

## SPE Section Annual Report 2017

### IMPORTANT:

- To submit your report, select the "Review" tab on the top toolbar and click "Submit". The section chair will receive a confirmation email once submitted.
- All sections are required to submit an annual activity and financial report by **1 June** in order to be compliant with [SPE policy](#).
- All active sections that submit by **1 June** are eligible for the [section awards](#). The awards recognize SPE sections who display exemplary efforts in technology dissemination, section operations, member benefits, society and community benefits, and innovation.

Where applicable, please distinguish between ongoing annual events or programs and those initiatives that were new during the past year.

Section Name *	<input type="text"/>
Establishment Date (MM/DD/YY)	<input type="text"/>
Compliance Status *	<input type="text"/>
SPE Region *	<input type="text"/>
Country *	<input type="text"/>
2016 Section Membership	<input type="text"/>
2016 Retention	<input type="text"/>
2016 Growth Percentage	<input type="text"/>
2016 Student Membership	<input type="text"/>

If the Section Chair details below are incorrect, [submit an updated roster](#).

Section Chair *	<input type="text"/>
Section Chair Email *	<input type="text"/>
SPE Regional Support *	<input type="text"/>
SPE Regional Support Email *	<input type="text"/>
Username	<input type="text"/>
Password	<input type="text"/>

### Financial Details

Please report your section's financials from 1 April 2016 through 31 March 2017. The numbers are for the entire section including all committees and study groups. Note: Financial details are not used in consideration for awards.

- **Enter all fields in USD**
- **Include numbers and decimal only (Example: 1234.12)**

**Beginning of Year Balance for Total Resources:**

What was your bank account balance as of 1 April 2016? \*

What was your balance of all other investment accounts as of 1 April 2016? \*

**End of Year Balance for Total Resources:**

What was your bank account balance as of 31 March 2017? \*

What was your balance of all other investment accounts as of 31 March 2017? \*

**INCOME**      1 April 2016 to 31 March 2017

What was your budget for income this year? \*

Interest and dividends earned \*

Registration from meetings and social activities \*

Sponsorships \*

Rebates from SPE International \*

Print newsletter advertising \*

Online advertising \*

Other \*

TOTAL INCOME

**EXPENSES**      1 April 2016 to 31 March 2017

What was your budget for expenses this year? \*

Meetings and social activities \*

Student support and scholarships \*

Donations - Industry related \*

Donations - Non-industry related \*

Print newsletter \*

Other \*

TOTAL EXPENSES

· ·  
· ·

How much money do you target to keep in reserves each year? \*

How have you assessed your expenses in line with the changes in the industry?  
  
0/100

- From where does your section receive funding for operations? Select all that apply. \*
- Company support
  - Events / Meetings
  - Fundraising
  - Member dues
  - Advertising
  - Other

What companies donate funding to your section?

How much are the member dues per year? \*

From what other sources does your section receive funding for operations?

Does your section have its financial records reviewed or audited by an outside firm or person annually? \*

Yes  
 No

Who conducted the audit? \*

**Donations and Scholarships**

Does your section donate more than USD 5000 to any person or organization? \*

Yes  
 No

List organization(s) and amount given. \*

Does your section give scholarships? \*

Yes  
 No

Please download and complete the [scholarship information](#) form.

Upload scholarship details (\*.doc;\*.docx;\*.pdf;\*.gif;\*.xlsx;\*.xls accepted) \*

(maximum size 300MB)

Total number of scholarship recipients. \*

Total dollar amount of scholarships given. \*



Does your section give scholarships to non-industry related degrees?

Yes  
 No

## Executive Summary

In 200 words or less, describe what makes your section excellent. This is crucial in determining [award winning sections](#).

Executive Summary \*

0/200: 100

## Needs and Challenges

What tool(s) or resource(s) does your section need that SPEI could provide? For what purpose?

Other than financial support, in what area do you feel your section needs the most support? (For example: events, meetings, operations, membership, etc.) Please explain.

Would your section benefit from any of the following visits?

- Presidential visit
- Regional Director visit

\*Please note, this does not guarantee a visit.

**Presidential Visit**

For what event? (For example: section anniversary, awards banquet, struggling to operate, etc.) Please provide details including the date(s) of events.

**Regional Director Visit**

For what event? (For example: section anniversary, awards banquet, struggling to operate, etc.) Please provide details including the date(s) of events.

Have any of the following changes occurred with industry employers in the section area? Check all that apply.

- Industry employer(s) moved INTO the area
- Industry employer(s) moved OUT of the area
- Industry employer(s) reduced staff

Which industry employers moved INTO the section area?

Which industry employers moved OUT of the section area?

Which companies have reduced staff in your area?

Are there any political, environmental, or financial circumstances or challenges of which you feel we should be aware? (For example, natural disasters, riots, wars, etc.)

0/100

### Technical Activities

These activities enhance the technical competence of your members.

Did your section organize and/or host any of the following technical events? Select all that apply. \*

- Distinguished Lecturers - speakers provided by SPEI
- Technical presentations (typically 1 hr.)
- Study group meetings
- Field trips
- Training courses
- Symposiums - one day or multi day event
- Webinars - online meetings
- Other

How many Distinguished Lecturers? \*

What was the average attendance? \*

How many technical presentations? \*

What was the average attendance? \*

How many study group meetings? \*

What was the average attendance? \*

How many field trips? \*

What was the average attendance? \*

How many training courses? \*

What was the average attendance? \*

How many symposiums? \*

What was the average attendance? \*

How many webinars? \*

What was the average attendance? \*

What other technical event(s) did your section organize and/or host? \*

0/50

How many of these other technical events? \*

What was the average attendance? \*

Consider the best technical event of the year. Describe the impact it had on your members.

0/250

## Professional Activities

These activities enhance skills which help your section members succeed in the professional world.

Did your section organize and/or host any of the following professional events? Select all that apply. \*

- Networking / fundraising / social events
- Career related presentations to university students (Ambassador Lecturer visits)
- Career guidance events (i.e. career fairs, resume workshops, recruiting fairs)
- Soft skills; non-technical skills related to leadership such as public speaking, presentation skills, etc.
- Mentor programs
- Other
- Did not organize any professional events

How many networking / fundraising / social events? \*

What was the average attendance? \*

How many career presentations to university students? \*

What is the average attendance? \*

How many career guidance events? \*

What was the average attendance? \*

How many soft skill events? \*

What was the average attendance? \*

How many members participate in the mentor program? \*

Briefly describe the mentor program. \*

What other professional event(s) did your section organize and/or host? \*

0/50

How many of these other professional events? \*

What was the average attendance? \*

Consider the best professional event of the year. Describe the impact it had on your members.



0/250

### Community Activities

These events educate the community about the petroleum industry.

Did your section organize and/or host any of the following community events to enhance the image of the petroleum industry? Select all that apply. \*

- Community education
- Pre-university student education
- Community service (SPE Cares)
- Other
- Did not organize any community events

Did your section use Energy4me resources? \*

- Yes
- No

What other community event(s) did your section organize and/or host? \*

0/50

How many TOTAL community events did your section organize and/or host?

Consider the best community outreach event of the year. Describe the impact it had on your members and how it relates to SPE's mission.

0/250

### Operations

In what month do section operations begin? \*

In what month do section operations end? \*

Upload your section's current bylaws in English. \*

(maximum size 300MB)

### Goals

Describe your section's goals for the past year and what progress was made.

0/200

What goals have been established for next year?

0/100

### Succession Planning

**Review the [roster](#) SPE has on file and make updates if needed.**

Our section board has reviewed the roster and confirms it is accurate.

Click here to confirm. \*

 Agreed

Do you use committees to help complete the work of the board? \*

 Yes  
 No

How often does your board meet? \*

 Twice a month  
 Once a month  
 Every two months  
 Once a quarter  
 Other

How often does your board meet?

- Who regularly attends your board meetings?
- Officers
  - Committee chairs
  - Faculty advisor(s)
  - Student chapter officers
  - Other

Who else attends the board meetings?

Describe your section's election process. \*

0/100

How do you transition information to new officers?

0/100

How does your section identify new leaders?

0/100

### Communications

- What methods does your section use to communicate with your members? Select all that apply. \*
- Flyers or posters (at offices, meeting, etc.)
  - Mailings by post
  - Email
  - Printed or electronic magazine
  - SMS / text messages including WhatsApp, Viber, etc.)
  - Website
  - Other

How often do you send mailings by post?

- Monthly
- Quarterly

- Annually
- Other

How often do you send mailings by post?

What is the title of your magazine? \*

To whom is the magazine distributed? \*

0/50

Describe the type of content that is included in the magazine. \*

0/100

Who creates the content for the magazine? \*

0/50

Website URL \*

What other method of communication? (excluding social media) \*

- How often does your section use this other method? \*
- Two or more times per week
  - Weekly
  - Every two weeks
  - Monthly
  - Quarterly or less

- What social media does your section use to communicate with your members? Select all that apply.
- Twitter
  - Facebook
  - Instagram
  - LinkedIn
  - YouTube
  - Other

Twitter URL \*

Facebook URL \*

Instagram URL \*

LinkedIn URL \*

YouTube URL \*

What other social media? \*

## Membership

### Membership Programs

Does your section have specific plans for any of the following? Select all that apply. \*

- New member welcome
- Member recruitment
- Member retention
- Welcome transfers
- Award nominations
- Welcome/recruit recent graduates
- Long term member recognition
- Volunteer recognition
- Sponsor appreciation
- None of the above

Does your section have programs dedicated to any of the following groups? Select all that apply. \*

- Unemployed members (Members in Transition)
- Senior Professionals (members age 55 and older)
- Faculty
- Companies
- Young Professionals (members age 35 and younger)
- University students
- Pre-university students
- None of the above

Describe any services or benefits your section has created to support your unemployed members.

0/50

Describe how your section engages Senior Professionals (age 55 and older.)

0/50

Describe how your section engages with university faculty.

0/50

Describe efforts by the section to liaise with industry employers.

0/50

Describe how your section engages Young Professionals (age 35 and younger.)

0/50

Describe how your section supports pre-university students.

0/50

**University Students**

Does your section sponsor any student chapter(s)? \*

- Yes
- No

Number of sponsored student chapter(s)

Name of sponsored student chapter(s)

Non-Compliant Student Chapters

Does your section wish to continue to sponsor each of your student chapters? \*

- Yes
- No

If no, please list the student chapters you no longer wish to sponsor and provide an explanation. \*

Does your section have an officer responsible for working with student chapters?

- Yes
- No

How often do you communicate with student chapter officers?

- Weekly
- Every two weeks
- Monthly
- Quarterly
- Other

How often do you communicate with your student chapter officers?

How often do you communicate with Faculty Advisor (s)?

- Weekly
- Every two weeks
- Monthly

- Quarterly
- Other

How often do you communicate with Faculty Advisor(s)?

How is your section involved with your student chapter(s)? Select all that apply. \*

- Reviews and approves budget
- Helps set goals
- Provides speakers
- Operating advice
- Reviews operating plan
- Assists with field trips
- Provides professional development opportunities such as internships
- Student chapter members invited to attend section meetings
- Section members invited to attend student chapter meetings/events
- Provides student volunteer opportunities at section events
- Provides financial support
- Other

In what way does your section provide financial support to students? (Select all that apply) \*

- Travel to section meetings
- Reduced cost for section events
- Travel to SPEI meetings or events (ex. ATCE, SPC, etc.)
- OnePetro subscription fees
- Participation in fundraisers
- General donations for unspecified cause
- Other

What other way(s) is your section involved?

What other type of financial support does your section provide?

Describe any programs/activities that your section offers specifically for university students. (For example: symposiums, career fairs, mentors, competitions, lecture series, etc.)

0/200

Does your section engage with any universities where you do NOT have a student chapter?

- Yes
- No

With what universities?

### Involvement

Describe how your section works with other SPE sections.

0/100

### Additional Information

**Optional:** You may provide up to three of the best photos of your section. Photos may be used in recognition ceremonies, so please consider the content and resolution.

Upload photo 1

(maximum size 300MB)

Upload photo 2

(maximum size 300MB)

Upload photo 3

(maximum size 300MB)

### SPE Section Annual Report

Our section board has reviewed and accepts the [SPE Conflict of Interest Policy](#).

Click here to confirm. \*

Agreed

We hereby certify, to the best of our knowledge, the information provided in this report is accurate. We agree to have this report or portions of it available to other SPE sections.

Click here to confirm. \*

We agree