



## SAME Foundation Board Meeting Agenda

1400 - 1600, Tuesday, May 7, 2019

JETC

Tampa Convention Center, Room 6

### Call-in Details

United States (Toll Free): [1 877 568 4106](tel:18775684106)

Access Code: 276-517-413

### Attendees

Invited (those that attended are in yellow)		
Tim Byers	Gary Engle	Julie Fisher
Angie Goral	Bud Griffis	Tony Leketa
*Mike Loose	*Gene Lupia (tentative)	John Mogge
John Peabody	Jane Penny	Hal Rosen
	Roger Wozny	Joe Schroedel**
Eddie Gonzalez**	Will Hoffman**	Kathy Off**
Scott Prosuch (AOF VC External)**		Susan Thames**
Ron Torgerson**		
Will not Attend		
Robert Van Antwerp	Sally Riker**	

\*Call-in

\*\*Non-voting

TIME	AGENDA	Discussion Leader or Briefer
1500 – 1505	Call to Order – Quorum Established – Pledge of Allegiance	John Mogge
<b>Reports (please address action items in updates – see action tracker)</b>		
1505 – 1510	Financial & Tax Update, Finance Staffing Update	Will Hoffman
1510 – 1520	Governance Update	John Mogge & Hal Rosen
1520 – 1525	Investment Committee Update	Gary Engle
1525 – 1540	Marketing Committee Update	Jane Penny
1540 – 1150	Stewardship Update (to include Stewarded Post Funds)	Gene Lupia/Julie Fisher
1545 – 1550	Internal Outreach Update	Roger Wozny
1550 – 1600	LDP Update (LDP Promo Packet and JETC 2019 Schedule)	Angie Goral
<b>Discussion</b>		
1600 – 1645	Fundraising Plan Forward	Hal Rosen/Julie and Jane
1645 – 1700	Summary & Action Assignments	John Mogge

### Action Tracker (from May 7<sup>th</sup> mtg, with carry-over from March 11<sup>th</sup> mtg)

Meeting	Action	Responsible	Estimated Completion
Mar 11, 2019	Need to assess what the administrative impact increased participation in the Post managed funds would incur on the admin fee? What do we anticipate is the demand and what can we approximate for an updated projected fee?	Gene/Will	

Mar 11, 2019	Next step is to develop an external fundraising flyer/communication piece based on the internal piece. Should be able to be produced internally.	Jane	
Mar 11, 2019	For JETC 2020, consider how the LDP class will present on their experience back to the Foundation board. LDP TF needs to provide an assessment of the program to the Foundation.	Eddie working with Kathy	Present assessment plan by SBC for Year 1 of LDP.
Mar 11, 2019	After final draft, send stewardship documents to Mike, Gene, Julie, and Hal for review.	Mike/Gene/Julie/Hal	In progress. Julie forwarded the draft to Gene, John and Jane on May 31
Mar 11, 2019	Get other stewardship policy examples from board members.	Gene/Julie	
Mar 11, 2019	Discussion on repurposing the internal outreach committee to take on international communication role especially as we move into the individual giving campaign.	Roger	
May 7, 2019	After JETC, get giving campaign designed and ready to email/mail. Track responses (clicks, reads, and donations.)		
May 7, 2019	Need to figure out how to benefit from SAME events like JETC to raise funds and the Centennial. Look into one-day of giving.		
May 7, 2019	Get details about the fundraising app, <i>Donor Perfect</i> , at <a href="http://www.donorperfect.com">www.donorperfect.com</a> .		
May 7, 2019	Need a donor recognition plan.		
May 7, 2019	Get out final draft of the Stewardship Policy to the Foundation by end of May. Send to Kathy to forward to full board for review. Schedule a call to go over the review. Target mid-June.		
May 7, 2019	Revise the FAQ, send back out to the board for review, and compile additional comments. When final will be uploaded to the Foundation website.	Roger	Updated doc sent out 6/11/19. Board reviewed and approved the new language. Staff will post on the Foundation website.

## Foundation Board Meeting Minutes

John opens meeting at 1:59pm

Launching the fundraising campaign. Going to test our compelling purpose and need. If the test goes well, good indicator that we can move forward with our campaign. Donor recognition ribbons to highlight donors.

Foundation supporting LDP and camps. About \$115K in outlays. Our target donor audience will be about 12000 members. Hoping to see 200-300 gifts. If averaging \$50-100, should see a good return. Returns should add to the Foundation's solvency and stability, despite some market fluctuations.

Succession Planning. Roger, Gen Van, John Mogge exiting the Foundation. This is an opportunity to open opportunities for others to take on a leadership position.

Board action will determine the how to fill.

Term: Maintain calendar year as the board term.

John Mogge: Calendar term makes sense to avoid all the other activities going on at JETC. Once terms are staggered, would have more continuity across terms.

First meeting each year at Capital Week. Final meeting each year would be SBC.

Board approved bylaw changes to 3-years, and 2 consecutive terms. Goal with succession planning is to get to regular order with the new Foundation board. Need to create opportunity for others to contribute as board members.

### **Financial & Tax Update, Finance Staffing Update**

Will: January and February had good donations. Dropped off dramatically since then. We will likely see more donations at year-end.

2017 closed with a clean audit.

2018 not good for investments. 2019 coming in better.

Current bank cash value is \$59K. May need to draw from investment accounts to increase the available cash. Outstanding payments: Kathy Swayze payments (though refunded to the Foundation from the Society), LDP, and a few others.

Investment returns will be reinvested. Won't pull unless we need. Though we may need to pull some cash if our available cash dips too low.

John: Do transfers from the investments have to be approved? Need approval and awareness of investment committee. Will coordinate with them.

John: E&M was the original source of the Foundation fund. If we must pull cash, take the investment proceeds of the E&M monies so we can say we are preserving the capital.

Hal: Need to start contemplating an endowment account that would remain untouched.

Currently have one restricted account, Elizabeth Meyers bequest to support girl scouts going to camp.

Without touching the corpus, Will has authority to draw from the proceeds of the investment funds.

### **Governance Update**

Covered in opening discussion. Anyone interested in the Foundation President position, mention it to Joe. Same for recommendations for board members. Sal, for example, is interested.

John: Want diversity, but also experience, especially people that understand campaigns.

No set criteria to keep the board landscape broad, but they should be passionate about the Foundation.

### **Investment Committee Update**

Gary: Both Society and Foundation started the year great. 7.33% return. Have made gains from last year's losses. Good quarter.

Reviewed investment policy and discussed benchmarks. Want to structure funds review better. Looking at a four week period to review performance. Want a longer review timeframe to give more attention to the numbers.

Committee has new members that need to be brought up to speed. Going to maintain current investment strategy.

There is interest by Posts about moving their monies to the Foundation based on what they have been hearing. Need to take that message to other Posts.

Policy is on the website to inform Posts on specifics of the Post funds opportunity.

Of the four test Posts, Houston decrease in value. Likely, they were impacted by the negative market performance.

Joe: Want to keep encouraging Posts to participate in the Foundation Funds investment. We had decided once we get to 10 Posts, we may need additional staff support in Finance. Likely that expense would be charged to the Foundation as part of the admin costs to offer the Post investment opportunity.

Should the investment costs be included in the admin costs to the Posts. Foundation fund performance should be higher than options they are exploring locally.

Including Post funds, investment portfolio almost \$1.8M.

### **Marketing Committee Update**

Jane: Edits to fundraising campaign were received. Working with Stephen on design and layout of the communication pieces.

John: Are we hitting up groups in sequence or all the same time?

Jane: Campaign will go out to the target audiences all at once. We will be able to track donations by person.

Because of LDP, folks are starting to see connections between the Foundation and the programs they support.

Hal: When the appeal goes out, it will be staged to deal with 12,000 emails and letters.

Joe: Impact Communications did the upfront research and design. The Foundation will take care of the deployment of the campaign. Just need to get past JETC.

Need to make sure we can document ROI for emails and letter appeals. Need to get a sense of how each medium performs.

There will be follow-up with the donors after their donation. \$200,000 target. The LDP class makes the work of the Foundation that much more real.

For LDP, need to take advantage of their end-of-the-program reports to highlight the impact to LDP participants.

LDP individual projects could help expand the capacity of the Foundation to promote their work.

Need action shots of the Foundation with the LDP to promote both programs.

The campaign should give us a good sense of the membership's support of the Foundation. Just waiting on Stephen's team to add the graphics to the campaign.

**ACTION: After JETC, get giving campaign designed and ready to email/mail. Track responses (clicks, reads, and donations.)**

**ACTION: Need to figure out how to benefit from SAME events like JETC to raise funds and the Centennial. Look into one-day of giving.**

Julie: There are tools we can use to create "flash-point" fundraising that can go viral quickly timed with some of our events.

**ACTION: Get fundraising app details from Julie.**

Possible donor celebration/reception at Capital Week in place of Golden Eagle dinner. And/or do a donor celebration at JETC 2020.

**ACTION: Need a donor recognition plan.**

### **Stewardship Update (to include Stewarded Post Funds)**

Stewardship policy still being reviewed and finalized. Policy needs to reflect endowments.

Stewardship covers: policies on gift acceptance (types of gifts), donor recognition, and managing gifts.

Policy includes reference to roles of the Investment Committee and staff. Waiting on Gene to review current draft. Will be a living document.

John: Can we get a board update by the end of the month?

**ACTION: Get out final draft of the Stewardship Policy to the Foundation by end of May. Send to Eddie to forward to full board for review. Schedule a call to go over the review. Target mid-June.**

Julie: What do we need to do to support an endowment. Could take the \$240K E&M fund and turn that into an endowment.

MOTION (Julie): E&M Fund serve as a starting endowment fund for the Foundation. Reference endowment in the investment policy.

Consensus is to move forward with the endowment designation.

John Peabody: What is the difference? Add a level of restriction to those funds.

Current E&M funds are restricted.

Hall will take reference an endowment in the Stewardship for review. Need some donor recognition level names. Diamond, Platinum, Gold to "donor" as lowest level.

For major donors (corporate), levels would be different. Tie major gifts levels to historical engineers assigned to donation amounts. \$1M and up. \$500K to \$1M, etc.

Comment on levels when you get the draft language. Should tie any final language to the history of the Foundation.

### **Internal Outreach Update**

Roger: Need to update the FAQ on the website.

One item is to be clear on the separation between SAME and SAME Foundation.

National Society versus SAME National? What is the appropriate reference?

Nuance of establishing the Foundation is to have a group designated to carefully steward funds. Need to capitalize on the Foundation separation from the National Office. We are not asking folks to contribute to the fund managed by staff.

The Foundation is the charitable arm of the Society.

Broad definition of donations we will seek (large gifts to small gifts).

Mention that the Foundation serves as an optional repository for Posts.

Under Why Have a Foundation? Remove reference to 2020 outcomes so that the work of the Foundation is not seen as time limited. It's an ongoing role to support the Society.

The Foundation resources the overall needs of the Society, as appropriate.

Add: How long will it take Posts to get needed funds.

Add: How will the Foundation funds be spent?

The Foundation funds programs. Need to determine what the Foundation will support. Mentor support versus camper scholarships.

Mentors are part of leader development. Fits in the same landscape of LDP.

The better we can define what the Foundation funds, the more we can communicate the need to support the Foundation through donations.

Then we can also tie Foundation support to impact of that support.

The Foundation supports leaders by supporting LDP, camp mentors, professional development, etc.

In the “What is the Foundation” include clear language to distinguish between the Society and the Foundation. Use language from SAME BOD meeting.

This clarity will also be important in recruiting new members. Ensure FAQ syncs up to other communication tools.

**ACTION:** Roger will revise the FAQ, send back out to the board for review, and compile additional comments. When final will be uploaded to the Foundation website.

### **LDP Update (LDP Promo Packet and JETC 2019 Schedule)**

18 participants.

Monthly webinars are being scheduled.

Need to set up a post-JETC debrief to gauge the program design moving into next year’s planning.

LDP task force wants to explore going into a COI.

### **Fundraising Plan Forward**

Covered in previous discussions.

### **Summary & Action Assignments**

Reviewed action tracker.

Meeting adjourned at 3:50pm.

**INVESTMENT  
COMMITTEE  
UPDATE**





# Investment Committee Report

**Gary Engle**

**7 May 2019 Foundation Board Update**



## Investment Committee Update

- Added 3 Members (November) and 1 (January). Committee Team is:
  - **Gary Engle (Foundation Board Liaison)**
  - **Mark Handley (departing)**
  - **Candis Hamilton** - Candis taking a leading role in setting the agenda and ensuring we follow up on action items. Minutes of the meetings, set up meetings, set agenda, etc.
  - **Brandi Dennis** - Brandi taking a lead role in investment analysis. She has the lead to coordinate our discussions and reviews with DiMeo Schneider & Associates LLC.
  - **Mark Zanardi** – (Accounting background - Vice President of Finance at Continental Heavy Civil Corp)
  - **Joe O'Brien** – (Vice President - Finance, Special Projects, Senior Engineer at O'Brien Engineering, Inc.)
  - **James V Works** – (Panama City Post Treasurer: served in nonprofit treasurer roles, good financial acumen)
  - **Curt Hatfield** – (Philly area – COO/CFO for a SB, Finance/Engineering and Law degrees, personal investing, member in Philly, NJ, and Baltimore Posts, strong interest)
  
- Will Hoffman participation – active and much appreciated!
  
- Succession Planning for the Committee (Mark Handley departure – VP selection)



## Financial Investment Performance through 31 Mar 2019

- ❖ Analyzed Q1 ending 31 March with DiMeo Schneider & Associates LLC on 4/29
- ❖ BLUF: CY18 was a volatile Market year. Seeing positive Q1 2019 recovery...
- ❖ Key Takeaways:
  - ✓ **YTD: 7.33%** vs 7.13% benchmark; since Inception: 4.12% vs 5.12%
  - ✓ Great first quarter - within our set guidelines on performance, slightly trailing the annual customized benchmark.
  - ✓ Performance is in expected range - stay the course...
- ❖ Committee Annual Review here at JETC:
  - ✓ Review Investment Policies
  - ✓ Benchmark Discussion – should we establish our own benchmark for investors to use
  - ✓ Review Timeline for Investor Reports and Committee calls
  - ✓ Committee Governance/Leadership for 2019-2020



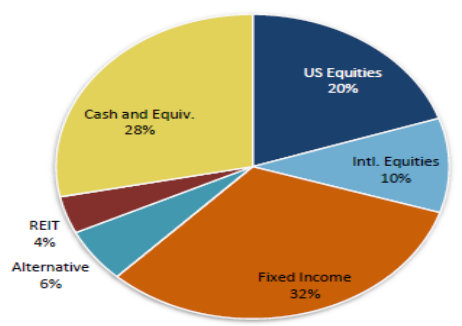
## PORTFOLIO SNAPSHOT

SAME Foundation

12/31/2018 to 03/31/2019

Investment Activity (12/31/2018 to 03/31/2019)	
Opening Market Value	1,327,540
Net Cash Flow	560,000
Appreciation	100,029
Closing Market Value	1,987,569
Portfolio Return	7.33
Weighted Fee	0.39

### Asset Allocation



Portfolio Description	Market Value	Weight (%)
Schwab S&P 500 Index	308,173	15.51
Janus Enterprise Mid Cap Growth	23,879	1.20
Vanguard Mid Cap ETF	21,737	1.09
Harbor Small Cap Value	19,462	0.98
Vanguard Small Cap ETF	21,562	1.08
Harding Loevner Int'l Gr	54,558	2.75
Causeway Int'l Value Fund	51,347	2.58
Vanguard FTSE Developed Mkts ETF	45,207	2.27
Lazard Emerging Mkts	48,170	2.42
JP Morgan Strategic Income	79,137	3.98
Loomis Sayles Invst Grade	79,367	3.99
Metropolitan West Total Ret	241,387	12.14
Western Asset Core Bond	241,153	12.13
Blackstone Alternative Multi Strategy Fund	57,593	2.90
Eaton Vance Absolute Return	55,692	2.80
iShares Core US REIT	78,832	3.97
Money Market	560,316	28.19
<b>Total</b>	<b>1,987,569</b>	<b>100.00</b>

Asset Class	Weight
US Equities	19.86
Intl. Equities	10.03
Fixed Income	32.25
Alternative	5.70
REIT	3.97
Cash and Equiv.	28.19

Past performance is not indicative of future results. Please see important information at the end of this report. Mutual Fund returns are net of fees. SMA returns are net of fees post 2005.





# SOCIETY OF AMERICAN MILITARY ENGINEERS



## MANAGER PERFORMANCE

SAME Foundation

04/30/2017 to 03/31/2019

Manager/Benchmark	Inception Period	MV/WT%	QTD	YTD	1 Yr	3 Yr	5 Yr	7 Yr	10 Yr	Inception
<b>Total Portfolio</b>	<b>05/2017 (1.9 yr)</b>	<b>1,987,569</b>	<b>7.33</b>	<b>7.33</b>	<b>3.07</b>					<b>4.12</b>
CPI			0.60	0.60	1.92					2.11
Customized Benchmark			7.13	7.13	4.31					5.12

### US Equities

<b>Schwab S&amp;P 500 Index</b>	<b>05/2017 (1.8 yr)</b>	<b>308,173</b>	<b>13.63</b>	<b>13.63</b>	<b>9.45</b>					<b>11.48</b>
S&P 500		15.5%	13.64	13.64	9.49					11.66
<b>Janus Enterprise Mid Cap Growth</b>	<b>05/2017 (1.8 yr)</b>	<b>23,879</b>	<b>17.84</b>	<b>17.84</b>	<b>11.30</b>					<b>17.11</b>
Russell MidCap Growth		1.2%	19.62	19.62	11.52					15.40
<b>Vanguard Mid Cap ETF</b>	<b>05/2017 (1.8 yr)</b>	<b>21,737</b>	<b>16.33</b>	<b>16.33</b>	<b>5.62</b>					<b>8.51</b>
CRSP US Mid Cap TR USD		1.1%	16.79	16.79	5.99					8.35
<b>Harbor Small Cap Value</b>	<b>05/2017 (1.8 yr)</b>	<b>19,462</b>	<b>13.18</b>	<b>13.18</b>	<b>-3.02</b>					<b>4.27</b>
Russell 2000 Value		1.0%	11.94	11.94	0.19					2.53
<b>Vanguard Small Cap ETF</b>	<b>05/2017 (1.8 yr)</b>	<b>21,562</b>	<b>15.77</b>	<b>15.77</b>	<b>5.24</b>					<b>8.10</b>
CRSP US Small Cap TR USD		1.1%	16.22	16.22	5.60					9.22
<b>Asset Class Total</b>		<b>394,811</b>	<b>14.11</b>	<b>14.11</b>	<b>8.42</b>					<b>11.05</b>

### Intl. Equities

<b>Harding Loevner Int'l Gr</b>	<b>05/2017 (1.8 yr)</b>	<b>54,558</b>	<b>11.60</b>	<b>11.60</b>	<b>-4.86</b>					<b>4.79</b>
MSCI EAFE		2.7%	9.98	9.98	-3.72					3.99
<b>Causeway Int'l Value Fund</b>	<b>10/2018 (0.4 yr)</b>	<b>51,347</b>	<b>10.29</b>	<b>10.29</b>						<b>2.69</b>
MSCI EAFE		2.6%	9.98	9.98						-3.81
<b>Vanguard FTSE Developed Mkts ETF</b>	<b>08/2017 (1.6 yr)</b>	<b>45,207</b>	<b>10.16</b>	<b>10.16</b>	<b>-5.15</b>					<b>0.41</b>
FTSE Developed ex North America NR USD		2.3%	9.69	9.69	-4.72					0.70
<b>Lazard Emerging Mkts</b>	<b>05/2017 (1.8 yr)</b>	<b>48,170</b>	<b>7.53</b>	<b>7.53</b>	<b>-13.69</b>					<b>0.24</b>
MSCI Emerging Markets Net		2.4%	9.92	9.92	-7.40					6.69
<b>Asset Class Total</b>		<b>199,281</b>	<b>9.93</b>	<b>9.93</b>	<b>-7.62</b>					<b>1.73</b>



# SOCIETY OF AMERICAN MILITARY ENGINEERS



## MANAGER PERFORMANCE

SAME Foundation

04/30/2017 to 03/31/2019

Manager/Benchmark	Inception Period	MV/WT%	QTD	YTD	1 Yr	3 Yr	5 Yr	7 Yr	10 Yr	Inception
<b>Fixed Income</b>										
JP Morgan Strategic Income	05/2017 (1.8 yr)	79,137	2.11	2.11	2.61					2.28
ML 3 Month LIBOR Index		4.0%	0.73	0.73	2.50					1.89
Loomis Sayles Invst Grade	05/2017 (1.8 yr)	79,367	3.35	3.35	2.96					3.48
Bloomberg Barcap Government Credit		4.0%	3.26	3.26	4.48					2.61
Metropolitan West Total Ret	05/2017 (1.8 yr)	241,387	3.20	3.20	4.72					2.64
Bloomberg Barcap Aggregate Bond		12.1%	2.94	2.94	4.48					2.54
Western Asset Core Bond	05/2017 (1.8 yr)	241,153	4.00	4.00	4.92					3.24
Bloomberg Barcap Aggregate Bond		12.1%	2.94	2.94	4.48					2.54
Asset Class Total		641,044	3.38	3.38	4.31					2.92
<b>Alternative</b>										
Blackstone Alternative Multi Strategy F	05/2017 (1.8 yr)	57,593	3.76	3.76	2.85					2.12
HFRI FOF Composite Index		2.9%	4.73	4.73	2.89					4.04
Eaton Vance Absolute Return	05/2017 (1.8 yr)	55,692	2.01	2.01	-1.76					0.41
U.S. Treasury Bills		2.8%	0.60	0.60	2.11					1.62
Asset Class Total		113,285	2.89	2.89	0.53					1.27
<b>REIT</b>										
iShares Core US REIT	01/2018 (1.2 yr)	78,832	16.29	16.29	20.80					12.58
FTSE NAREIT Equity REITs TR USD		4.0%	16.34	16.34	20.85					13.25
Asset Class Total		78,832	16.29	16.29	20.80					8.84
<b>Cash and Equiv.</b>										
Money Market	05/2017 (1.8 yr)	560,316								
CD - 3 Month		28.2%								
Asset Class Total		560,316								



## Stewarded Post Funds Summary

- ❖ 4 Posts participating: Houston, Northern VA and Narragansett Bay and Omaha. Total invested to date is ~ \$949K.
  - ❖ Houston: Contribution: \$225K 31 Mar Balance: \$223.7K
  - ❖ Northern VA: Contribution: \$108.4K 31 Mar Balance: \$111.7K
  - ❖ Narragansett Bay: Contribution: \$39K 31 Mar Balance: \$ 40.2K
  - ❖ Omaha Post: Contribution: \$560K 31 Mar Balance: \$565.1K
  
- ❖ Some other Posts starting to show interest. Omaha Post signed an agreement and transferred funds in early March 2019. Some other post inquiries – Orange County was one.
  
- ❖ Funds are managed by DiMeo Schneider, LLC and comprised of 32% Bond Funds, 30% Equity Funds, 28% Cash and 10% other. (*Cash amount is to hedge risk with the bond market downturn and for careful entry into equity funds given that the market is at an all time high*).
  
- ❖ Each participating Post gets a quarterly statement.

**INTERNAL  
OUTREACH  
COMMITTEE  
UPDATE**



## MEMORANDUM

**TO:** The Society of American Military Engineers National Foundation Board

**FROM:** SAME Foundation Internal Outreach Committee

**SUBJECT:** Update to Internal Outreach Communications Plan

**DATE:** Issued for review in advance of May 7, 2019 Board Meeting

An updated Foundation Brief and Frequently Asked Questions sheet (FAQ) needs to be posted on the SAME Foundation webpage. A draft briefing update has been reviewed and Tony Leketa has posed several items that should be discussed by the Foundation Board prior to posting. Please look over and time permitting, it would be good to address them during our May 7 meeting.

There have been no changes to the Internal Outreach Post Contact update provided during the March Board meeting.

During the March Board meeting, it was suggested that the Internal Outreach Committee be "repurposed". Further discussion with President Mogge has not yet occurred.

Your comments are welcomed and appreciated.

Respectfully Submitted,

A handwritten signature in black ink that reads "Roger J. Wozny". The signature is written in a cursive style.

Roger J. Wozny, P.E., FSAME, LEED® AP  
Committee Chair



— OUR FOUNDATION —

is rooted in our heritage.



OUR FOUNDATION



will help lead us  
*into the future.*



3/20/2019



**Society of American Military Engineers  
National Foundation**



The Foundation's **Compelling Purpose:**  
Fostering Engineering Leadership for the Nation



**Society of American Military Engineers  
National Foundation**



# What is the Foundation?

- Nonprofit Corporation registered in the District of Columbia
- **Separate and distinct from SAME National with its own governance** AL9
- Article 3: Purpose: The purposes for which the Corporation is organized are: charitable, educational, and scientific purposes with the meaning of Section 501(c)(3) of the Internal Revenue Code including but not limited to support of the educational and scientific purposes of the Society of American Military Engineers --- specifically, to **Foster Engineering Leadership for the Nation.**
- Does not have members
- Does have a “volunteer” Board of Directors



**Society of American Military Engineers  
National Foundation**



### Slide 3

---

**AL9**

This is a key point - John has a good way of expressing the relationship with National which I cannot recall but I have heard many times that the Foundation is part of SAME National, or I as a member of the Board am from SAME National - need to clarify the relationship.

Anthony Leketa, 4/11/2019

# Why have a Foundation?

- Support the Strategic Plan 2020 Outcomes (internal and external)
- Separate philanthropic from operational – with the motivation to attract available **(broadly based)** resources
- Provide an **(optional)** repository for Post Scholarship Funds (sAL1e volunteers)
  - Leverage national investment management expertise
  - Eliminate separate Post level incorporated funds AL2
  - Relieve Post volunteers from responsibility of making AL10 investment decisions
  - Compliment post fundraising
- Serve the wider objectives of the AEC industry and professional societies



**Society of American Military Engineers  
National Foundation**



## Slide 4

---

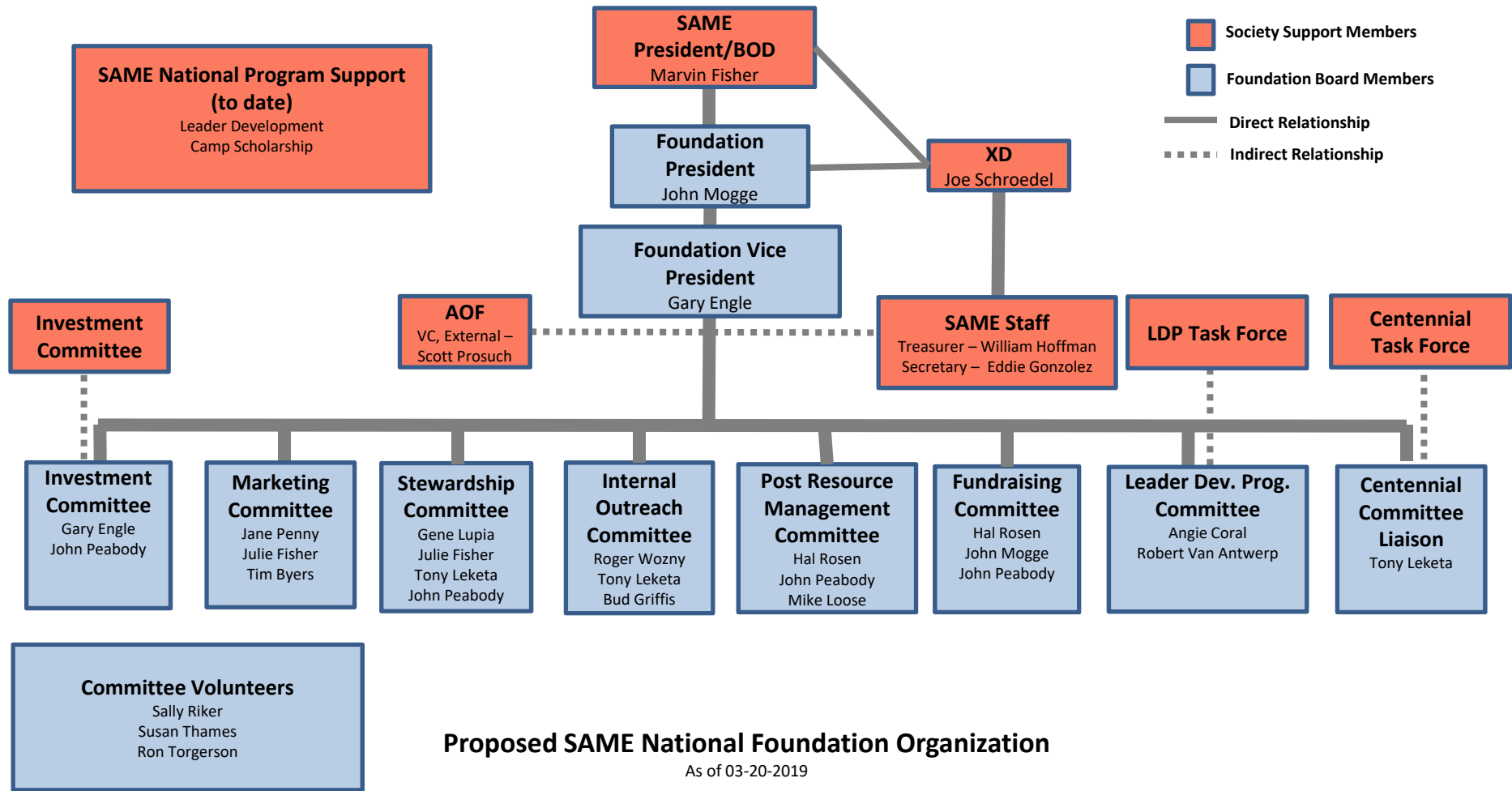
**AL1** What does "serve volunteers" mean?

Anthony Leketa, 4/11/2019

**AL2** Anthony Leketa, 4/11/2019

**AL10** This language is too strong and implies the Foundation is trying to take over all the Posts funds (which isn't true). I've heard this comment repeatedly, and it needs to be clarified. I think this statement needs to be softened.

Anthony Leketa, 4/11/2019





# How does the Foundation work and what work has been done?

- *Slow and methodically* – “walk before we run” AL11
- Small teams based on a broad strategy – outlined by the Foundation By-Laws
  - Clear alignment on the fiduciary differences between the Society and its Foundation
  - Ensure we have the “**Compelling Need**” correct and deployable
    - Build the dialog and get the word out
  - Understanding the competitive market for philanthropic activities
    - Build a specific plan around the market conditions and our niche space in the market
- Build a communications plan to deploy the “need” to the target market
- Begin to generate more resources beyond the transferred funds



**Society of American Military Engineers  
National Foundation**



## Slide 6

---

**AL11**

Is this comment still relevant? I think we are up and running now, and this comment isn't necessary.

Anthony Leketa, 4/11/2019

# What can you do to help the Foundation?

- Be articulate about your Foundation
  - What it is and what it is not!
  - Separate out the rumors from the facts
- Be an advocate for its broad purpose to individuals and corporations and organizations beyond our ranks
- Promote the **“Compelling Need”** – help find the needy
- Volunteer to help the committees with their tasks – no board membership required to do this
- Stay current on the affairs of the Foundation – website monthly
- Make personal and/or corporate contributions to the Foundation and encourage SAME members and non-members to do so



**Society of American Military Engineers  
National Foundation**





## Frequently Asked Questions

1. How will the Foundation funds be spent?
2. Who can donate to the Foundation?
3. Can Posts transfer funds to the Foundation?
4. Can Posts draw funds for operational purposes?
5. How are funds invested and managed?
6. Can restrictions be imposed on the way the money is spent?
7. What is the difference between unrestricted, temporarily restricted and permanently restricted support?
8. Will Posts be charged a management fee?
9. How long will it take for a Post to recover needed funds if transferred to the Foundation?



**Society of American Military Engineers  
National Foundation**



# Frequently Asked Questions



## 1. How will the Foundation funds be spent?

- Funding Member professional development and career advancement **to include stipends** for member travel to SAME events
- Supporting SAME Engineering and Construction Camps
- Promoting Science Technology Engineering Math (STEM) - related activities
- Providing scholarships to students pursuing STEM-related degrees
- **Supporting a Leadership Development Program focused on tomorrow's engineering leaders**

## 2. Who can donate to the Foundation?

- Any SAME member, non-member, individual, firm or organization (public or private, for-profit or not-for-profit)
- **This is YOUR Foundation!**



**Society of American Military Engineers  
National Foundation**



# Frequently Asked Questions



## 3. Can Posts transfer funds to the Foundation?

- Yes, to ease the Posts' administration burden of investing and fund distribution
- Governed by a specific agreement between Post and Foundation regarding fund spending and distribution

## 4. Can Posts draw funds for operational purposes?

- Funds required for annual operations should not be invested with the Foundation



**Society of American Military Engineers  
National Foundation**



# Frequently Asked Questions



## 5. How are funds invested and managed?

- All Foundation assets will be invested with oversight of an Investment Management Committee under the provisions of the Foundation Investment Policy stipulating a long term view
- Returns are compared to industry benchmarks to ensure the fund is performing to expectations
- Investment Management Committee reviews performance quarterly **and reports results to the Foundation Board**
- A foundation-specialized investment management advisor is retained
- Fund size allows investment manager/brokerage fee (currently 0.6%) which is below industry average and expected to decrease as Fund corpus grows



**Society of American Military Engineers  
National Foundation**



## Frequently Asked Questions



6. Can restrictions be imposed on the way the money is spent?
  - When money is contributed to the Foundation, the donor can limit the spending of the amount to a specific use or time criteria
  
7. What is the difference between unrestricted, temporarily restricted and permanently restricted support?
  - First, the Foundation welcomes all forms of support
  - **Unrestricted support** includes all forms of contributions to the Foundation that can be spent, based on the discretion of Foundation leadership



**Society of American Military Engineers  
National Foundation**





# Frequently Asked Questions



7. What is the difference between unrestricted, temporarily restricted and permanently restricted support? (continued)

- **Temporarily restricted** includes all forms of contributions to the Foundation that can be expended but must be for a specific purpose (time or use)
- **Permanently restricted** includes all forms of contributions which are not expendable by the Foundation, such as an endowment fund where the Foundation can use the investment earnings, but not the corpus



**Society of American Military Engineers  
National Foundation**



# Frequently Asked Questions



## 8. Will Posts be charged a management fee?

- A modest management fee will be assessed Posts placing funds with the Foundation. It includes headquarters administration and the investment advisor/brokerage fee which will be deducted from investment earnings, **currently estimated at 0.1%**
- The purpose of the Foundation is to support the overall strategic goals of the Society, which includes supporting the Posts
- The Foundation will seek unrestricted contributions to support the administration of the Foundation and will not pass the costs on to the Post.
- Suggested minimum investment thresholds: Small Post: \$20K, Medium Post: \$30K, Large Post: \$50K



**Society of American Military Engineers  
National Foundation**



# Frequently Asked Questions



9. How long will it take for Posts to recover needed funds if transferred to the Foundation?

- Funds will be returned to a Post within thirty (30) days of receipt of a written request.



Other questions – <http://www.same.org/foundation>

or

William Hoffman, SAME Director of Finance and Administration  
(703) 549-3800 ext. 132 [whoffman@same.org](mailto:whoffman@same.org)



**Society of American Military Engineers  
National Foundation**



The Foundation's **Compelling Purpose:**  
Fostering Engineering Leadership for the Nation



**Society of American Military Engineers  
National Foundation**





— OUR FOUNDATION —

is rooted in our heritage.



OUR FOUNDATION



will help lead us  
*into the future.*



**Society of American Military Engineers  
National Foundation**



# **LDP UPDATE**



## 2019-2020 Leader Development Program

### LDP Schedule at JETC 2019 Tentative | Subject to Change

<b>Monday, May 6, 2019*</b>	
3:00 p.m.–5:00 p.m.	<p><b>Classroom Session (Tampa CC, Room 3)</b></p> <p>Facilitator designs an opening icebreaker activity that gives participants a chance to meet each other and get oriented to the program.</p>
5:00 p.m.–7:00 p.m.	<p><b>President’s Reception (Tampa CC, Pre-function Area)</b></p> <p>LDP poster will be on display. No program planned. This is an opportunity for the participants to start meeting the attendees.</p> <p>Role of mentors: Help the participant navigate the crowd. Introduce them to any personal contacts in attendance to create some networking momentum. The mentor does not have to be a constant chaperone but should keep an eye on whether the participant needs any assistance.</p>
<b>Tuesday, May 7, 2019</b>	
8:00 a.m. – 10:00 a.m.	<p><b>Classroom Session (Tampa CC, Room 3)</b></p> <p>Group will convene with the facilitator to begin the full day’s training.</p> <p>Classroom session will cover:</p> <ul style="list-style-type: none"> <li>• Leadership Style Assessment</li> <li>• Build the Team</li> <li>• Listening Skills</li> <li>• Emotional Intelligence</li> </ul>
10:00 a.m. – 10:15 a.m.	<b>Break</b>
10:15 a.m. – 12:00 p.m.	<p><b>Classroom Session (cont.)</b></p> <p>Facilitator training continues.</p>
11:30am	<b>Marv Fisher, Joe Schroedel, and John Mogge invited to recognize the Task Force members</b>
12:00 p.m.–1:15 p.m.	<p><b>Society Leadership &amp; Post Awards Luncheon (Tampa CC, Ballroom A-C)</b></p> <p>Participants will be guided to the luncheon location. Jimmy and Angie will be recognized as distinguished volunteers representing</p>



	<p>LDP. Mike and Caroline will be recognized verbally from their seats at some point during the program.</p> <p>Once lunch and the ceremony concludes, participants and facilitator will return to the classroom location.</p>
1:30 pm. – 2:30 p.m.	<p><b>Classroom Session (cont.)</b> Facilitator training continues.</p>
2:30 pm. – 2:45 p.m.	<p><b>Break</b></p>
2:45 p.m. – 4:00 p.m.	<p><b>Classroom Session (cont.)</b> Facilitator training continues.</p>
4:00 p.m. – 5:00 p.m.	<p><b>Classroom Session: Personal Branding Session (cont.)</b> Session provided by the Victoria Mechtly, Task Force Member</p>
6:00 p.m. – 8:00 p.m.	<p><b>Opening Reception (Location TBD)</b> No specific program planned but participants encouraged to attend to work on their networking skills and download on their day.</p>
<b>Wednesday, May 8, 2019</b>	
8:30 a.m.–10:00 a.m.	<p><b>Class Introduction at General Session w/Keynote (Tampa CC, Ballroom A-C)</b></p> <p>8:30am Start of Closing Keynote session  8:30am Voice of God introduces Col. John Mogge, Ph.D., RA, F.SAME, USAF (Ret.), Chair of the SAME Foundation, and gives some background on the program. John Mogge gives remarks (likely about 5 minutes total)  8:40am John introduces Mike and Caroline, task force Co-chairs, and each participant up to the stage listing name, region, and company. Participants shake hands with the co-chairs and John as they line up on stage. John hands them their pin John as they line up.  SAME takes the group photo  8:49am John thanks the class and they walks off the stage  8:50am Session continues with keynote speaker</p>
10:00am	<p><b>Full Task Force and Participants convene on stage at the end of the session to take group photo with the Task Force.</b></p>

\* facilitator session

\*\* task force led session

## SAME 2019 JETC Schedule with LDP Highlights Tentative | Subject to Change

\* denotes facilitator session

<b>Monday, May 6, 2019</b>			
9:00 a.m.–10:00 a.m.	SAME National New Board Member Orientation		
10:00 a.m.–5:00 p.m.	SAME National Board of Direction Meeting		
1:00 p.m.–5:00 p.m.	Registration Open		
1:00 p.m.–5:00 p.m.	Exhibitor Move-In		
3:00 p.m.–5:00 p.m.	2-hour LDP ice-breaker* (3-5pm)		
5:00 p.m.–7:00 p.m.	President's Reception (by invitation. Gathering point for LDP Class.)		
<b>Tuesday, May 7, 2019</b>			
7:30 a.m.–7:00 p.m.	Registration Open		
8:00 a.m.–5:00 p.m.	Exhibitor Move-In		
8:30 a.m.–11:30 a.m.	Technical Tours ( <i>additional registration required</i> )		
8:00 a.m. - 9:00 a.m.	RVP Meeting	<b>LDP Classroom Session*</b> (6hrs not including lunch and breaks) 8:00am Morning Session Start 10-10:15am Break 12:00 pm Morning Session Adjourn 12:00-1:15pm Lunch (move group to Awards Luncheon) 1:30 pm Afternoon Session Start 2:30-2:45 pm Break 4:00 pm Afternoon Session Adjourn 4-5:00pm Personal Branding Presentation	
9:15 a.m. – 10:30 a.m.	Post Presidents Meeting		
	Committee and Council Meetings A		
10:45 a.m. – 11:45 a.m.	Committee and Council Meetings B		
	New member / First-Timer Orientation		
12:00 p.m.–1:15 p.m.	Society Leadership & Post Awards Luncheon (RSVP required)		
1:30 pm. – 2:30 p.m.	Concurrent Education Sessions		
2:50 p.m. – 3:50 p.m.	Concurrent Education Sessions		
4:15 p.m. – 5:30 p.m.	Opening General Session with Keynote		
6:00 p.m. – 8:00 p.m.	Opening Reception (Gathering point for LDP Class.)		
<b>Wednesday, May 8, 2019</b>			
7:30 a.m.–5:30 p.m.	Registration Open		
7:30 a.m. –8:30 a.m.	Continental Breakfast		
7:15 a.m. – 8:15 a.m.	Uniformed Services All Hands Meetings		
8:30 a.m.–10:00 a.m.	General Session w/Keynote (Announce LDP Class. Participants can depart JETC as soon as General Session ends.)		
10:30 a.m.–11:30 a.m.	Concurrent Education Sessions		
11:30 a.m.–1:00 p.m.	Networking Lunch		
1:15 p.m.–2:15 p.m.	Concurrent Education Sessions	Exhibit Hall Open	
2:45 p.m.–3:45 p.m.	Concurrent Education Sessions		
4:15 p.m. – 5:15 p.m.	Concurrent Education Sessions		
5:15 p.m.–6:30 p.m.	Networking in Exhibit Hall with Reception		Table Top Exercise (TTEx)

Schedule	Topic	Instructor	Reading Assignment	LDP TM LEAD
<b>Know Yourself</b>		Ms Jenn Stillings, World Awake		Susan Thames
Apr-19	Leadership Style Assessment	Ms Jenn Stillings	On-line Questionnaires	
6-May-19	Build the Team	Ms Jenn Stillings	The 21 Irrefutable Laws of Leadership by	
7-May-19	Listening Skills	Ms Jenn Stillings	John Maxwell (LDP Lead: Caroline	
7-May-19	Emotional Intelligence	Ms Jenn Stillings	Roberts)	
7-May-19	Social Media/Personal Branding	Ms. Victora Mechtley		
<b>Know Your Team</b>				
26-Jun-19	Team Performance	BG Dianna Holland, CG, SAD, USACE		Jimmy Blake
24-Jul-19	Leading Global Teams	MG Jeff Milhorn, CG, NAD, USACE		Jimmy Blake
1-Aug-19	Business Acumen/Financial	Mr. Kevin Berryman, CFO, Jacobs	Good to Great by Jim Collins (LDP Lead	Caroline Roberts
<b>Know Your Future</b>			Gen VanAntwerp)	
Sep-19	Milestone Planning/Time Management/Respecting	Mr. Chris Collie, Engaged Talent Solutions		Jimmy Blake
Oct-19	Personal Vision/Goal Setting	Heather Wishart-Smith (Jacobs)		Angie Goral
Nov-19	Career Transition - Technical SME to Leader	Mike Nosbish	How to Win Friends and Influence	Angie/Mike
			People by Dale Carengie (LDP Lead	
Dec-19	No Group session - holiday		Victoria Mechtly)	
Jan-20	Utilization Project Overview and Intro.	BG(R) Joe Schroedel		Caroline Roberts
Feb-20	Guest Speaker - Leadership Challenges/Lessons Learned	TBD	Start With Why by Simon Sinek (LDP	Caroline Roberts
Mar-20	Guest Speaker - Challenges/Lessons Learned	LTG(R) Robert Van Antwerp	Lead: Mike Darrow Angie Goral)	Mike Darrow
Apr-20	Project Outbriefs	BG(R) Joe Schroedel		All
May-20	Graduation/Project Outbrief	Service Chiefs in person at JETC to be informed by candidates of their UPIC and contributions through their project. Recieve feedback, thoughts from Service Chief's.		All



## 2019-2020 Leader Development Program Promotion Packet

### Short Blurb:

Developed with support from the [SAME Foundation](#), the Leader Development Program identifies and cultivates talent from within SAME's membership to address the nation's grand challenges. A total of 18 individuals from across the membership, one from each SAME region and one representing the International Committee, have been selected to be part of the inaugural 2019-2020 LDP Class.

The program supports the development of the next generation of world-class military, government, and industry leaders for the Society and our nation through a curriculum of hands-on training, study, and active engagement in new opportunities. Participants will explore individual strengths and team dynamics, and discover their potential personally and professionally. LDP is a yearlong commitment beginning at the 2019 Joint Engineer Training Conference (JETC). The graduation of the first class will be held at the 2020 JETC in Washington D.C. They will also be paired with a mentor to aid in their professional development and participate in webinars and online discussions throughout the year. More information on SAME's Leader Development Program can be found at [www.same.org/ldp](http://www.same.org/ldp). Applications for the 2020-2021 class should be available by late summer.

### Long Blurb:

The Society of American Military Engineers (SAME) is pleased to present the inaugural class of participants in the Leader Development Program (LDP). A total of 18 individuals from across the membership, one from each SAME region and one representing the International Committee, have been selected to participate in this professional development program.

Developed with support from the [SAME Foundation](#), LDP identifies and cultivates talent from within SAME's membership to address the nation's grand challenges. The program supports the development of the next generation of world-class military, government, and industry leaders for the Society and our nation through a curriculum of hands-on training, study, and active engagement in new opportunities. Participants will explore individual strengths and team dynamics, and discover their potential personally and professionally.

LDP is a yearlong commitment beginning at the 2019 Joint Engineer Training Conference (JETC). The graduation of the first class will be held at the 2020 JETC in Washington D.C. They will also be paired with a mentor to aid in their professional development and participate in webinars and online discussions throughout the year.

The 2019-2020 LDP Inaugural Class includes:

- Ilana Almquist, Coffman Engineers Inc. (Pacific Region)

- Holly Bigelow, P.E., Wood (Europe Region)
- Maj. Craig Bryant, USA, Fort Hood, Texas (TEXOMA Region)
- Maj. Mark DeSouza, P.E., USAR, Thomas & Hutton (Carolinas Region)
- Angela Gomez, KOMAN Construction LLC (Southwest Region)
- Patricia Graham, EnSafe Inc. (New England Region)
- Lt. Mike Guaigua, P.E., CEC, USN, NAVFAC EURAFSWA (International Committee)
- Erin Krug, P.E., USACE St. Paul District (Great Lakes Region)
- Sean Lebel, P.E., AECOM (Mid-Atlantic Region)
- Lt. Cdr. Samuel Lee, P.E., CEC, USN, University of Washington (Northwest Region)
- Melissa Lewis, Scott AFB, Ill. (Missouri River Region)
- Capt. Brendan Maestas, USAF, Air Force Institute of Technology (Ohio Valley Region)
- Benjamin Nichols, Harkins Builders Inc. (North Atlantic Region)
- Zakary Payne, P.E., Matrix Design Group (Rocky Mountain Region)
- Claudia Penny, HCR Construction Inc. (South Atlantic Region)
- Jorge Rodriguez, P.E., M.S. Hatch Consulting (California Region)
- Mary Ruiz, Quaternary Resource Investigations (Lower Mississippi)
- Stephen Shattuck, formerly with LandMark Engineering and Land Planning Inc. (South Central Region)

More information on SAME's Leader Development Program can be found at [www.same.org/ldp](http://www.same.org/ldp). Applications for the 2020-2021 class should be available by late summer.

## 2019-2020 Leader Development Program Inaugural Class

### **Ilana Almquist, Marketing Coordinator, Coffman Engineers, Inc. (Pacific Region)**



Ilana Almquist is a marketing coordinator for Coffman Engineers' Honolulu and Guam offices. As the marketing lead for Coffman's Pacific Team, Ilana strengthens relationships through interaction with her local community as well as through the professional societies with which she's engaged. As a remote employee living in Guam, Ilana's work is fundamental to the interoperability of Coffman's Pacific Region, where she supports go-to-market strategies, facilitates company engagement with professional associations, and develops marketing information promoting the Coffman brand.

Over the last 3 years, Ilana has maintained a Board of Directors position with the SAME Guam Post while serving on multiple committees and chairing events throughout the year. Her support and leadership have helped the Guam Post grow tremendously, achieving record growth in both scholarship-fundraising and membership. In 2018, her involvement with the Guam Industry Forum committee was instrumental for its success in netting over \$100k, while also chairing the Charlie Corn Scholarship Golf Tournament and netting over \$42k, both of which proved to be critical to the success of the local SAME Guam Chapter. As a growing leader, Ilana continued her 2018 involvement by volunteering for the inaugural SAME Air Force STEM Camp at Scott AFB, IL as the logistics coordinator.

Born and raised in Anchorage, Alaska with her 6 siblings, Ilana's family relocated to Liberty Lake, Washington during her high school years. Ilana married her husband, Master Sergeant Jamie Almquist in 2007. In their spare time, they enjoy golfing, scuba diving, traveling, and hiking with their three children Akayla (11), Collin (8), and Graeme (4). Over the last decade she has been appointed as a Key Spouse, serving as a liaison between unit leadership and hundreds of families while being stationed at Fairchild AFB, Washington, Scott AFB, Illinois, and Andersen AFB, Guam. Ilana was awarded the Joan Orr Award for 2016 & 2017 at the 11th Air Force PACAF AOR level for her dedication to assisting families as they adapt to the transitions and challenges of military life.

### **Holly Bigelow, Program Manager, Wood (European Region)**



Holly Bigelow is a Program Manager for Wood where she leads their U.S. Army-Europe Program. In this role she manages Wood's portfolio of U.S. Army contracts throughout Europe and supports 15 Project Managers.

Prior to entering this role in 2017, Holly worked as an Environmental Engineer and Quality Control Professional on a large DoD construction project for Wood where she reviewed technical engineering submittals and conducted construction inspections.

Holly entered the private sector in 2016 after serving on active duty in the U.S. Air Force for seven years. During her time in the Air Force she held various civil engineering positions including: Project Manager and Operations Support Manager, 30<sup>th</sup> Civil Engineer Squadron, Vandenberg Air Force Base, California; Contingency Planner, 7<sup>th</sup> Air Force/A7, Osan Air Base, Republic of Korea; and Flight Commander, 435<sup>th</sup> Construction and Training Squadron,

Ramstein Air Base, Germany. During her active duty service, she also deployed to Iraq in support of Operation New Dawn in 2011 and to Liberia in support of Operation United Assistance in 2014.

Holly is a native of Barker, New York. She attended the U.S. Air Force Academy, where she received a Bachelor of Science degree in Environmental Engineering in 2009. Additionally, she attended Johns Hopkins University where she received a Master of Science degree in Environmental Engineering and Science in 2015. She is a registered professional engineer in the state of Colorado.

Holly is an active SAME member having served as the Kaiserslautern Post Secretary from 2015 to 2018. More recently, Holly was an active member on the planning committee for the 2019 NAVFAC EURAFSWA-SAME Industry-Government Engagement Forum.

In her free time Holly is a hobby homebrewer and an avid NY Yankees fan.

### **MAJ Craig Bryant, P.E., Operations Officer, Fort Hood, TX (Texoma Region)**



MAJ Craig W. Bryant is the Operations Officer for the 8th Engineer Battalion, 2nd Armored Brigade Combat Team, 1st Cavalry Division at Fort Hood, Texas. MAJ Bryant joined the Society of American Military Engineers in 2014 and currently serves as the President of the Fort Hood Post

A 2004 graduate of the United States Military Academy, MAJ Bryant has served in a variety of staff and command positions throughout his career. From 2004 to 2007 he served as Platoon Leader, Battalion Construction Officer, Company Executive Officer, and Battalion Adjutant with the 46th Engineer Battalion at Fort Polk, LA. During this assignment MAJ Bryant deployed to Ramadi and Fallujah, Iraq. In 2008, MAJ Bryant attended the Engineer Captain's Career Course at Fort Leonard Wood, MO, where he was the SAME Award Winner as the top General Engineering Studies student in his class. Following the Career Course, MAJ Bryant served as an Assistant Operations Officer and Company Commander with the 3rd Special Troops Battalion, 3rd Brigade Combat Team, 82nd Airborne Division at Fort Bragg, NC from 2008-2012. During this assignment, MAJ Bryant deployed to Baghdad, Iraq. Upon completion of company command MAJ Bryant attended Advanced Civil Schooling at the Virginia Polytechnic Institute and State University in Blacksburg, VA from 2012-2013. In 2014 MAJ Bryant attended the Command and General Staff College at Fort Leavenworth, KS. From 2015-2016, MAJ Bryant served as a project manager with the U.S. Army Corps of Engineers' Baltimore District. In 2017, MAJ Bryant joined 2nd Armored Brigade Combat Team as the Brigade Engineer, deploying with the brigade to the Republic of Korea prior to returning to Fort Hood and assuming his current position in 2018.

MAJ Bryant holds a Bachelor of Science in Electrical Engineering from West Point and a Master of Science in Civil Engineering (Transportation and Infrastructure Systems) from the Virginia Polytechnic Institute and State University. He is a registered Professional Engineer in the Commonwealth of Virginia. MAJ Bryant's thesis, titled "Study of Truck Driver Behavior for Design of Traffic Signal Yellow and Clearance Timings" was published in the *Transportation Research Record*, No. 2488.

MAJ Bryant's award and decorations include the Bronze Star Medal, the Meritorious Service Medal, the Army Commendation Medal, the Navy Achievement Medal, the Iraqi Campaign Medal (4 Stars), the Korean Defense Service Medal, the Humanitarian Service Medal, the Combat Action Badge, the Senior Parachutist Badge, and the Air Assault Badge.



MAJ Bryant is married to the former Megan Nicely of Cumberland, VA. They have two sons, Gavin, 6, and Jonah, 3.

**Mark DeSouza, Civil Site Design Project Manager, Thomas & Hutton (Carolinas Region)**



Mark DeSouza grew up in Columbia, SC and earned his Civil Engineering degree at Clemson University. While in college, he enlisted in the Army Reserves as a Combat Engineer and later commissioned as an Engineer Officer through ROTC. Mark moved to Atlanta, GA to start a position as a site design project engineer in 2005 and focused on residential projects with an emphasis on stormwater management.

Mark married Shannon in 2006 and deployed to Iraq in support of Operation Iraqi Freedom in 2007. In Anbar Province, Mark led a platoon of 41 combat engineers in 185 Route Clearance patrols in which they searched for, and eliminated, Improvised Explosive Devices. This provided freedom of movement for Coalition forces.

Upon his return to civilian employment, he obtained his professional engineer license in 2009 to include GA, SC and AL. He continued to enhance his skills in civil engineering by providing support to his team in commercial and municipal projects.

In 2010, Mark deployed to Afghanistan in support of Operation Enduring Freedom as a Route Clearance Company Executive officer. He was responsible with leading the company's staff including personnel, intelligence, operations, supply and medical staff sections. He planned, coordinated and sourced Route clearance missions in support of the 101st, 2nd Brigade Combat team.

Upon return, Mark's civilian occupation expanded to include Civil Site Design Project Manager with a focus on national retail clients and mixed-use projects. He led project teams including organic designers and external consultants while managing contracts, budgets, quality control, permitting and construction assistance.

In 2011, Mark took command of the 323rd Route Clearance Company and led 178 Soldiers for 27 months. This included three 21-day annual training missions and his unit was the first Army Reserve Unit to be fielded a full set of Route Clearance Vehicles in the states. He was accountable for over \$20 million dollar worth of Vehicles, weapons and equipment, as well as its maintenance and storage.

In 2014, Mark deployed to Iraq for a second time as a technical engineer in a Forward Engineer Support Team. In this capacity, Mark served as a civil engineer in a small forward deployable team which was an extension of USACE. His team supported the department of defense by providing technical engineering support in austere locations.

Currently, Mark is living in Columbia, South Carolina working as a Civil Site Design Project Manager. He leads a project team in design, permitting and construction of commercial and industrial projects. He also serves as a plans officer in an Army Reserve Engineer Brigade Staff. In his spare time, he enjoys playing with his two sons, Ethan (9) and Sloan (5). He plays adult soccer and is active in his kid's soccer leagues as an assistant coach.



**Angela Gomez, Business Manager, KOMAN Construction LLC (Southwest Region)**



Angela Gomez was born in Waukegan Illinois, the middle child of three. Growing up there, she met her future husband while they were both still in high school. During this time, Angela was faced with a hard decision and chose to leave school to start a family with her high school sweetheart. After he graduated, he enlisted in the Marine Corps, which presented new challenges and opportunities.

Angela married her high school sweetheart and moved with him to his first duty station in South Carolina. During his enlistment she learned to juggle being a military spouse, a mother of three, and a full-time employee. She found herself an entry level job and moved through the ranks quickly to manager. After her husband's enlistment concluded, their time in South Carolina was ending and they had to move on. They decided to move their young family to Florida.

In the Sunshine State, their family transitioned from city life to rural country life by establishing a little farm, with horses, cows, chickens, pigs, donkeys, goats, and many more. There was a little culture shock going from the city life to a small-town life, but it was a great environment for their little ones.

During her time in Florida, Angela found inspiration to thrive and returned to school where she earned a Bachelor of Arts Degree in Criminology and a minor in Non-profit Organization from the University of Florida. In between, going to school, crazy work hours, and making a home for her husband and three beautiful children, Angela still found time to volunteer.

Angela volunteered at numerous non-profit organizations. Some of her roles were Fundraiser Chair, Event Coordinator, Cheerleading Director, Vice President, and anywhere else the need arose. She was very influential as a Girl Scout leader, Cheerleading Coach, Soccer Coach, Team Manager, and T-ball Coach providing guidance to young people and serving her community. She also served as the President of a non-profit youth organization and co-founded a competitive youth soccer club, another non-profit organization.

Angela and her family lived in Florida for many years. After the family became older, opportunities started to present themselves for her husband in the Southwest. Once again, their family decided it was time to follow a new path and make another move. Angela was able to make the most of the change and was able to secure a position with KOMAN. She started out as an admin and worked up to her current position of Business Manager, making use of her unique talents and abilities she learned throughout her journey. It is in this position that she began her newfound relationship with SAME, to network with its many prestigious members. She is committed to striving for greater excellence and achievement, not only for herself, but for her post as well.

**Patricia Graham, Project Geologist, EnSafe Inc. (New England Region)**



Patricia, a project geologist located at EnSafe's Londonderry, New Hampshire office, has more than 11 years of environmental consulting experience at known or suspected petroleum and hazardous waste sites located throughout New England. She provides consulting services to a broad spectrum of private, commercial, and municipal clients, with the goals of ultimately minimizing or eliminating: environmental damage, risks to human health or the environment, and, client liabilities associated with the conditions at these sites.

Patricia has been a part of EnSafe since 2014, with her primary focus on the technical requirements and field management responsibilities associated with successful completion of environmental assessment and remediation projects. Technical requirements include: design and implementation of subsurface investigations into the nature and extent of impacts to environmental media; operations and maintenance activities to optimize performance of various types of active and passive remediation systems; design and execution of environmental site assessments associated with property transactions; design and execution of building materials surveys to evaluate suspect building materials for the presence of regulated hazardous materials; design and implementation of investigations for vapor intrusion into indoor air at petroleum and hazardous waste sites; assistance with Spill Prevention, Control, Countermeasure (SPCC) plans; and, Emergency Planning and Community Right-to-Know Tier II reporting. Management responsibilities include: budget estimation; project staffing; work flow management; subcontractor oversight and management; property access; and client updates.

Patricia holds a bachelor degree in Earth and Geographical Science with hydrogeology certification from the University of Massachusetts Boston.

Fascinated since childhood by physical features ranging from mysterious cave and canyon formations to beautiful snow-capped mountain ranges, the study of hydrogeology and geomorphology was a natural path for Patricia. Patricia also grew up close to a Superfund site that had been ranked 14<sup>th</sup> on the list of immediate priorities when it was added to the Superfund roster in 1982. Her commitment to help protect public human health and well-being began when she learned of this 'ugly truth' impacting her local community, hidden in its soil and water.

Patricia has been actively involved in her local community as a former member of the conservation commission and a registered member of the Boys Scouts America. For the last seven years, she has been an assistant scout master with the Boys Scouts America, with the goal of guiding boys ages 11 to 18 through the program. When not on a job site or camping with the Boy Scouts, you can find Patricia enjoying the outdoors with her two sons, hiking to new heights or traveling to new locations.

#### **LT Mike Guaigua, Civil Engineer Corps, U.S. Navy (International Committee)**



Lieutenant Mike Guaigua reported to Public Works Department Camp Lemonnier Djibouti on June 2018. LT Guaigua joined the Navy and attended Recruit Training Command at Great Lakes, Chicago in November 2001. After graduation, he attended Engineering Aide "A" School training in Fort Leonard Wood, MO. He reported to Naval Mobile Construction SEVENTY-FOUR in June 2002, where he completed deployments to Guam, Kuwait, Iraq, Spain, and Okinawa. In June 2007, he transferred to NAVFACEURAFSWA – PWD Bahrain and assumed duties as the Facilities Maintenance Specialist Leading Petty Officer. LT Guaigua was selected for the STA-21 program in 2010.

During his junior officer tour with Naval Mobile Construction Battalion FOUR, LT Guaigua served as Charlie Company Platoon Commander, Construction Civic Action Detail – Cambodia Liaison Officer, and as the Assistant Operations Officer. He most recently served as a Construction Manager for NAVFACEURAFSWA – PWD Rota.

LT Guaigua is a Registered Professional Engineer in the state of Pennsylvania. He is a member of ASCE, SAME, and Tau Beta Pi. He is a qualified Seabee Combat Warfare Officer. His personal awards include the Navy and Marine Corps Commendation Medal (2), Navy and Marine Corps Achievement Medal (5), and other unit and service awards.

LT Guaigua holds a Bachelor of Science degree in Civil and Environmental Engineering from The Citadel. He lives in El Puerto de Santa Maria, with his wife Agneta Guaigua, daughter Mikaela Adonai (7), and son David Andres (4).

**Erin Krug, P.E., Structural Engineer, U.S. Army Corps of Engineers (Great Lakes Region)**



Erin Krug is a Professional Engineer, a LEED Accredited Professional in Building Design + Construction, and a certified Facilities Engineering Acquisition Professional who has served as the Junior Vice President of SAME, Minneapolis-St. Paul Post since 2017. In addition to her role as Junior Vice President, she has contributed to the success of several Post programs as the Scholarship Committee Chairperson, the Engineering and Construction Camps Point of Contact, and the Social Media Manager. Erin is also active in the SAME National STEM and National College Outreach Committees.

In 2011, Erin graduated with a Bachelor's degree in Civil Engineering from the University of Vermont, and in 2013 earned her Master's degree in Civil Engineering from Johns Hopkins University. While completing her graduate coursework, Erin advanced novel applications of control theory in the field of experimental methods in earthquake engineering in order to dynamically control force in hydraulic actuators. This work, which Erin presented at technical and professional conferences throughout the country, was published in multiple peer-reviewed academic journals.

As a structural engineer with the U.S. Army Corps of Engineers St. Paul District, Erin specializes in the design and inspection of flood risk management and navigation projects. As the team leader for multiple designs and inspections of locks and dams, Erin determines project scopes and provides mentoring and guidance to junior staff, and conducts quality assurance/quality control (QA/QC) review of project work, which includes structural calculations and models, technical design and inspection reports, and construction documents. As the technical point of contact for the National Sign Program Mandatory Center of Expertise, Erin fields inquiries from manufacturers, engineers, and operations personnel about engineering, manufacturing, support structures, and layout to aid safe navigation through the locks and dams.

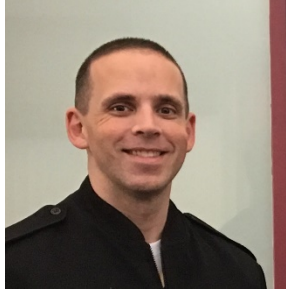
Outside of work and SAME, Erin plays sports such as softball, tennis, broomball, soccer, and curling, as well as taking part in other outdoor endeavors. For the past two years, Erin has officiated matches in regional, national, international, and Olympic curling competitions as a U.S. Curling Association Level II Official. Erin also enjoys bicycle commuting, British crime dramas, cat videos, and the Minnesota United Football Club.

**Sean Lebel, P.E., Operations Manager, AECOM (Mid-Atlantic Region)**



Sean Lebel serves as the Operations Manager for AECOM's Design and Consulting Services group in Norfolk, VA. He supports team staffing and management of internal and external resources to achieve successful project completion. His technical areas of responsibility include management of multi-disciplinary services including civil, environmental, electrical, mechanical, structural, architectural, and fire protection / life safety. In addition to his responsibilities as Operations Manager, he serves as both a Program Manager and Project Manager on contract Task Orders; and serves as a senior Fire Protection Engineer for local, state, and federal clients. Sean is a registered fire protection engineer in the Commonwealth of Virginia and is a 2005 graduate of Clarkson University.

**LCDR Sam Lee, Civil Engineer, U.S. Navy (Northwest Region)**



LCDR Sam Lee P.E. is a Navy, Civil Engineer Corps officer. He received a Bachelor of Science in Civil Engineering from Brigham Young University and was commissioned after completion of Officer Candidate School in November 2007. His past assignments include Assistant Public Works Officer, Public Works Department China Lake, California; Officer in Charge of Detail Andros and Detail Kunduz, U.S. Naval Mobile Construction Battalion 40; Construction Manager, Public Works Department Maine; Officer in Charge, NAVFAC Pacific-Site Philippines; and Personnel Exchange Program Officer, U.S. Army 555

Engineer Brigade. LCDR Lee is currently assigned to the University of Washington and is pursuing a Master of Science in Civil Engineering. He will be reporting to NAVFAC Northwest in June 2019 to serve as the Director of the Facilities Engineering and Acquisition Division Bangor at Naval Base Kitsap. LCDR Lee is a registered professional engineer in the State of Washington, and a qualified Seabee Combat Warfare Officer. He has been a member of SAME since 2008 and is currently serving as the Programs Co-Chair for the Mt Tacoma Post, Student Chapter Mentor at the University of Washington, and National Young Member Council Vice Chair for Military/Government Engagement.

**Melissa Lewis, Supervisor Project Management, Scott Air Force Base (Missouri Region)**



Melissa E. Lewis is a Civil Engineer and Project Management Team Lead for the 375 Civil Engineering Squadron at Scott AFB. She leads 20 engineers overseeing infrastructure design, programming, construction and maintenance for an installation encompassing 46,000 daily population, 3,500 acres and 826 facilities valued at \$4.7 billion. Melissa's diverse team of project managers executed a \$200 million facility maintenance portfolio, ensuring the success of the Department of Defense's (DoD) global mobility operations.

Melissa Lewis received her Bachelor of Science in Civil Engineering at the University of Arkansas. She met her husband, Major Allen Lewis, while at the University. She then began work as a Corporate Management Trainee (CMT)/Assistant Road Master for Burlington Northern Santa Fe Railroad in Denver, CO. After Major Lewis commissioned in 2009, they got married and moved to their first duty station at Joint Base Pearl Harbor Hickam, Hawaii. There she began her government service working for Naval Facilities and Engineer Command as the lead engineering tech in the Facility Maintenance Division. She was first introduced to SAME at Hickam in their STEM outreach program. In 2012 they moved to Davis-Monthan AFB, Tucson, AZ where Melissa set up Requirements and Optimization for the 355 Civil Engineer Squadron. They had their first son, Nathaniel in 2013. She became heavily involved with SAME by serving as the post Vice President and then Co-President. Later in 2015, they moved to Scott AFB, IL. They had their second and third child, William (2015) and Penelope (2017). Melissa continued her government service as a Civil Engineer Project Manager for the 375 Civil Engineering Squadron and later moved on to her current position at SAFB. As a member of the Scott Post Melissa has held positions including government membership, young member chair, and currently Secretary. Additionally, Melissa took on Assistant Camp Director to help pioneer the inaugural STEM Camp at Scott AFB.



### **Capt Brendan Maestas, Instructor, Wright-Patterson AFB (Ohio Region)**



Capt Brendan J. Maestas is an instructor at The Civil Engineer School, Air Force Institute of Technology, Wright-Patterson AFB, Ohio, where he directs the BUILDER Sustainment Management System courses and teaches lessons in many other resident and satellite broadcast courses.

Capt Maestas commissioned in 2012 from the United States Air Force Academy. He earned a Bachelor of Science degree in Civil Engineering from the United States Air Force Academy, Colorado Springs, Colorado. His first duty assignment was with the 5th Civil Engineer Squadron, Minot Air Force Base, North Dakota, where he served as the Officer in Charge of the Programming Element, the Asset Accountability Element Chief, Deputy Installation Management Flight Chief, Section Commander, and Officer in Charge of the Requirements and Optimization Element. Prior to his current assignment, Capt Maestas was a student in the Air Force Institute of Technology's Graduate of Engineering Management program, earning a Master of Science in Engineering Management with focuses in both Asset Management and Construction Management.

In 2015, Capt Maestas deployed to Bagram Air Base, Afghanistan in support of Operation FREEDOM'S SENTINEL. While deployed as the Operations Flight Commander for the 455<sup>th</sup> Expeditionary Civil Engineer Squadron, he led 41 Airmen at the United States Central Command's busiest combat air logistics hub. Additionally, his leadership was vital to the planning and execution of a Four Million dollar beddown project and conversion of a parallel taxiway into an alternate runway.

### **Ben Nichols, Project Executive, Harkins Builders, Inc. (North Atlantic Region)**



Ben is currently the Project Executive at Harkins Builders and is charged with leading the division of the Company focused on new construction and renovation work for Local Municipalities, County, State, and Federal Government clientele. Ben has built more than \$100M worth of work in the last two years for clients including NAVFAC, USACE, Army National Guard, US Secret Service, State of Maryland, and Howard County, MD.

Prior to coming on board at Harkins, Ben was the General Manager of Construction Operations at Allen & Shariff, Inc. In that role, he managed construction projects in both government and the private sector. Contracts included commercial, healthcare, industrial, retail, renovations, and ground up building construction.

Prior to his civilian work experience, Ben graduated from the United States Naval Academy in 2008 with a Bachelor of Science degree in Ocean Engineering and subsequently was commissioned as a Marine Corps Combat Engineer Officer. In his first tour of duty in Okinawa, Japan, Ben was a platoon commander for 44 Marines and had the opportunity to deploy to Marjah, Afghanistan where he spent the vast majority of the deployment building patrol bases, guard towers, and improving force protection for Battalion. Additionally, as the senior engineer for 2nd Battalion, 9th Marines (an infantry battalion composed of 600 Marines), he advised the commanding officer on all engineering issues to include sourcing the right engineer units and equipment to accomplish the engineering priorities of the commander in Marjah, Helmand Province.

Following a two-year stint in Okinawa Japan, Ben took a special billet which assigned him to a "Seabee" battalion, Naval Mobile Construction Battalion FIVE (NMCB 5) in Port Hueneme, CA. As a Company Commander, he successfully managed construction projects on a 7-month deployment in Rota, Spain in support of base improvement / maintenance operations. Following the Spain deployment, Ben became the Assistant Operations Officer for NMCB 5 and deployed again to Okinawa. In Okinawa, he managed base maintenance & humanitarian service construction projects spread throughout Asia (Korea, Mainland Japan, Okinawa, Diego Garcia, Cambodia, Thailand, and The Philippines).

**Zakary Payne, Associate, Matrix Design Group, Inc. (Rocky Mountain Region)**



Zakary Payne is an Associate with the Matrix Design Group, Inc. in Colorado Springs, CO. He is a member of the Government Consulting Services directorate currently supporting clients in the Commonwealth of Virginia, the States of Florida and Michigan, and the Office of the Secretary of Defense.

Zakary began his career in 2004 as a newly commissioned Civil Engineer Officer in the United States Air Force. His first and only Active Duty assignment was at McGuire AFB, NJ. Zakary separated from Active Duty in 2006 and transitioned to the Inactive Ready Reserves. He joined Toll Brothers, Inc. as an Assistant Land Development Manager responsible for overseeing planning, design and construction of all utilities, earthwork and transportation networks in multiple residential subdivision. In September 2007, Zakary moved to San Antonio, TX where he served as a Project Engineer with Pape-Dawson Engineers, Inc. While working for Pape-Dawson Engineers, Zakary earned his Professional Engineer license and served as the lead engineer on multiple residential and commercial projects, including Morgan's Wonderland – the world's first ultra-accessible theme park for special needs children. In 2010 Zakary returned to the Air Force as a civil servant at Randolph AFB where he served as the Engineering Flight Chief and Deputy Base Civil Engineer. Zakary left Randolph in 2013 to stand-up the Planning & Integration Directorate of the newly formed Air Force Civil Engineer Center (AFCEC). While in that position, Zakary was directly responsible for developing the risk-based scoring model used to prioritize facilities and infrastructure investments across the Air Force and he was the co-creator of the Centralized Tasking Order which is still in use today. Zakary departed AFCEC in 2017 and spent 12-months as the Deputy Base Civil Engineer at Misawa Air Base, Japan. He followed that assignment by serving as the Engineering Flight Chief at Schriever AFB, CO prior to joining Matrix.

Zakary received a Bachelor of Science degree in Civil Engineering from the United States Air Force Academy in 2004. He also received a Master of Business Administration degree from the University of Texas at San Antonio in 2015.

Zakary is married to Verna Payne and together they have five children: Brenna (23), Brayden (22), Zachary (19), Hadleigh (6), and Keegan (4).

**Claudia Penny, Assistant Project Manager, HCR Construction, Inc. (South Atlantic Region)**



Ms. Penny is a construction management professional with over 10 years of construction project supervision and property management experience. Ms. Penny has experience in all aspects of the design, development, and construction process. She is also familiar with the marketing, sales, business administration and financial aspects of the business. She is currently employed by HCR Construction, Inc. as the Assistant Project Manager on multiple contracts throughout the southeast including Navy, Air Force, Army Installation, and USACE projects. She has been working on an

ID/IQ MATOC at Fort Benning for over 5 years and has been with HCR for over 6 years. She has been actively engaged with SAME since 2011. Ms. Penny serves as the Camper Coordinator and Alumni Liaison for the SAME Marine Corps Engineering and Construction Camp. She currently serves as a member of the Atlanta SAME Post Board of Directors as the Young Member Chair and STEM Camp Committee Chair. She received a BS in Construction Management with a concentration in development from Southern Polytechnic State University in 2010.

I hope to improve my leadership skills and use them to motivate and engage the people around me to form effective teams. As a construction professional, I also hope to learn ways to bring designers, engineers, and builders together, so that they work more efficiently as a team, or a true strategic partnership.

**Jorge Rodriguez, Senior Engineer, M.S. Hatch Consulting, LLC (California Region)**



I'm Jorge, a problem solver with a curiosity of how things work that lead me to become an engineer who found a passion for environmental consulting. I started my career at GE Energy & Environmental Research (EER) Corporation, immediately after graduating from the University of California Irvine in 2002 with a Bachelor of Science in Mechanical and Aerospace Engineering. I spent one year working at EER, supporting design engineers on emission control retrofit systems for large power plants. The retrofits were focused on reducing oxides of nitrogen (NO<sub>x</sub>), a precursor to ground-level ozone. Unfortunately (or fortunately as I view this in hindsight) GE was under a hiring freeze and my one-year employment under a technical contract was over. My career then took a turn to a position with URS Corporation (now AECOM) with a wonderful and diverse team doing environmental compliance. At URS I found my passion for problem solving, team work and client interaction for a variety of clients ranging from the U.S. Navy to Universal Studios Hollywood.

Throughout my 13 years at URS and then AECOM after the 2014 acquisition, my career grew from an entry level engineer, to a supervisor and my final position as a department manager prior to my departure in 2016. As a department manager, our environmental compliance group was involved in air quality, hazard materials and waste management, auditing, health and safety, and stack source testing. In 2016 I took a turn from an 85,000-person firm, to a small 4-person woman-owned business. This change allowed me to return to central passion, a client focus and doing strong technical air quality work.

When I'm not crunching away on spreadsheets or talking with clients, I spend my time with my family. My wonderful wife Melissa of 13 years, who is also an engineer working in transportation. We keep each other balanced at home, at work and in life. Our two amazing kids, 7-year-old son Isaac and 5-year-old daughter Kaiya, well they keep us busy the rest of the time. The kids are beginning their trials into sports, which has already given me the opportunity to coach baseball, referee and coach soccer, and currently coach flag football. I enjoy the time I can spend with them during their extracurricular activities or during the weekly volunteer time in my son's 1<sup>st</sup> grade class for reading groups. Watching them learn and grow is a wonderful thing, moments I will always cherish.

**Mary Ruiz, VP of Sales, Quaternary Resource Investigations, LLC (Lower Mississippi Region)**



Mary Ruiz has over 10 years of experience producing and managing multimillion-dollar Federal proposal efforts for clients such as the USACE, the US Air Force, the US Navy, the US Coast Guard, FEMA and the GSA. She first joined QRI in 2007 as a part-time writer for marketing materials and proposals. After graduating from LSU in 2011, she accepted a full-time position as QRI's Federal Proposal Manager. Ms. Ruiz has played an integral part in generating \$1.6B in contract value by securing 111 Federal contracts with \$94M in obligated value with over 500 task orders since 2011—average of 25 proposals and estimates each month with a 72%-win rate. She has also closely managed QRI's Joint Venture, Mentor Protégé and large business relationships, which has been essential to QRI's growth and development in the Federal arena. Ms. Ruiz now serves

as the Vice President of Sales and has attended SAME's JETC and SBC tradeshow as a Young Member since 2011.

As QRI's Federal Proposal Manager from June 2011 to April 2018, Ms. Ruiz was responsible for all proposal development steps for over 600 \$5K to \$200M efforts. Responsibilities included leading kick-off meetings with large, multi-discipline teams, creating proposal management plans, document design, translation, editing, graphic direction, RFP compliance, publishing and document submission. Ms. Ruiz modernized QRI's existing proposal management processes for preparing bids and proposals to ensure deliverables were compliant to FAR bidding specifications, completed in a timely manner, and reviewed for proper management approval. She developed compliance and capabilities matrixes and provided input to upper management conducting bid/no-bid reviews, and maintained QRI's library of proposal documents, graphics, master resumes/project descriptions, and photos. Ms. Ruiz also participated in marketing strategy development, the redesign of corporate branding, newsletter composition, special event planning, and tradeshow participation. She also drafted and managed all Joint Venture documents with small business partners in addition to all teaming agreements and relationships with large business partners.

Since her promotion to Vice President of Sales in April of 2018, Ms. Ruiz conducts and manages business intelligence research to evaluate competitors and potential teaming partners; identifies and negotiates potential contract and task order opportunities to internal and external stakeholders; defines, manages, and enforces internal customer relationship management systems and processes; and tracks and manages corporate sales goals to ensure targets are being met. Ms. Ruiz facilitates Mentor-Protégé and Joint Venture relationships and develops quarterly "State of the Union" addresses to QRI staff that detail the company's past and future goals.

**Stephen Shattuck, Civil Engineer, formerly with LandMark Engineering (South Central Region)**



Stephen Shattuck graduated from the University of Colorado at Boulder (CU Boulder) in December of 2012 with a Bachelor of Science in Civil Engineering, emphasis in Construction Management.

After graduation from CU Boulder, Stephen earned his Commission as a Naval Officer and moved from Colorado, to Pensacola, Florida, to begin his career as a Naval Flight Student. He worked for the United States Navy (USN) as a Flight Student, Administrative Assistant, and Civil Engineer for just over two years (2013-2015). Unfortunately, he did not complete the flight program, however, he began working as a Civil Engineer at the Public Works Department (PWD) aboard Naval Air Station Pensacola. He



worked amongst the Facilities Management Division within PWD, providing a wide variety of technical services for many aspects of the installation.

After his time with the Navy, he began working as an Engineering Technician for Naval Facilities Engineering Command Southeast (NAVFAC SE). He worked for just under two years (2015-2017) amongst the Public Works Department (PWD) aboard Naval Air Station Pensacola providing technical guidance to supported commands for facility construction/ maintenance.

From NAVFAC SE, he began working as an Engineering Aide and Staff Engineer for NOVA Engineering and Environmental Inc. (NOVA). He worked for just over a year (2017-2018) amongst the NOVA Pensacola Branch where I provided a wide variety of Geotechnical Engineering, Construction Materials Testing, and Environmental Consulting services.

After his time with NOVA Engineering LLC, he began working as a Staff Engineer for LandMark Engineering where he provided design-build consulting engineering services focused on residential and commercial projects including designing and managing several construction projects.



## 2019-2020 Leader Development Program

### Task Force Members

#### Chairs



**Michael R. Darrow, P.E., PMP**

Deputy District Engineer  
Programs and Project Management, Norfolk District  
US Army Corps of Engineers  
Norfolk, VA  
[Michael.r.darrow@usace.army.mil](mailto:Michael.r.darrow@usace.army.mil)

As the Senior Civilian for the Norfolk District; Provides Program and Project Management, and Engineering and Construction Leadership. Executes oversight of the full range of the \$500M+ district program to ensure project delivery, on time, within budget, and in accordance with applicable regulations. Interfaces internally and externally to assure integrated district efforts to produce quality products. Provides overall continuity and leadership to ensure commitments to customers are met and program is executed using best business practices. Provides direct support to GWOT and National or Regional emergency missions. Provides guidance to the district commander in the execution of District programs and operations. Serves as the District's Congressional Liaison.

Mike Darrow holds a Bachelor of Science degree in civil engineering from Clarkson University (1988) and a Masters of Engineering in Environmental Engineering from Cornell University (1998). He served 22 years in the Army and his military education includes the Engineer Officer Basic and Advanced Courses, the Armor Officer Advanced Course, Scout Platoon Leader Course, the Army Command and General Staff College, and the Joint and Combined Warfighting School.



**Caroline Roberts, GISP**

Department of Defense Client Account Manager, JACOBS  
Seattle, WA  
[Caroline.Roberts@Jacobs.com](mailto:Caroline.Roberts@Jacobs.com)

Caroline is a Client Account Manager with JACOBS where she proudly serves various branches of the Department of Defense with global environmental, building, infrastructure, and advanced facility solutions and scientific research. Caroline has a Bachelor of Science in Geology and a Master of Science in Oceanography, both from North Carolina State University; as well as a GISP professional certification. She is actively involved in the Society of American Military Engineers (SAME) as a Director for the Seattle Post and an Appointed Director for the SAME National Board of Direction. She has served as chair for various SAME committees at the local and national levels. Currently, Caroline co-chairs the SAME National LDP with Mike Darrow and has harnessed her passion for leadership with the unique resources of the Society to deliver meaningful training, lessons learned, professional development, and inspiration to our members.

## Members



**James Blake**  
Engineer, OBG  
East Norriton, PA  
[James.Blake@obg.com](mailto:James.Blake@obg.com)

Mr. Blake is an environmental design engineer and has over 14 years of experience in the environmental consulting field. His technical expertise includes remedial design, remedial action, solid waste stabilization and solidification, process installation and operational commissioning, environmental compliance, and project document review. His business development experience includes Federal Government branding, targeting, sales, and project delivery. At OBG, he supports the Federal Market Sector Program by assisting with channel partner relationship development, company-wide targeting, and sales support. He works across all four OBG Brands as a small business advocate and liaison.

**Ann Ewy**  
[annewysame@gmail.com](mailto:annewysame@gmail.com)

Bio not yet available.



**Patrick Hogeboom IV COL USARMY CESAD (US)**  
Deputy Division Commander, US Army Corps of Engineers  
Atlanta, GA  
[Charles.P.Hogeboom@usace.army.mil](mailto:Charles.P.Hogeboom@usace.army.mil)

Colonel Hogeboom was commissioned into the U.S. Army Engineer Regiment following graduation from Virginia Tech where he earned a Bachelor of Science in Civil Engineering. He was awarded a Master of Science degree in Environmental Engineering from Missouri S&T. Colonel Hogeboom is a registered Professional Engineer in the Commonwealth of Virginia.

His previous assignments include: Plans Branch Chief, Office of the Chief of Engineers, The Pentagon; Deputy Commanding Officer, Transatlantic Afghanistan District, U.S. Army Corps of Engineers, Bagram, Afghanistan; Commander, 1-361<sup>st</sup> Engineer Battalion, Fort Bliss, TX; Engineer Planner, Joint Task Force North, Fort Bliss, TX; Brigade Engineer, 4<sup>th</sup> Brigade, 1<sup>st</sup> Armored Division and Battalion Executive Officer, Special Troops Battalion, 4<sup>th</sup> Brigade, 1<sup>st</sup> Armored Division, Tallil, Iraq; Assistant Professor of Military Science and Recruiting Operations Officer, Virginia Tech Army ROTC, Blacksburg, VA; Company Commander, HHC, 36<sup>th</sup> Engineer Group, Design Engineer, Assistant Operations Officer (S-3 Operations), 36<sup>th</sup> Engineer Group, Fort Benning, GA; Assistant Operations Officer (S-3 Air), 30<sup>th</sup> Engineer Battalion, Executive Officer, Headquarters and Headquarters Company (HHC), 30<sup>th</sup> Engineer Battalion, Executive Officer, 175<sup>th</sup> Engineer Company, Terrain Analysis Platoon Leader and Survey Platoon Leader, 100<sup>th</sup> Engineer Company, Fort Bragg, NC; Gold Bar Recruiter, Virginia Tech Army ROTC, Blacksburg, VA.

Colonel Hogeboom's military education includes: Command and General Staff College, Combined Arms Services Staff School, Engineer Captains Career Course, Jumpmaster School, Mapping Charting and Geodesy Officer Course (MCGOC), Engineer Officer Basic Course and Airborne School.

His operational deployments include operation support to Operation FREEDOM'S SENTINEL, Operation IRAQI FREEDOM and Operation ENDURING FREEDOM.



**Angie Martinez Goral, P.E.**  
Vice President, Martinez Construction Services  
Merritt Island, FL  
[angiegoral@martinezconstruction.com](mailto:angiegoral@martinezconstruction.com)

Angie is currently Vice President of Martinez Construction Services, a small business specializing in General Contracting Services for the Federal Government. Angie has 22 years of experience in the federal design and construction industry, including four years as an active duty Navy officer in the Civil Engineer Corps. After her time in the Navy, Angie spent a few years working for a small environmental consulting firm, and then, after realizing she missed construction work, she moved on to work for a large government contractor. After about ten years, Angie transitioned to consulting, where she worked with companies to help develop their business development strategies for the federal market. In 2015, she joined her sister and brother-in-law to build Martinez Construction Services from a small 2-person design consulting firm to a \$20M/year contractor with 20 employees and 4 offices in 3 states. As Vice President Angie assists in business development across several Federal markets as well as managing human resources and administration for the company. Angie has a bachelor's degree in civil engineering from Auburn University. Angie is currently the secretary of the Space Coast Post of SAME, serves on the national board for the SAME Foundation, and will be taking over as RVP for the South Atlantic Region next year. She is a former member of the posts in Guam, Washington DC, and Northern Virginia.



**Victoria Mechtly**  
Business Development Manager, Tega Companies  
Kansas City, MO  
[Victoria.mechtly@tepa.com](mailto:Victoria.mechtly@tepa.com)

Victoria Mechtly is an architecture, engineering and construction (A/E/C) marketing professional who specializes in client development, strategic messaging and imagery for business-critical marketing and communications efforts. For over five years, she has been working with her technical staff to create business development approaches and materials, and with principals to secure new clients and projects.

Ms. Mechtly holds a degree in business management, marketing and sales, and brings a passion for helping others develop interpersonal skills. She works with engineers, project managers and marketing staff to improve communication, team collaboration and other soft skills that lead to successful careers.

Ms. Mechtly was the 2017 recipient of the SMPS Kansas City Chapter Marketer of the Year award. She currently serves as the Incoming Chairwomen for the National Young Member Council and is a Board Member for the Greater Kansas City Post for the Society of American Military Engineers (SAME). In her spare time, she works with Big Brother Big Sisters of Kansas City as a member of the Diversity Task Force to help bring awareness to the benefits of diversity within the workplace and helping kids who face adversity.



**Michael Nosbisch**

Associate Principal, Spire Consulting Group

Long Beach, CA

[miken@spirecq.com](mailto:miken@spirecq.com)

Beginning his career as a program manager and instructor in the U.S. Marine Corps, Michael has since worked for several of the leading engineering, procurement, and construction (EPC) firms in the industry, to include URS Corporation, Jacobs Engineering, Kiewit, and Parsons Corporation. In 2009, he joined a leading management consulting firm, SM&A, and was responsible for their successful EVM Compliance and Consulting practice. From May of 2011 to March of 2015 he was Managing Principal, Western Region and EVM Practice Lead at Project Time & Cost (PT&C), after which he joined Hill International's Irvine (CA) office as a Vice President. In October of 2017, Michael went to work for Spire Consulting Group, an 8(a)-certified small business that specializes in project/construction management and claims avoidance/resolution. A Past President and Fellow of AACE International, he was recently the Chair of their Education Board, and is the Vice President for the Society of American Engineers (SAME) Orange County Post. Michael is also an adjunct professor at the University of Southern California teaching graduate level courses in estimating and scheduling. Education: Master of Engineering Management (MEM), The George Washington University; BA in Geology, University of Rochester (NY)

**Nathanael (Nate) Price, CAPT USN DHA J-1/8 (US)**

nathanael.b.price.mil@mail.mil

Bio not yet available.

**Sally Riker**

[sally.riker@loweengineers.com](mailto:sally.riker@loweengineers.com)

Bio not yet available.



**Joseph Schroedel**

Executive Director, SAME

Alexandria, VA

[jschroedel@same.org](mailto:jschroedel@same.org)

Brig. Gen. Joseph "Joe" Schroedel, P.E., F.SAME, USA (Ret.) became SAME Executive Director in August 2014. He joined SAME from Parsons Brinckerhoff, which he joined after a 34-year career with the U.S. Army. He also serves as an Adjunct Professor in the Graduate Construction Management Program at George Mason University.

As Executive Director Gen. Schroedel leads an organization comprising 105 Posts around the world and nearly 30,000 members, including uniform service members, civilians with the federal government as well as state and local agencies, academics, college students, and professionals from across the



architecture, engineering and construction industry and related fields such as environmental remediation and facility asset management.



**Susan Thames, F. SAME**

Associate Director, TTI Environmental, Inc.  
Moorestown, NJ  
[susant@ttienv.com](mailto:susant@ttienv.com)

Susan has been an executive with TTI Environmental, Inc. for nearly 19 years. She is responsible for business development, marketing and operations for the firm. Susan’s specialty is identifying and maintaining business relationships with various clients. Ms. Thames researches and studies regulations encompassing environmental compliance in relation to tanks, asbestos, lead, mold, groundwater, soil and OSHA regulations. Ms. Thames seeks federal contract opportunities for federal agencies. She also manages relationships with large federal contractors including engineering, architectural and construction management firms. Ms. Thames is a very active SAME member. She served as New Jersey Post President 2013-2015. She is a mentor and founder of the Rowan University SAME Student Chapter. She also is member of the SAME Leadership Development Program Task Force and Foundation Board. Ms. Thames is also very active with the New Jersey Association of School Business Officials and served as Associate Business Members President 2017-2018. Ms. Thames is also the Director of Community Outreach for The Museum of Sports – Philadelphia. Education: B.A. in Broadcast Journalism, Lock Haven University (PA)

**Lisa Thoele**

Business Development & Marketing Manager, RS&H  
Jacksonville, FL  
[Lisa.Thoele@rsandh.com](mailto:Lisa.Thoele@rsandh.com)

Bio not yet available.



**R.L. “Van” Van Antwerp, LTG(R)**

Chief of Infrastructure and Executive Development, Flippen Group  
College Station, TX  
[robert.vanantwerp@flippengroup.com](mailto:robert.vanantwerp@flippengroup.com)

R.L. “Van” Van Antwerp LTG (Ret.) is the Chief of Infrastructure and Executive Development for the Flippen Group, a Texas based leadership and organizational development company that specializes in talent assessment, development, and alignment. He works with a wide range of clients in education, corporate, government, sports, and not-for-profit sectors, providing Executive Development consulting, coaching, and Leadership Keynotes.

In addition to working for the Flippen Group, he is Chairman of the Board of Eagle Creek Renewable Energy Corporation and Director on 3 other corporate boards to include USAA.

Van retired from the Army after 39 years of service and a final assignment as Chief of Engineers and Commanding General of the U.S Army Corps of Engineers. As Chief, he oversaw a \$40+ billion program including most of the Nation’s civil works infrastructure and military construction on over 150

Army and Air Force installations. He was responsible for over 37,000 employees who provided engineering, project management, construction, and operation and maintenance support in nearly 100 countries around the world.

Van is a graduate of the United States Military Academy at West Point and holds an M.B.A from Long Island University and M.S.E in Mechanical Engineering from University of Michigan. He is a Registered Professional Engineer. Van and his wife, Paula, have five children and 16 grandchildren and reside in North Carolina.

*Dedicated to National Security – Since 1920*

## **Inaugural Leader Development Class Announced, Will Convene at the 2019 JETC in Tampa, Fla.**

ALEXANDRIA, Va., March 22, 2019 — The Society of American Military Engineers (SAME) is pleased to present the inaugural class of participants in the Leader Development Program (LDP). A total of 18 individuals from across the membership, one from each SAME region and one representing the International Committee, have been selected to participate in this professional development program.

Developed with support from the SAME Foundation, LDP identifies and cultivates talent from within SAME's membership to address the nation's grand challenges. The program supports the development of the next generation of world-class military, government, and industry leaders for the Society and our nation through a curriculum of hands-on training, study, and active engagement in new opportunities. Participants will explore individual strengths and team dynamics, and discover their potential personally and professionally. LDP is a yearlong commitment beginning at the Joint Engineer Training Conference (JETC) 2019 to be held in Tampa, Fla, May 7-9. The graduation of the first class will be held at the 2020 JETC in Washington D.C.

SAME and the SAME Foundation are proud to introduce the 2019-2020 LDP Inaugural Class:

- Ilana Almquist, Coffman Engineers Inc. (Pacific Region)
- Holly Bigelow, P.E., Wood (Europe Region)
- Maj. Craig Bryant, USA, Fort Hood, Texas (TEXOMA Region)
- Maj. Mark DeSouza, P.E., USAR, Thomas & Hutton (Carolinas Region)
- Angela Gomez, KOMAN Construction LLC (Southwest Region)
- Patricia Graham, EnSafe Inc. (New England Region)
- Lt. Mike Guaigua, P.E., CEC, USN, NAVFAC EURAFSWA (International Committee)
- Erin Krug, P.E., USACE St. Paul District (Great Lakes Region)
- Sean Lebel, P.E., AECOM (Mid-Atlantic Region)
- Lt. Cdr. Samuel Lee, P.E., CEC, USN, University of Washington (Northwest Region)
- Melissa Lewis, Scott AFB, Ill. (Missouri River Region)
- Capt. Brendan Maestas, USAF, Air Force Institute of Technology (Ohio Valley Region)
- Benjamin Nichols, Harkins Builders Inc. (North Atlantic Region)
- Zakary Payne, P.E., Matrix Design Group (Rocky Mountain Region)
- Claudia Penny, HCR Construction Inc. (South Atlantic Region)
- Jorge Rodriguez, P.E., M.S. Hatch Consulting (California Region)
- Mary Ruiz, Quaternary Resource Investigations (Lower Mississippi)
- Stephen Shattuck, formerly with LandMark Engineering and Land Planning Inc. (South Central Region)

For more information on SAME's Leader Development Program, visit [www.same.org/ldp](http://www.same.org/ldp).

Drawing over 1,800 attendees each year, JETC is the foremost education and training event for public and private sector professionals in the architecture, engineering, construction, environmental, facilities management, project planning and contracting fields including members from all U.S. uniformed services, industry, academia and other state, local and federal agencies. More information is available at [www.samejetc.org](http://www.samejetc.org).

###

Founded in 1920, SAME through its 28,000 members leads collaborative efforts to identify and resolve national security infrastructure-related challenges. With a National Office in Alexandria, Va., and over 100 local Posts and Field Chapters around the world, the Society unites military, public, private and academic sector individuals and organizations from across the architecture, engineering, construction, environmental and facility management, cyber security, and contracting disciplines.



**FOUNDATION  
UPDATE  
TO SAME BOD**



Update for the SAME Board of Direction

May 6, 2019

# Fostering Engineering Leadership for the Nation

<http://www.same.org/foundation>



# Fundraising Pilot Update

**Consideration given to different types of fundraising:**

**Annual Fund (individuals; internal)**

**Corporate Major Donors (corporate; initially external)**

**Planned Giving (individuals; internal)**

**Realized need to develop “message”**

**Internal providing message “test pad”**

**Decision to pursue Annual Fund with guidance from Impact Communications**

**Society contract with Impact**

**Entailed “educating” Impact about SAME and Foundation purposes**

**Impact outlined process “steps” in context of “deliverables”**

**Introductory email from XD alerting all to coming letter**

**Letter from Board Chair/President with flyer and donation return card**

**Follow up emails and talking points**

# Fundraising Pilot - continued



**Joint effort by Impact and Foundation to draft wording complete**  
**Art work design and production by national office underway**  
**Database management by national office**  
**Admin for printing/mailing by national office**

**Intended audience: 12,000 +/- individual members**  
**Prior E&M Fund donors (900)**  
**Fellows (615)**  
**Life Members (1,270)**  
**Leadership throughout Society (580)**  
**Individual members 10+ years (4,350)**  
**Individual members 5-9 years (4,340)**  
**No redundancies**

**Kick-off in June; finish up through July**

# Fundraising Pilot - continued



**Joint effort by Impact and Foundation to draft wording complete**  
**Art work design and production by national office underway**  
**Database management by national office**  
**Admin for printing/mailing by national office**

**Intended audience: 12,000 +/- individual members**  
**Prior E&M Fund donors (900)**  
**Fellows (615)**  
**Life Members (1,270)**  
**Leadership throughout Society (580)**  
**Individual members 10+ years (4,350)**  
**Individual members 5-9 years (4,340)**  
**No redundancies**

**Kick-off in June; finish up through July**

## PORTFOLIO SNAPSHOT

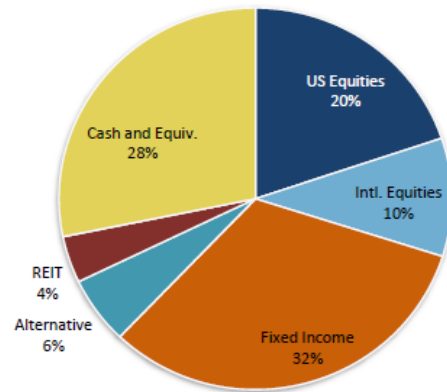
12/31/2018 to 03/31/2019



### Investment Activity (12/31/2018 to 03/31/2019)

Opening Market Value	1,327,540
Net Cash Flow	560,000
Appreciation	100,029
Closing Market Value	1,987,569
Portfolio Return	7.33
Weighted Fee	0.39

### Asset Allocation



Asset Class	Weight
US Equities	19.86
Intl. Equities	10.03
Fixed Income	32.25
Alternative	5.70
REIT	3.97
Cash and Equiv.	28.19

Portfolio Description	Market Value	Weight (%)
Schwab S&P 500 Index	308,173	15.51
Janus Enterprise Mid Cap Growth	23,879	1.20
Vanguard Mid Cap ETF	21,737	1.09
Harbor Small Cap Value	19,462	0.98
Vanguard Small Cap ETF	21,562	1.08
Harding Loevner Int'l Gr	54,558	2.75
Causeway Int'l Value Fund	51,347	2.58
Vanguard FTSE Developed Mkts ETF	45,207	2.27
Lazard Emerging Mkts	48,170	2.42
JP Morgan Strategic Income	79,137	3.98
Loomis Sayles Invst Grade	79,367	3.99
Metropolitan West Total Ret	241,387	12.14
Western Asset Core Bond	241,153	12.13
Blackstone Alternative Multi Strategy Fund	57,593	2.90
Eaton Vance Absolute Return	55,692	2.80
iShares Core US REIT	78,832	3.97
Money Market	560,316	28.19
	<b>1,987,569</b>	<b>100.00</b>

## Stewarded Post Funds Summary



- ❖ 4 Posts participating: Houston, Northern VA and Narragansett Bay and Omaha. Total invested to date is ~ \$949K.
  - ❖ Houston: Contribution: \$225K 31 Mar Balance: \$223.7K
  - ❖ Northern VA: Contribution: \$108.4K 31 Mar Balance: \$111.7K
  - ❖ Narragansett Bay: Contribution: \$39K 31 Mar Balance: \$ 40.2K
  - ❖ Omaha Post: Contribution: \$560K 31 Mar Balance: \$565.1K
  
- ❖ Some other Posts starting to show interest. Omaha Post signed an agreement and transferred funds in early March 2019. Some other post inquiries – Orange County was one.
  
- ❖ Funds are managed by DiMeo Schneider, LLC and comprised of 32% Bond Funds, 30% Equity Funds, 28% Cash and 10% other. (*Cash amount is to hedge risk with the bond market downturn and for careful entry into equity funds given that the market is at an all time high*).
  
- ❖ Each participating Post gets a quarterly statement.

# 2019-2020 Inaugural LDP Class



- Ilana Almquist, Coffman Engineers Inc. (Pacific Region)
- Holly Bigelow, P.E., Wood (Europe Region)
- Maj. Craig Bryant, USA, Fort Hood, Texas (TEXOMA Region)
- Maj. Mark DeSouza, P.E., USAR, Thomas & Hutton (Carolinas Region)
- Angela Gomez, KOMAN Construction LLC (Southwest Region)
- Patricia Graham, EnSafe Inc. (New England Region)
- Lt. Mike Guaigua, P.E., CEC, USN, NAVFAC EURAFSWA (International Committee)
- Erin Krug, P.E., USACE St. Paul District (Great Lakes Region)
- Sean Lebel, P.E., AECOM (Mid-Atlantic Region)
- Lt. Cdr. Samuel Lee, P.E., CEC, USN, University of Washington (Northwest Region)
- Melissa Lewis, Scott AFB, Ill. (Missouri River Region)
- Capt. Brendan Maestas, USAF, Air Force Institute of Technology (Ohio Valley Region)
- Benjamin Nichols, Harkins Builders Inc. (North Atlantic Region)
- Zakary Payne, P.E., Matrix Design Group (Rocky Mountain Region)
- Claudia Penny, HCR Construction Inc. (South Atlantic Region)
- Jorge Rodriguez, P.E., M.S. Hatch Consulting (California Region)
- Mary Ruiz, Quaternary Resource Investigations (Lower Mississippi)
- Stephen Shattuck, formerly with LandMark Engineering and Land Planning Inc. (South Central Region)



# LDP Support



## LDP at JETC

<b>Monday, May 6, 2019*</b>	
3:00 p.m.–5:00 p.m.	<b>Classroom Session (Tampa CC, Room 3)</b>
5:00 p.m.–7:00 p.m.	<b>President’s Reception (Tampa CC, Pre-function Area)</b>
<b>Tuesday, May 7, 2019</b>	
8:00 a.m. – 11:30 p.m.	<b>Classroom Session with Facilitator (Tampa CC, Room 3)</b> Group will convene with the facilitator to begin the full day training.  Classroom session will cover: <ul style="list-style-type: none"> <li>• Leadership Style Assessment</li> <li>• Build the Team</li> <li>• Listening Skills</li> <li>• Emotional Intelligence</li> </ul>
11:30am	<b>Task Force Members Recognized at Classroom Session</b>
12:00 p.m.–1:15 p.m.	<b>Society Leadership &amp; Post Awards Luncheon (Tampa CC, Ballroom A-C)</b>
1:30 pm. – 4:00 p.m.	<b>Classroom Session with Facilitator, cont.</b>
4:00 p.m. – 5:00 p.m.	<b>Personal Branding Session</b> Session provided by the Victoria Mechtly, Task Force Member
6:00 p.m. – 8:00 p.m.	<b>Opening Reception</b>
<b>Wednesday, May 8, 2019</b>	
8:30 a.m.–10:00 a.m.	<b>Class Introduction at General Session w/Keynote (Tampa CC, Ballroom A-C)</b>
10:00am	<b>Full Task Force and Participants convene on stage at the end of the session to take group photo.</b>

## LDP After JETC

- Assigned mentors will meet regularly with their participant, virtually or in-person.
- Monthly webinars lead by SAME volunteer instructors.  
Confirmed so far:
  - June: Team Performance, BG Holland, USACE
  - July: Leading Global Teams, MB Milhorn, USACE
  - August: Business Acumen, Speaker TBD
  - September: Time Management, Chris Collie
- Quarterly book assignments with discussions led by SAME volunteers
  - May/Jun/Jul: *21 Irrefutable Laws of Leadership*
  - Aug/Sept/Oct: *Good to Great*
  - Nov/Dec/Jan: *How to Win Friends and Influence People*
  - Feb/Mar/Apr: *Start with Why*
- Regular Google Classroom Discussions led by Task Force Co-chair, Caroline Roberts

# LDP Budget Update-FY19



SAME LDP Cost Estimates--FY2019		Number of Participants	20	Includes one LDP per Region (18) and 2 LDP Committee members	
Cohort 1		Per Person Estimate	Total Estimate	Actual	
<b>JETC 2019 - Induction</b>					
	SAME branded swag	\$ 100.00	\$ 2,000.00	\$ 794.00	Coins, shirts, binders
	Flight	\$ 500.00	\$ 10,000.00	\$ -	
	Hotel	\$ 500.00	\$ 10,000.00	\$ -	2 nights at \$250/night
	Catering	\$ 60.00	\$ 1,200.00	\$ -	Coffee, Beverages, Lunch x 1
	Facilitator Flight	\$ 500.00	\$ 500.00	\$ -	
	Facilitator Hotel	\$ 500.00	\$ 500.00	\$ -	2 nights at \$250/night
	Facilitator Fee for Service - 8 hr	\$ 5,000.00	\$ 5,000.00	\$ 4,000.00	Professional Leadership Coach
	Participant Self-Assessment (Myers Brigg)	\$ 41.50	\$ 996.00	\$ 830.00	For 24 Assessments
	Participant Self-Assessment (EQ-i Workplace)	\$ 74.84	\$ 1,796.16	\$ 1,496.80	For 24 Assessments
	Miscellaneous Support Costs		\$ 5,000.00	\$ -	Support materials
	<b>Total Fiscal Year Cost</b>		<b>\$ 36,992.16</b>	<b>\$ 7,120.80</b>	

# LDP Budget Update-FY20



SAME LDP Cost Estimates--FY2020		Number of Participants		20		Includes one LDP per Region (18) and 2 LDP Committee members	
Cohort 1		Per Person Estimate	Total Estimate	Actual			
JETC 2020 - Graduation							
	Flight	\$ 500.00	\$ 10,000.00	\$ -			
	Hotel	\$ 500.00	\$ 10,000.00	\$ -			
	Catering	\$ 60.00	\$ 1,200.00	\$ -			
	Possible End of Program Participant Assessment	\$ 75.00	\$ 1,800.00	\$ -			Assess professional development of participants (for 24 assessments)
Cohort 2							
JETC 2020 - Induction							
	SAME branded swag	\$ 100.00	\$ 2,000.00	\$ -			Coins, shirts, binders
	Flight	\$ 500.00	\$ 10,000.00	\$ -			
	Hotel	\$ 500.00	\$ 10,000.00	\$ -			2 nights at \$250/night
	Registration	\$ -	\$ -	\$ -			Assumes Comp Registration
	Catering	\$ 60.00	\$ 1,200.00	\$ -			Coffee, Beverages, Lunch x 1
	Facilitator Flight	\$ 500.00	\$ 500.00	\$ -			
	Facilitator Hotel	\$ 500.00	\$ 500.00	\$ -			2 nights at \$250/night
	Facilitator Fee for Service - 8 hr	\$ 5,000.00	\$ 5,000.00	\$ -			Professional Leadership Coach
	Participant Self-Assessment (Myers Brigg)	\$ 41.50	\$ 996.00	\$ -			For 24 Assessments
	Participant Self-Assessment (EQ-i Workplace)	\$ 74.84	\$ 1,796.16	\$ -			For 24 Assessments
	Miscellaneous Support Costs		\$ 5,000.00	\$ -			Support materials
	<b>Total Fiscal Year Cost</b>		<b>\$ 59,992.16</b>	<b>\$ -</b>			

# Centennial Update



- **Tony Leketa, Foundation Board Rep to Centennial Commission**
- **Commission kickoff session at Capital Week**
- **1<sup>st</sup> Meeting (telephonic) held 9 April 2019**
- **Looking for ways to leverage Foundation to support Centennial**
- **Seeking input to Centennial Planning from Foundation**
- **Discuss Centennial opportunities to support Foundation**

# Succession Planning Update



**Three vacancies to fill at the end of the year**

Col John Mogge (Board processes)

Lt Gen Van Antwerp

Mr. Roger Wozny



# Discussion - Questions