



Society  
of  
Petroleum Engineers

2015  
FORUM SERIES  
MANUAL

# **SOCIETY OF PETROLEUM ENGINEERS (SPE) FORUM SERIES GUIDELINES**

## **SCOPE**

To the extent possible, the SPE Forum Series shall encompass the total range of technical subjects covered by the SPE.

## **OBJECTIVES**

Each Forum shall attempt to stimulate thought and accelerate the development of technology in a selected portion of the technical spectrum covered by the Society. This objective is consistent with SPE's mission to maximize the dissemination of technical information through meetings and publications.

The Forum Series shall seek to stimulate discussion and innovation, both during and subsequent to the Forum.

One objective of a Forum is to maximize discussion and minimize prepared presentation. The discussion should consist of a maximum of information on new advances and a minimum of review of established technology. Reporting new, unpublished, and incomplete results are encouraged.

Another objective is to provide communication between knowledgeable persons from industry, government, and academic institutions; members of different disciplines working in related areas; and groups having diverse experience and geographic backgrounds.

## **CRITERIA FOR ACHIEVING OBJECTIVES**

The guiding principle in formulating criteria for the SPE Forum Series is that any reasonable method that will promote completely free and effective discussion among the participants should be considered.

1. Topic Selection
  - a. To the extent possible, the SPE Forum Series shall encompass the technical coverage of the SPE technical disciplines. The disciplines are Management and Information; Projects, Facilities and Construction; Drilling and Completions; Reservoir Description and Dynamics; Health, Safety, Security, and Environment, and Social Responsibility; and Production and Operations.
  - b. An attempt shall be made each year, as well as on a long-term basis, to distribute the selected topics among the technical disciplines to cover the range of interest of the Society's membership.
  - c. Topics may be repeated if warranted by advancing technology, general interest, or other factors. Topics should not be repeated more than once

every 4 years.

- d. In the selection of Forum topics, areas in which intense competition would inhibit free and objective discussion should be avoided.
  - e. A Forum topic should be broad (or narrow) enough that a comprehensive, in-depth discussion of the subject matter is accomplished during the time period allotted for the Forum.
  - f. Topic input comes from many sources. SPE canvasses SPE Section Chairpersons and Technical Directors. In addition, participants at each Forum are asked to recommend future topics. These topics are collected by SPE staff and provided to the Forum Series Implementation Committee (FSIC) for their topic selection meetings.
2. Number of Forums
- a. As a goal, Forums will be held on topics in each of the major technical areas. A maximum of two Forums in each core area is suggested annually.
  - b. A standardized classification system for Forum titles has been developed to improve coordination and monitoring of the series. Titles are categorized under Management and Information; Projects, Facilities and Construction; Drilling and Completions; Reservoir Description and Dynamics; Health, Safety, Security, and Environment, and Social Responsibility; and Production and Operations.
  - c. The number of Forums held each year shall normally vary from five to twelve. The number depends on the availability of timely, quality topics. It is essential to the success of the Forum Series that this criterion be maintained.
3. Organization
- a. Page **Error! Bookmark not defined.** contains an organization chart for the SPE Forum Series.
  - b. The SPE Forum Series Coordinating Committee (FSCC) is charged by the SPE Board of Directors with responsibility for overseeing the worldwide SPE Forum Series program.

- c. The Chairpersons of the two SPE Forum Series Implementation Committees (FSICs)—Eastern Hemisphere and Western Hemisphere – also serve as members of the SPE Forum Series Coordinating Committee (FSCC). The Implementation Committees organize and conduct the Forum Series meetings in specific geographic areas. Each committee should consist of at least seven members, each of whom should have responsibility for one of the major technical areas. Each Forum will be assigned an FSIC Liaison to provide guidance and support throughout the development and implementation of the Forum. The FSIC Chairperson has a responsibility to uphold SPE standards and has the authority to replace the Forum Chairperson (or Vice Chairperson), if necessary, to assure that those standards are upheld. If a Forum Chairperson fails to respond to coaching by the FSIC Liaison and continues to steer the Forum in an inappropriate manner, the FSIC Chairperson will obtain input from the entire FSIC and make the decision as to whether to replace the Forum Chairperson. Once the decision is made, the FSIC Chairperson will dismiss the current Forum Chairperson and appoint a replacement.
  - d. SPE membership is a requirement for the position of Forum Chairperson.
  - e. Each Forum Chairperson shall form a steering committee to develop the Forum agenda and conduct the Forum sessions. A majority of the committee shall be SPE members.
  - f. Except in unusual circumstances, attendance of at least one SPE Forum shall be a qualification of all members of the Steering Committee, including the Chairperson.
  - g. What the person can contribute to the Forum should be the first consideration in the selection of the Chairperson and all other members of the Steering Committee
  - h. Steering Committee composition should represent as wide a cross-section of anticipated Forum participants as possible.
4. Programming
- a. If possible, the Forum Chairperson should attend the annual workshop for Forum Chairpersons on planning, organizing, and conducting SPE Forum Series meetings. If the Forum Chairperson is unable to attend the annual workshop, the FSIC Chairperson responsible for that region will coordinate adequate training to be delivered by the assigned FSIC representative.
  - b. The Forum Chairperson has overall responsibility for the quality of the Forum program.

- c. The Steering Committee is responsible for development of the program and inviting key participants. (See “Conduct of SPE Forums” on page 6.)
- d. Each Forum program shall be arranged to ensure that several sessions are of interest to most of the expected participants.
- e. The SPE staff is responsible for the selection of the meeting place, meeting arrangements, and related matters.

5. Participants’ Qualifications

- a. What the participant can be expected to contribute to the Forum, through the expression of ideas and insights gained from academic and work experience, shall be the criterion for selection.
- b. All potential Forum participants will complete an official SPE application form.
- c. All participants, with the exception of the Steering Committee members, will be selected on the basis of the information provided on the application form.
- d. Discussion leaders and speakers should be selected on the additional basis of recognized leadership and/or reputation in their field.
- e. Special effort will be made to solicit participation from a balance of people from industry, government, and academic sectors as well as from geographic locations and disciplines that are relevant to the Forum topic.
- f. The members of the Steering Committee are responsible for inviting persons who will enhance the technical expertise of the Forum and promote a balanced representation among the participants.
- g. Applicants should acknowledge that they will endeavor to attend all sessions of the Forum as a condition of acceptance.
- h. Limited financial support is provided for the assistance of accepted applicants who could not otherwise attend (See “Financial Support” section on page 8).
- i. SPE officers and directors should be permitted to apply, register and attend Forums. Such attendance is intended to ensure that the goals and objectives of the Forum Series are achieved.

6. Number of Participants

- a. To stimulate, attain, and maintain the level of discussion and other general objectives desired of the SPE Forums, it is considered essential that the number of participants not exceed approximately 75 persons.
- b. When the number of applicants exceeds 75, the Steering Committee shall select the best applicants and request SPE staff to place the remaining applicants on a waiting list. Acceptance and waiting list letters shall be mailed only from the SPE office.
- c. Should the number of applicants exceed 75, those applicants who have attended two or more Forums in the last 4 years should normally be placed on a waiting list.
- d. The number of SPE officers and directors attending a Forum should be determined in part by the number of qualified applicants accepted. A minimum of two and maximum of four places is recommended. Officers and directors attending under this provision should pay full registration fees and are not eligible for financial support.

7. Documentation and Discussions

- a. To protect individual rights and thus promote the desired levels of discussion, innovation, and presentation of incomplete and partial results, it is essential that the SPE Forums be conducted strictly off the record. Written papers shall not be required and shall be prohibited, all participants shall not be quoted, and the audio or video recording of presentations and discussion is prohibited. Participants will have agreed to these conditions when they apply to attend the Forum.
- b. Applicants for an SPE Forum should recognize that the limitation on documentation is intended to result in freer discussion and flow of information exchange on the technology covered in the Forum.
- c. Extensive note-taking is forbidden.
- d. Publication of information disclosed at an SPE Forum is prohibited without written approval from the originator. (The originator is free and is encouraged to publish his/her own contribution.)

- e. A Forum may elect to prepare and distribute a written summary of the major issues and opinions arising from the Forum for distribution to Forum participants after the Forum. Forum participants must agree on the content of the summary. This summary will be prepared by the Steering Committee and will require prior approval by the Forum Series Implementation Committee (FSIC) before distribution by SPE staff.

Each session manager will be responsible for completion of their session's summary.

Maximum length of the total summary will be 3-4 pages, and comments should be listed in bullet-style, without detail.

The following summary format must be utilized by Steering Committees who elect to provide a summary:

FORUM NAME, SESSION (Title)

Each summary will capture information in the following six general categories:

1. Management Issues.
2. Research Issues.
3. Practical Engineering Issues.
4. Issues of Highest Priority
5. Issues That Are Least Understood
6. Any Novel Ideas from the Session

## 8. Conduct of SPE Forums

### Location and Facilities

- a. SPE Forums are conducted in quiet surroundings conducive to effective informal communication.
- b. A pleasant climate, both natural and psychological, is desirable to promote extended informal discussion among participants during "free time" periods.
- c. Limited recreational facilities should be available but should not be permitted to detract from the principal objectives of the Forum.
- d. Forum meeting rooms should be arranged to encourage informal discussion in preference to presentation of papers, and provide maximum eye contact among participants.
- e. Forum meeting rooms should be nearly square (or circular) to provide an advantageous seating arrangement and good acoustic quality for the participants.

- f. Use of classroom seating should be avoided to discourage extensive note-taking and improve seating arrangements.
- g. SPE Forum sessions should be conducted, with one or two free periods scheduled to provide an opportunity for daytime recreation.
- h. Breaks should be provided midway through the morning, afternoon, or evening sessions.
- i. Alternate afternoons and evenings should be available for rest, recreation and unorganized discussions. Neither organized recreation nor family activities should be permitted to detract from discussion opportunities.
- j. The Forum Chairperson should open the meeting by introducing the Steering Committee members and representatives from SPE. The Chairperson should review the Forum Series Guidelines and set the stage for the technical program.
- k. Steering Committee members shall ordinarily serve as Session Managers.
- l. Scheduled Discussion Leaders (no more than three per session) may summarize and/or discuss new information on a particular subject. However, their primary function is that of facilitator, not lecturer.
- m. Scheduled talks should be informal, and should be no more than 1 hour of the session (leaving more than 2 hours per session for discussion).
- n. Discussion should be interspersed throughout the scheduled talks, rather than afterward, to stimulate more effective communication. Participants should be advised in advance that open discussion is encouraged at any time.
- o. Participants should also be encouraged to contact the Chairpersons for possible short, unscheduled contributions. The Chairpersons may elect to have several unscheduled contributions made during one of the sessions.
- p. Session managers are responsible for preventing “sales pitches” or the domination of a session by any one person, clique, or faction.
- q. The Steering Committee should consider innovative methods for encouraging discussion from the participants. Consider small breakout groups with a report back period to the Forum. Games and/or controversial proposals may be introduced to stimulate interaction among the participants.

9. Monitoring
  - a. The Forum Series Implementation Committee (FSIC) monitors individual Forums through assigned Liaisons. The Forum Series Coordinating Committee (FSCC) evaluates the Forum Series as a whole.
  - b. Each Forum participant is requested to complete a survey.
  - c. The SPE Staff summarizes the results of the surveys, and provides a report at the first meeting of the FSCC following the year's Forum program. (This meeting is normally held at the SPE Annual Technical Conference and Exhibition.)

## **REGISTRATION MATTERS**

1. Registration fees are set with the intention of making the Forum Series self-supporting.
2. A portion of the registration fee may be used to provide financial assistance to invited participants who could not otherwise attend. The amount made available for this purpose is set at a maximum of \$5,000 for each SPE Forum. SPE staff shall keep records of disbursements made from the SPE office.
3. The SPE staff is responsible for additional registration matters.

## **FINANCIAL SUPPORT**

1. Persons receiving financial support should be individuals expected to make major contributions to the success of that Forum, such as Discussion Leaders, Session Chairpersons, recognized industry authorities, or appropriate "sounding boards" from government or academia.
2. Persons receiving financial support should be individuals who would not be able to attend without some financial support.
3. Maximum financial support to any single participant should not exceed "round-trip coach air fare" or "full registration fee," whichever is the lesser amount.
4. Funds are available to the invited individual only, not to accompanying family or guests.

5. Funds for financial support may be “pooled annually” to provide the most benefit for that year's Forum Series.
  - a. Deadline for requesting financial support is the application deadline.
  - b. If a specific Forum's financial need exceeds its allocated fund, a maximum of \$2,000 can be shifted from one Forum to another with the consent of both Forum Chairpersons.
  - c. If the allocated funds to all other Forums are not used, a maximum of \$8,000 can be expended for financial support to one Forum.
  - d. Funds are disbursed from the SPE office upon approval of the Forum Series Committee Chairpersons.
  - e. Each Forum will be self-supporting after adjustments for differences in financial aid requirements.
6. Individuals who have received support in the last 3 years are not eligible for financial support for the current year program.

## **MARKETING**

1. The SPE staff is responsible for conducting marketing for the Forums.
2. Each Forum shall be marketed in the *Journal of Petroleum Technology*, on the SPE website, and in other appropriate SPE publications. It should also be marketed in other publications that treat the subject matter of the Forum, particularly if the Forum is cosponsored with another organization.
3. Published information shall include dates and meeting location, registration fees for participants and guests, and application and selection procedures.
4. The Forums shall be further marketed by distribution of marketing materials at SPE conferences and to SPE sections.
5. SPE Forum Series attendee lists will not be distributed to non-participants or released for commercial purposes. Participants receiving such lists may not distribute them to anyone else.