

# SPE Events Policy and Procedures Manual



# Contents

---

- SPE Event Policies ..... 5
  - 1.0 Introduction ..... 5
    - 1.1 Use of SPE Imprimatur ..... 6
    - 1.2 Purposes of Events ..... 6
    - 1.3 Objectives of Events Policy..... 6
    - 1.4 Underlying Principles to the Policy..... 7
    - 1.5 Procedures, Training, and Evaluation..... 7
    - 1.6 Volunteerism ..... 7
  - 2.0 Definitions ..... 8
    - 2.1 SPE Event ..... 8
    - 2.2 Annual Event ..... 8
    - 2.3 Conference ..... 8
    - 2.4 Forum ..... 8
    - 2.5 Summit ..... 8
    - 2.6 Symposium ..... 9
    - 2.7 Training Course ..... 9
    - 2.8 Workshop ..... 9
    - 2.9 Regional Event..... 10
    - 2.10 Section Event..... 10
    - 2.11 Joint Event ..... 11
    - 2.12 Co-Located Event ..... 11
  - 3.0 Administration of SPE Events ..... 11
    - 3.1 SPE Events ..... 11
    - 3.2 Joint Conferences/Symposia ..... 15
    - 3.3 Co-Located Events ..... 16
  - 4.0 Administration of Exhibits..... 17
  - 5.0 Financial Policy ..... 18
- SPE International Events - Guidelines for Planning ..... 19
  - Administration ..... 19
  - General Chairperson ..... 19
  - Technical Program Committee..... 19

Steering/Advisory/Executive Committee.....	20
SPE Regional Events- Guidelines for Planning .....	21
Administration .....	21
Events Research Services .....	21
Committee Overview .....	21
General Chairperson .....	22
Technical Program Lead .....	23
Structure.....	23
Program Chairperson .....	23
Responsibilities.....	23
Program Committee Members .....	23
Responsibilities.....	23
Process .....	24
Paper Proposal Solicitation .....	24
Development of Technical Program.....	24
Program Selection .....	24
“No Paper, No Podium” Policy .....	25
Proceedings.....	25
Costs .....	25
Copyright.....	25
Session Chairpersons .....	25
Responsibilities.....	26
Advance Meeting of Session Chairpersons .....	26
Miscellaneous .....	27
Logistics Lead .....	27
Finances.....	27
Exhibits/Sponsorships Lead .....	27
Finance Lead .....	28
Budget .....	28
Registration/Housing Lead.....	28
Membership Lead .....	29
Marketing/Public Relations Lead .....	29
Marketing Plan .....	29

Attendee promotional plan.....	30
Exhibitor promotional plan .....	30
On-site promotional plan .....	30
Training Course Lead.....	30
SPE Policy .....	30
Appendix A – Event Definitions .....	31
Conference.....	31
Forum .....	31
Summit .....	31
Symposium.....	31
Training Course .....	32
Workshop.....	32
Appendix B – Related SPE Policies and Procedures.....	33
Guidelines for Members .....	33
Publication Guidelines .....	33
Logo Usage Guidelines .....	33
SPE Event Cancellation Guidelines.....	34
Exhibitions Fee Refund Policy .....	34
Attendee Registration Refund Policy .....	34
General Guidelines.....	34
How SPE Uses Member Information.....	34
Matters Involving Prices and Terms of Competition .....	34
Matters Affecting Participation.....	35
Suggestion of Standards.....	35
Fairness of SPE Activities.....	35
Public Interface/Political .....	35

# SPE Event Policies

---

## 1.0 Introduction

The Society of Petroleum Engineers (SPE)<sup>1</sup> is a global organization that promotes technology dissemination in the upstream oil and gas industry. Events 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 events. To assure that SPE maintains quality, the SPE Board has adopted this policy governing the planning, conduct, and evaluation of any event 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 events, plus revenue from exhibitions, provides almost 70% of SPE's revenue.

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 events 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 events. However local sections may use these policies 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\*

Events	70%
Member Programs	9%
Publications	9%
Training Courses	5%
SPE.org/One Petro	5%
Retail Sales	2%

\*Per SPE 2014 Annual Report

Publication expenses normally offset the revenue generated from publications. The main sources of revenue to fund the worldwide operations of SPE are events and member programs (dues). Revenue at a section level is sourced generally from events and fund raising activities. SPE shall maintain an Event 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 event 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 Event Policy to be certain that all SPE events 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 Event Policy and in the Event Procedures Manual.

### 1.2 Purposes of Events

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

- Exchange information regarding technology and share expertise
- Promote volunteerism
- Offer related training courses in conjunction with the event and provide CEU's for members and nonmembers
- Promote young professionals involvement and membership retention
- Provide professional development opportunities
- Generate income for SPE's worldwide operations
- Generate income for regional/section activities
- Offer networking opportunities
- Market industry products and services at exhibitions
- Increase SPE membership.

Involved members shall determine the purposes for each event and plan the event to fulfill the stated purposes.

### 1.3 Objectives of Events Policy

The Events Policy has been adopted by the Board to ensure that all SPE events 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 uses SPE resources in an orderly, consistent manner throughout the global organization, so that conflicts with other events and programs can be minimized and complies with local legislative and cultural requirements

## 1.4 Underlying Principles to the Policy

The following principles form the foundation for the Events Policy:

- Any event where the SPE imprimatur is used shall be conducted in a manner that is consistent with the Events Policy.
- SPE should avoid scheduling conflicts among its events in order to maintain consistent quality and attendance levels.
- Contractual, legal, and copyright policies shall be considered in planning all events.
- SPE is ultimately liable for all SPE operations, including section activities.
- SPE shall provide a safe and secure environment for all event participants through distribution of proper event 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 Events Policy to be successfully implemented, an Event Procedures Manual is required. Responsibility for developing and maintaining the procedures manual lies with SPE Staff. The SPE Board Committee on Training, Programs and Meetings (TPM) will review and approve the content of the Event Procedures Manual to ensure it appropriately reflects the procedures for implementing SPE events and the experience of the Membership. The Event Procedures Manual defines roles and responsibilities as well as helpful tips for the planning and conduct of symposia, conferences, exhibitions, 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 events be evaluated by the involved Members and the participants of each event. The TPM (or any subsequent Board committee responsible for events) defines a procedure for quantitative evaluation of all aspects of every event. 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 events. By thoroughly evaluating all events, future events can be improved to provide increased value to all SPE members. The ultimate responsibility for the technical, organizational, and financial performance of all events lies with the TPM, in collaboration with the SPE staff. The TPM may choose to delegate the evaluation of certain events 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 and committee members. SPE thrives on volunteerism. All activities at the section or region level are successful only because of the volunteer efforts of SPE members. Thus, any section or region hosting an SPE event should apply the concept of volunteerism to assure the success of the event.

However, the SPE Board realizes that certain tasks are best handled by professional event 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 Events Policy, we have included the following definitions.

### 2.1 SPE Event

An SPE society-level event is one that is planned, organized, managed and implemented primarily by the SPE Staff, in cooperation with involved members. See the [SPE Global Event Calendar](#) for examples of these events.

### 2.2 Annual Event

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

### 2.3 Conference

An SPE Conference promotes the exchange of technical knowledge on current and proven technologies through technical paper presentations, and may include plenary sessions, panel sessions, and ePosters. In many cases, conferences also feature an exhibition of the latest products and services, offering attendees a chance to experience new equipment and technologies in person. Conferences can be focused on a specific topic or have a broad technical scope. This technical information, including SPE technical papers, is further disseminated through publication in the conference proceedings and on OnePetro. Conferences are managed by SPEI.

*Please note the use of "ePosters" may also include paper poster presentations.*

### 2.4 Forum

A Technical Forum is an invitation-only SPE event, developed and approved through the Forum Series Coordination Committee that brings together top technologists, innovators, and managers to explore a specific industry challenge not already addressed in existing SPE Conferences, Workshops, and Symposia. Participants are encouraged to come prepared to contribute their experience and knowledge rather than be spectators or students. The objective is to create a collaborative, idea-generating arena that stimulates new ideas and innovation about future challenges facing the E&P industry.

A written summary may be prepared and distributed to the participants after the forum and with unanimous participant agreement at the discretion of the program committee and SPE approval.

Forums do not offer a Call for Papers, published presentations, sponsorships or exhibitions of any kind.

### 2.5 Summit

An SPE Summit is a one to three day, invitation-only SPE International event with specific, predefined objectives. It is a fast-track response to emerging issues, problems, technologies, and strategies of broad significance to the industry. Written records of the discussions and conclusions are published, with the intent of providing a deliverable that benefits the industry and has the potential to lead to further initiatives. [Note: Approval by the Finance and Strategy Committee is required for a Technical Report of the summit to be published]

There is neither a Call for Papers nor presentations offered. Summits do not include any commercialism and do not offer an exhibition.



## 2.6 Symposium

An SPE Symposium is a meeting of experts in a particular field. A symposium serves as a transition event for a topic that has matured beyond a workshop format. Symposia can provide the opportunity for authors to publish their papers, but the event may not be a fully papered program. The technical program committee will build their program from invited presenters and those selected through Call for Speakers process, if offered. Programs may include paper presentations, no-paper presentations, plenary sessions, panel sessions, and ePosters. SPE manuscripts (if any) will be further disseminated through OnePetro. In many cases, symposia also feature an exhibition of the latest products and services, offering attendees a chance to experience new equipment and technologies in person. Symposia may be offered by a region or section provided the following conditions apply:

- A Region or Section-managed event is one in which all services are provided by the section or SPEI is hired by the section to manage one or more services. At a minimum, SPEI will be hired to conduct the post-event survey.
- To offer papers for inclusion into OnePetro, the section is required to hire SPEI services to prepare a Call for Papers, to manage the paper submission process, and to produce the master CD of proceedings in addition to administering the post-event attendee survey.
- If a Region or Section-managed event is to appear on the SPE event calendar, the host region or section must submit a MRF to TPM for approval. Any region or section-managed events must include the name of the region or section in the event title.
- A Region or Section-managed event that has a Call for Papers, but does not post papers to OnePetro must still be approved by TPM through the MRF process. TPM may revoke the Call for Papers privileges of a Region / Section symposium if the technical quality survey ratings, from previous years, are considered poor.

*Please note the use of “ePosters” may also include paper poster presentations.*

## 2.7 Training Course

An SPE training course is one that has been reviewed and approved for technical quality and relevance by the Global Training Committee (GTC). A training course also may be approved by a regional advisory committee or a regional conference planning committee when there is insufficient time for GTC review or there is no intent to offer the course beyond a single event. They are usually lecture-based and taught by instructors who are subject matter experts. These courses cover practical, hands-on introductory, intermediate, and advanced engineering topics in all six SPE technical disciplines as well as several nontechnical topics. Continuing education units (CEUs) are offered for completed courses.

## 2.8 Workshop

An SPE Workshop maximizes the exchange of ideas among attendees and presenters through brief technical presentations followed by extended Q&A periods. Highly focused topics attract an informed audience eager to discuss issues critical to advancing both technology and best practices. Workshop topics must not overlap or conflict with those of other events. The technical program is comprised of presentations solicited by the program committee as opposed to a general Call for Papers or Presentations.

Many of the presentations take the form of case studies, highlighting engineering achievements and lessons learned. To stimulate frank discussion, no proceedings are published, and members of the press are not invited

to attend. Presentations that have been authorized for release are compiled by the SPE staff and released to attendees after the workshop.

### What Type of SPE Event is it?

Event Type	# attendees*	Call for paper proposal	Exhibitors	SPEI managed	Section Managed	Invitation only
Conference	200+	Y	Y	Y	N	N
Symposium	100+	N**	Y	Y	Y	N
Workshop	< 175	N	N	Y	N	N
Forum	<75	N	N	Y	N	Y
Summit	< 100	N	N	Y	N	Y
Training Course	< 30	N	N	Y	N	N

\*Denotes guideline, not policy

\*\*Symposia may have only invited presentations rather than call for paper proposals or be a mixture of both

SPE managed events are where all services are completed by SPEI. Section managed events are those run by sections that have the option to “hire” SPEI for various services. However, if the event is a section run symposium that wants to offer a call for paper proposals for inclusion into OnePetro, they will be required to hire SPEI to prepare call for papers proposals, manage manuscript submissions, and produce the master proceedings, as well as manage the post-event attendee survey.

#### 2.9 Regional Event

A regional event 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 Events Policy and Event Procedures Manual. It is intended to provide for technical dissemination between the sections in a geographic region.

#### 2.10 Section Event

A section event 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 event is planned, organized, managed, and implemented primarily by local section officers and other involved members.

Such events may be arranged jointly with local sections of other societies without SPE Board approval provided that (a) only the SPE section name and logo is utilized, and (b) the event is only marketed in the jurisdiction of the local section. All agreements for such jointly arranged events must be between the local section officers and the other officers of the other societies. It is recommended that the section consult with its Regional Director prior to entering into an agreement for such joint events, and it is required that the agreement parameters are described in the Section Annual Report.

Board approval is required prior to organizing, or any publication of, the event if:

1. A section seeks to have a joint event or activity with a commercial meeting organizer. The commercial organizer of an event is the organization responsible for the commercial arrangements for the whole event, including but not limited to, financial, venue and supplier management, marketing, content development and event execution.
2. A section seeks to market the joint event beyond the jurisdiction of the local section.

Board approval of the above 2 scenarios will serve as the approval of use of the SPE name and logo within the terms of the joint event or activity agreement between the parties. Separate Board approval of SPE's name or logo use is not required.

### 2.11 Joint Event

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

### 2.12 Co-Located Event

A Concurrent (Co-Location) event is an event in which SPE joins with one or more organizations for the purpose of conducting independent events in the same location (city/facility). The SPE Board of Directors shall approve all concurrent events before any agreements may be made with other organizations. A joint agreement between organizations must also be in place before a concurrent event may occur.

## 3.0 Administration of SPE Events

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

The SPE Board delegates some of its review and control responsibilities to individual members or SPE Staff. When planning or conducting an event, 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 Events

**3.1.1** All SPE events shall be approved by the SPE Board Committee on Training, Programs and Meetings (TPM), or any subsequent Board committee responsible for events. SPE's best business practices recommend that a ERF be submitted to the TPM at least 18 months before the proposed event date. This is particularly important for Regional and Annual events. However, it is recognized that other events such as workshops, which operate under shorter time constraints are excluded from this requirement. Once the event is approved by the TPM, the ERF will be sent to the Board for final approval. If the event is a reoccurring event that has a multiple year history of success and is not changing locations or movement on the calendar by more than 3 months, a new ERF is not required.

**3.1.2** The SPE Event Naming Policy - The following event naming requirements will apply to all the events that use the SPE logo (international and section) unless exception has been approved by TPM.

- Conference
- Symposium
- Workshop

- Summit
- Forum
- Training Course

1. All event titles will begin with “SPE”.

Example: “SPE Reservoir Simulation Symposium”

2. All events must include the type of event in the official name, as defined in Section 2.0 and Appendix A.

Example: “SPE Well Construction Efficiency: NPT, Reliability, and Process Improvement Workshop”

3. All Regionally based conferences and symposiums with similar topics in multiple locations will use the naming convention: “SPE xxxxx Heavy Oil Conference”, where xxxxx is the name of the region. This will allow each of these typically larger events to be distinct from one another during marketing and promotion.

Example: “SPE Canada Heavy Oil Conference”

4. The year of the event may not be included in the official title.

Incorrect: “2014 Annual Technical Conference and Exhibition”

Correct: “SPE Annual Technical Conference and Exhibition”

5. The edition of the event may not be included in the official title.

Incorrect: “3rd Annual Hydraulic Fracturing Technology Conference”

Correct: “SPE Hydraulic Fracturing Technology Conference”

*Note:* The year or edition of the event can be used in the body of the marketing text and as a sub-heading on the website. *Typically, the date alone should indicate the year in which the event is being held.*

6. Conferences held in conjunction with a non-SPE controlled exhibition or show may not include the name of the show in the official name.

Incorrect: “SPE Canada Heavy Oil Conference at Global Petroleum Show”

Correct: “SPE Canada Heavy Oil Conference”

*Note:* The name of the non-SPE controlled exhibition or show may be included in the body of the marketing text or as a sub-heading on the website and promotional material.

7. For events where the program content is developed in partnership with a non-SPE association or partner, the names of all partners will be included in the event title.

Example: SPE/IADC Drilling Conference

8. The event title must correctly reflect the content of the technical program. If the title is specific to a topic or discipline, then the content in the technical program must match the title. If the title is very general, then the technical program should be necessarily broad.

9. Event name acronyms are not to be used in official conference communications (websites, printed brochures, technical programs, etc.). If using the full name is awkward because of its length, rewrite the sentence or use a generic term, such as “the conference.”

Exceptions:

- The SPE Annual Technical Conference and Exhibition may be referred to as ATCE in copy, but the full name of the conference should be the primary usage style
- The Offshore Technology Conference may be referred to as OTC
- The International Technical Petroleum Conference may be referred to IPTC
- Other exceptions include OE, LACPEC, MEOS and APOGCE

10. The official event name should be finalized and approved by the relevant SPE Managing Director before putting it on any public-facing source (websites, printed brochures, technical programs, etc.). SPE staff will consult with the relevant SPE Regional Director on event names.

11. The official name of the event will be used consistently on all of the following:

- Long Range Calendar
- Global Events Calendar
- Marketing/promotional materials
- Pre-program/Full Technical Program
- Event website
- Official communications (Emails/Visa letters/Press releases)
- Technical papers generated for the event, if applicable
- Presentation materials

12. Any modifications to an existing conference event name must have the Chief Operations Officer approval.

Exception:

Existing Partner events - Both SPE and the partner-published materials should use the official name established according to the terms indicated in the agreement. However, it is the intent of this policy to reach naming consistency over time. If unable to reach agreement with a partner on a proposed name change, TPM must approve the continued use of the original name.

**3.1.3** 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 to 2 regional Implementation Committees, Eastern and Western Hemispheres. These committees are responsible for performing the continuous evaluation of event performance to ensure these events remain consistent with SPE's policies and overall objectives.

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

**3.1.5** To maintain consistent quality at all SPE events, the SPE staff is accountable for the following:

- Printing and distribution of the call for paper proposals and 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 and delivery to the event
- 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
- Advance registration
- Artwork development
- Event marketing
- Exhibition sales
- On-site registration
- On-site conference management
- On-site exhibition management
- Public Relations
- Technical program development and coordination
- Support of technical session operations
- Final event wrap-up and analysis

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

**3.1.6** 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 reviewed by an 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 event planning documents, and such exceptions shall require approval of the TPM.

**3.1.7** Technical presentations shall be supported by written manuscripts by the presenting author and co-author(s). Substitutes for full papers, such as extended abstracts or PowerPoint presentations, are not acceptable. The manuscripts will be assigned SPE numbers and included in the event proceedings and subsequently in OnePetro. SPE will hold copyright to these papers. For a joint event, 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 workshops or Forum Series. However, for keynote speeches and plenary sessions, organizers should try to obtain presentation materials, such as an abstract and PowerPoint presentation, and should seek permission for SPE to post the information on the SPE website. These materials will not be copyrighted by SPE. Refer to the appropriate section of the SPE Event Policy and 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.

**3.1.8** The Program Committee for each conference shall adopt SPE's "No Paper, No Podium" policy for the event or develop alternative policies, subject to Board approval, designed to enforce the importance of manuscript submittal.

The “No Paper, No Podium” Policy states that if an abstract is accepted to an event, the author will be required to submit a manuscript by the deadline date. If a manuscript is not submitted, the paper will be withdrawn from the program and the author will not be allowed to present at the conference. All presented manuscripts will become an official record in SPE’s permanent technical paper archive, OnePetro, which is available online at [www.onepetro.org](http://www.onepetro.org). If an approved paper is not presented at the conference, it will be withdrawn from the conference and OnePetro. Please refer to the SPE Paper Policies at: [www.spe.org/authors/policies](http://www.spe.org/authors/policies).

Historically, 10 - 15% of papers accepted for events on the basis of the abstracts submitted are withdrawn, not submitted on time, or not presented at the event. The Program Committee should select 10 - 15% more papers than desired for the event, with the understanding that some papers will not be written or presented. These additional papers are considered alternates that are moved up into a primary position in the event of a withdrawal or no-show onsite. They may also serve as Knowledge Sharing Poster Presentations.

**3.1.9** 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 training courses, and evaluating the success of the event. See the Guidelines for Planning section of this document for descriptions of committee roles and responsibilities for events.

**3.1.10** Regional and topical events are conducted as SPE events under the management of either SPE sections or SPE staff. These events will be charged for only direct costs incurred by SPE by third parties and staff costs (hours). A proposed budget, including an estimate of direct costs and SPE staff costs, will be prepared during the event planning process. After both parties agree on the estimate, SPE staff will provide periodic updates to keep budget on track.

## 3.2 Joint Conferences/Symposia

The following policy applies to all SPE jointly sponsored conferences and symposia. Special care shall be taken to be certain that joint event 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 TPM shall approve any joint events, excluding workshops. A decision shall be provided within **30 days** unless any of the sponsors of the event is a commercial organization, in which case **60 days** are allowed for review and approval.

**3.2.2** SPE will support joint events for the primary purpose of technology dissemination. Support and involvement also helps ensure the consistency and branding of all SPE events. All events 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 events. Due to the substantial number of events SPE manages, SPE and/or designated agent of record 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 events. Also, SPE support brings marketing opportunities that the smaller events 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 Event Request Form, before a commitment is made. The agreement shall, at the minimum, include each co-sponsor’s operational and financial responsibilities, any special event conditions (such as papers copyrighted in the name of the event for joint rights by the co-sponsors), and any proposed revenue and cost-sharing 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 an event with another organization or entity:

- 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.
- SPE shall provide the other organization(s) with a proposed agreement for review. The agreement shall outline major protections and issues relating to the above, as well as:
  - Funding
  - Income and revenue sharing
  - Technical and volunteer input
  - Staff requirements
- 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, SPE staff shall clarify that items related to ensuring protections as noted in the policy above are not subject to negotiation.
- Excluding workshops, all negotiations are subject to the TPM and subsequent SPE Board approval as outlined herein. SPE staff shall summarize the negotiation results in writing and recommend actions to the TPM.
- The TPM 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 TPM discussion. All comments from involved parties shall be included with the written recommendation.
- 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 TPM motion.
- Results of the recommendation shall be referred back to the TPM, and to the appropriate SPE staff person. The SPE 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 TPM shall be kept informed of progress.

**3.2.4** Except for special provisions made for certain joint events, as approved by the Board of Directors, SPE will maintain the copyright on all technical papers programmed by SPE.

**3.2.5** In joint events, the SPE Regional Director will be kept fully informed by the members planning the event, 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 events.

### **3.3 Co-Located Events**

The following policy applies to all SPE co-located events.

**3.3.1** The TPM shall approve any co-located event. A decision shall be provided within 30 days unless any of the sponsors of the event is a commercial organization, in which case 60 days are allowed for review and approval.

**3.3.2** SPE will support co-located events 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 Event Request Form, before a commitment is made. The agreement shall outline all reciprocal arrangements and registration fees, between all co-located event sponsors.

**3.3.4** SPE will maintain the copyright on all technical papers programmed by SPE for the co-located events.

**3.3.5** When feasible, the SPE Staff shall plan, organize, conduct, and supervise the execution of co-located events.

#### 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, health, safety, security and environment (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.
- The database of exhibitors contains confidential information.

The following policy applies to exhibitions at joint events:

- 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 events 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 event organizers and planners and approved by the SPE Board.

Revenues and expenses for all SPE events 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.

All events 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 events in which such services are used. Therefore, all SPE events shall be planned and budgeted to at least break-even.

Should a section or region seek to host an event 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 event 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 TPM for final resolution.

# SPE International Events - Guidelines for Planning

---

## Administration

For SPE International events (SPEI), 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 event
- Technical Program development and coordination
- Call for Paper Proposals: 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 event
- Final Program: Production and delivery to the event
- Exhibition: Exhibition sales and on-site management
- Reporting: Post-event evaluation

## General Chairperson

For most SPEI events—most notably the Society's Annual Technical Conference and Exhibition—the SPE Board appoints a general chairperson. The general chairperson for an SPEI event works with event committees and SPE staff in overall planning and conduct of the event.

## Technical Program Committee

The program committee is responsible for developing the content of the technical program for the event. 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 goals of the technical program
- 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 Paper Proposals, recommending SPE technical interests for development of the mailing list, and direct contacts to companies, government agencies, and universities
- Reviewing, rating and selecting papers for the technical program
- Selecting and inviting plenary session speakers
- Serving as session chairpersons during the conference
- Communicating with and coordinating authors and speakers on-site

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

More importantly, technical papers become part of the Multi-Society literature and online archive, OnePetro, and are the foundation of the SPE mission. They are the SPE members' legacy to future generations of engineers.

### Steering/Advisory/Executive Committee

The Board may appoint a Steering Committee for some SPEI events. A Steering Committee provides overall direction and support for the event. The committee's responsibilities include the following:

- Ensuring commitment for participation and continuity of the event, including conduct of any sponsorship program
- Encouraging executives and managers to support their employee attendance at the event.
- Hosting important guests at the event
- Soliciting sponsorships or other special support for the event
- Advising the Program Committee on nomination and invitation of special speakers such as industry notables, and luncheon, keynote, and plenary session speakers
- Directing the performance of event conduct subcommittees and on-site operations
- Deciding any additional special sessions such as panel sessions, industry breakfasts, topical luncheons, and nominating speakers for such

# SPE Regional Events- Guidelines for Planning

---

## Administration

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

- Development of artwork
- Printing and distribution of the Call for Paper Proposals and 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 event
- Printing and distribution of the final technical program
- Exhibition/Sponsorship sales
- Advance and on-site registration
- Marketing (such as *JPT*, *SPE.org*)
- On-site conference and exhibition management

Occasionally, contracted event planners may be required to carry out some activities. Sections may have recommendations of local individuals with whom they have worked previously. SPE staff can assist with finding contractors to support regional event planning.

## Events Research Services

It is common practice following an event 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 events. 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 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 TPM has issued a directive to conduct a survey for all events. The committee will need to provide a spreadsheet containing email addresses for attendees immediately following the event.

## Committee Overview

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

SPE Regional Event Leads include the following:

**General Chairperson** - The General Chairperson names lead for each element of the planning committee, who will in turn invite other members to support their respective functions. It is encouraged that all committees shall be composed of SPE members.

**Technical Program Lead** — Develops the technical program, including solicitation and selection of papers and invited speakers

**Logistics Lead** — Secures and coordinates the audio visual and other mechanical features of the technical sessions, social functions, luncheons, receptions, and dinners. Works closely with the venue to determine the space requirements for the event

**Exhibits/Sponsorship Lead** — Organizes and operates the exhibition and the Marketing and fulfillment of benefits of any sponsorships sold for the event (including logistics, and on-site service). Will work closely with the Logistics Lead to coordinate the space requirements for the exhibition

**Finance Lead** — Prepares the total event budget, handles all financial affairs related to the event, and reports financial outcome. Will be included on communication between SPE staff and the General Chairperson on costs associated with SPE services

**Registration/Housing Lead** — Develops and manages registration process and secures hotel accommodations for those who attend the event, arranges for transportation to and from hotel and event facility and/or social functions, if necessary - Will work closely with the Logistics Lead.

**Membership Lead** — Formulates a plan and coordinates action to promote the event and SPE membership to non-members

**Marketing/Public Relations/Membership Lead** — Promotes the event through trade announcements, invitational brochures, press releases, and local community relations. Gathers and organizes text for the conference preview and on-site program

**Registration Lead** — Coordinates registration (advance and on-site) for all persons attending the event

**Training Course Lead** — Coordinates appropriate training courses

\*\*In some regions, the above responsibilities of Logistics Management, Exhibits/ Sponsorship Sales, Finance, Registration/Housing, Membership, Marketing, Registration and Training Leads are undertaken by SPEI staff rather than volunteer members.

## General Chairperson

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

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

Event dates do not include pre- or post-events, such as training courses.

Once the Event Request Form has been approved, the selection of Committee Chairpersons is the next step. To ensure the overall success of the event, 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 Chairpersons to ensure that their responsibilities are being discharged on schedule.

## Technical Program Lead

### Structure

The Program Committee usually consists of a chairperson and sufficient members to handle the review, rating, and selection of paper proposals, and the development of any plenary sessions planned, as well as serving as Session Chairpersons.

### 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
- 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 (CFPP), and a selection meeting at which the paper proposals that will be included in the program are selected. Other meetings may be necessary.
- Prepares material to be included in the CFPP. If SPE is preparing and distributing the CFPP, the Chairperson submits this material to SPE. However, some regional and topical event organizers elect to produce their own CFPP. Most CFPP 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 CFPP 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 in:

- Soliciting paper proposals for the conference
- Reviewing, rating and selecting the papers to be included in the program

- Developing technical sessions and any plenary sessions desired
- Serving as a Session Chairperson

## Process

With the assistance of SPE staff, 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 CFPP. 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. Paper proposal submissions are made online via SPE's Paper Proposal Management System (PPMS).

The Program Chairperson works with SPE staff to determine which SPE members will receive the CFPP 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 CFPP. 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 CFPP and posts it on SPE web site.

Program Committee members shall actively solicit paper proposals for the conference. If hard copies of the CFPP are produced, a supply 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 event, the technical program might consist of a 2-4 day program 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 CFPP distribution brings in many papers, but the Program Committee shall also proactively seek good papers for the program. A technical program is developed in two ways:

- Selecting a specific field of technology and then inviting individuals recognized in that field to contribute papers on the subject, or
- 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 CFPP. Technical sessions are usually 1-1/2 to 2 hours long. This allows for three to four 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. A technical program grid outlining the session time slots will be provided to the committee by the SPE staff.

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 abstracts are accepted and technical sessions are organized, the SPE staff will send out the author notifications (acceptance and decline). The acceptance notification provides the corresponding author with detailed information on manuscript preparation and deadlines and access to the Author Kit.

### “No Paper, No Podium” Policy

If an abstract is accepted to a conference, the author will be required to submit a manuscript by the deadline date. If a manuscript is not submitted, the paper will be withdrawn from the program and the author will not be allowed to present at the conference. All presented manuscripts will become an official record in SPE's permanent technical paper archive, OnePetro, which is available online at [www.onepetro.org](http://www.onepetro.org). An exception to this policy for the conference can be requested from the SPE Board of Directors during the event approval process. If an approved paper is not presented at the conference, it will be pulled and not become an official record in SPE's permanent technical paper archive, OnePetro.

As the manuscript 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. Any author with questions about the manuscript deadline should be referred to the SPE Technical Program Lead.

### Proceedings

Proceedings (a collection of the technical papers presented at the conference) are a well-established requirement of SPE events. SPE provides copies of the event proceedings to registrants at the event.

The manuscripts provided by the authors participating in the technical program will be submitted for inclusion in the proceedings. All authors are required to transfer copyright for their papers to SPE.

Plenary session speakers and keynote speakers are not required to submit a written manuscript. For these presentations, the SPE shall request permission to re-publish the speaker's presentation materials.

### Costs

Currently all Proceedings are produced on CD, USB or (Digital Proceedings) under the direction of SPE staff. Proceedings costs depend on the number of papers and the number of CD's/USBs to be produced. SPE staff will provide cost estimates and a proceedings production schedule from the CFPP through delivery of proceedings to the event.

### Copyright

In accordance with SPE policy, the Society copyrights all papers produced for SPE events. 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 events (assuming they have not been copyrighted previously or are government exempt). Further information regarding publication rights may be obtained directly from SPE Technical Publications at the SPE Americas Office.

### Session Chairpersons

Each technical session shall have two presiding chairpersons. Session Chairpersons may be Program Committee members or individuals who have helped to plan the event, such as a 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 and correspond with 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 moderate 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 due date cannot be presented and are withdrawn from 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 the manuscript and presentation deadlines. The Session Chairperson shall remain in contact with the corresponding authors in the session from acceptance of the paper proposal through to the onsite presentation 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 Conference Program lead immediately.

Session Chairpersons can access a list of the authors and papers to be presented during their session, via the PPMS system online. About three weeks before the event, the Session Chairperson will have access to the submitted manuscripts in his/her session.

## Advance Meeting of Session Chairpersons

It is desirable for all persons serving as Session Chairpersons and members of the logistics committee to meet before the event 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 logistics lead. The purpose of such meetings is to discuss responsibilities and to be sure that every person is acquainted with procedures.

An **Authors' Breakfast/Briefing** is a good time to bring author and speakers together to provide them with presentation details and the expectations for the session. 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 event budget. Other considerations are special registration rates for presenting authors and/or Session Chairpersons and an author's social function (such as a breakfast). The Program Chairperson shall notify authors of any special functions and/or registration procedures.

### Logistics Lead

The Logistics Lead is one of the event 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 Logistics Lead 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 Lead. This shall take place approximately 10 months before the event, with a revised budget submitted six months before the event. The Logistics Lead shall instruct vendors to send invoices to him/her immediately after the event. He/she shall review the invoices for accuracy and then forward them to the Finance Lead for payment.

### Exhibits/Sponsorships Lead

The Exhibits/Sponsorships Lead 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
- Program ad sales

The SPE staff has extensive experience in planning and managing exhibitions. Exhibition sales and management at SPE regional events may be under the management auspices of SPE staff. Exhibition sales are managed by the SPE staff, at a fee, if desired. 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, such as, decorators and freight operators, will have to be contracted to provide services for the event.

The Exhibits/Sponsorships Lead 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. It is recommended that all contracts be reviewed by SPE staff.

Revenues generated from the sale of exhibit space typically match or exceed the events registration income. Therefore, the exhibit arrangements are of great importance to the success of the event.

The SPE staff can provide the exhibits committee with the following information:

- A list of potential decorators and contractors to be considered for solicitation of proposals
- 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
- 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

## Finance Lead

The Finance Lead is responsible for preparing the total event budget, preliminary and final, and handling all financial affairs related to the event. Sections shall ensure that they have adequate financial resources to conduct an event and ensure its success.

Regional events 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 an event 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 events 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 event 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 fee is nominal, and can or cannot include any social functions. Social functions shall be planned so that the ticket price will cover the cost of the function for each individual.

An event budget template has been established to document reporting of income/expense on a consistent basis for all SPE event. SPE staff will email the template to the Finance Lead 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.

## Registration/Housing Lead

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

The Registration/Housing lead 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 need 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 event. Thus, if 500 registrants from outside the local

area are expected, approximately 350 rooms will be required. It is helpful to obtain room block history from prior events to help determine current needs.

## Membership Lead

SPE events provide an excellent opportunity to recruit new SPE members, inform current members about the services SPE provides, and encourage existing members to renew. Therefore, promotion of SPE membership shall be a part of all SPE events. The Membership Lead coordinates the SPE membership promotions, working with the SPE staff, and the membership chairperson of the host section(s).

The Membership Lead meets with his/her committee to develop an action plan well in advance of the event. All promotions of the event – before, during and after – should be viewed as an opportunity to promote SPE membership. Remember, SPE gives monetary awards to both sections and individual members who excel at membership recruitment.

At the event, materials should be displayed that promote SPE and membership applications should be available for prospective members. Sections officers can order materials from SPE free of charge from the [Marketing Materials](#) site on spe.org. The lead should also coordinate member volunteers to be in charge of inviting non-member attendees to join SPE.

If space allows, a more elaborate booth will include an extensive display about SPE services and programs, including periodicals, books, on-line services, training courses and international events. For this, a schedule will be made for member volunteers to staff the booth at all times.

Once an overall plan is created, a budget shall be determined and submitted to the Finance Lead. This shall be accomplished at least six months before the event, leaving adequate time for membership promotions to be added to pre-event materials.

## Marketing/Public Relations Lead

The Marketing/Public Relations Lead responsibility is to communicate and market the event to an identified audience including SPE members, community leaders, news media, and other industry groups. SPE will publicize the event in the *Journal of Petroleum Technology* and on the SPE website ([www.spe.org](http://www.spe.org)). Other communication vehicles you 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. Effective marketing and communications that reach a target audience can positively impact the bottom line by helping draw more paid registrants to an event.

*Please note only events managed by SPEI are posted on the SPE website unless an exception is approved by the SPE Board of Directors.*

## Marketing Plan

The first step in effective marketing of an SPE event is a marketing plan that ideally starts six months before the event. The essential elements include:

### Attendee promotional plan

- Establish the target audience (SPE can provide a report)
- Select the appropriate media for presenting the message/promotion
- Create artwork
- Promote the event through
  - print advertising in trade magazines
  - SPE and section websites
  - broadcast emails or faxes to the targeted audience
- Develop a conference preview

### Exhibitor promotional plan

- Establish the target audience (past, current, and potential exhibitors)
- Develop an exhibitor prospectus at least one year before the event
- Post exhibitor information on the SPE website or section websites
- Promote exhibiting opportunities via direct mail, ads, website, and other media

### On-site promotional plan

- Use of the Conference Program
- Use on-site advertising/signage promoting next year's event

## Training Course Lead

Continuing education programs provide a special service to attendees at SPE events. A wide variety of courses approved by SPE Global Training are available. A variety of options are offered for course administration, facilitation, and implementation, dependent on available resources.

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

- Prepare participants for more in-depth comprehension of technical program presentations
- Provide unique opportunities for continuing education to event participants from remote locations
- Provide an opportunity for individuals and companies to economize by combining continuing education and event 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 event, rather than a part of the event. Thus, while event information may publicize these programs, their dates are not part of the event dates.)

## SPE Policy

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

- Close coordination is maintained between a non-SPE sponsoring organization and SPE event organizers
- Course offerings are selected from a list of SPE Training Courses or **reviewed and approved** by the SPE Continuing Education Committee for presentation at the event

## Appendix A – Event Definitions

---

### Conference

An SPE Conference promotes the exchange of technical knowledge on current and proven technologies through technical paper presentations, and may include plenary sessions, panel sessions, and ePosters. In many cases, conferences also feature an exhibition of the latest products and services, offering attendees a chance to experience new equipment and technologies in person. Conferences can be focused on a specific topic or have a broad technical scope. This technical information, including SPE technical papers, is further disseminated through publication in the conference proceedings and on OnePetro. Conferences are managed by SPEI.

*Please note the use of “ePosters” may also include paper poster presentations.*

### Forum

A Technical Forum is an invitation-only SPE event, developed and approved through the Forum Series Coordination Committee that brings together top technologists, innovators, and managers to explore a specific industry challenge not already addressed in existing SPE Conferences, Workshops, and Symposia. Participants are encouraged to come prepared to contribute their experience and knowledge rather than be spectators or students. The objective is to create a collaborative, idea-generating arena that stimulates new ideas and innovation about future challenges facing the E&P industry.

A written summary may be prepared and distributed to the participants after the forum and with unanimous participant agreement at the discretion of the program committee and SPE approval.

Forums do not offer a Call for Papers, published presentations, sponsorships or exhibitions of any kind.

### Summit

An SPE Summit is a one to three day, invitation-only SPE International event with specific, predefined objectives. It is a fast-track response to emerging issues, problems, technologies, and strategies of broad significance to the industry. Written records of the discussions and conclusions are published, with the intent of providing a deliverable that benefits the industry and has the potential to lead to further initiatives. [Note: Approval by the Finance and Strategy Committee is required for a Technical Report of the summit to be published]

There is neither a Call for Papers nor presentations offered. Summits do not include any commercialism and do not offer an exhibition.

### Symposium

An SPE Symposium is a meeting of experts in a particular field. A symposium serves as a transition event for a topic that has matured beyond a workshop format. Symposia can provide the opportunity for authors to publish their papers, but the event may not be a fully papered program. The technical program committee will build their program from invited presenters and those selected through Call for Speakers process, if offered. Programs may include paper presentations, no-paper presentations, plenary sessions, panel sessions, and ePosters. SPE manuscripts (if any) will be further disseminated through OnePetro. In many cases, symposia also feature an exhibition of the latest products and services, offering attendees a chance to experience new equipment and technologies in person. Symposia may be offered by a region or section provided the following conditions apply:

- A Region or Section-managed event is one in which all services are provided by the section or SPEI is hired by the section to manage one or more services. At a minimum, SPEI will be hired to conduct the post-event survey.
- To offer papers for inclusion into OnePetro, the section is required to hire SPEI services to prepare a Call for Papers, to manage the paper submission process, and to produce the master CD of proceedings in addition to administering the post-event attendee survey.
- If a Region or Section-managed event is to appear on the SPE event calendar, the host region or section must submit a MRF to TPM for approval. Any region or section-managed events must include the name of the region or section in the event title.
- A Region or Section-managed event that has a Call for Papers, but does not post papers to OnePetro must still be approved by TPM through the MRF process. TPM may revoke the Call for Papers privileges of a Region / Section symposium if the technical quality survey ratings, from previous years, are considered poor.

*Please note the use of “ePosters” may also include paper poster presentations.*

### Training Course

An SPE training course is one that has been reviewed and approved for technical quality and relevance by the Global Training Committee (GTC). A training course also may be approved by a regional advisory committee or a regional conference planning committee when there is insufficient time for GTC review or there is no intent to offer the course beyond a single event. They are usually lecture-based and taught by instructors who are subject matter experts. These courses cover practical, hands-on introductory, intermediate, and advanced engineering topics in all six SPE technical disciplines as well as several nontechnical topics. Continuing education units (CEUs) are offered for completed courses.

### Workshop

An SPE Workshop maximizes the exchange of ideas among attendees and presenters through brief technical presentations followed by extended Q&A periods. Highly focused topics attract an informed audience eager to discuss issues critical to advancing both technology and best practices. Workshop topics must not overlap or conflict with those of other events. The technical program is comprised of presentations solicited by the program committee as opposed to a general Call for Papers or Presentations.

Many of the presentations take the form of case studies, highlighting engineering achievements and lessons learned. To stimulate frank discussion, no proceedings are published, and members of the press are not invited to attend. Presentations that have been authorized for release are compiled by the SPE staff and released to attendees after the workshop.



## Appendix B – Related SPE Policies and Procedures

---

Our members expect high standards of integrity of themselves and of other members. In carrying out our mission, all SPE activities shall be conducted according to our policies and procedures.

### Guidelines for Members

SPE believes that its members should exhibit high standards of competency, honesty, integrity, and impartiality, be fair and equitable, and accept a personal responsibility for adhering to applicable laws, protecting the environment, and safeguarding the public welfare in their professional actions and behavior.

[Professional Conduct](#)

[Anti-Harassment](#)

[Conflict of Interest](#)

[Online Communities](#)

[Anti-Trust Policy](#)

[Health, Safety, Security, Environment,  
Social Responsibility, Regulations, Quality](#)

[Sustainability](#)

### Publication Guidelines

SPE encourages open and objective discussion of technical and professional subjects, and our publications shall contain no judgmental remarks or opinion as to the technical competence, personal character, or motivations of any individual, company, or group. Any material that, in SPE'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.

[Editorial Policy](#)

[Publications](#)

[Copyright](#)

[Permissions Procedure](#)

[Author Frequently Asked Questions](#)

[Plagiarism Policy](#)

### Logo Usage Guidelines

The Society of Petroleum Engineers' (SPE) name and logo should be used by sections, regional councils and student chapters for promoting and communicating all official SPE business. The aim of this policy is to safeguard the strong brand image and reputation SPE has built over time, and herein is clear direction on members' and sections' use of the SPE name and logo in connection with non-SPE events.

[Use of SPE Name and Logo](#)

[Name and Logo Frequently Asked Questions](#)

[Graphic Standards](#)

[Guidelines for Section Websites](#)

## SPE Event Cancellation Guidelines

### Exhibitions Fee Refund Policy

If SPE declares force majeure, due to imminent threat of circumstances that may make holding the event impractical or harmful to people attending it; we reserve the right to cancel or reschedule the conference.

Should SPE elect to cancel or reschedule an event, SPE will refund up to 90% of exhibition and sponsorship fee less amounts paid for items already produced and upon written request from the exhibitor or sponsor.

### Attendee Registration Refund Policy

If SPE declares force majeure, due to imminent threat of circumstances that may make holding the event impractical or harmful to people attending it; we reserve the right to cancel or reschedule the event. In those circumstances, SPE will refund 100% of the registration fee.

## General Guidelines

Each function and activity of the Society should serve the broader membership while addressing local needs, supporting technical and professional excellence, making wise use of society resources, as well as complying with all US and EU laws.

[One SPE Guiding Principles](#)

[Policy on Intersociety Cooperation \(LINK NOT WORKING\)](#)

[Sanction Law Compliance](#)

[Add Enterprise/Fraud Risk – not on website](#)

## How SPE Uses Member Information

We collect certain information, such as a member's address, telephone number, and other demographic and billing information to process their membership effectively and efficiently, and in planning future programs and services to better serve them.

[Privacy Policy](#)

[Cookie Policy](#)

[Terms of Service](#)

## 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 Board Committee on Finance and Strategy (F&S). 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 F&S to formulate any recommended industry standards without prior clearance from this 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 or SPEI staff) 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. 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 F&S.

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 economic 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  
US  
Telephone: +1.972.952.9393  
Facsimile: +1.972.952.9435  
E-mail: [president@spe.org](mailto:president@spe.org)