SPE FORUM SERIES MANUAL

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INTRODUCTION

SPE Forums are about the future. They are collaborative, idea-generating meetings that stimulate new ideas and innovation to meet upcoming challenges to the E&P industry. Thought leaders are invited to participate in a week-long exploration of the future and how to shape it.

SPE Forums are unique, limited attendance events that bring together top technologists, innovators, and other stakeholders to address specific industry challenges. Successful forums require active participation from all attendees. Forums gather the best minds to exchange thoughts and views and produce revelations and new ways of looking at things that could not otherwise be achieved.

Unique Purpose. Forums are unique from other SPE workshops and conferences because they focus on the future and things that haven't been done before.

Conferences are about what has been done in the past. Speakers present what they did, the results of their actions, and their conclusions based on those results. SPE workshops focus on the current application of technology. Speakers talk about current best practices and technologies used in the field now.

Forums are about the future. Participants focus on where the technology needs to go rather than what has already been done, generate ideas rather than solving problems, and have peer-to-peer discussion rather than presentations.

Informal Format. The Forum format is intended to create an atmosphere that encourages the open exchange of thoughts and views among all participants.

- Forums are "off-the-record" with no papers presented. Extensive notetaking is prohibited.
- Forums are held in a relaxed, informal setting, either in-person or virtually. If virtual, plan networking sessions, either in-person or virtual.
- Forums are limited to 50-75 invited participants who are encouraged to contribute to all sessions. It is considered an honor to be invited to attend a Forum as it is a clear indication that an individual is recognized as an authority or future thought leader on the subject.
- Forums are fully residential, and participants are expected to attend the full duration of the Forum.
- Forums discourage lengthy use of slides and encourage maximum discussion.
- Forums provide opportunities for networking outside the session room through social events, joint meals, and breaks.
- Forums are international in scope, drawing technical leaders worldwide.

Useful Guidelines. The Forum Guidelines (See Supplement A on page 13) and this manual have been developed and continually updated to reflect the experience of more than 40 years of holding Forums. They reflect the practices that numerous Forum Chairpersons and Steering Committees have found work best to achieve the objectives of the Forum Series to stimulate thought, innovation, and discussion.

The key to a successful Forum is to follow the guidelines and the advice in this manual.

FORUM TOPIC AND CHAIRPERSON SELECTION

Topics for Forums are recommended by a Forum Series Implementation Committee (FSIC) and approved and accepted by the Forum Series Coordinating Committee (FSCC). These topics are from suggestions by the Technical/Regional Directors, past Forum participants, committee members, and other SPE members. At the end of each Forum, participants are asked to suggest topics for future Forums.

SPE Technical/Regional Directors may be asked by an FSIC for recommendations for Forum Chairpersons or to assist the individual forum chairpersons early in the forum planning cycle. There may be an opportunity for a Technical or Regional Directors to act as Co-Chair or committee member at a Forum or attend a Forum during their tenure.

Then, the FSIC recommends Co-chairpersons to the FSCC. Finally, they are accepted and approved by the FSCC. Co-chairpersons are selected based on their knowledge and experience in the technology and ability to work with other volunteers to develop and implement the Forum.

FORUM LIAISON APPOINTMENT

A member of one of the Forum Series Implementation Committee will be assigned to act as the Forum Liaison. The Liaison's job is to provide advice and guidance on the process of developing a Forum, the guidelines, and best practices gained from his/her experience while attending and developing past Forums. Very often, the Liaison has been instrumental in not only identifying the Forum topic, but also developing the approved abstract.

Each Forum Chairperson should contact the Liaison appointed to his/her Forum and arrange for the Liaison to attend Steering Committee meetings.

FORMING A FORUM STEERING COMMITTEE

Each Forum Chairperson(s) forms a Steering Committee to develop the technical program for the Forum. It is important that the committee cover both a level of expertise needed and all-important audiences that should attend the Forum. Criteria for committee members include:
- Knowledge of the subject. (Avoid experts who might tend to present or instruct rather than leading discussion.)
- Connections within the field. (Someone who can identify potential discussion leaders and participants. Target technical managers who make things happen.)
- Availability to attend Steering Committee meetings. (Attendance at the first Steering Committee meeting is essential.)
- Identification and inclusion of future thought leaders from the young professional (YP) ranks is strongly encouraged.
- Geographic and company representation. (The committee should include a cross-section of the Forum's audience to ensure all pertinent viewpoints are covered and have connections for potential discussion leaders and participants.) Forums are international, not regional, and the steering committee should reflect this fact.

In forming a Steering Committee, the Chairpersons should:
- **Plan for 12 or more committee members** so there are sufficient members to act as Session Managers for the nine Forum sessions. **Select a "right hand" on the steering committee if there is not a Vice Chairperson or Co-chairperson.**

- Contact the appropriate Technical or Regional Director, Technical Interest Groups, the Forum Liaison, and/or SPE staff if you need assistance in finding people willing to serve on the Steering Committee.

STEERING COMMITTEE SCHEDULE

To hold the Forum on the scheduled dates, and to ensure adequate promotion of the Forum to attract participants, the Steering Committee must meet the deadlines in the Forum Production Schedule.

12 Months Out	Chairpersons form Steering Committee.
9 Months Out	▪ Conduct first (Kickoff) Steering Committee meeting. ▪ Produce tentative technical agenda. ▪ Identify people who should attend the Forum keeping in mind that the purpose is not to build consensus but to create a better future. Diverse views and experiences are required to conduct a successful forum.
6 Months Out	▪ Conduct Second Steering Committee meeting (May be a series of meetings used to develop the technical agenda) ▪ Technical agenda refined. ▪ Discussion Leaders identified. ▪ Promotional brochure produced and distributed to target audience specified in Forum abstract. ▪ Steering Committee members recruit applicants to attend the Forum.
5 Months Out	▪ Technical agenda further refined. ▪ Discussion Leaders confirmed. ▪ Steering Committee members continue to recruit applicants to attend the Forum.
3 Months Out	▪ Technical Agenda finalized and posted on SPE.org. ▪ Application deadline ▪ Conduct Third (Application Selection) Steering Committee meeting. ▪ Finalize list of applicants to invite to the Forum.
1 Month Out	Registration/payment deadline (subject to contract deadlines)
2 Weeks Out	Technical Agenda printed for onsite packets.
Forum Begins	▪ Steering Committee meets with Discussion Leaders prior to the start of the Forum. ▪ Poster Chairperson meets with poster presenters prior to the start of the Forum on the day of arrival.
Within 1month after the Forum	▪ The Steering Committee collects and reviews the survey results. ▪ The Chairperson and Liaison reports are due to the SPE staff.

DEVELOPING THE TECHNICAL AGENDA

The heart of a Forum is the Technical Agenda. This document describes the technical content of the Forum sessions. The Forum Chairpersons are responsible for developing the Technical Agenda, which is comprised of half-day sessions, based on the number of days of the forum. The Technical Agenda must stay within the general scope and description in the original abstract that was approved by the FSCC for the Forum. However, the abstract and title may be slightly modified during the first Steering Committee meeting, and then re-approved by the appropriate FSIC via the FSIC Liaison.

A minimum of three Steering Committee meetings are needed, although some committees meet more often. The Steering Committee is suggested to meet face-to-face for the first meeting, as well as the third, selection meeting. Committees often have interim teleconference meetings as well.

First (Kickoff) Steering Committee Meeting

Goals:
- Review the Forum Guidelines so that all Committee members understand the purpose of the Forum and the rules.
- Fine-tune the title and abstract, if necessary.
- Determine the topic(s) for each of the half-day sessions (2 per day, based on the number of days of the forum).
- Assign Session Managers for each session -- committee members who will be responsible for the following tasks before the next committee meeting:
  - ☐ Determine the format and content of the session.
  - ☐ Write a brief two- or three-sentence session description.
  - ☐ Identify and invite discussion leaders (usually three per session).
- Start a list of potential Forum participants – Who should be at this Forum? Experience should be balanced with emerging talent.
- Set dates for the next Steering Committee meeting.
- Review action items at the end of the meeting to ensure everyone understands what is expected of them and when.

Tips to developing a compelling Technical Agenda:
- Determine the flow from one session to the next.
- Be creative with the afternoon and evening sessions. Arrange for evening sessions to be the less-intense ones or have a fun format to keep participants engaged.
- Have Session Managers develop their own sessions and take ownership for their success.
- Emphasize new, emerging technologies and novel applications of older technologies.
- Emphasize on the technical content instead of the Discussion Leader.
- Hold a breakout session early in the week to allow interaction and relationship building.
- Give a boost on Thursday morning with a high-interest or active session.
- Leave time for unscheduled discussions. A "parking lot" where issues are parked for further discussion later is a good idea.

Second Steering Committee Meeting – May be a series of meetings

Goals:
- Finalize the Technical Agenda, name Discussion Leaders, and confirm session format.
    - ☐ Have Session Managers present their session plans, including discussion topics, Discussion Leaders, and any breakouts.
    - ☐ Avoid using the same Discussion Leader in more than one session. Last-minute cancellations sometimes occur, and the hole left in the program can be large if that person had a key role in several sessions.
- Ensure continuity and focus from session to session.
- Designate a Poster Chairperson if posters are to be part of the Forum. (See Poster Session Section on page 11.)
- Discuss financial support to offset registration for individuals who are important to the Forum. These persons are individuals who would not be able to attend otherwise. (See Forum Guidelines on page 13.)
- Review the technical agenda.
- Notify SPE staff of facilities requirements, such as room setup, audio/visual equipment, or breakout rooms.
- Review action items to ensure everyone understands what is expected of them and when.

Third (Application Selection) Steering Committee Meeting

Goals:
- Review applications, finalize the list of invited participants, and rank the waiting list.

    Forums are limited to about 75 participants, with a minimum number of approximately 50 persons, including Steering Committee members and Discussion Leaders.

Forum Chairpersons	2
Steering Committee Members	12
Discussion Leaders (3 per session)	27
Other Participants	34
Total	75

- Assign Steering Committee members to follow up with selected participants who the committee wants to ensure attend the Forum.
- Finalize last-minute details on the Technical Agenda such as Discussion Leader slides, posters, or breakout sessions.
- Plan any Steering Committee onsite meetings that would occur during the Forum.
- Discuss ice breakers. Ice breakers can be held before dinner during the opening evening reception, or after the opening evening dinner. They create interaction and interject fun and humor. If desired, assign an ice breaker Chairperson.
- For multidisciplinary Forums, consider ways to provide a background to get everyone on the same page. Poster sessions, pre-reading material, or optional tutorials outside Forum sessions are possibilities.
- Review action items.

MARKETING FOR THE FORUM

A large portion of Forum participants respond to personal invitations from Steering Committee members. Nothing is as effective as a personal invitation from a colleague to apply. However, SPE also markets the Forums. Adherence to the production schedule is necessary to enable SPE website marketing.

Topics of Forums to be held during the next year are posted on SPE.org. As dates and venues for the Forums are confirmed, they are added to the event calendar on SPE.org.

A list of upcoming Forums appears in the [Forum Series website](#).

An application document is produced for the Forum. The document is distributed via the individual forum website to the public. Emails concerning applications are made available to Steering Committee members so they can solicit application from colleagues.

GUIDANCE FOR SESSION MANAGERS

Prior to the Forum
- Finalize your session description and Discussion Leaders before the second Steering Committee meeting.
- Finalize your session format. Sessions can vary from full plenary sessions to breakout sessions to round table discussion sessions. Sessions should be formatted to best encourage discussion around the subject matter.
- Select Discussion Leaders who are good facilitators, can provoke thought and adjust to the flow of the discussion.
- Make sure Discussion Leaders understand that the Forum should encourage discussion and not presentation (maximum of 10-minute talk with 3 to 4 slides).
- SPE staff will provide invitations to discussion leaders after confirmation through the session managers.
- Identify key issues for the Discussion Leaders.
- Training will be provided to Discussion Leaders by the SPE staff.
- Encourage Discussion Leaders to be controversial.
- Remind Discussion Leaders not to rely on past work but to focus on the future.
- Review the Discussion Leader's material prior to presentation. Common faults include material that is too formal, has too many slides, or is too conclusive.
- Communicate to your Discussion Leader the need to avoid commercialism including the use of logos.

During the Forum
- Accept impromptu contributions from the floor. These discussions must be noncommercial and concise (3 minutes maximum).
- Ensure that slides/discussions are focused but they should be flexible if the discussion is worthwhile.
- React immediately when main rules are infringed (extensive notetaking, commerciality, focusing on the past, or too long a presentation).
- Engage all participants. Draw out those participants who are quiet or are "low participators."
- Delegate roles such as breakout facilitator, or someone with planted questions to targeted participants.
- Fine tune as the Forum progresses.

During Breakout Sessions
- Limit breakout groups to a maximum of four per session to ensure adequate time for reporting back to the entire Forum. Mini-table breakouts for brief (5-minute) discussions are encouraged, as are longer table discussion periods.
- Give clear directions, expectations, rules, and objectives before breaking into groups.
- Pre-select breakout members to ensure you get desired results. Mix people during the week to encourage relationship building.
- Spread Steering Committee members among the breakout groups to stimulate discussion. Plant some "live wires" in each group.
- Nominate breakout facilitators based on skills to lead discussion groups. They should be adaptable to direction of the discussion.
- Select a scribe for the breakout group. (This is a good way to involve all participants.)
- Have breakout groups report back to the full Forum.
- Make sure you allow sufficient time for discussion of group reports and for overall discussion.

Typical breakout session schedule:

Subject introduction and discussion of breakout assignment	30 minutes
Breakout group meeting	45 minutes
Coffee break	30 minutes
Two group reports	15 minutes
Discussion	15 minutes
Two group reports	15 minutes
Discussion	15 minutes
Overall discussion and summary	15 minutes

HOW TO HAVE A GREAT FORUM

More than 40 years of experience have led to many lessons learned.

What Makes a Successful Forum?
- Select Steering Committee members who are diverse, committed, and well-connected.
- Select Steering Committee members who can manage the session effectively.
- Establish objectives at the first Steering Committee meeting.
- Emphasize the need for a thorough briefing of Discussion Leaders, using and enforcing the Forum Guidelines (Supplement A, page 13).
- Limit Discussion Leaders to 10-minutes and 3 to 4 slides.
- Ensure a maximum of three Discussion Leaders per session.
- Gain participation by **all** participants through breakout sessions and poster sessions.
- Maintain a high ratio of participant discussion time to Discussion Leader time.
- Use poster sessions to provoke new ideas, stimulate fresh discussion, and save subject introduction time.
- Manage sessions firmly and avoid lengthy blind alleys.
- Avoid domination by one or more individuals, prohibit commercialism, and ruthlessly stamp out personal attacks and fruitless argument.
- Select participants carefully. Seek a balance of company and geographic origin. Identification and inclusion of future thought leaders from the young professional (YP) ranks is strongly encouraged.
- Remember that the goal of the Forum is not to achieve a consensus of opinion.

What Makes a Disastrous Forum?
- Lack of commitment by Steering Committee members.
- Ignoring the Forum Guidelines.
- Having a Steering Committee with predetermined solutions. Failure to respond to participants' expectations by not understanding what they are and then providing time to address them.
- Inflexibility in scheduling. It is essential to provide time to deal with relevant trends or ideas that emerge during the Forum.
- Having too little discussion time.
- Permitting personal agendas to intrude or allowing a few "experts" to dominate discussions.
- Not actively engaging the quieter participants.
- Forgetting that at the majority of SPE Forums, the English language is the primary language for fewer than half the participants. The Chairpersons must remind all participants, Session Managers, and Discussion Leaders of this fact and encourage them to speak slowly and clearly and avoid slang phrases and jargon.

POSTER SESSIONS

Poster sessions can be a good way to review technical details and case histories that provide background. This is particularly useful for multidisciplinary Forums with participants from many technical backgrounds who need a better understanding of the other technologies to improve their participation in the Forum.

If a poster session is desired, the Steering Committee should assign a committee member to chair the session. The Poster Chairperson will develop the session, including soliciting posters and managing the session onsite.

Commercialism should be minimized. The Poster Chairperson should review all posters before the Forum. Unscheduled posters can be invited, but they should also be managed by the Poster Chairperson to minimize commercialism and ensure focus.

SPE staff will include a Poster Participation Form in the materials sent to accepted participants. This form asks participants to notify SPE if they would like to submit a poster.

AFTER THE FORUM

Forum Summaries. A Forum Steering Committee may elect to prepare a written summary of the major issues and opinions arising from the Forum for distribution to Forum participants after the Forum. The website will publish whether the forum will or will not have this optional summary report. The summary must be approved by the Forum Liaison as a Forum Series Implementation Committee (FSIC) representative before distribution.
Again, remember that this summary simply records major discussion points. There is no need for a consensus of opinion.

If a summary is desired by the Forum Steering Committee, Session Managers should summarize each session at the end and take notes for the summary. The summary should be one-page in bullet-style without detail. No quotes will be included in the summary. Each summary may capture information in six general categories:
- Management issues
- Research issues
- Practical engineering issues
- Issues of highest priority
- Issues that are least understood
- Novel ideas form the session

Session Managers will submit their summaries to the Forum Chairpersons, who will compile them into a summary and submit it to SPE staff. The Forum Chairpersons will not distribute the Forum Summary. SPE staff will coordinate the approval of the summary by the Forum Series Implementation Committee and distribution to Forum participants.

Chairperson and Liaison Reports. Forum Chairpersons are required to prepare a report of the Forum and submit to SPE staff. A form for preparation of this report can be found on page 23. The report should include what methods worked best to encourage discussion and meet the objectives of the Forum and what didn't work or went wrong. The Forum Liaison submits a report on the Forum as well. The Forum Series Implementation Committee (FSIC) and the Forum Series Coordinating Committee (FSCC) review the two reports.

SPE STAFF SUPPORT

SPE staff supports the Steering Committee in developing the Technical Agenda and identifying participants.

- Attends Steering Committee meetings to provide information, guidance, answer questions, and take meeting notes.
- Prepares and distributes Steering Committee meeting notes.

In addition, SPE staff manages the arrangements for the Forum.

- Selects site, facility, and service contractors, and makes all arrangements with them.
- Establishes registration fees and housing costs and Forum budgets.
- Coordinates SPE Forum marketing, including development and distribution of application brochures.
- Manages the application and registration process.
- Attends the Forum to manage onsite logistics with the facility, room accommodations, catering services, and contractors.

Supplement A
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 after 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 latest list of disciplines are found [here](#).

   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. The FSIC canvasses SPE Section Chairpersons and Technical and Regional 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 by the technical disciplines found here.

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 22 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 current SPE Forum Series Implementation Committees (FSICs)–Europe and Americas – 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. The FSIC will work with the Technical Directors to place at least one FSIC member on each of the current advisory committees. The Technical/Regional Directors and the FSIC will work together to fill the areas on the advisory committees that are underrepresented.

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.

The Asia Pacific Regional Advisory Committee (APRAC) and the Middle East Regional Advisory Committee (MERAC) would act as regional FSIC to review forum ideas and then send potential Forum abstracts to the FSCC for input before the individual forums were implemented locally. Staff will facilitate any communication between APRTAC or MERAC and the FSCC as appropriate.

These forums could be titled Regional Forums to differentiate them from FSCC approved forums. Feedback/ results of Regional Forums will be shared with FSCC.

d.   SPE membership is encouraged for the position of Forum Chairperson.

e.   The Forum Chairpersons shall form a steering committee to develop the Forum agenda and conduct the Forum sessions. A majority of the committee should 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 Chairpersons should attend a meeting for Forum Chairpersons on planning, organizing, and conducting SPE Forum Series meetings that is coordinated by SPE staff. If the Forum Chairpersons are

unable to attend the meeting, the FSIC Liaison will coordinate adequate training to educate the Chairpersons on their role.

    b.   The Forum Chairpersons have 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 18.)

    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, except for the Steering Committee members, will be selected based on 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. Identification and inclusion of future thought leaders from the young professional (YP) ranks is strongly encouraged

    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 20).

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 sent only from the SPE staff.

     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 housing costs 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 notetaking is forbidden.

     d.   Publication of information disclosed at an SPE Forum is prohibited without written approval from the originator. (The originator is free to and is encouraged to publish his/her own contribution.)

e.   A Forum Steering Committee 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. 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 may 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, either in-person or virtually. If virtual, plan networking sessions, either in-person or virtual.

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 notetaking 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 Chairpersons should open the meeting by introducing the Steering Committee members and representatives from SPE. The Chairpersons and Forum Liaison 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 USD 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 Managers, 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 "full registration fee."

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 USD 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 USD 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.
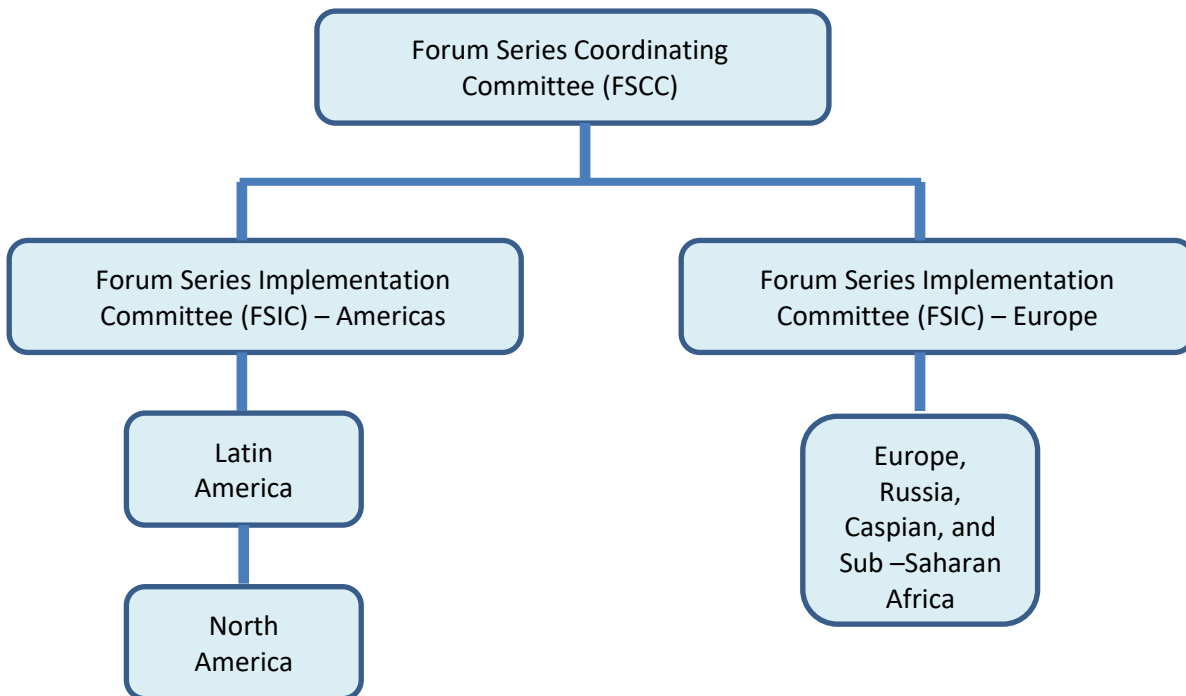
SPONSORSHIP

1. A set of sponsorship opportunities should be offered on the forum website.

2. As an optional sponsorship opportunity, a company may provide their facilities for a Forum venue. If so, the company will be recognized as the venue host.

MARKETING

1. The SPE staff is responsible for conducting marketing for the Forums.

2. Each Forum should 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 and housing costs 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.

Forum Series Organizational Chart

```
                    ┌─────────────────────────┐
                    │ Forum Series Coordinating│
                    │    Committee (FSCC)      │
                    └─────────────────────────┘
                               │
            ┌──────────────────┴──────────────────┐
┌─────────────────────────────┐      ┌─────────────────────────────┐
│ Forum Series Implementation │      │ Forum Series Implementation │
│  Committee (FSIC) – Americas│      │  Committee (FSIC) – Europe  │
└─────────────────────────────┘      └─────────────────────────────┘
            │                                      │
   ┌─────────────────┐                   ┌─────────────────┐
   │      Latin      │                   │     Europe,     │
   │     America     │                   │     Russia,     │
   └─────────────────┘                   │  Caspian, and   │
            │                            │  Sub –Saharan   │
   ┌─────────────────┐                   │     Africa      │
   │      North      │                   └─────────────────┘
   │     America     │
   └─────────────────┘
```

Currently, there are no FSICs for:

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   ┌─────────────────┐   ┌─────────────────┐
   │  *Asia Pacific  │   │  *Middle East,  │
   │                 │   │  North Africa,  │
   │                 │   │    and India    │
   └─────────────────┘   └─────────────────┘
```

*The Asia Pacific Regional Advisory Committee (APRAC) and the Middle East Regional Advisory Committee (MERAC) would act as a regional FSICs.

Forms and Form Letters

FORUM CHAIRPERSONS' REPORT

Forum Title:

Forum Dates (note days of the week):

Steering Committee

Steering Committee Chairperson(s):

Number of SC Members: Number of SC meetings held:

Steering Committee Breakdown

Number of Operators	Number of Service Companies	Number of Universities	Number of Government Agencies	Number of Other Industries	Number of YPs

Conduct of the Forum

Number of scheduled discussion leaders per session:

☐ Easy   ☐ Difficult to secure and retain DLs

Comments:

Any sessions used to achieve a common background?   ☐ yes   ☐ no

Break-out Session(s):   If yes, how many?
What type of break-outs were organized and for which sessions?

Poster Session: If yes, how many posters?
How were the posters organized (displayed all week, a poster session during reception, at lunch-time or during a session)? If there was a specific poster session, what was the time and day?

FORUM CHAIRPERSONS' REPORT

Wrap-up Session: ☐ yes ☐ no   Attendance (%) of this session? ☐

Optional Summary Report: ☐ yes ☐ no
Comments:

☐

What went right? Any new insights on implementation? Any new activities?

☐

What went wrong? Any outstanding occurrences?

☐

Additional Comments and Suggestions:

☐

For Staff to Complete

Applicants
Number of applicants ☐

Participants

Africa	☐	Middle East	☐
Australia	☐	North America	
Asia	☐	South America/Caribbean	☐
Europe	☐		

Participant Breakdown:

Number of Operators	Number of Service Companies	Number of Universities:	Number of Government Agencies	Number of Other Industries	Number of YPs

FORUM SERIES IMPLEMENTATION COMMITTEE LIAISON REPORT

Name of FSIC Liaison Completing This Report:

Forum Title:

Forum Dates:

Opening Comments:

Planning Phase

Number of days of the forum:

Was this a ☐ cross-disciplinary or ☐ single disciplinary forum?

Any sessions used to achieve a common background? ☐ yes ☐ no

Any planned breakouts or poster sessions? ☐ yes ☐ no

Any other unusual plans? ☐ yes ☐ no

Comments on Planning Phase:

FORUM SERIES IMPLEMENTATION COMMITTEE LIAISON REPORT

Implementation Phase

Any new insights on forum implementation – new activity, etc? ☐ yes ☐ no

What went right?

What went wrong?

What tools such as Audience Response System (ARS) were used? ☐ yes ☐ no

Any outstanding participants to note as future FSIC members? ☐ yes ☐ no

Comments on Implementation Phase:

SAMPLE FORUM DISCUSSION LEADER INVITATION LETTER

[date]

[Name and physical address]

Subject: **SPE Forum Discussion Leader Invitation**

Dear [Name]:

On behalf of the [20xx] SPE Forum, *"[Forum Name],"* we would like to invite you to serve as a Discussion Leader. This forum is scheduled for *[date]* in *[location with country].* Your invitation was based on your reputation as a leading professional in your field and your ability to share critical knowledge of the oil and gas industry.

Approximately 75 attendees will be selected based on their ability to contribute to the forum, as judged by consensus of the Steering Committee from information supplied on the application forms.

Attached are Discussion Leader Guidelines to assist you in your preparation for this role. One of the key responsibilities you will have is to minimize the formal presentation, while maximizing discussion among attendees. Your session managers and SPE staff will be available at all times to assist you in your endeavor. There will be a Discussion Leader training prior to the Forum. This training will be held via teleconference. More information will be sent out to you in the next few weeks.

All Discussion Leaders will be expected to:
  (1) submit an *[application]* form for acceptance by *[date]*
  (2) submit a registration form with payment **after** application period has ended. You will receive an invitation to register at that time.
  (3) attend Discussion Leader training via teleconference. Here are some resources in the meantime.
      - What is a Society of Petroleum Engineers Forum?
      - What is a Society of Petroleum Engineers Forum Discussion Leader?
  (4) attend onsite Discussion Leader/Session Manager meeting *[Monday]* afternoon before the forum begins

We do require that all participants pay the registration fee of **USD *[XXX]*** for the event. This includes accepted applicants, discussion leaders, steering committee members and the chairpersons as well. You are encouraged to register early to take advantage of the lower fee. The registration price includes most meals. Accommodations are not included in the registration fee, but SPE has arranged a room block to save you time and money. Thank you for your understanding.

SPE and the Forum Steering Committee look forward to working with you. Please feel free to contact us.

Best regards,
[Session Manager Name]   Session Manager Name]
[Session Manager Company]   [Session Manager Company]
[Session Manager email]   [Session Manager email]

Attachment: What is a Society of Petroleum Engineers Forum?
What is a Society of Petroleum Engineers Forum Discussion Leader?

CC: [Chairperson Name], Forum Steering Committee Co-chairperson
           [Chairperson Name], Forum Steering Committee Co-chairperson

What is the Discussion Leader's Role in the Forum?

Promoter (facilitator) of discussion

How Do You Prepare for Your Discussion Leader Role?

- Work with your Session Manager to determine the flow of your discussion and maintain continuity with the other Discussion Leaders in your session as well as with all of the discussions for all of the sessions.
- Develop your discussion slides with your Session Manager well before the forum to resolve any issues.
- Realize that you are a facilitator rather than the subject matter expert.
  - Direct the participants' focus to the topic discussion and each other.
  - Limit the time that the participants are focused on you - speak for a maximum of 10 minutes total.
  - Cover the background of the discussion.
  - Present the problem at hand.
  - Stay away from proposing solutions.
  - Limit slides to 3-4; never more than 4.

How is the Discussion Leader's Role Successfully Achieved?

- Be concise during your initial discussion statements.
- Be enthusiastic, motivated, and self-confident.
- Encourage controversy while focusing on the future.
- Be flexible; adjust with the flow of the discussion.
- Use your listening skills to guide people and the discussion.
- Encourage people to talk.
- Conclusions and consensus are not required.
- Ask open-ended questions.
- Do not answer questions.
- Frame the discussion and explore options.

Enjoy your role in the forum!

You are facilitating an elite group of industry experts.
The networking opportunities and stimulating discussion will be unparalleled!

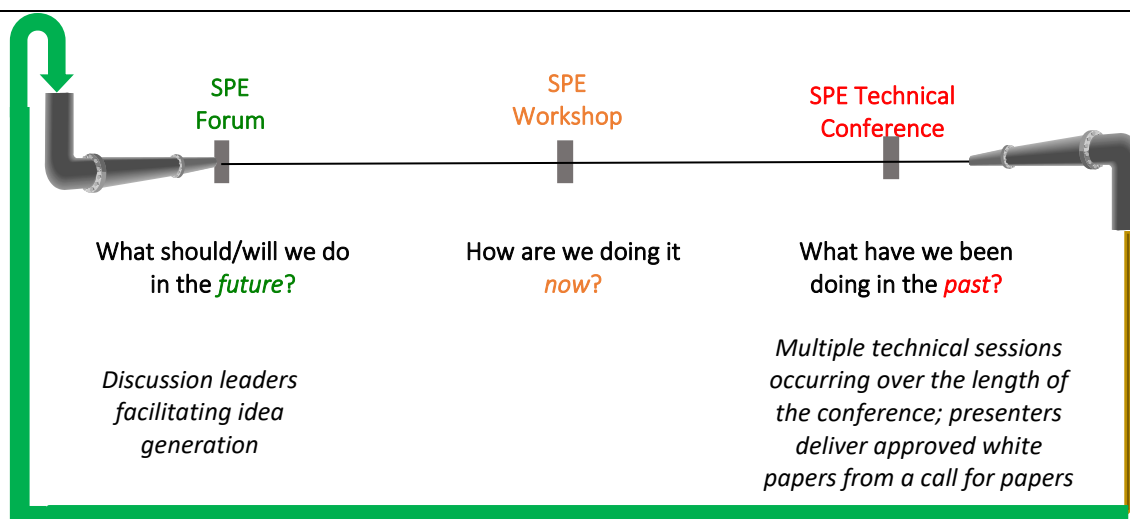## What is a Society of Petroleum Engineers Forum?

- A collaborative, idea-generating event that stimulates new ideas and innovation about **future** of the E&P industry.
- A week-long exploration of the **future.**
- A gathering together of 50-75 of the best minds to discuss new ways of viewing the **future** that could not be achieved individually. Experience should be balanced with emerging talent.
- Focusing on the **future**; where the technology could or should go, generating ideas rather than solving problems, and emphasizing discussion rather than presentation.

What are the SPE Forum Objectives?

- Stimulate thought and accelerate technology development.
- Promote maximum discussion and minimum prepared presentation.
- Maximize the discussion of new advances and minimize reviewing established technology.
- Encourage discussion of new, unpublished, and incomplete work.
- Encourage communication between knowledgeable people from industrial, governmental, and academic institutions and diverse geographical backgrounds and work areas.
- Keep the topics as international in scope as possible.

How is an SPE Forum Different from an SPE Workshop or Conference? In an SPE Forum:

- Industry technical leaders become acquainted and exchange ideas in an informal setting.
- A limited number of participants are selected for their ability to contribute to Forum objectives.
- There is an informal discussion format that encourages unpublished and incomplete results.
- There can be single discipline or multidisciplinary topics.
- The attendees don't solve problems, but rather, they raise and discuss issues.

SPE Forum — What should/will we do in the *future*? — Discussion leaders facilitating idea generation

SPE Workshop — How are we doing it *now*?

SPE Technical Conference — What have we been doing in the *past*? — Multiple technical sessions occurring over the length of the conference; presenters deliver approved white papers from a call for papers

Forum Series Coordinating Committee (FSCC) and Forum Series Implementation Committee (FSIC) Structure/Function

FORUM SERIES COORDINATING COMMITTEE (FSCC)

Structure: The committee comprises five (5) members or 2 per FSIC plus 1 chairperson. Terms for the chairperson and for committee members are three years and are subject to renewal. Appointments are by the SPE President-elect. The Chairperson is generally chosen from among the committee members. Committee members include the Chairpersons of Forum Series Implementation Committee (FSIC) plus at-large representatives. The at-large representatives should have experience in Forum Series programs.

Function: The Committee is responsible for the oversight of the SPE Forum Series program including the planning and conduct of Forums under policies and guidelines approved by the SPE Board of Directors. Specific responsibilities include:

1. Reporting, at least annually, to the SPE Board Committee on Technical Programs and Meetings on plans for the SPE Forum Series program worldwide.
2. Submitting, at least every three years, a comprehensive report on the Forum Series to the SPE Board on recommendations for changes in the program.
3. Submitting annually at the February/March meeting of the SPE Board Committee on Technical Programs and Meetings proposed topics for the following year's Forums.
4. Performing the following functions in an oversight capacity with the Forum Series Implementation Committees (FSICs) - presently Europe and Americas:
    a. selection approval of the Steering Committee for each Forum
    b. reviewing with each Forum Chairperson the development of the program for each Forum, including timetables and schedules that are in accordance with Board-approved guidelines and policies
5. Making decisions on scheduling and format issues regarding individual Forums in compliance with Board approved policies and guidelines.
6. Monitoring the conduct of individual Forums and developing recommendations for changes in policies and guidelines for SPE Board consideration.
7. Preparation of an annual report to the SPE Board on the Forum Series program held worldwide. This report should include an assessment of individual Forums including information on number of applicants and participants, a summary of participant comments, and an evaluation of mechanics.
8. Participate in two meetings a year with one held at the SPE Annual Technical Conference and Exhibition and one early in the calendar year.

Board Committee: Technical Programs and Meetings

FORUM SERIES IMPLEMENTATION COMMITTEES (FSIC)

Structure: Forum Series Implementation Committees consist of six (6) to nine (9) members. There are presently two implementation committees – currently one for the Americas and the other for Europe. Currently, other regions develop forums via regional advisory committees. Terms are three years and are subject to renewal after the three years. The previous Chairperson appoints the Chairperson, usually from among senior members of the committee. The Chairperson also serves as a member of the Forum Series Coordinating Committee (FSCC) along with a second FSIC member-at-large or Vice-Chairperson. Ideally, committee members should have extensive experience with the Forum Series.

Function: Forum Series Implementation Committees have the following responsibilities:

1. Reporting annually to the SPE Forum Series Coordinating Committee (FSCC) on matters involving Forums conducted during the year in the coverage area.
2. Soliciting from the Society membership, including Technical Directors, section officers and Forum participants, topics for future Forums.
3. Recommending topics for Forums during the following year to the FSCC for review and comment, and for subsequent reporting to the SPE Board.
4. Submittal of recommendations for Chairpersons of approved Forums in the area of responsibility to the FSCC.
5. Reviewing with the Chairpersons of each Forum the plans and scheduling for individual Forums. Providing regular reports to the FSCC on the status of planning for each Forum.
6. Ensuring that the scheduling and planning for each Forum is handled in accordance with policies and guidelines adopted by the SPE Board. Making scheduling and format decisions regarding individual Forums consistent with the Board-approved documents and advising the Chairperson of the FSCC of such actions.
7. Reviewing each Forum and submitting recommendations to the FSCC for revisions to Forum Series guidelines and policies approved by the FSCC, such recommendations are submitted to the SPE Board.
8. Preparing and submitting an annual report on the Forums held in the area of responsibility. The report should include the number for Forums held, Forum topics, and evaluations to each Forum by participants, the Forum Chairperson(s), and other Steering Committee members. This report is to be submitted for review by the FSCC and submitted as part of the FSCC's annual report to the SPE Board at the February/March meeting.
9. Participate in at least two meetings a year with one held at the SPE Annual Technical Conference and Exhibition.

Board Committee: Technical Programs and Meetings through the FSCC Standing Committee

FORUM SERIES IMPLEMENTATION COMMITTEES (FSIC) RESPONSIBILITIES

The primary responsibilities of members of Forum Series Implementation are to:

- Identify topics for Forum Series in Americas and Europe. Currently, other regionally based committees determine Forums in the Asia Pacific and Middle East.

- Draft abstracts and include feedback from fellow FSIC members for selected topics.

- Identify suitable Chairpersons for the selected Forum topics.

- Confirm a FSIC liaison for each Forum.

- Follow up with appointed Forum Chairpersons.

- Coach Chairpersons on the rules and expectations of a Forum Steering Committee and the Forum itself.

- Attend Forum Steering Committees meetings – especially the first and the third.

- When required, enforce Forum Series guidelines.

- Attend the Forum itself and act as coach and mentor to the Steering Committee.

The secondary responsibilities of members of Forum Series Implementation Committee (FSIC) are to:

- Review and evaluate past Forums.

- Submit recommendations on how to improve the Forum Series to the Forum Series Coordinating Committee (FSCC).

THE PROCESS FOR PREPARING THE ABSTRACT COVERING AN SPE FORUM

- The abstract is prepared by a member of Forum Series Implementation Committee (FSIC). This individual may become the Liaison to the Forum if the Forum is held during his/her term.

- The abstract is discussed among members of the FSIC. The feedback is incorporated into the abstract, and the updated abstract is sent to Forum Series Coordinating Committee (FSCC) for approval.

- Once a Forum has been approved by the FSCC, the abstract is reviewed at the first meeting of the Forum Steering Committee. Following discussion, the abstract can include

minor changes with the final abstract approved by all members of the Forum Steering Committee and the FSIC.

THE PROCESS FOR APPOINTING A CHAIRPERSON FOR AN SPE FORUM

- The Chairpersons for each SPE Forum are proposed by the FSIC member who writes the abstract.

- The Chairpersons for an SPE Forum are recommended by the appropriate FSIC to the FSCC and approved and accepted by the FSCC.

- The FSIC Liaison meets with the SPE Forum Chairpersons prior to the first Forum Committee Meeting and coaches them on the rules and expectations associated with the Forum.

- If there are indications that a Forum Chairperson is deviating the Forum from the guidelines, either the Forum Liaison and/or the SPE Staff are expected to identify the problem and coach the Chairperson. If coaching fails, the matter should be raised with FSIC.

- Ultimately and at the extreme, if the Chairperson continues to steer the Forum in an inappropriate manner, the FSIC Chairperson has the power to dismiss the Forum Chairperson and appoint a new Forum Chairperson.

THE FORMULATION OF A FORUM STEERING COMMITTEE

- The Forum Steering Committee should be composed of individuals with a passion and deep understanding of the subject.

- The Forum Steering Committee should represent a broad cross-section of industry and include people who work for the operators, major service companies, consultants and where appropriate, the academic world. The Forum Steering Committee should not be dominated by any one section of the industry.

The Forum Steering Committee should include a minimum of 10 and a maximum of 18 people.

Supplement D
Virtual Forum Guidelines

On 21 and 24 July 2020, SPE held a trial virtual forum with the Steering Committee of the previously planned forum on enhanced oil recovery (EOR). Overall, the trial was a success. It was a unanimous view of attendees that the technology and forum flow exceeded expectations. Further, it was a unanimous view that virtual forums are worth doing, particularly during these times when traveling is not possible. After the initial trial in 2020, a series of successful virtual forums were held in 2020, 2021 and 2022. Therefore, virtual forums are a consideration when developing a forum.

Virtual forums have the same core tenets as in-person forums:
- Future-oriented
- Presentation should be short (1 to 3 slides) and solely for the purposes of initiating group discussion
- Actively managed attendee list to ensure all participants will contribute
- Limit commercial discussions (including training DL's and vetting slides in advance)
- Prohibit extensive notetaking

Length and Timing: Virtual forums provide considerable flexibility to cater the length of the forum to the topic. This is one of the most compelling values of virtual forums: it can enable forums on narrower topics that would not have been deemed sufficient to justify an in-person forum. The following are the general guidelines for length and timing of a virtual forum:
- No single sit-down should last more than half a day (to avoid "Zoom fatigue").
- Full event should be a minimum 4 half-days, up to 9 half-days.
- There was no consensus among trial participants on whether the event should happen in sequential days or with free days in between. This can be left to the discretion of the steering committee. However, the whole event should not go on longer than 1 month.
- The trial occurred in sessions that were at most 1.5 hours long. All agreed that this was too short to engage in meaningful discussions. It is recommended that sessions for virtual forums mirror the format of a regular forum, with each session taking a half day (with scheduled breaks) with multiple discussion leaders, enabling ample time for deep discussions on the topic.

Technology and Format: Virtual forums will be hosted by SPE staff in Zoom. The following are general guidelines on technology and format:
- As a rule-of-thumb, forums should be capped at no more than 10 attendees per session. For example: a 7-session virtual forum should be capped at 70 attendees, whereas a 4-session virtual forum should be capped at 40 attendees.
- Zoom has both a chat feature and a hand raise feature. Both were shown in the trial to be effective methods of "managing the mic" for discussions, even in large groups.
- **All participants must have their camera on during forum sessions** and need to be warned that participants without cameras on may be removed. Attendees should be told this well in advance (and given multiple reminders), so they can ensure they have the right tools, appropriate IT security clearance, and are participating from a location with adequate bandwidth to participate via video. If during the forum certain participants do

not have their cameras on, it is the FSIC liaison's role to engage them in a private chat to see why. The liaison should ask SPE to remove a participant if they are blatantly and/or consistently disregarding the camera-on rule. The SPE staff can readmit the person to the virtual forum once they confirm that they can attend with their camera on.

- At the beginning of the forum, the liaison should share forum norms, which include: no extensive notetaking, keep microphone on mute unless talking, keep camera on at all times except breaks, avoid commercialism, and keep discussions focused on the future.

- Zoom has a break-out room feature, which in the trial had unanimously positive feedback as a means of encouraging more intimate conversations. Therefore, **the regular use of breakout rooms during a forum is heavily encouraged**. If the steering committee desires unmanaged free-wheeling conversations in breakouts, the number of attendees in each breakout room should be limited to between 5 and 8 individuals. Larger breakout rooms are possible, but then there needs to be an assigned facilitator and use of chat or hand-raise feature to manage the discussion.

- Zoom has a share screen feature, which is useful for discussion leaders and for reporting back to the large group after breakouts. However, share screen does take up screen space and limits the ability to look at participants faces. Therefore, screen sharing should not be overused.

- Zoom has a polling feature, but poll questions must be submitted in advance to SPE.

- Icebreaker - networking

- One of the identified weaknesses of a forum – which was confirmed in the trial's feedback – is the lack of rich networking that forums have become known for. There were several suggestions, such as networking breakout rooms during breaks and optional networking sessions that participants could join before or after technical session hours. Liaisons should work with forum steering committee members to try different methods to improve and increase networking during virtual forums. The liaisons should get feedback from participants on their networking efforts and report back to the FSIC committee so that best practices for virtual forum networking can be developed.

Planning: Planning a virtual forum is broadly the same as a regular forum, with a few nuances:
- The steering committee can be much smaller, especially for shorter forums. For example, for a 4-session forum a steering committee of 8-10 people should be plenty. But a 7-session virtual forum should have a steering committee with 14-16 members. Forums with more sessions will benefit from a proportionately larger steering committee.

- We expect that virtual forums will have a shorter planning cycle than regular forums, especially ones with a narrow topic and fewer sessions. For example, for a 4-session virtual forum, once abstract is approved and chairs are selected, there is no reason it cannot be hosted within 3-4 months but may be a 5-month planning cycle for 7-session virtual forums. SPE should begin advertising a given virtual forum 2-3 months in advance, with application deadline and attendee selection occurring at least a month in advance (to allow ample time for attendees to block their calendars) and registration 2-3 weeks in advance. DL slides and poll questions should be submitted to SPE at least 2 weeks in advance.

- In hindsight, the committee determined that more time was needed to develop the virtual forums and suggested a minimum of 6 months for planning.

- The fee to attend a virtual forum was originally calculated as $100 per session. Therefore, for a 4-session forum, the registration fee was $400. After completing a set of forums, it was determined that this fee was too low and the next 4-session forum's registration fee was increased to $500 with the understanding that future forums should be priced at least at $125-150 per session. Ultimately, the forum registration should be determined, based on current costs for future forums.