Guidelines for the SPE Technical Report Series of Publications

An SPE Technical Report is a publication developed to present technical and engineering information on a **controversial** topic where publication of the consensus of engineering knowledge and practice would be of benefit to the public and the SPE membership.

SPE's mission is to collect, disseminate, and exchange technical knowledge concerning the exploration, development and production of oil and gas resources, and related technologies for the public benefit; and to provide opportunities for professionals to enhance their technical and professional competence.

To achieve its mission, SPE publishes Technical Reports when there is a clear need for either (1) an evaluation of the state of technology or (2) technical guidance on issues of importance to the industry. Input from subject matter experts (SMEs) is gathered to develop the Technical Report, either through an SPE Summit that brings SMEs together for discussion or through a specially formed committee. Before an SPE Technical Report can be published, a draft report is made available to SPE members for review and comment. Member comments are considered in the final development of the report. Each Technical Report is vetted and approved by the SPE Board before publication.

Proposal Process

Any SPE member can propose development of a Technical Report, or the SPE Board of Directors can initiate a Technical Report on a specific topic. In either case, a Proposal (Appendix A) is completed and submitted to the SPE President for consideration by the Board Committee on Communications and Knowledge Sharing (CKS).

Stage	Action
Proposal	Submitted by any SPE member or member of the Board
Board Approval	Goes to CKS and then to full Board; TD assigned
SME Input	SME (Author) Committee and Review panels formed; may hold Summit to obtain broader input
Draft	SMEs develop draft
Reviewer Input	Comment period for 30 days
Revision - Draft 2	SMEs review comments and revise document
Minor Staff Edit	Allow 2-3 weeks
Board Approval for Posting	CKS approval to post for public comment – allow approximately 2 weeks
Public Comment	Public comment period – 30 days – begins with required announcement in JPT
Revision – Draft 3	SMEs review comments and revise document
Authors respond to comments	Must be done within 15 days from close of comment period
Staff Edit	Allow at least 4 weeks
Author Approval	SMEs approve edits and create final document
TD Approval	Technical Director approves final document
Board pre-read	Final due for Board pre-read; deadline cannot be changed (usually March/June/September)
Board Approval	CKS, then full Board approves final document
Publication	Published on SPE.org with announcement and awareness campaign

If approved by the Board Committee on Communications and Knowledge Sharing and the full Board, a Technical Director on SPE's Board of Directors is assigned to manage the process of developing the Technical Report. The Technical Director appoints a Chairman and committee of SMEs on the topic. The committee should consist of a

minimum of three authors with different affiliations. The names and affiliations of the committee should be made public.

The Technical Director should select a review panel of additional subject matter experts, independent of the authors, who increase the diversity of backgrounds involved in creating and vetting the Technical Report. The names and affiliations of the review panel should be made public. The review panel should contain a minimum of five members with different affiliations.

The Technical Director serves as an advisor to the SME committee, is notified of and invited to attend all meetings, and is provided all notes from meetings. The committee establishes and documents the consensus knowledge and practices on the topic. If the committee deems it necessary, this could involve holding a Summit to gain viewpoints from a broader group of industry professionals.

The committee produces a draft document to be provided to the independent review panel for a period of 30 days. The authors and reviewers must reach a consensus on the report contents within an additional 30 days. The Technical Director has the authority to reconcile differences of opinion.

Following the author and reviewer consensus, the revised draft is posted on the SPE website for member comment. The Technical Director must agree that the document is ready to be posted for member comment and the appropriate SPE Board Committee must approve. Notice of the draft will be communicated to SPE professional members via the Journal of Petroleum Technology (JPT) and SPE Technical Community sites, in local section communications, and through other feasible communication mechanisms. Public comments must be received within 30 days of notice in the JPT. All public comments will be made available publically on SPE.org.

After the comment period, the committee will review the comments received and consider revisions to address them. The committee is required to acknowledge receipt of and action taken (if any) in response to each public comment within 15 days of receipt of the comment. Actions will be made available publicly on SPE.org.

The final version of the Technical Report will be reviewed by the Technical Director for appropriateness and the report will then be proposed for approval to the SPE Board. If approved, it will be published as an SPE Technical Report.

Technical Reports will be available for free download from SPE.org and OnePetro. Publication of the report will include announcements using the same methods for soliciting public comment. The committee may also recommend potential strategies for publicizing the existence of the report The report will reside on SPE.org in a manner that allows continuing comment/discussion by members and the industry.

Technical Reports will be published as SPE publications attributing the names and affiliations of the authors, editors, and independent reviewers. Each one will include the following statement of purpose:

This report represents the consensus viewpoints of subject matter experts and is intended to provide useful guidance to SPE members, the industry and the public.

SPE Technical Report Update Process

SPE Technical Reports will be reviewed on an established schedule set by the Board based on the recommendations of the originating committee and updated when required by advances in technology. The committee will be reconvened or a new committee of experienced professionals in the topic formed to perform the review and, if necessary, the revision. The review committee will consider any comments on the Technical Report that have been submitted since publication. The Technical Directors are charged with ensuring periodic review of Technical Reports. Updates follow the same process as the initial development of a narrative, with a draft revision posted for comment for at least 30 days. Each narrative will include a publication month and year on the front page indicating the time of the last update.

Appendix A - SPE Technical Report Proposal Format

The SPE Board will consider topics that meet one or more of the following criteria:
- Technical, engineering solutions are needed to address the topic.
- The topic is of global concern and the Technical Report will have global applicability.
- Risks to safety or the environment are involved.
- The issues affect the industry's access to resources on a global scale.
- The topic is not already being adequately addresses by other organizations.
- Time and resources are available to develop a Technical Report.

Complete the form below to propose development of a Technical Report. Submit to techreports@spe.org.

Topic:

Description:

Questions for Board Consideration:

1. Why is a Technical Report needed? How will it be useful to the industry?

2. In what way is this topic controversial?

2. In what region(s) of the world are the issues related to this topic most critical? Are there other regions where the Technical Report would be applicable?

3. What are the key technical issues requiring solutions?

4. What are the implications of not producing a Technical Report on this topic?

5. Are any other organizations developing a publication on this topic?
   a.   If yes, why should SPE initiate its own publication?
   b.   Is coordination with another organization(s) needed? If so, how will it be accomplished?

6. Are volunteer resources available to work on developing this Technical Report? Is a willing Chairman identified? If so, please name. Also list others willing to participate.

7. How urgent is this issue? What is the time frame for developing a Technical Report?

8. Will a summit be held on this topic or can the report be developed through a series of more informal conference calls and meetings? (A summit is an event intended to broaden input into the report beyond the committee, where attendees will be required to apply/register with a fee.)

9. Please provide any other information that is pertinent to the proposal.