



University of Calgary
SPE Student Chapter



**PETROLEUM &
ENERGY SOCIETY**
UNIVERSITY OF CALGARY

EXECUTIVE TRANSITION DOCUMENT

2020

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CLUB BIOGRAPHY

Mandate

The University of Calgary Petroleum and Energy Society (PES) is a non-profit organization run by undergraduate students with the fundamental purpose of creating an informed, knowledgeable, and connected student workforce in the oil and gas industry. We believe that by equipping students with a solid foundation of knowledge, experience, and networking skills, they will gain a competitive advantage when entering the industry.

Metrics

To fulfill our mandate, PES has identified four key areas of student development on which to focus our efforts. They include:

- Professional Development
- Experiential Learning
- Networking
- Social Responsibility

We believe that, by focusing on these specific areas, our student members will benefit through gaining a competitive advantage upon entering the industry.

2019 – 2020 Club Activities in Review

- Sent 15 students to the SPE Annual Technical Conference & Exhibition in Calgary, AB
- Sent 18 students to ADIPEC – Abu Dhabi International Petroleum Exhibition & Conference in Abu Dhabi, UAE
- Paired 38 students with experienced industry members in our PES Mentorship Program
- Hosted 100+ students at our Annual Industry Mixer showcasing PES' corporate sponsors
- Sent 4 students to Los Angeles to compete in the SPE North American PetroBowl competition
- Presented at least 6 Lunch & Learns with topics including corrosion, professional development and operations, energy, and waste
- Hosted a Beer and Chat networking event with Nu Vista Engineering
- Hosted an Excel Workshop with a data analyst from InterPipeline
- Planned a social event with Cowboys Dance Hall
- Will be sending 40 students to Edmonton and Conklin for a tour of MEG Energy's SAGD facility
- Planned a panel and networking event with senior executives from industry
- Will be sending 40 students to Edmonton to tour StreamFlo industries manufacturing site and Alberta Innovates research facilities

ORGANIZATIONAL STRUCTURE

The 2020-2021 organizational structure is seen below. Within the organizational structure, there are three levels of student volunteer positions, they include: Senior Council (also referred to as President and Vice Presidents); Directors; and Auxiliary Council. President and Vice President positions require a high level of accountability as well as group and time management skills. Director positions are focused on specific tasks surrounding the planning and logistics of club activities and are suited for more entry-level candidates. There is no limit to what you can apply for as a student, however, be sure to choose a position that most closely meets your schedule and interest.

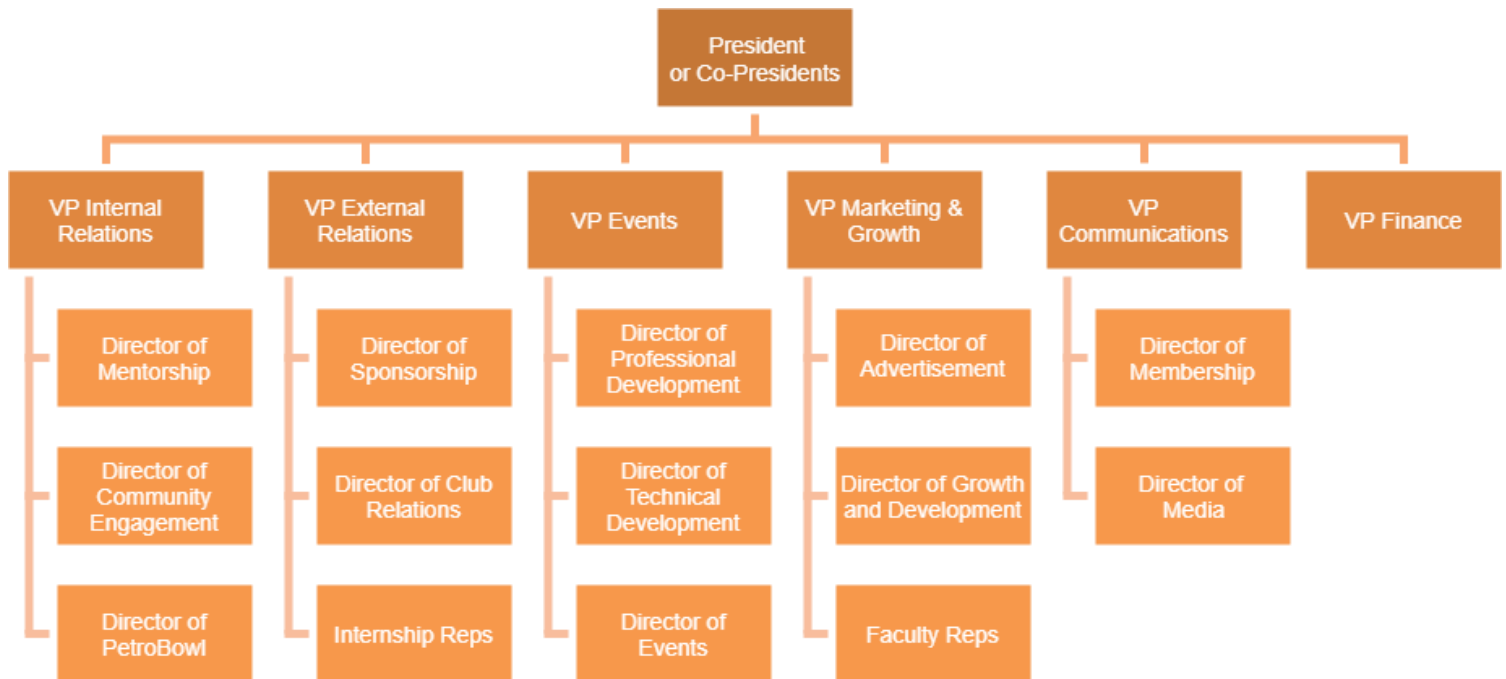


Fig. 1: Organizational Structure

APPLICATION REQUIREMENTS

Mandatory Requirements and Timeline

Candidates applying for incoming President and senior council positions **must** meet and attend the following deadlines and meetings:

- Saturday, February 15th (11:59pm)
 - All Presidential applications due (see page 8)
- March 4th (12:00pm - 1:00pm)
 - Annual General Meeting (AGM) and Presidential Election
 - Presidential and council applicants must attend
- Sunday, March 8th (11:59pm)
 - ALL applications for incoming council positions due (see page 9)
- March 9th-12th (Date TBD)
 - Council selection meeting
 - Elected President must attend with outgoing senior council
- Date TBD
 - Annual retreat and transition meetings
 - Both incoming and outgoing council members are expected to attend

Expectations

It is expected that all applicants will read through this transition document and become familiar with the working structure and responsibilities of each council member within the U of C Petroleum & Energy Society. It is important that all applicants understand the responsibilities, commitments and benefits of becoming involved with the Petroleum & Energy Society.

If you have any questions or concerns regarding this year's transition, position responsibilities, or the U of C Petroleum & Energy Society, please do not hesitate to contact the current council executives. Contact information can be found on page 18 of this document.

TRANSITION PROCESS

Stage One - Application

- Presidential applications are due by February 15th by 11:59pm and all applications for the remaining council positions by March 8th at 11:59pm (see page 9)
- Outgoing senior council pre-screens all Presidential applications and selects top two Presidential applicants based on following criteria:
 - Previous PES Experience - 50%
 - Leadership Experience - 30%
 - Vision for the Club - 20%
- Applicants must meet criteria to pass pre-screen process

Stage Two – President Selection

- The two selected presidential nominees address stakeholders at the AGM on March 4th with their vision for the club (see requirements and responsibilities section for presentation details)
- Voting ballots will be handed out and tallied

Stage Three – Senior Council Selection

- Elected President will select incoming senior council members with the outgoing executive council
- Final decision on the new senior council selection lies at the discretion of the incoming President
- If desired, the incoming President may interview senior council applicants, but this must be done with at least one member of the outgoing senior council in attendance

Stage Four – Director and Rep Council Selection

- Elected President and incoming senior council will decide on director and rep candidates
- Final decision on directors and reps remains to the discretion of the incoming President

APPLICATION FORMS

Presidential Application

All students looking to submit Presidential applications must submit a separate Presidential application. The Presidential application consists of the following:

- General application form
- Updated resume
- Cover letter (maximum one page length)
- The cover letter should detail your previous leadership experience, proposed vision for the organization under your leadership, and why you think you would make the ideal PES President. President applications must be submitted via email by Saturday, February 15th (11:59pm) to the current VP Internal Relations, Mandeep Shergill, at mandeep.shergill@pesucalgary.com

Executive Council Application

All students looking to submit applications for an executive council position must submit the following documentation:

- General application form
- Updated resume

Senior council applications should be submitted via email by Sunday, March 8th, at 11:59pm to the current VP Internal Relations, Mandeep Shergill, at mandeep.shergill@pesucalgary.com

Director and Rep Council Application

All students looking to submit applications for a director or rep level position are only required to complete the general application form. Director and rep position applications should be submitted via email by Sunday, March 8th, at 11:59pm to the current VP Internal Relations, Mandeep Shergill, at mandeep.shergill@pesucalgary.com

Forms

All application forms will be made available through the PES website at www.pesucalgary.ca. In addition, all PES members will receive an email with the attached forms and transitional documentation. If you do not have a form and are interested in applying for a position, please contact us at mandeep.shergill@pesucalgary.com. We look forward to your applications!

POSITION DESCRIPTIONS

PRESIDENT

Recommendations

- Strongly recommended 4th year student
- Strong verbal and written communication skills
- Excellent leadership skills, management skills, and mentorship capacity
- Strong understanding of all the council portfolios and their roles within the organization
- Deep understanding of how the club fits within the University and community abroad
- High capacity to make decisions individually and through group collaboration

Requirements

- Must have previously served on PES council (in any type of role)
- Must have previous experience in the energy industry
- Must submit a Presidential application and be chosen to present at the AGM
- Must attend the AGM and provide a presentation on their vision:
 - Provide a short background of yourself
 - Personal vision and goals for the society
 - Provide ideas on expanding the organization
 - Ideas on the sustainable improvement of the society
 - Means to maintain club image and integrity

Responsibilities

- Accountable for all club activities and finances
- Act as the ambassador for the U of C SPE Student Chapter
- Coordinate and implement the PES vision with senior council
- Coordinate the responsibilities and provide support to each portfolio
- Develop and implement a process for scheduling all club activities
- Chair regular meetings with council and designate action items
- Develop guidelines for final approval of all external documentation
- Sustain a strongly integrated and motivated leadership committee
- Act as focal point of arbitration for disputing internal conflicts should any exist

1. INTERNAL RELATIONS TEAM

VP INTERNAL RELATIONS

Recommended

- 4th year student
- Strong leadership and communication skills
- Strong capacity for event planning, budgeting and team building

Requirements

- Must understand the responsibilities of the position and be able to effectively guide and mentor supporting internal team
- Must have previous experience in the energy industry
- Must be well organized and capable of planning large expenditure internal activities
- Must have basic financial management skills

Responsibilities

- Prepare yearly budget for the Internal portfolio with the VP Finance
- Keep expenditures within budgetary guidelines as approved by VP Finance and President
- Order club specific promotional items
 - Clubs week items
 - Thank-you gifts for speakers
 - Council polo shirts
- Hold triple signing authority on all cheques with VP Finance and President
- Organize and execute the planning of major internal events, including but not limited to:
 - SPE ATCE
 - Council bonding events
 - Annual council retreat
 - Annual North American PetroBowl Qualifiers
- Apply for external event funding and prepare post-conference report for SPE ATCE
- Organize and oversee the PetroBowl team with the Director of PetroBowl
 - Coordinate materials and training for SPE ATCE
 - Facilitate trip logistics if required
- Oversee PES Mentorship Program with the Director of Mentorship
 - Provide assistance and guidance to program activities
- Support director council in the internal relations group
 - Chair internal team meetings and assign action items
 - Provide an avenue for mentorship to the supporting director council
- Assist the VP Events and VP External with organizing major events
 - Energy Panel
 - Membership Drive

DIRECTOR OF MENTORSHIP

Recommended

- 2nd, 3rd or 4th year student
- Strong leadership, organizational and communication skills
- Strong capacity for event planning and budgeting
- Ability to maintain large volumes of information

Responsibilities

- Lead, organize, and promote the PES Mentorship Program
 - Recruit mentors and students for the program
 - Organize the kick-off, mid-year and wrap-up events
 - Plan monthly or bi-monthly workshops
 - Provide monthly program activities and support participants when needed
 - Keep consistent communication with mentors and mentees

DIRECTOR OF COMMUNITY ENGAGEMENT

Recommended

- 2nd or 3rd year student
- Strong communication skills with demonstrated commitment to community

Responsibilities

- Work with VP Internal on strategy for PES community involvement
- Work with reps to organize volunteering initiatives in the community for council members to attend
- Execution of PES marketing strategies to ensure advertisement is reaching targeted audience
- Maintaining a strong feedback channel with the student body
- Seek new opportunities to collaborate and support other community-engaged clubs

DIRECTOR OF PETROBOWL

Recommended

- 3rd, internship, or 4th year student
- Strong communication skills and knowledge of the industry
- Previous experience in PetroBowl or Energy Bowl required

Responsibilities

- Work with the VP Internal in organizing the PetroBowl team
- Recruit and train members of the PetroBowl team and organize regular study sessions
- Assist the VP Internal in organizing the trip to the annual North American PetroBowl Qualifiers and SPE Student Symposium

2. EXTERNAL RELATIONS TEAM

VP EXTERNAL RELATIONS

Recommended Skill Set

- Strongly recommended 4th year student
- Excellent public speaking and communications skills with high degree of professionalism
- Strong capacity for sponsorship activities and external communication meetings

Requirements

- Must understand the responsibilities of the position and be able to effectively lead a team of two directors and two reps
- Must possess previous sponsorship experience
- Must have confident and comfortable public speaking skills
- Must have previous experience in the energy industry

Responsibilities

- Assist in preparation of yearly budget and projected sponsorship income with the VP Finance
- Keep expenditures within budgetary guidelines outlined by VP Finance and President
- Manage sponsor relations:
 - Continually seek new external relation opportunities
 - Manage current activities with external partners to ensure quality is maintained
- Develop and manage an efficient process for obtaining and maintaining corporate sponsors in conjunction with the Director of Sponsorship:
 - Make necessary modifications to sponsorship package given current market conditions
 - Create plan for seeking sponsorship
 - Set up corporate meetings
 - Maintain a detailed sponsorship and communication log
 - Write thank-you letters and coordinate invoice documentation with VP Finance
- Order Christmas cards and develop annual report to send to sponsors
- Accountable to senior council for ensuring corporate needs and agreements are satisfied
- Facilitate and assist in the planning of major events with corporate sponsors
 - Industry Association Mixer
 - Energy Panel
- Support external team:
 - Chair internal team meetings and assign action items
 - Provide an avenue for mentorship to external team
 - Assist in conflict resolution with Industry Luncheon tickets

DIRECTOR OF SPONSORSHIP

Recommendation

- Internship student (required)
- Strong public speaking and communication skills with high degree of professionalism

Responsibilities

- Work with the VP External Relations to revise Sponsorship Package and relating documents for 2019 – 2020
- Coordinate logistics with VP External Relations and scheduling of sponsorship campaign
- Attend sponsor meetings and be available for communication
- Learn and develop follow up process from the VP External Relations
- Be capable of independently initiating new partnerships throughout the year
- Represent PES at the SPE Young Professionals Monthly Council meetings

DIRECTOR OF CLUB RELATIONS

Recommendation

- Internship student (required)
- Strong public speaking and communication skills with high degree of professionalism

Responsibilities

- Attend monthly SPE YP meetings to provide updates on PES activities
- Act as a liaison between PES and external organizations
- Maintain positive relations with industry associations and seek out new partnerships
- Work with the VP External Relations to organize the Industry Association Mixer
- Assist the VP External Relations with planning other major events including the Energy Panel

INTERNSHIP REPRESENTATIVES (3)

Recommendations

- Internship student (required)
- Demonstrated passion for the industry
- Strong organizational and communication skills

Responsibilities

- Responsible for recruiting interested PES members on internship
- Maintain communication regarding PES- and SPE-related activities both on and off campus
- Compile list of monthly SPE technical luncheons and represent PES at these events
- Track statistics of PES members attending SPE events, and report results to VP External Relations
- Help plan at least one event (ski trip, end of year event, tour, etc.)

3. EVENTS TEAM

VP EVENTS

Recommended Skill Set

- Strongly recommended 4th year student
- Excellent leadership and organization skills
- High capacity for event planning, budgeting and execution

Requirements

- Must be organized and have a fundamental understanding of the event proposal and planning process
- Must understand the responsibilities of the position and be able to effectively lead a team of two directors

Responsibilities

- Provide experience, support and mentoring in logistical coordinating of major events
- Prepare funding application for Fort McMurray Tour (SEEL, SSAF, SPE)
- Prepare yearly budget for your team with the VP Finance
- Keep expenditures within budgetary guidelines as approved by VP Finance and President
- Manage communication with the VP External Relations and sponsors for event schedules
- Maintain a club calendar with all events for council to access
- Ensure directors are involved in key external relations meetings
- Responsible for planning major club activities, including:
 - Fort McMurray Oil Sands Tour
 - Annual Industry Mixer
 - Service Facility Tour* ○ Gas Plant Tour*
 - Wind Farm Tour*
- Support events team with event booking and logistics

*Tours are dependent on sponsorship and are subject to change

DIRECTOR OF PROFESSIONAL DEVELOPMENT

Recommended

- 2nd, 3rd or 4th year student
- Event planning skills

Responsibilities

- Coordinate room bookings through SU ClubHub including renting A/V equipment, catering, registration, thank-you gifts and all other event-specific logistics
- May be expected to coordinate logistics for scheduling of event with corporate sponsors
- Prepare detailed budget for each professional development event with VP Events
- Coordinate with Marketing and External teams for speakers and event promotion
- Professional Development events include:
 - Lunch & Learns*
 - Annual Industry Mixer
 - Leadership Development Sessions

*Lunch & Learns are subject to obtained sponsors

DIRECTOR OF TECHNICAL DEVELOPMENT

Overview

- The goal of this position is to increase technical development opportunities for students. There is a lot of freedom for creativity in this position and you are encouraged to explore new avenues that PES hasn't typically been involved in.

Responsibilities

- Be the main point of contact between professors and the club
- Approach professors to set up tours of their labs or other technical training sessions (preferably lead by the professor but also could be led by a graduate student)
- Approach Alberta Innovates (aka Innotech Alberta), C-FER Technologies, and other research companies to see if they can give us a tour or technical workshop
- Work with the director of club relations to expand partnerships with technical associations and non-profits such as Enform, PTAC, Pink Petro, etc...
- Assist with planning the GeoLOGIC and Palintir Workshops
- Plan at least 2 technical events in addition to the GeoLOGIC and Palintir Workshops and maintain them on the club calendar
- Be capable of independently initiating new partnerships throughout the year
- Maintain positive relations with professors and communicate PES events to them to share with their students
- Help recruit petroleum engineering graduate students for the PetroBowl team
- Gather a list of all upcoming industry conferences in Fort McMurray and Edmonton that we could potentially incorporate into our trips
- Approach training companies to provide us seats in their courses, especially if they don't

sell out

- Approach companies that sell software to provide us training on their software, especially if they are based in Calgary (ie Spotfire, Wellview, Accumap, P&ID makers, log analysis software, emissions software)
- Approach companies that have showrooms to do a tour of their new technologies (ie Tundra, Spartan Controls, 3M)
- Maintain a contact log of professors to pass on to next year's director
- Can also approach the technical clubs to see if they can do some demos of their work (ie solar car, Drillbotics, GNCTR, rocket club, etc)
- Contact Seismic in Motion to see if we can have some spots reserved for PES Students

DIRECTOR OF EVENTS

Recommended

- 2nd, 3rd or 4th year student
- Event planning skills

Responsibilities

- Booking buses, SU waivers, food, accommodation, thank you gifts, tour itinerary, speakers and all other logistical requirements for events
- Prepare a detailed budget for each event with the VP Events
- Current experiential learning events:
 - Fort McMurray Trip
 - Service Facility Tour*
 - Gas Plant Tour*
 - Wind Farm Tour*

*Tours are dependent on sponsorship and are subject to change

4. MARKETING & GROWTH TEAM

VP MARKETING & GROWTH

Recommendations

- 4th year student
- Strong leadership skills
- High capacity for communications and budgeting
- Strong understanding of marketing the club's brand, perception and presence on campus

Requirements

- Must understand the responsibilities of the position and be able to effectively guide and mentor supporting director council
- Must have previous experience in the energy industry and strong communication skills
- Must be capable of applying creative thinking towards tangible problem solving

Responsibilities

- Execute presidential vision as laid out in initial meetings
- Prepare yearly budget for the marketing team with the VP Finance
- Keep expenditures within budgetary guidelines as approved by VP Finance and President
- Get consent from President on all external PES publications before distribution
- Growth development:
 - Find opportunities for growth inside and outside of SSE
 - Strategize short and long terms plans for the organization
 - Develop feedback system for PES events and all external consultations
 - Design unique recruitment and information sessions for the student body
- Manage PES marketing brand:
 - Manage PES social media accounts (Facebook, instagram, twitter)
 - Actively manage the PES brand and applying it towards communications activities
 - Develop and execute regular marketing campaigns in support of club activities
 - Execute growth strategy with marketing action items
 - Communicate PES brand to students
- Support marketing team members:
 - Chair internal team meetings and assign action items
 - Engage 1st/2nd/3rd year, business and geosciences rep to reach out to the student body
 - Provide guidance to the Director of Advertisement in managing the PES brand and producing marketing material
 - Manage and regulate proper communication between PES and all affiliates
 - Provide an avenue for mentorship to the supporting director council



JOIN THE PES TEAM!

DIRECTOR OF ADVERTISEMENT

Recommended

- 2nd, 3rd or 4th year student
- Photoshop or other design software skills

Responsibilities

- Execution of PES brand
- Develop marketing strategy and execution plan:
 - Posters
 - Announcements
- Help reps manage social media presence in platforms such as Facebook, LinkedIn, etc
- Review and understand usage requirements of corporate logos
- Work with VP Marketing & Growth on strategy for PES growth
- Work with VP Marketing & Growth to design and order PES power-point templates, poster templates, PES swag, thank-you cards, business cards and gifts as required

DIRECTOR OF GROWTH AND DEVELOPMENT

Overview

- The goal of this position is to find opportunities for growth inside and outside of SSE based on student demand. We can't give the students what they want if we don't know what they want, so it is important that we are growing in the right areas to make sure we offer the tours and events that students find valuable. You are expected to further define the responsibilities throughout the year based on your experience to ensure they are fit-for-purpose.

Responsibilities

- Work with VP Marketing & Growth on strategy for PES growth
- Develop feedback system for PES events and also a feedback system within council
- Develop reports based on data gathered from feedback
- Contact both University and city media to see if they can feature PES our our events
- Example: Try to get us an article in uToday and as many publications as possible right away so we can show them to potential sponsors.
- There are probably some local e-magazines that we could approach to do an interview or article with.
- Strategize short and long terms plans for the organization
- Execute growth strategy with marketing action items
- Brainstorm on how we can best use all the extra swag PES has, raffles, contests, giveaways, social media giveaways, etc.
- Coordinate visiting high schools to do talks in their science classes
- Provide an avenue for mentorship to the faculty representatives and internship reps



JOIN THE PES TEAM!

- Communicate potential sponsorship opportunities to VP External
- Communicate free industry events to VP Communications to include in our newsletters
- Work with the intern reps to nominate PES for SPE awards such as the outstanding student chapter award.

FACULTY REPRESENTATIVES

Recommended

Enrolled in 1st, 2nd or 3rd year engineering, or enrolled in 4th year business or 4th year geosciences, respectively.

Responsibilities

- Display strong interest in PES and the energy industry
- Responsible for communicating PES related activities to the student body through class announcements and Facebook posts
- Responsible in helping recruit PES members
- Engage in required PES growth development as designated by the VP Marketing & Growth
- Assist in supporting all event needs and requirements

5. COMMUNICATIONS TEAM

VP COMMUNICATIONS

Recommended

- Strong writing skills
- Excellent leadership and organizational skills

Responsibilities

- Call meetings for senior and regular council meetings
 - Collect schedules from all council and find collective meeting times
- Prepare agendas and record minutes at meetings
- Manage PES email account and incoming mail content
- Manage information/knowledge sharing database
 - Contact database
 - Handover documents
- Prepare PES Publications and reports being released to external stakeholders
 - Post-event reports
 - SPE/SU Annual Reports
 - Working with U of C, SSE, and other faculties on media releases
- Ensure all external PES publications are kept within professional standards
- Provide leadership and support for Director of Membership and Director of Media

DIRECTOR OF MEMBERSHIP

Recommended

- 2nd, 3rd or 4th year student
- Ability to maintain large volumes of information
- Able to present large amounts of information in an organized fashion

Responsibilities

- Prepare an organized and intuitive system for membership tracking at events
- Create new documentation for membership marketing
- Membership and prospecting
 - Coordinate career fair and membership drive with VP Internal Relations
 - Track statistics of student members at PES events
 - Strategize on targeting larger membership base (e.g. Geosciences and Business)
- Maintain statistics on PES membership and demographics and track PES membership payments
- Provide up-to-date email lists to VP Communications for regular communications



JOIN THE PES TEAM!

DIRECTOR OF MEDIA

Recommended

- 2nd, 3rd or 4th year student
- Proficiency with HTML and website management

Responsibilities

- Update and maintain the current PES website
- Maintain communication with the VP Communications and VP Events regarding upcoming events for advertisement on the website
- Ensure all website functions are operating normally
 - Payment system
 - Links and hierarchy
- Update website with any changes to PES Constitution and incoming PES council profiles

6. FINANCE TEAM

VP FINANCE

Recommended Skill Set

- 4th year student
- Strong budgeting, organizational and financial management skills
- Previous experience dealing with budgets and/or financial management

Requirements

- Must be responsible and accountable when handling financial accounts
- Must have high ethical standards, responsible and trustworthy to the organization
- Must be prepared to supply appropriate documentation in rare occurrence of immediate auditing

Responsibilities

- Oversee all of PES financials:
 - Manage both PES financial accounts (Bank Account and Paypal Account)
 - Make recommendations to President and individual teams on financial activity
- Prepare yearly budget for the organization (to be complete before academic year):
 - Includes projected cash flows, accounts receivable, accounts payable
 - Includes detailed program budgets prepared by Operations, Internal Relations, External Relations, Communications and Growth and Marketing
- Manage PES bank account
 - Hold triple signing authority on all cheques with President and VP Internal
 - Hold all banking information and cards (not shared with anyone from council, with the exception of the President)
- Responsible for keeping account and books up to date
 - Includes a detailed breakdown of expenditures, revenues and account status
 - Sending invoices to sponsors upon receiving and depositing cheques (signed only by VP finance)
 - Preparing monthly financial statements for the President and senior committee
 - Keeping financial activity private between yourself and the President
- Develop and manage financial documentation
 - Manage re-imbursement forms (cheques signed by VP Finance and President)
 - Letters of financial requests to bank (change of signing authority, etc)
- Maintain high degree of transparency and honesty with club finances
 - Prepare regular updates to executive council regarding current finances with clearly identified areas of improvement
 - Discuss any financial discrepancies with VPs as required



JOIN THE PES TEAM!

CONTACT

If you have any questions concerning the executive transition or are looking for more information on the current council, PES mandate, and portfolio of events please do not hesitate to contact the current VP Internal Relations, Mandeep Shergill, at mandeep.shergill@pesucalgary.com. Specific questions sent to this account will be directed to our current senior council and responded to appropriately. We would also recommend that you check out our website at www.pesucalgary.ca for more information.

We look forward to your applications and watching the next team of student leaders carry on the PES torch! We are excited to have you in the student energy community.

Best Regards,

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PES Council
2019 - 2020