SPE Gulf Coast Section Annual Kickoff Meeting
28th August 2020

PROGRAMS BREAKOUT SESSION
Carlos Torres/Bharath Rajappa

Outline

1. 2019-2020 Financial results
2. Programs 2020-2021 Goals and updates
3. Virtual meetings and webinars
4. Pricing guidelines and sponsorships levels
5. Webinars process update
6. In person events - Covid19 Safety Protocols
7. How to Be a Successful Study Group
8. General Study Group Guidelines and Recommendations
9. SPE Distinguished Lecturer Program
10. Who is Going to Help Me

1- Financial results 2019-2020

1. On target to beat previous year (2018-2019)

2. Severely affected by Covid19

3. Great job by Programs and all SG and Committees to adjust and
   host webinars

4. Consistent increase in attendance for virtual events during 2020

2- Programs 2020-2021 Goals and Updates

1. Contribution to SEF and Scholarship endowment fund, cover operating cost

2. Increase webinars attendance

3. Virtual meetings and webinars – process update

4. Recruit one volunteer for the Programs Committee

5. Encourage virtual events as much as possible
   – Implement Covid19 Protocols for in-person events

6. Host events in collaboration with other SPE Sections

7. Populate SPE GCS Library content with webinars and events recordings

Keep in mind: our goal is to raise funds

1. Funds for our scholarship program, STEM programs, community outreach and the scholarship endowment fund and to cover the section operating cost

2. Sponsorships are down due to current market conditions
   - Be creative to secure sponsorships
   - Remember we are one of the SPE largest sections (>10K members)
   - Sponsorships funds must be received before advertisement on GCS website

3. Until we can hold in person events, our revenue will reply on the webinars
   - Reduced logistics
   - Quick and easy to set up

3- Virtual meetings and webinars

1. So far, we have seen an increase in **webinars attendance**

2. Must continue to grow attendance by promoting and **using all SPE GCS resources available** to you
   – Newsletter
   – Webpage, LinkedIn
   – SPEi Marketing to all 3 regions
   – Watch for submission deadlines

3. Webinar equipment:
   – Two sets available
   – One is always at the SPEi office on Westheimer
   – Second set is at the CoreLab offices (Reservoir and Study group have this kit)

4. Follow pricing guidelines
   – Try to use "credit" for future events instead of refunds

Virtual meetings and webinars

6. **Each SG and Committee is responsible for having a trained person to set up for each event (webinar and in-person)**

5. **Publish content on library**, assisted by Programs Chair and Vice-Chair
   - Pricing for recordings will be the same as if registering for the live event
   - Paying on the SPE GCS Library, grants access to view the event once, not to own a copy or download it.
   - Work with Speakers to allow recording the sessions, events, webinars

Webinar software features

1. Zoom
- Waiting room – host can validate the attendees
- Polling questions
- Limit 100 attendees (can be increased to 500 if needed)
- Does not allows to see the active webcam, all the other attendees' webcams will be on display
- Allows to view the speaker's webcam

2. GoToMeeting
- Limit of 250
- Does not have waiting room nor polling questions
- Allows to view the active web can only, and not see all the other attendants

3. **Log in info** to be provided by Programs Chair, Vice Chair or the Study Group responsible person
- Programs control access and setting up meetings

Webinar software Training

1.Session #1 – GoToMeeting

- − The information below for a GoToMeeting training session:
- − Date: 09/02/20
- − Time: 12m
- − Duration: 1hour

2. Session #2 – Zoom

- − Date: 09/08/20
- − Time: 12m
- − Duration: 1hour

4- Process update: Virtual meetings and webinars

1.Creation of a shared calendar for all SG and Committees to set place holder for their events/meetings

- spegcs.webinar@gmail.com
- Password:
- https://calendar.google.com/calendar/b/0/r?cid=Y18zOWg1NnJ2Z2tyMWVtZGYyMTIjaXJoODAxc0Bncm91cC5jYWxlbmRhci5nb29nbGUuY29t

2. **Each SG and Committee will be able to log in and set the placeholder for their event**

– Must specify what Virtual meeting platform would like to use

– Meeting links will be emailed on a weekly basis

– Moving or deleting someone else's event is not permitted

4. **Chair/VC will then send meeting details on Virtual platform to use**

5. **SG and Committees are responsible for creating the event on the GCS web page**

- Remember →adhere to SPE naming guidelines

4- Pricing Guidelines

Webinar	SPE Member	Non SPE Member	Students, MiT, Retired SPE
1 Hour Event (Recommend Rates)	$15	$20	$10
2-4 Hour Event (Recommend Rates)	$35	$50	$25
All Day Event (Recommend Rates)	$65	$75	$35

Sponsorships –> be creative

Remember, SPE GCS support many initiatives, we need the funds!

Recommended Sponsorship levels Webinars

Benefit / Sponsorship Level	Luncheon / Networking	1 Hour Webinar	½ Day Webinar Event
	In-Person Event	Event	
	$500	$500	$1,000
Logo on SPE-GCS event webpage	✓	✓	✓
Logo on SPE-GCS Connect Newsletter Event Listing	✓	✓	✓
Logo on Pre-Event Slide Show	✓	✓	✓
Complimentary Registration to Event		1	2

Keep in mind, sponsorships works two ways: benefit the sponsor, and the SPE GCS

Evaluate on a case by case basis

Covid19 Protocols – in person events

1. Always, think Health and Safety first

2. Follow SPE-GCS Covid-19 Safety Protocol – available on our web site under **"Member Resources"**

3. Until further notice, the preference is to hold virtual events, as the Covid19 situation evolves, hybrid events would be our goal

4. Plan for safety supplies and logistics in your event budget
   – Check in procedures for attendees/questionnaire
   – Thermometers
   – Masks
   – Gloves

Will email Covid19 Safety Protocols

Event Documentation

- HSSE-SR Study Group Sponsorship Flyer
- Group Sponsorship Flyer Template
- Section Wide Sponsorship Flyer
- Special Event Naming Guidelines
- Special Event Pricing Guidelines
- Webinar Procedure Guide
- 2019-2020 Webinar Equipment Calendar
- 2020 COVID-19 Guidelines
- COVID QR Code

6- How to Be a Successful Study Group

1. **Keep your roster/officers up to date on the SPE GCS website**
   – **Contact Lindsey Newsome for any support required**
2. **Define program goals**
   – Contribution to SEF, endowment fund
3. **Line up speakers well in advance**
   – Make use of the Distinguished Lecturer Series
4. **Minimize clustering group programs on same or near same day with other study groups**
5. **Provide event details in time to be on the websites**, included in email blasts and in the monthly newsletter

How to Be a Successful Study Group

6. **Establish a backup plan for missing speakers**:
   – Prepared presentation by study group member
   – Existing ATCE presentations
7. **Advertise meetings as much as possible and within the SPE guidelines**

7- General Study Group Guidelines and Recommendations

1. SPE-GCS Mission (2 out of 5)
- *"Providing forums that afford members the opportunity to upgrade and maintain professional competence"*
2. Providing social interaction that increases member participation in Section activities as a whole, while striving to maintain the integrity of the Section
3. Promote Collaboration between Study Groups
4. Exchange experiences and best practices
5. Study Groups joining forces
6. Collaborative events with other organizations

7- General Study Group Guidelines and Recommendations

8. Seek out sponsorships for events
9. Sponsorship funds _should be paid "before"_ using their logos on event pages, email blast or social media.
10. Pursue opportunity to provide 1 "big event" (seminar, assembly, meetings, congress, session, conclave, quorum, etc.)
11. SPE Event Naming Policy
   – Our customers should know from the event title what content is covered and in what format.

8- In Person Events- Guidelines

1. Each SG and Committee should assign a person to be responsible for handling/set up/pick up and return the webinar equipment
2. Communicate with Vice-chair to allocate/return equipment
3. Covid19 Safety Protocols
4. Each SG and Comm need to review their contracts and exit-clause

Before the meeting/event

1. Secure/confirm speaker
2. Define pricing (follow guidelines as a minimum)
3. Will the event be sponsored?
    – Define sponsorship level
    – Confirm sponsorship/donation before placing logo on advertisement
4. Prepare event advertising
5. Is it a Webinar? → coordinate and prepare equipment, set up
6. Remote presentation → prepare Zoom/GoToMeeting event
7. Ensure speakers follow non-commerciality policy"

What Happens Before The Meeting / Event

- **Create the event on the GCS Website**
  - If you have set dates then add placeholders

- **Connect Online Newsletter Submission**
  - SG Chairs will be emailed the form to submit
  - Prior to the newsletter being published the SG chairs will receive a PDF copy to re view.
  - GCS Communications Teams will submit Social Media posts based on
        Events on the GCS calendar.

- **Ensure venue is ready for meeting / event**
  - Confirm dates and numbers
  - Finalize contracts, if needed

What happens at the meeting/event

1. Call presenter to ensure he/she is ready
2. If it is a webinar – must arrive on site 1 hour before the event to set up and test equipment
   – Equipment information and set up details to be provided by Programs
3. Log in at least 15 minutes before event start time
   – Set power point presentation on auto-mode to display event info or other events info
4. Monitor attendees on waiting room
5. Start meeting on time, set up a Q&A room at the end
6. Deliver a brief intro (2 min)
7. Don't let the meeting run over the published time. Close the meeting out and say the speaker will be here for a few minutes to answer any further   questions.

What happens after the meeting/event

1. It's important that the SG treasurer submit their check request in Nexonia ASAP

2. It takes awhile to get the approvals, process the checks, get them signed and mailed.

3. Return the webinar equipment

4. Prepare/edit video to be posted on the GCS library, submit to Programs Chair and Vice-Chair

5. If possible, share some content from the event on the GCS Social media accounts (LinkedIn, Instagram)

9- SPE Distinguished Lecturer Program

- **SPE sends out the "next" year list in JANUARY**
- Section Program Chair creates the "ballot" and sends to the SG Chairs and SG Program Chairs
- SG's vote for their preferred lectures
- Section Program Chair sends in our top 10 lecturer list
- SPE sends out the final lecturer results to the sections
- Section Program Chairs reviews the ballots that were returned and allocates DL's to the appropriate SG **(if you did not return a ballot you will not be considered for a DL).**
- CONFIRMED – October 26th 2020, 12am
  - Dr. Leen Weijers
  - Fracture Model Calibration for Conventional and Unconventional Rocks
  - Contact person: Kanat Iskaliyev

Who is Going to Help Me?

1. The past Study Group Programs Chair

2. The study group Chairman, Vice Chairman, Registration Chair, Programs, Facility Chair, etc.

3. The GCS Section Programs Chair

- Carlos Torres ctorres@roes.online

5. The GCS Section Vice Programs Chair

- Bharath Rajappa Bharath.Rajappa@conocophillips.com

4. The GCS Director of Study Groups

- Leslie Malone lesleahmalone@gmail.com

5. The GCS Section Administrator

- Kristen Washam Spe-gcs@spe.org