Meeting

- A. The primary objective of the meeting is to offer a service to each organization's membership by providing a venue for the dissemination of technology and information relating to the oil and gas industry.
- B. It is the intent that the (Meeting Name) will be profitable and thereby self-funding.

2. Organizing Committee

- A. The Organizing Committee shall be made up of volunteer members from each of the Cosponsors, allowing for equal representation from each organization. The Chairperson of the committee will be a volunteer representative from the (Name of Section) of SPE. A representative from each of the other Cosponsors will be General Co-chairpersons of the committee. Duties of the Chairperson and Co-chairperson will be divided as agreed by the three representatives.
- B. The Chairperson and Co-chairperson are responsible for the overall coordination, planning and conduct of the meeting. Where possible, decisions affecting (Meeting Name) outside the scope of this agreement will be made on a consensus basis between the Chairperson and Co-chairperson. The ultimate decision lies with the Chairperson.
- C. The remainder of the Organizing Committee will be made up of volunteer Chairpersons from each of the Cosponsors who oversee the following portfolios; "Finances", "Program", "Publicity", "Registration", "Housing and Arrangements", "Sponsorship", "Exhibition", and "Events". The Chairperson and Co-chairperson are responsible for recruiting volunteers to fill these positions.
- D. Additional portfolios may be added or existing portfolios combined at the discretion of the Chairperson and Co-chairperson.
- E. A professional Conference Management company, if recommended by the General Chairperson and Co-chairperson, will be hired by the Organizer to assist the members of the Organizing Committee.

3. Funding

- A. The (Meeting Name) will be jointly and equally funded by the Cosponsors.
- B. The Cosponsors will each provide seed money of \$_____ approximately eighteen months in advance of the (Meeting Name) to cover costs of deposits on facilities, advertising and other incidents which may occur in preparation of the meeting. These funds will be kept in a bank account opened by the Organizing Committee.

4. Profit Sharing

- A. All profits incurred as a result of the meeting will be shared equally amongst the Cosponsors.
- B. Profits are defined as gross income less operating expenses which include the agreed upon Conference Management Company's and Exhibitions Manager's fee and the Organizer's staff cost.

Operating expenses are defined as:

- I. Direct cost –Third party payments including but not limited to printing, postage, courier charges, insert charges, author kits, name tags, etc. charged directly to the conference at cost. Proceedings CD Mastering charges are also a direct cost. **Choose one: Full CD mastering by SPE with replication by 3rd party, Full CD mastering by SPE with in-house replication or Full CD mastering with replication by local section** will be used for (Meeting Name). Proceedings CD Mastering includes collecting the papers, converting papers to PDF format, artwork and creating the Master CD with Table of Contents and links.
 - II. Staff cost – includes overhead costs associated with services performed by their full-time office staff.
- C. The SPE staff cost is to be set at _____ percent of the (Meeting Name) gross revenue.

5. Technical Program

- A. The Organizer will distribute the "call for technical papers" to the SPE membership. The Cosponsors will distribute the call for papers to their respective membership.
- B. The "Program" Chairperson of the Organizing Committee will assemble a Technical Committee with representatives from each of the Cosponsors to review submitted abstracts and choose technical papers to be presented at (Meeting Name).
- C. Technical papers will be selected based upon technical integrity and the suitability of the topic for the (Meeting Name), as determined by the Technical Committee, and not by the authors' affiliation with the Cosponsors.
- D. The Technical Committee will prepare a preliminary technical program and submit the selected technical papers to the Organizer. The Organizer will distribute the preliminary technical program to the SPE members. The Cosponsors will distribute the program to their respective members. Organizer will post the program on its website for the conference and have links to Cosponsors.
- E. The Organizer will be responsible for preparing and submitting author kits to selected authors. These kits will outline the required format to meet Organizer's specifications.
- F. The Organizer will collect the completed papers from the authors and assemble the (Meeting Name) proceedings for printing and distribution at the conference. Subject to the Organizers approval, the printing of the proceedings may be completed using local printers.

6. Copyright and Publishing Rights

- A. Authors will assign copyright for their papers to SPE. Paper numbers will be assigned by SPE and will appear as "SPE/#####" on all published proceedings. SPE will handle all requests for use or reproduction of conference papers by third parties and any charges for this service will be retained by SPE to cover related administration costs.
- B. The SPE will grant one time journal publication rights to authors which MUST be declared with the submission of final manuscripts. No author will be allowed to present his/her paper unless the publication declaration has been made. The SPE will advise the Primary Organizations of the author's choice of publication. Papers cannot be published until the (Meeting Name) has concluded. Each of the Primary Organizations shall be entitled to add the conference papers to their respective Technology Bank.
- C. SPE must ensure that it receives for no charge enough copies of the proceedings to fulfill standing orders.

7. Exhibition

- A. An exhibition will be run in conjunction with the technical meeting.
- B. The exhibition will be administered by the Organizing Committee with guidance and support for the Organizer in accordance with the "SPE Policy on Meetings and Exhibitions" dated February 2003.
- C. The Organizing Committee may recommend employment of the services of a Professional Exhibition Manager to oversee the exhibition in accordance with the "SPE Policy on Meetings and Exhibitions" dated February 2003. Restitution will be determined by the Chairperson and Co-chairperson.

8. Registration (Applicable only if SPE will manage the registration process i.e. Regional Meetings)

- A. SPE will be responsible for and manage the registration process. This will include providing an online registration system and onsite registration management. SPE will also develop and produce registration reports as well as

financial reconciliation. The Organizing Committee will provide assistance in obtaining volunteer members to assist with onsite registration needs.

- B. Full conference registrants include members, non-members, one-day members and one-day non-members, but exclude students, spouses and complimentary registrations.

9. Conference Promotion

- A. Official Cosponsors of the meeting will recognized equally as Co-Sponsors on promotional materials prepared for the conference, signs at the conference, the conference proceedings, and all activities conducted as part of the conference.
- B. Each Co-Sponsor will promote the conference by
 - 1. including the conference on any calendar of events the Co-Sponsor publishes in print or electronically
 - 2. either posting or linking to the Call for Paper Proposals and conference promotional and registration information from any website the Co-Sponsor has
 - 3. distributing or providing SPE information to allow SPE to distribute appropriate notices(electronic and/or in print) of the Call for Paper Proposal and conference registration information to its members who have an interest in the conference topic
 - 4. including at least one article on the conference in the Co-Sponsors main journal or newsletter if one exists.

10. Post Conference Duties

- A. The Chairperson and Co-chairperson are jointly responsible for preparing and submitting a closing document, which reports the accrued financial results of the (Meeting Name) no later than (approximately 60 Days from the last day of the conference). The report will also include recommendations of the organizing committee to enhance future meetings.
- B. Any bank accounts opened for (Meeting Name) shall be closed and funds distributed no later than (approximately 60 Days from the last day of the conference). Any remaining assets from the conference (i.e. surplus supplies, proceedings, etc.) shall be distributed equally among all Cosponsors.

The foregoing terms and conditions are hereby acknowledged and agreed to on behalf of our organizations.

Society of Petroleum Engineers, Inc.

Signature: _____

Name:

Position or Office Held:

Date:

(Cosponsor Organization)

Signature: _____

Name:

Position or Office Held:

Date:

(Cosponsor Organization)

Signature: _____

Name:

Position or Office Held:

Date:

Projected attendance			2007 Preliminary BUDGET	NOTES
REVENUE: 2628				
Publicity & Promotion Income				
SL	4100	Program Advertising	\$0.00	
SL	4110	Other	\$0.00	
		TOTAL	\$ -	
Technical Paper Income				
SL	4243	Proceedings CD-ROM Member	\$0.00	
SL	4244	Proceedings CD-ROM Nonmember	\$0.00	
		TOTAL	\$ -	
Registration Income				
SL	4316	Registration - Member -	\$0.00	
SL	4317	Registration - Non Member -	\$0.00	
SL	4319	Registration - Exhibitors	\$0.00	
SL	4320	Refunds	\$0.00	
SL	4321	Registration - Spouse	\$0.00	
SL	4322	Registration - Non-College Student	\$0.00	
SL	4330	Cash Over/Short	\$0.00	
SL	4332	Nonmember Dues Rebate	\$0.00	
SL	4355	Other - Comps	\$0.00	
SL	4366	Registration - 1 Day Member	\$0.00	
SL	4367	Registration - 1 Day Nonmember	\$0.00	
		TOTAL	\$0.00	
Social/Food Income				
ME	4405	Keynote Luncheon	\$0.00	
ME	4416	Reception #1	\$0.00	
		TOTAL	\$0.00	
Exhibition Income				
SL	4500	Indoor	\$0.00	
SL	4525	Cancellation Fees	\$0.00	
SL	4530	Publication Cubicles	\$0.00	
		TOTAL	\$ -	
Meeting General Income				
SL	4620	Sponsorships/Contributions	\$0.00	
		TOTAL	\$ -	
Miscellaneous Income				
ME	4700	Meeting Distribution	\$0.00	
		TOTAL	\$0.00	
TOTAL REVENUE			\$0.00	

EXPENSES: 1656				
Publicity & Promotion				
RC	8120	Conference Preview		\$0.00
RC	8125	Advertising		\$0.00
RC	8130	Freight and Delivery		\$0.00
RC	8135	Program Guide		\$0.00
RC	8140	Call for Papers		\$0.00
RC	8143	Public Relations		\$0.00
RC	8145	Other		\$0.00
		TOTAL		\$0.00
Technical Paper				
PM	8210	Proceedings		\$0.00
PM	8220	Program Committee		\$0.00
PM	8225	Author Kits		\$0.00
		TOTAL		\$0.00
Recognition Gifts & Awards				
PM	8310	Honorariums		\$0.00
PM	8315	Awards		\$0.00
PM	8320	Complimentary Meals		\$0.00
PM	8325	Gifts		\$0.00
		TOTAL		\$0.00
Technical Session				
PM	8410	Technical Session Room Rentals		\$0.00
PM	8415	AV		\$0.00
PM	8420	Session Aids		\$0.00
PM	8425	Other		\$0.00
		TOTAL		\$0.00
Registration				
ME	8510	Registration Expense		\$0.00
ME	8515	Temporary Employees		\$0.00
ME	8520	Freight and Delivery		\$0.00
ME	8525	Printing		\$0.00
ME	8540	Credit Card Expenses		\$0.00
ME	8555	Meeting Supplies		\$0.00
ME	8560	Office Equipment Rental		\$0.00
		TOTAL		\$0.00

Social / Food Expense					
PM	8600	Author Functions		\$0.00	
ME	8610	Keynote Luncheon		\$0.00	
ME	8625	Reception #1		\$0.00	
ME	8627	Reception #2		\$0.00	
ME	8650	Coffee Breaks		\$0.00	
ME	8685	Other		\$0.00	
		TOTAL		\$0.00	
Exhibition Expense					
ME	8700	Decorating		\$0.00	
ME	8715	Exhibitor Brochures & Promotion		\$0.00	
ME	8730	Insurance		\$0.00	
		TOTAL		\$0.00	
Meeting General Expense					
ME	8805	Miscellaneous		\$0.00	
ME	8815	Signs		\$0.00	
ME	8835	Telephone		\$0.00	
ME	8860	Photocopying		\$0.00	
ME	8865	Postage and Handling		\$0.00	
ME	8870	Freight and Delivery		\$0.00	
		TOTAL		\$0.00	
Planning & Miscellaneous Expense					
ME	8900	Staff Travel		\$0.00	
ME	8915	Committee Expenses		\$0.00	
ME	8940	Miscellaneous	\$	-	
		TOTAL		\$0.00	
		Spe.org	\$	-	
TOTAL EXPENSES				\$0.00	
ME	8930	Staff Allocation		\$0.00	
NET REVENUE				\$0.00	

Account	Item	Note	Unit	Unit	Unit Price	Sub-Total	Total	Grand Total
INCOME:								\$0.00
Publicity & Promotion Income								\$0.00
4100	Program Advertising						\$0.00	
4110	Other						\$0.00	
Technical Paper Income								\$0.00
4243	Proceedings CD-ROM Member			0.0	\$0.00	\$0.00	\$0.00	
4244	Proceedings CD-ROM Nonmember			0.0	\$0.00	\$0.00	\$0.00	
Registration Income								\$0.00
4316	Registration - Member						\$0.00	
	Advance			0.0	\$0.00	\$0.00		
	On-Site			0.0	\$0.00	\$0.00		
4317	Registration - Non Member						\$0.00	
	Advance			0.0	\$0.00	\$0.00		
	On-Site			0.0	\$0.00	\$0.00		
4319	Paid Exhibitor (included in cost of booth)			0.0	\$0.00	\$0.00	\$0.00	
4320	Refunds						\$0.00	
4321	Registration - Spouse			0.0	\$0.00	\$0.00	\$0.00	
4322	Registration - Non-College Student			0.0	\$0.00	\$0.00	\$0.00	
4330	Cash Over/Short						\$0.00	
4332	Nonmember Dues Rebate			0.0		\$0.00	\$0.00	
4355	Other - Comps			0.0			\$0.00	
4366	Registration - 1 Day Member			0.0	\$0.00	\$0.00	\$0.00	
4367	Registration - 1 Day Nonmember			0.0	\$0.00	\$0.00	\$0.00	
Social/Food Income								\$0.00
4405	Keynote Luncheon			0.0	\$0.00	\$0.00	\$0.00	
4416	Reception #1			0.0	\$0.00	\$0.00	\$0.00	

Exhibition Income - Not Applicable								\$0.00
4500	Indoor			0.0	\$0.00	\$0.00	\$0.00	
4525	Cancellation Fees							
4530	Publication Cubicles							
Meeting General Income								\$0.00
4620	Sponsorships/Contributions						\$0.00	
Miscellaneous Income								\$0.00
EXPENSES:								\$0.00
Publicity & Promotion								\$0.00
8120	Conference Preview						\$0.00	
						\$0.00		
8125	Advertising						\$0.00	
						\$0.00		
8130	Freight and Delivery						\$0.00	
						\$0.00		
8135	Program Guide						\$0.00	
						\$0.00		
8140	Call for Papers						\$0.00	
						\$0.00		
8143	Public Relations						\$0.00	
						\$0.00		
8145	Other						\$0.00	
Technical Paper								\$0.00
8210	Proceedings						\$0.00	
	CD 's					\$0.00		
8220	Program Committee						\$0.00	
						\$0.00		
8225	Author Kits						\$0.00	
	Postage, DHL					\$0.00		

Recognition Gifts & Awards								\$0.00
8310	Honorariums						\$0.00	
8315	Awards						\$0.00	
8320	Complimentary Meals						\$0.00	
8325	Gifts					\$0.00	\$0.00	
Technical Session								\$0.00
8410	Technical Session Room Rentals					\$0.00	\$0.00	
8415	AV					\$0.00	\$0.00	
8420	Session Aids					\$0.00	\$0.00	
8425	Other					\$0.00	\$0.00	
Registration								\$0.00
8510	Registration Expense						\$0.00	
8515	Temporary Employees						\$0.00	
8520	Freight and Delivery					\$0.00	\$0.00	
8525	Printing					\$0.00	\$0.00	
8540	Credit Card Expenses					\$0.00	\$0.00	
8555	Meeting Supplies					\$0.00	\$0.00	
8560	Office Equipment Rental			0.0	\$0.00	\$0.00	\$0.00	

Social / Food Expense								\$0.00
8600	Author Functions						\$0.00	
						\$0.00		
8610	Keynote Luncheon						\$0.00	
						\$0.00		
8625	Opening Reception #1						\$0.00	
						\$0.00		
8627	Dessert & Coffee						\$0.00	
						\$0.00		
8650	Coffee Breaks						\$0.00	
						\$0.00		
8685	Other						\$0.00	
						\$0.00		
Exhibition Expense								\$0.00
8700	Decorating						\$0.00	
8715	Exhibitor Brochures & Promotion						\$0.00	
						\$0.00		
8730	Insurance						\$0.00	
						\$0.00		
Meeting General Expense								\$0.00
8805	Miscellaneous						\$0.00	
						\$0.00		
8815	Signs						\$0.00	
						\$0.00		
8835	Telephone						\$0.00	
						\$0.00		
8860	Photocopying						\$0.00	
						\$0.00		

8865	Postage and Handling						\$0.00	
							\$0.00	
8870	Freight and Delivery						\$0.00	
Planning & Miscellaneous Expense								\$0.00
8900	Staff Travel						\$0.00	
							\$0.00	
8915	Committee Expenses						\$0.00	
							\$0.00	
8920	Planning Meeting						\$0.00	
							\$0.00	
8927	Management Fee						\$0.00	
8940	Miscellaneous						\$ -	
							\$ -	
8930	Staff Allocation						\$0.00	
							\$0.00	
	Spe.org							
	TOTAL INCOME							\$0.00
	TOTAL EXPENSES							\$0.00
	NET REVENUE							\$0.00



Branding and Identity Standards for Meetings and Conferences

The objective of these standards is to unify for the Society of Petroleum Engineers its overall worldwide branding and trademarking activities. Our goal is to provide consistency of brand treatment and to recognize accurately the roles of SPE (and its cosponsors). The essential aspects to consider when developing conference and meetings marketing materials are

- Appropriate use of the SPE logo and name
- Clear and prominent identification of SPE's roles (meeting organizer or sponsor, technical conference program development, etc.) to indicate its full contributions to the event

Please allow SPE Marketing the opportunity for a courtesy review of artwork and marketing materials before printing or publishing.

Below are the specific elements to include on the respective marketing materials.

Overall SPE Branding

- On the meeting artwork and each piece of conference collateral, in every case include all three elements below:
 - The SPE logo in the designated colors only (blue/white, white/blue, black/white, white/black)
 - The URL www.spe.org (or the associated meeting URL), and
 - The words "Society of Petroleum Engineers" spelled out on the artwork

SPE Logo Treatment

- Ensure that the SPE logo size and page position are comparable to any other conference cosponsor logos and also reflective of SPE's role and contribution to the event.
- Ensure that the SPE logo is large enough to read its text clearly.
- Avoid placing the logo on a background the same color as the logo art.
- Place the logo in an area of the artwork that provides clear visibility.

Printed Collateral

- Include SPE contact information (address and phone required, fax and email address optional) in addition to the SPE name, logo, and URL.
- Include the current and complete SPE and cosponsor boilerplates in cosponsored conference printed collateral. The boilerplate can be obtained by contacting Margaret Watson at +1.972.952.9304 or mwatson@spe.org.
- Identify the conference name on all forms and contracts: forms (registration, housing, SPE paper and abstract submissions) and contracts (sponsorships, exhibition space, advertising).

Websites

- Use the logo and SPE name on the website home page and when possible on first-level navigation pages.
- Include SPE contact information on website pages that contain information about the aspects that SPE contributed to the conference.
- Include the current and complete SPE (and cosponsor) boilerplate. The boilerplate can be obtained by contacting Margaret Watson at +1.972.952.9304 or mwatson@spe.org.
- Identify the conference name on all forms and contracts: forms (registration, housing, SPE paper and abstract submissions) and contracts (sponsorships, exhibition space, advertising).

News Releases

- Refer to SPE in the headline when possible. When it's not possible, refer to SPE (and cosponsor) in the first paragraph.
- Name in the text the role of SPE (and cosponsor) in the event.
- Include the current and complete SPE boilerplate.

Broadcast Emails

- Refer to SPE (and cosponsor) in the headline when possible. When it's not possible, refer to SPE (and cosponsor) in the first paragraph.
- Name in the text the role of SPE (and cosponsor) in the event.
- Include the current and complete SPE (and cosponsor) contact information. Identify the roles of each contact (and cosponsor) for clarity.
- Include an opt-out option for recipients to unsubscribe to lists.

SPE Conference Preview Template

Inside

Registration and Housing Information	Schedule of Events	Technical Program (Session titles and high-level descriptions)	Technical Program (Session titles and high-level descriptions)
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Outside

Exhibitor Listing and Sponsors	Welcome Letter and Committee Listings	Self-Mailer Info (postage and mailing address)	Cover Artwork (Include the words <i>Society of Petroleum Engineers</i> , the SPE logo, and the meeting web address)
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**FOR IMMEDIATE RELEASE**

CONTACT: Dana Otilio (+1.972.952.9471, email dotillio@spe.org)

SPE Annual Meeting Highlights Heavy Oil and the Industry's Future

RICHARDSON, Texas, USA (17 July 2006) — On 24-27 September, the Society of Petroleum Engineers (SPE) brings together more than 8,000 exploration and production professionals from around the world for the 2006 Annual Technical Conference and Exhibition (ATCE 2006) in San Antonio, Texas, USA, to preview the industry's future.

ATCE 2006 offers the opportunity to learn from world-class experts about the latest technology and innovative approaches for meeting global industry challenges.

The ATCE technical program includes more than 500 carefully selected technical papers and numerous panel sessions covering many opportunities and issues important to the industry.

Topics include

- megaprojects execution
- residual oil zones
- emerging technologies in reservoir monitoring
- real-time reservoir surveillance
- horizontal well completions
- drilling and completions waste-management strategy
- applications of dynamic price models

“Heavy Oil: From Rock Face to Fuel Pumps” is the subject for Monday’s Opening General Session. A panel moderated by Vikram Rao, vice president of Halliburton, discusses the unique challenges that heavy oil presents in relation to economics, reserves estimates and capacity. Panelists also address existing and future technology with an emphasis on the role of research and development for finding new methods of extraction and refining.

Panelists for the Opening General Session include Don Paul, vice president and chief technology officer of Chevron; Alan Kardec Pinto, refining executive manager of Petrobras; Robert Skinner, former director of the Oxford Institute for Energy Studies; and Murray Smith, minister-counsellor of the Government of Alberta, Embassy of Canada.

“ATCE 2006 presents the most current topics in the industry, from the future of heavy oil to emerging technologies in reservoir monitoring. Attendees will see cutting-edge products and services from more than 350 exhibitors,” said 2006 SPE President Eve Sprunt.

In “Reserves: To Be (Proved), or Not To Be (Proved), That Is the Question,” a panel of industry experts share their perspectives on how the current and evolving classifications and definitions affect their areas of expertise.

Separate sessions address the unique interests and career issues of young professionals and women in the oil and gas industry.

A panel of young professionals from several geographic regions provides insight and shares information about current issues and activities across SPE, followed by a networking brunch where young professionals can meet and network with select industry management.

“Women’s Issues in the Petroleum Industry” brings together a panel of women who have managed successful careers in the oil industry to discuss career planning, mentorship and hurdles.

On the final day, San Antonio-area high school students plan to visit the ATCE exhibition and hear an exciting presentation by Dr. Brian Glass, noted NASA research scientist, on how petroleum technology is being used for drilling on the planet Mars.

After a successful inaugural year in 2005, the Chairman’s Luncheon returns with ATCE 2006 General Chairperson Clarence P. Cazalot Jr., president and chief executive officer of Marathon Oil Corporation, who shares his insights on the E&P industry.

ATCE’s time-honored events include the Annual Reception and Banquet, which honors distinguished SPE members; the Ramadan Iftar and Dinner; and the President’s Luncheon, which offers the “State of the Society Address” from 2006 SPE President Eve Sprunt, who will pass the presidential gavel to 2007 SPE President Abdul-Jaleel Al-Khalifa.

For more information on ATCE 2006, visit www.spe.org/atce.

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About SPE

The Society of Petroleum Engineers (SPE) is a not-for-profit professional association whose members are engaged in energy resources development and production. SPE serves 69,000-plus members in 112 countries worldwide. SPE is a key resource for technical knowledge related to the oil and gas exploration and production industry and provides services through its publications, conferences, workshops, forums and website at www.spe.org.