Post Operations Manual

Revised December 2023

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Chapter 1: Governance and Organization

National Governance

Documents:

a. SAME Certificate of Incorporation. SAME was formed in 1920 and was incorporated in the District of Columbia on December 5, 1924.

b. SAME Constitution. The SAME Constitution was last amended on May 24, 2012, at which time the position of President-Elect and the terms of the national Vice Presidents were changed from one year to two years.

c. SAME Bylaws. The Bylaws are updated regularly to reflect changes adopted by the National Board of Direction. They are posted on the SAME website.

d. SAME Code of Conduct. SAME is committed to providing a safe and welcoming experience for all participants, regardless of race, ethnicity, disability, religion, political affiliation, gender, gender identity or expression, sexual orientation, and any other characteristic protected by applicable federal, state, or local laws, regulations, or ordinances. SAME does not tolerate discrimination, intolerance, harassment, aggression or ill-will of any kind, whether presented in person, digitally or via another method.

e. 2025 SAME Strategic Plan. The *SAME Strategic Plan* is updated regularly to reflect changes in focus as SAME adapts and conforms to the priorities of the nation and National Security. It includes a Mission and Vision statement, Values, Goals and Objectives.

> ***SAME Mission*. To build leaders and lead collaboration among government and industry to develop multidisciplined solutions to national security infrastructure challenges.**
>
> ***SAME Vision*. To serve our nation as the foremost integrator for leadership development and technical collaboration within the A/E/C profession**.
>
> ***SAME 2025 Strategic Outcome*. Set the industry standard for active membership that creates lasting impact at the local and national levels.**

Organizational Structure

National Level—SAME is governed by a Board of Direction and managed by an Executive Director and National Office Staff located in Alexandria, VA. Each March, SAME Members vote to elect a President-Elect, three Vice Presidents, and four Directors. National Community of Interest Chairs are approved by the respective COI and appointed by the National President for two-year terms, which can be extended up to four years. The National Board of Direction meets twice annually in May at the annual Joint Engineer Training Conference and Expo (JETC) and in the fall at the Small Business Conference (SBC).

The Executive Committee, which is a subset of the Board of Direction, meets monthly. The roles and responsibilities of the Board of Direction, Executive Committee and the Executive Director are specified in the SAME Constitution and Bylaws.

SAME established in 2011 a Uniformed Services Advisory Group (USAG) composed of the Engineering Services Chiefs of the Uniformed Services. In 2021, the group was re-named the Executive Advisory Group (EAG) and consists of public agencies in addition to our uniformed services. The USAG meets with members of the SAME Board of Direction at JETC and with the National Officers in the fall each year to discuss how the parties can maintain and improve the partnership between SAME and the military engineer organizations.

Regional Level—SAME is geographically organized into 18 regions with a Regional Vice President (RVP) elected to oversee each region. RVPs are members of the National Board of Direction and are elected for a two-year term by the Posts within their region and may extend their term to three years with the approval of the SAME Executive Director. Regional Vice Presidents may designate a Deputy to assist them with their duties.

Ethics—SAME Relationship with Government Organizations and Officials. - The Joint Ethics Regulation (JER) governs interaction by individuals with Military Associations. Interpretation of regulations is guided by the intent of the regulation then acted upon by decisions of the commander. Interpretation of the JER should focus on how an individual can ethically participate, versus declaring why not. For more information, please contact the SAME Strategic & Stakeholder Relations Officer.

Post Governance

Bylaws. The basic operating element of SAME is the Post. Posts are affiliates to SAME and as such, are legally bound to the SAME Constitution and bylaws and are expected to support the *SAME Strategic Plan*. However, each Post is required to adopt its own bylaws, which set forth the way the Post is governed and operates. A Post bylaws Template consistent with the National organization bylaws is located on the SAME Post Resource Center website and is provided as a guide. Bylaws should be reviewed and updated every five years. A copy of the current bylaws must be submitted to SAME National.

Affiliate Agreement. Posts obtain their IRS nonprofit status under a group exemption umbrella from the National organization. The exemption number is 1278 and is required to file the Post 990 tax return. Each Post is required to sign an Affiliate Agreement with the National Office that acknowledges the relationship between the National organization and the Post.

Post Size. Posts are divided into three size categories based on total membership.

- Small Post: 0 - XXX
- Medium Post: XXX - XXX
- Large Post: XXX +

Post Officer Positions.
All Post leaders must be SAME members in good standing. Each Post should have the following positions in its Bylaws to manage the Post and receive the SAME National Post Leaders emails sent regularly. The Post Bylaws will establish the roles, responsibilities, and terms of these positions.

a. **President**. The Post President is responsible for general supervision of Post affairs and shall preside over Post meetings. A President may serve more than a one-year term or a two-year term, as it may be difficult for a Post President to learn the position and make a meaningful difference in one year.

b. **Vice President**. The Post should have at least one Vice President and in some cases several Vice Presidents with specified duties. The 1st Vice President will officiate Board meetings in the absence of the President. Often, the Post succession plan includes the 1st Vice President as nominated to become the President in the following year.

c. **Secretary**. The Post Secretary is responsible for maintaining the correspondence and records of the Post, sending out notices of meetings (unless there is Communications POC or Committee), recording the proceedings of all Board and membership meetings, and maintaining a copy of the Streamer and Award submissions. The Secretary is also responsible for submitting the Change of Post Officer Report to SAME immediately following a change in Post leadership.

d. **Treasurer**. The Post Treasurer is the controller of the Post accounts under the direction of the President and is responsible for submitting the Post Annual Report to the National office, filing tax returns, and financial reporting to the Board of Directors. The Board of Directors is required to specify the level of authority for the Treasurer to sign checks and obtain the President's or Board's approval prior to obligating the Post to financial obligations. Normally, checks over a specified amount should be co-signed by the Treasurer and another Board member. (See additional guidance in the Financial Guidelines Chapter). Post Treasurers should serve no more than three consecutive years in order to ensure proper control of the Post finances has been maintained. *(See the section on Financial Guidelines for more information about the Treasurer position and responsibilities.)*

e. **Membership**: Post Membership Points of Contact (POCs) are responsible for reviewing the Post roster at least monthly to ensure the Post welcomes new members and reaches out to members in 'grace period' and inactive members. This position has access to a variety of rosters, available online through their member account. Rosters are updated as soon as a member joins or transfers to a Post. Membership POCs should also be reporting monthly membership statistics at regular board meetings. Membership POCs should maintain a separate listing of non-member prospects to invite to Post activities and events and they should encourage them to join SAME. A full position description has been developed by the Membership Community of Interest (COI) and may be found on the SAME website.

f. **Additional Positions**: These positions are optional, and the Post may determine the positions that best meet Post needs.

- Camp POC
- Communications Chair
- Fellows POC
- Scholarship Chair/POC
- Small Business COI Liaison
- STEM POC
- Streamers Chair/POC
- 2nd/3rd Vice President (Succession Planning)
- Website Administrator
- Young Professional POC

g. **Post Committees:** Posts should establish standing committees to support programs, activities, and finances. The specific names of these Committees are decided by each Post to best support its members, as provided by its Bylaws. In general, Chairs of Standing Committees should be members of the Post Board of Directors. Some suggested standing committees are as follows:

- **Programs**. Responsible for providing and executing a plan for the calendar year to include general membership meetings, Industry Government Engagement programs, field trips, technical workshops and trainings, and networking/social events.
- **Communications**. Responsible for sending out emails for Post events, updating information on the Post website, adding events to the SAME National calendar, posting on social media, providing information for major Post events and accomplishments to the SAME National Communications Team.
- **Awards and Recognition**. Responsible for establishing or maintaining a Post Awards program, submitting streamers and nominations for National Awards to SAME National, and working with Post Fellows on nominations of individuals to be elevated to the status of Fellow.
- **Finance Committee**. Provides oversight to the Post investment accounts, and annual financial audit of accounts.
- **Audit Committee**. The Board is responsible for appointing an Audit Committee. to annually review the Posts financial records, or when there is a change in Treasurer, or hiring an external auditor.
- **Nominations.** Generates the slate of officers and directors for election.

Task Forces. In addition to Standing Committees, Posts may establish Committees, Task Forces or Working Groups to accomplish specific activities or events, with a sunset clause when the requirement no longer exists.

Post Officer Transition: SAME National recommends a transition period for Post Officers whereby outgoing positions train the incoming person. All prospective Post Officers **must** be members, in good standing of SAME upon nomination and remain so throughout their term. Post Officers must be elected to the Board; however, other members of the Board may be elected or appointed positions, consistent with the Post Bylaws. ***It is important that the Secretary submits a Change of Post Officers Report as soon as officers are sworn in***.

Installation of New Officers: The procedure for the installation of new Post Officers is located at the end of this Post Operations Manual**.** Use this document as a reference for post officer installation ceremony requirements. The installing Officer may be a Member of the National Leadership, the RVP or Post Board of Directors, or a senior member of the Post.

Chapter 2: Administration

Process to Establish a Post. SAME Members are encouraged to establish new Posts or Field Chapters as local interest warrants.

a. Complete the Application for Charter and demonstrate that the following criteria are met:
   i. A sustainable leadership base—Elected Post officers committed to establishing the Post and provide for leadership succession for at least two years.
   ii. A sustainable company base—A minimum of three Corporate Members.
   iii. A sustainable Individual Membership base—A minimum of 20 Individual active members.
   iv. Prepare Post bylaws using the Post Bylaws template in the Post Resources Center online.
b. Submit the completed Application for Charter and proposed Post Bylaws to the appropriate SAME RVP.
c. The RVP should review the documents and forward the package to SAME National Membership and Post Operations department, with a letter endorsing the proposed Post.
d. Following approval by the SAME Board of Direction, the Post must apply for an Employer Identification Number (EIN) by completing an SS-4 Form. Once the EIN is obtained the Post may open bank accounts.

Post Mailing Address: SAME recommends that Posts use a P.O. Box as a mailing address to avoid changes as Post Leaders change office. While most of the correspondence from SAME National is done electronically, an official mailing address must be reported on the Post Financial Report and the Form 990 filing with the IRS. Posts should not use a government mailing address, government resources or logistical support for a Post.

Post Goals and Objectives: Post boards should align the Post goals, objectives, and activities with the SAME Streamer Program, which is designed to help Posts support the *SAME Strategic Plan*. Streamer criteria is posted in the online Post Resources Center. Streamer input is required as part of the Post's Annual Report.

Post Membership Dues. All dues are collected by SAME National. A portion of the dues collected from all Individual and Organizational Members and are distributed quarterly to Posts that are in good standing*, by submitting their Annual Report and having a signed Affiliate Agreement on file. If a Post receives a dues payment directly from a member in error, the check should immediately be forwarded to the National Office at 1420 King St, Suite 100, Alexandria, VA 22314.

Process to change the Post name. Occasionally a Post may choose to change their name due to an installation name change or other reason. The following is the process to ensure a proper process and approvals.

a. Post needs to survey members to select a new name for the Post. It is recommended that at least two options are provided to members.
b. After the name has been selected by the members, the Post bylaws need to be updated with the new name. Bylaws and an email should be sent to posts@same.org for approval by the National Leadership Team.
c. Post needs to confirm name change on banking records, credit card processing, email

provider. P.O. Box, etc. and ensure proper updates are made to each.

d. Post should review IRS procedures for filing their 990 tax return after the name change. https://www.irs.gov/charities-non-profits/annual-filing-and-forms

e. Other considerations: website updates, email address change (if using a generic email for Post communications), mailing address, SAME Post logo.

Post Calendar of Events. Posts should develop and maintain a Calendar of Events for at least six months into the future, and if possible, for the full calendar year, to align with the Streamer evaluation period. This listing should include contact information for event organizers. The calendar should contain all key events and meeting dates, as well as critical dates for submitting reports and nominations to SAME National. Please submit Post or Regional/Joint Post events to webmanager@same.org.

Post Deactivation. Should the Post become inactive and no longer sustainable, the RVP will work with the National Office and any remaining members to determine whether the Post should be shifted to a Field Chapter or deactivated. The RVP will conduct a formal assessment, including outreach to all members and research to determine if any funds remain in account(s). Should it be determined that the Post will be deactivated, any remaining funds will be returned to the SAME National Office. Should there be a separate Education and Mentoring account, those funds will be turned over to the SAME Foundation.

Posts in Good Standing:

- Have a signed Affiliate Agreement on file with the National Office.
- Submits their programmatic information via the Streamers program by Jan 31.
- Submits SAME Annual Financial Report by March 31.
- Submits appropriate IRS form 990 by May 15 annually.

Post Leaders Workshop

SAME National offers an annual workshop in August. The workshops provide two Post Leaders from each Post with information on best practices and allow Post Leaders to share ideas for achieving the goals outlined in the *SAME Strategic Plan and* Streamers program. The National office covers the cost of registration and 2 nights CONUS/3 nights OCOUNS lodging for the two-day event. The Post or individual is responsible for transportation costs to/from the workshop and any other incidentals they may choose to cover.

SAME Swag

SAME makes pens and SAME lapel pins available at no charge to Posts. Occasionally, other swag is available. Contact Posts@same.org to request availability. 4imprint.com is where SAME acquires most of it swag, Posts may consider ordering larger quantities from www.4imprint.com.

SAME Lands End Store

SAME has a Lands End store with the SAME logo and insignia available to use on your order. Posts may place an order, pay and have it shipped directly to their location. https://business.landsend.com/store/same100.

Field Chapters

a. Field Chapters are ideal for locations where membership numbers may not be sufficient, or the situation precludes the ability to establish and/or maintain a fully functional Post. Field Chapters become affiliated with an active Post, which will be designed a "Host Post" for the Field Chapter.
b. New Field Chapters only require approval from the Regional Vice President however the charter needs to be sent to the Post Operations department at the National office to set up the Field Chapter in the member database.
c. Posts that transition to a Field Chapter need a Host Post agreement and any remaining operating funds are to be transferred to the Host Post for separate accounting. If the Post has a separate Education & Mentoring fund or account, the funds are to be transferred to the SAME Foundation. All bank accounts need to be closed.
d. Conditions of a Field Chapter include:
    i. Field Chapter members should be members of the Host Post and may join the Field Chapter at no additional cost.
    ii. The Field Chapter will not have a Board of Direction but should have a Field Chapter President or Leader who serves on the Host Post Board of Directors. This individual should be listed on the Post website as the Point of Contact for the Field Chapter.
    iii. There are no Bylaws for the Field Chapter, only a charter agreement signed by Field Chapter and Host Post Presidents. A template is available on the SAME Post Resource Center.
    iv. The Host Post should agree to hold at least one event per year at the Field Chapter location and to provide financial support to the Field Chapter.
    v. Field Chapters may host events separately from the Host Post.
    vi. Field Chapters may not hold bank accounts or collect dues. The Host Post will hold funds with separate accounting for the Field Chapter.

Student Chapters Student Chapters must be sponsored by a local Post.

Requirements for Student Chapters:

a. Minimum of 10 students - SAME Membership is free to full-time students, under the age of 25 (active-duty military do not qualify as students) when they sign up for a SAME membership on the SAME website.
b. Student Chapter Application – Submitted to the Host Post for review and approval, then forwarded to SAME National for formal recognition as a Student Chapter.
c. Board of Directors – The Student Chapter needs to elect a board to govern the chapter.
d. Faculty Advisor – On-campus faculty that will assist in overseeing the student chapter along with the Host Post.
e. Post Student Chapter Mentor – Closely monitors the student chapter ensuring succession of officers and that graduating students are transitioned to Young Members.
f. Student Chapters are required to file a status report twice annually in April and December.

STEM/Engineering & Construction Camps Posts may choose to support a camper(s) for a minimum of half or full tuition of the camp fee. Posts may also support travel for the camper(s).

a. December – Posts confirm whether they will support a camper(s) for the upcoming camp season and their Post camp POC who will receive all communications about camps.
b. March – the Post Camp POC will be notified of any camper applications in the online portal and select the campers the Post choses to sponsor. They will send their selection to the Camp Program Manager.
c. SAME will invoice the Post for their portion of the camp fees for their sponsored camper(s).

Chapter 3: Financial Guidelines

Tax-Exempt Status.

a. SAME National has been granted tax-exempt status under IRS section 501(c)(3). All Posts, unless separately incorporated, are exempt from federal income tax under SAME National Group Exemption (Group Exemption Number 1278). Group exemption does not include foundations and separately incorporated entities such as scholarship funds.

b. Posts are required to obtain an Internal Revenue Service Tax Identification Number (TIN) separate from the National Office and file Federal 990 tax forms annually as required based on the amount of gross receipts received by the Post. Posts may need to obtain a tax-exempt status from their state for income. Should Posts host major events, exemption from state sales tax could be particularly important if major taxable expenditures are involved.

c. SAME National files a Group Exemption Report with the IRS each September listing all the affiliated Posts. This Group Exemption Grants Posts their tax-exempt status, provided the certain requirements are met. The Post Financial Report provides information that SAME National needs to file the Group Exemption Report. Posts will lose tax-exempt status if not listed as a subordinate on this report or if they do not file their 990 tax return for three or more years consecutively.

d. To maintain exemption under SAME National's 501(c)(3) status, all Posts must annually file a Form 990 Return of Organization Exempt from Income Tax with the IRS. Gross annual receipts will determine which version of the form.

Completing the Annual Report and IRS Report. Posts are required to submit an Annual Financial Report to SAME National by **March 31 of** each year and must file a Form 990, 9900-EZ or 990-N each year with the IRS by **May 15**. Posts may request an extension from the IRS.

a. If the Post Financial Report is not received by April 1 until the Financial Report is received, and if SAME National does not receive a copy of the report filed with IRS by **May 30**, SAME National will withhold payment of the Posts portion of dues.
b. Delinquent Financial Reports and IRS Reports are a basis for deactivating a Post.
c. If a Post does not file an annual return for three consecutive years their tax exemption is automatically revoked. To regain tax-exempt status, the Post must file Form 1023 to secure separate tax-exemption which may not be automatically granted by IRS. Please visit www.irs.gov/eo for further instructions and information.
d. To complete the Post Financial Report, go to www.same.org and then the Post Resource Center. Please provide a valid e-mail address for Post Treasurer and the Post mailing address that is used on Form 990.
e. IRS Tax Filing Requirements: All Posts must file and send copy or confirmation of the filing to SAME National Office: Post Operations. As non-profit organizations, all Posts must now annually file a Form 990 with the IRS - the specific Form 990 that your Post files will depend upon your Post's gross receipts. Please review the IRS page for non-profits for more information and forms: https://www.irs.gov/charities-and-Non-Profits
f. IRS Guidance and Forms: The group exemption number is 1278. This will be needed on IRS Form 990. The specific Form 990 that your Post files will depend upon your Post's gross receipts.
g. Posts with average gross receipts of $50,000 or less file Form 990-N (known as the e-Postcard).

h. Those with higher annual gross receipts than that will continue to file a Form 990 or Form 990-EZ as required for their circumstances by the IRS regulations. The filing of a tax return should reflect the overall revenue and expenses of the Post regardless of the nature of the revenue or expense.
i. SAME encourages Posts to consult with a Professional Tax Adviser as they address their IRS filing requirements.

Separately Incorporated Funds. SAME does not recommend that Posts separately incorporate Scholarship, Education and Mentoring, or a Special Fund. However, if the Post has a separately incorporated fund, the following provisions apply:

a. The Post must submit a separate Financial Report for that fund in addition to the Post Financial Report submitted each year.
b. The fund will have a separate Tax Identification Number from the Post. Also, the Post must file with the IRS annually for the separately incorporated fund.

Accounting Policy and Procedures:

a. Posts should be using standard accounting practices on a cash or accrual basis.

b. Posts dues are paid by Electronic Funds Transfer (EFT). It is the Post's responsibility to notify SAME National of any changes to the Post banking information. SAME National must have the current bank account number, transit number and bank name to make the EFT dues payments. The name and contact information for the Post Treasurer must be kept current.

c. The fiscal year for all Posts and SAME National ends **December 31**.

d. The Treasurer of the Post or Finance Committee designated by the Post Board should prepare an annual budget and have it approved by the Post Board of Directors. Expenditures should be authorized in accordance with the approved budget or by exception in accordance with Post operating procedures.

e. All Posts should have proper segregation of controls over the expenditure process. This includes requiring a person other than the check signer to reconcile the bank statements, or dual signatures required on all checks.

f. If the Post conducts events to raise money solely for the Education and Mentoring Fund or Scholarship Fund, the net revenue from the event must be placed in the Education and Mentoring or Scholarship Account. However, events can be conducted to put partial proceeds into the Education and Mentoring Fund. Education & Mentoring fundraising needs to be specifically advertised as such.

Standard Accounts. The Post should establish standard bank accounts, checking and/or, savings/money markets that will be considered under the control of the Post Board of Directors. Administration of bank accounts should be managed by the Post Treasurer and Finance Committee, as designated by the Board of Directors. Additional accounts may be established for other specifically designated purposes, such as a Scholarship or Education and Mentoring fund. The Post Board of Directors should establish a level of authority for the Treasurer to sign checks, and an approval process for expenditures. Two signatures are recommended for checks over an amount established by the Board (typically $500).

Operating Account. This account supports the ongoing operations of the Post. This account needs to be liquid so that checks can be drawn from either a checking or money market account.

Education and Mentoring or Scholarship Accounts. All Posts have the option to maintain their own Education and Mentoring Funds, or to invest in the SAME Foundation. The benefit of the SAME Foundation is it mitigates the Post's risk of investment decisions and management and allows Posts to leverage the lower fees dues to the overall size of the investment. Money invested in the SAME Foundation is still under the spending direction and authority of the individual Post. If the Post opts not to use the SAME Foundation, SAME National prefers for Posts to establish an Education and Mentoring Fund Account rather than a Scholarship Account to allow the Post more flexibility on the use of the funds to support a variety of education and mentoring initiatives. This account should include all funds not required for the Operating Account or for the purposes of sponsoring the education and mentoring activities of students and members. Once funds are placed in this account, they may be used only to support Post Education and Mentoring activities. If the Post intends to establish an amount from which the dividends and interest will be used each year to support education and mentoring activities, the corpus should be invested in fixed revenue securities that will provide dividends and interest. A Post has a fiduciary duty to appropriately manage the funds and should therefore seek non-profit investment advice if considering investments beyond CDs and mutual funds. The Education and Mentoring Fund should be used solely for supporting education and mentoring activities of the Post, including but not limited to:

- Scholarships for two or four year college students, technical/trade/vocational students.
- Sponsor high school students to attend SAME's Engineering & Construction Camps and Society.
- Stipends for Young Professional (uniform, government, private sector) members to pursue professional certifications.
- Stipends for young professional members to attend National SAME conferences.
- Expenditures for fundraising activities for the Education and Mentoring Fund.

Post Financial Responsibilities. The Board of Direction is responsible for ensuring the financial integrity of Post accounts. The Treasurer should have specific responsibilities defined in the Post Bylaws, be knowledgeable of accounting practices, and be willing to commit the time to maintain accurate accounting of all revenue and expenses. The Post should establish a Finance Committee to oversee any investments. The Board of Direction must ensure an audit of Post accounts is conducted annually (before March 31), or whenever the Treasurer changes, and the results reported to the Post Board of Direction.

- The Treasurer should not be the sole signatory for Post accounts.
- All disbursements over an amount designated by the Board should require two signatures.

Responsibilities of Post Treasurer:

a. Prepare and submit the Annual Financial Report to National Office by March 31 for the previous fiscal (calendar) year. If an Education and Mentoring Fund is separately incorporated, please note it on the annual report in the additional accounts section.

b. Preparation of Annual Budget for approval by Post Board of Direction before the start of the new fiscal year.

c. Maintain Audit trail for all revenue and expenditures.

d. Provide reports on revenue and expenditures to the Post Board of Directors at a minimum of quarterly at board meetings.

e. Treasurers are responsible for completing any required financial reporting forms such as:

f. Filing IRS Form 990, 990-EZ or 990-N and State Tax Returns as required by their State Tax regulations by May 15 and providing a copy or confirmation to SAME National.
g. Coordinate annual audit as described below.
h. Formal transfer, including bank signatory authority, access to any online credit card processor and the overall financial records to their successor.
i. Provide W-9 upon request
j. Treasurers should serve no more than three consecutive years without a break.

Financial Policies:

a. **Dues Collection.** Only SAME National is authorized to collect dues. If dues are erroneously sent to the Post, the Treasurer should not deposit the check and forward it to the National Office at 1420 King St., #100, Alexandria, VA 22314. Dues distributions from SAME National to Posts, made quarterly, are considered "unrestricted" and may be used for either operating expenses or transferred to funds when not needed for operational needs.
b. Dues are paid electronically and the treasurer on record will receive an email notification prior to the dues being paid. Posts receive the following based on paid memberships each quarter:
c. $5.00 per individual member
d. 15% of the Post fee for corporate members.
e. **Recommended Pricing Structure.** Posts may establish fees for the various events and activities it sponsors and should differentiate rates between categories of members.
f. **Member of the Post** *(this should be the lowest rate)*
g. **Member of SAME**
h. **Young Member/Enlisted**
i. **Non-members** - Fees for Non-members should be substantially higher than for members to encourage membership and some events may be open only to members, as appropriate. Posts also may establish a first-time guest registration fee to introduce potential new members to SAME.

Internal Controls. The Post must establish controls to ensure transactions are authorized and assets are properly safeguarded.

a. The Board should generally approve expenditures based on a previously approved budget— unbudgeted expenditures over a specific dollar amount (set by the Board) should not be allowed without Board approval (which can be accomplished by email).
b. The Post must establish accountability for collecting and depositing funds from Post sponsored functions. Maintain supporting documentation for funds collected (e.g., number of people attending, total funds collected, and deposit record) and cash disbursements.
c. The Board of Directors should designate specific individuals with the authority to commit funds and to approve invoices before they are submitted to the Treasurer for payment. Approvals should be documented and a level of check signing authority established (e.g., require second signature on cash disbursements over a certain dollar amount, typically $500).
d. Posts should ensure related party transactions (i.e., vendors who have a relationship with a member of the Board of Direction) are approved by an individual independent of the transaction and approved by the Board of Direction to avoid conflict of interests.
e. Posts shall **never** set up personal accounts using personal social security numbers and shall **never** issue personal loans. Posts shall use only the Post Tax ID Number to set up any financial accounts.

f. Post bank accounts are to be in established institutions that are federally insured. OCONUS Posts must have a U.S. based bank account.
g. The Board of Direction should approve a fiscal year budget before January 1 to guide the posts in its expenditures. Variances in the budget should be reviewed periodically by the Board of Direction. The budget should only be adjusted for major changes so that the Board can monitor performance against the original fiscal year plan.
h. Document internal accounting controls. Written procedures and policies serve to train Post volunteers and assist with the review of accounts in the annual audit.
i. Posts must ensure that all revenue and expenditures are consistent with SAME's tax exempt purpose.

Audit. Posts must conduct an annual audit each year no later than March 31 when the Annual Report is due to SAME National. Accounts must also be audited within 30 days of a change in Treasurer. The audit may be performed by an internal audit committee of at least two members appointed by the President and approved by the Board, who are independent of any financial responsibility. At least one audit committee member should be knowledgeable of accounting practices. Another audit option is for the Post to hire an independent professional or company to perform the audit, prepare the SAME Financial Report and IRS reports.

Role of the Finance Committee. Unless the assets are invested with SAME Foundation, the Post Finance Committee should be comprised of at least one member of the Board of Direction to oversee and recommend to the Board the investment strategy. The Finance Committee should consider the SAME Foundation for its investments.

a. The Finance Committee should develop an investment policy to guide the Post investments. Such policy should indicate that the goal of the Post is to minimize the risk to principal while earning interest or providing capital appreciation and should establish a general portfolio allocation of fixed revenue and equity investments.
b. The Finance Committee should periodically review the Posts investment portfolio against its investment policy and reallocate as appropriate.

Chapter 4: Insurance

SAME National Coverage. Posts have insurance coverage from SAME National policies. Posts may require additional coverage for special events as requested by the venue. Posts may purchase coverage through SAME National's policy.

- **a.** General Liability coverage is for bodily injury or property damage to a third party (third party is an invited guest or general public, NOT coverage for Post members or employees). Some activities are excluded from this coverage.
- **b.** Directors and Officers (D&O) coverage is for volunteer leaders. If the Post is separately incorporated, upon receipt and review of the application, a quote will be provided for a separate policy as separately incorporated chapters are not eligible for coverage under the National policy. Criminal offenses and intentional acts are also not covered under D&O insurance.

Certificate of Insurance. Posts may request a Certificate of Insurance from SAME National if a facility in which the Post is holding a meeting, workshop, or conference requests such a certificate. The facility may require the Post to show it as an "Additionally Insured" party. To obtain a certificate showing the coverages:

- **a.** E-mail the Certificate of Insurance Request to posts@same.org
- **b.** If the event falls outside the general administrative need, a Special Event Questionnaire Form may be required. SAME National will provide the form for additional information. There may be an additional premium for special event coverage.
- **c.** Once the insurance agent has generated the Certificate of Insurance, they will e-mail a copy of the certificate to the requesting Post and SAME National.

Contact SAME National Post Operations at posts@same.org for all other questions regarding insurance coverage.

Chapter 5: Membership

Membership Point of Contact (POC). Post Membership POCs lead recruitment and retention efforts, relying on the support of SAME National. SAME has a very diverse membership, and Posts should designate a lead person for Individual Members and a lead for Sustaining Members. If the Post has the need, a POC can be designated for Public Agencies, Noncommissioned officers, Young Members, or other segments of SAME membership.

Post Membership Reports. The following officers have access to the member reports for their Post: President, Secretary, Membership POC, Communications POC. Login to your member account using your email and password. (See appendix for instructions)

Downloadable Post rosters in excel format that are available include:

a. Current Individual Members *(Includes all member types.)*
b. Grace Period Individual Members *(members who are past their renewal date but within the 60-day grace period)*
c. Lapsed Individual Members *(memberships that have expired)*
d. Current Organization Members (*Including Company, Public Agency Reps, Academic members)*
e. Grace Period Organization Members *(members who are past their renewal date but within the 60-day grace period)*
f. Lapsed Organization Members (*memberships that have expired*)
g. Dropped Individuals *(individual members who have left your Post but not SAME)*

Membership Marketing Materials. Posts may submit requests for membership marketing materials, issues of TME, pens and SAME lapel pins. Please email your request to: posts@same.org. Occasionally, the National Office has extra swag they make available to Posts. Email posts@same.org for availability.

Retention: Retention efforts begin the moment the member joins SAME. A new member's first experience can determine whether they renew their membership. Personal contact helps to increase membership retention. Use your Post roster to identify new members by sorting the Join Date column. Reach out to new members as soon as possible to welcome them to the Post.

Individual Membership Development Initiatives. The Membership POC or Committee should greet all new Post members. Ideally, a designated individual will personally invite each new member to the next Post event and answer any new member questions. Other best practices include:

a. *Targeted E-mails*—send targeted e-mails to your members to keep them informed of your activities, events, and efforts.

b. *Focus Groups*—conduct special membership focus groups occasionally to learn what your Post members need or want.

c. *Mentoring System*—Develop a mentoring system for Young Members and Student Members. The goal is to provide the new member with a resource for their questions and to help them develop lasting member relationships.

d. *Engage your Members*—Studies indicate that individuals actively engaged in their organization maintain their membership and become membership advocates.

e. *New Member Orientations*—Host a new member orientation quarterly. This networking opportunity will help acquaint your new members with Post leadership, in addition to learning about Post and Society history and culture.

f. *Contact Sheets*—Provide contact sheets containing e-mail addresses and/or telephone numbers of Post leadership.

g. *Member Surveys* – Periodic surveys of member needs provide members the opportunity to have their voice heard and valuable feedback for Post leadership.

Company, Public Agency, and Academic Membership Initiatives.

a. *Meet and Greet*—make arrangements to personally meet with representatives from the new Member companies and provide information about specific Post member benefits.

b. *Participation*—Encourage Company Member firms to submit white papers or technical papers and presentations at Post programs.

c. *Recognition*—Recognize Member companies, public agencies, colleges, and universities for accomplishments. Allow these organizations to showcase at meetings; for example, create a "Company Member Spotlight" during special meetings.

d. *Networking*—Networking is a key benefit to Member companies. Develop programs with enough time for people to network before and after or for day long programs, in between sessions.

Membership Types and Dues*

Individual Dues Categories and Rates – effective October 1, 2021

Private Industry Regular	$125
Private Industry Young Professional (under age 39)	$75
Government Regular (military/civilian)	$55
Government Young Professional	$40
Academic/Non-profit Regular	$55
Academic/Non-profit Young Professional	$40
Retired	$55
Student (full-time, under age 25)	$0
Additional Post	$10

Membership Dues are determined by the SAME National Board of Direction.

Company Membership – effective July 1, 2022

- Includes one Post for the company and six Individual Memberships that the company may assign to their employees.
- Individual Members who are paid for by the member company will "own" their membership (rather than be a "representative"). They take it with them if they leave the company, then they will be billed directly on an annual basis to renew. A company can opt to add individual memberships to its corporate invoice.
- Companies will purchase people and Posts separately.
- Companies will not have to purchase a Post just to allow a single person to join it. The individual can join at the corporate individual rate and join the Post(s)*** of their choosing. Individuals can join as many Posts as desired.
- Individuals who work for a member company may buy an Individual Membership at a corporate rate.

Company / Organization Dues				
# of Employees	**National Dues**	**Per Post Fee**	**Corporate Individual**	**Corporate Young Prof.**
1-10	$325**	$80	$95	$60
11-50	$650*	$150	$95	$60
51-100	$800*	$225	$95	$60
101-500	$950*	$300	$95	$60
501-1,000	$1,200*	$350	$95	$60
1001-5,000	$1,450*	$350	$95	$60
5,001 +	$1,700*	$350	$95	$60
Public Agency	$325 / 3 years*	$80	$55	$40
Academic Inst.	$325*	$80	$55	$40
*includes six individual memberships **includes three individual memberships ***Individual memberships include one Post and unlimited additional Posts may be added for $10 each.				

Chapter 6: Programs

Opening Ceremony. Posts should include the Pledge of Allegiance at the opening of each meeting or activity (excluding social events). The American Flag and Post Flag (or banner) should be used at events. Invocations are optional, but if used, should be non-denominational as SAME is composed of individuals of all backgrounds.

Post Programs Committee. The mission of the Post Programs Committee is to plan, develop and oversee the programs presented at Post meetings, events, and workshops. These may include both regular Post meetings, annual events such as small business or industry days and joint meetings with other Posts or professional associations and societies. The committee should review and implement a schedule of programs at least six months ahead. Programs should align with the *SAME Strategic Plan* and the Streamer program. The committee chair selection is the responsibility of the Post President.

Program Concepts. There is no one solution to designing Post programs. The Programs Committee must determine the target audiences and design programs to meet their needs. Having a monthly meeting to which only a small portion of the Post membership attends is not the best approach to involving and serving the Post membership. Be innovative, creative and try new approaches—if they do not work, give it more time, or try another approach.

- **a.** Think about ways to draw public sector participation, considering topic, price, time, and location.
- **b.** Variety is important for program types and locations, since different members enjoy doing different things. Make Post activities a magnet for ***all*** members and remember, people are involved in any society for these reasons:
  - Industry Government Engagement
  - Networking with others in the profession
  - Professional and technical development
  - Industry knowledge
- **c.** Always have a contingency plan for a back-up speaker, particularly if the invited speaker for a Post program is in a high-ranking position, such as a senior government official. Sometimes unexpected scheduling conflicts arise for people in these positions.
- **d.** Exchange information with other Posts, even those outside of the region. This helps introduce new ideas to other Posts and to reap benefit from their new ideas.
- **e.** Webinars are a cost-effective way to communicate valuable information to your target audience. Web-based programs enable presenters to conduct virtual seminars for anyone to participate. Webinars can produce revenue for the Post with a corporate sponsorship.
- **f.** Registration procedures should be spelled out in every meeting notice. Since participation can turn into membership, encourage members to bring guests. Introduce guests at meetings to make them feel welcome. Establish a reminder system for Post meetings and other events. Members should receive notices at least one month before events. As the event date approaches, an e-mail reminder keeps the event in members' minds and helps drive registrations.
- **g.** Posts are encouraged to hold periodic joint meetings or events with other Posts as well as conduct joint meetings or workshops each year with other professional organizations. These joint meetings provide value to members of both organizations and facilitate synergy between the organizations' membership. Longer technical programs with Professional Development Hours (PDH) are a better forum for joint events. SAME has agreements over 30 Strategic Partners that Posts can consider for event partnering.
- **h.** The SAME event staff will also review Post contracts and agreements for events, provided they have not already been executed.
- **i.** In many areas, national "Engineers Week" ends in February with an Awards Dinner for members of

engineer organizations. SAME should be represented at such events. The Post should decide on how to participate locally by going into schools, promoting engineering activities, or sponsoring Engineers Week events.

j. If geographic conditions permit, Posts may want to consider the possibility of hosting joint meetings with other Posts or Field Chapters in the vicinity. The "lead" Post should be clearly identified, so that responsibility for the program and other arrangements is established.

Best Practices:
Post leaders are encouraged to publicize the recent activities and accomplishments of their Posts by submitting articles and high-resolution photos for publication in the various SAME publications including, *Real TiME* newsletter, SAME News and The Military Engineer (TME) magazine. Post may submit their articles in Word format with up to three photos to the editor at editor@same.org or online:

Check the SAME Calendar of Events online to preclude major conflicts with national, regional, or other geographically close Post events. Posts are requested to not schedule major events in May around SAME's annual Joint Engineer Training Conference & Expo (JETC) or the week of the Small Business Conference (SBC) in November.

Surveys. A periodic Post membership survey provides insight into the needs and desires of members with respect to Post programs. Surveys assist in:

- **a.** Understanding why members attend Post meetings, events, or activities
- **b.** Selecting convenient times and places for Post events and meetings
- **c.** Determining interest in types of meetings, workshops, technical tours, and events
- **d.** Identifying technical and general topics of interest
- **e.** What factors may limit member participation

The Membership COI created a question bank to assist Posts with types of questions to ask on their survey. The Post Operations department of the SAME National Office can assist with setting up a Post survey.

Potential Speakers and Topics. Speakers and topics should reflect a variety of specialties within engineering and related fields. Presentations on local capital improvements, programs and projects that directly affect members in your area will draw good attendance. Occasional "just for fun" programs with motivational speakers, humorists or other notables provide a relaxing atmosphere for members and draw potential new members as well.

Public Sector Program Briefings. Posts should plan on hosting briefings that forecast anticipated federal, state, county, and city construction projects in the area for the coming year and future year's programs. Briefings should feature program and contracting speakers who can provide information on doing work with their agencies.

Field Trips. Some of the most popular activities for Post members are field trips to construction sites or recently completed engineering projects. These types of functions are especially interesting to Student Members. Before any field trip starts, a safety briefing should be given. If necessary, arrange for an insurance certificate to address any liability issues. Please contact the SAME Post Operations Specialist for an insurance certificate template.

Social Events. Social events and activities are limited only by the interest and imagination of the members, in addition to the private and commercial facilities available in the area. It is good practice to include spouses and guests in at least one social event per year. The following types of programs have been of interest—and successful—at various posts.

a. *Troop Recognition*. Plan an event to recognize military, civilians and contractors who have been overseas.
b. *Banquets*. Such an event can be tied in with a meeting of general interest, such as the installation of Post officers, a visit from National Leadership, Regional Vice President (RVP) or the presentation of Post Awards.
c. *Holiday Parties*. Be aware that some clubs and restaurants require banquet room reservations as far as 12 months in advance.
d. *Golf Outings or Tournaments*. These have great appeal for many members and are a great way to raise funds for scholarships.
e. *Other Ideas*. Wine tasting parties, river cruises, sporting activities, cookouts, theatre, and many other events are opportunities informal networking.

Best Practice: The SAME National Office meetings team will review contracts ***prior*** to a Post signing to ensure the contract is in the best interest of the Post. Contact: Posts@same.org to have a contract reviewed.

Continuing Education Guidance. The SAME Strategic Plan encourages credentialing and awarding continuous education for Post and regional activities as an appropriate, and highly recommended, method to provide professional development support to members. Today, SAME is more than just engineers and architects. SAME is comprised of scientists, marketers, academics, facility professionals, and many more that are also required to maintain their credentials with continuous education. This guide is meant to serve as a reference to help ensure any professional development hours provided through workshops, webinars, or other continuous education courses can support the maintenance of the broadest amount of credentials.

While there are administrative requirements to provide continuous education certificates, they are not terribly burdensome. The term "professional development hour" or "professional development hours" (both abbreviated PDH) is defined by the National Council of Examiners for Engineering and Surveying (NCEES) as a contact hour (nominal) of instruction or presentation. Each Post should be giving out PDHs for programs that follow the guidelines as outlined in the *Guide to Continuing Professional Competency*. PDH certificates may be awarded using the following guidelines (excepting where a state has established different or more stringent criteria):

1 PDH = a minimum of 50 minutes for presentation and/or participation per hour
.5 PDH = a minimum of 30 uninterrupted minutes for presentation and/or participation

1 PDH = 0.1 Continuous Education (CE) Unit = 1 CE Hour = 1 Professional Development Unit = 1 Green Building Certification, Inc. (GBCI) = 1 American Institute of Architects (AIA) credit = 1 Learning Unit = 0.2 Association of Energy Engineers credits

Various credentialing authorities have different requirements, and some are more stringent than others. SAME intends to cater broadly using the PDH standard. To provide our members the best opportunity to self-report continuous education regardless of credentials, the below list are the minimum areas to be addressed on a PDH certificate.

The post or entity hosting the event should also maintain a list of attendees in case of any audit by an outside agency for whom certificates were issued to.

- Date of activity
- Title of activity
- Length of Activity
- Number of CEUs or PDHs of Activity
- Activity location

- Instructor's Name
- Course title
- Description of the Activity to include learning statement that describes the educational value of the activity

Industry Government Engagement Workshops (IGE). Posts are encouraged to host IGE Workshops that bring government and industry together to try and solve a local or other issue in the A/E/C National Security space.

Virtual Programming. Posts should consider using webinars to leverage the internet's capacity to deliver continuing education at a low cost (no travel costs or time away from the office). A 60-minute webinar, offering 1 PDH, is an excellent way to reach the many Post members who are unable to attend Post meetings. SAME National has a growing Knowledge Network of topics and speakers that Posts can utilize to support virtual offerings.

COI Sponsored Webinars. Posts should consider encouraging members to become involved with SAME Communities of Interest (COI), which sponsor regular educational webinars that typically provide PDHs. Posts leaders can also assist in advertising topics relevant to all their membership when a COI is producing a webinar, providing members more education options without any real logistical or administrative burden to the Post.

Working with Other Organizations:

Public Agencies. Positive relationships with the Uniformed Services within the local area are necessary along with connections to Guard, Reserves and other state and municipal public agencies in proximity to the Post. Invite leaders from agencies to speak at Post meetings or on panels and encourage them to bring relevant staff.

Academic Institutions. These institutions can offer speaker options, interdisciplinary activities or discussion groups, and many other opportunities. These institutions should be encouraged to join as Academic Members to include faculty and staff. Refer to the College Outreach COI webpage for information regarding working with student chapters.

Young Professionals:

Young Professionals should be fully integrated into leadership positions and committees of the Post. Many Posts specify that a Young Professional fill at least one Director-level Position.
Young Professionals are defined as those members of SAME who are 39 years or younger.
Many Posts conduct special programs for Young Professionals, for leader development, professional development, or professional certification or licensure.

Enlisted/Noncommissioned Officers (NCOs). Posts in the vicinity of military installations should encourage enlisted member participation. Enlisted member participation can be drawn by planning programs with a focus on activities of interest to them or planning separate activities that will satisfy their professional development needs. Posts are encouraged to appoint or elect an enlisted member to serve on their Board of Directors. The Enlisted COI may serve as an additional resource for the Post.

Chapter 7: Communications

E-mail Lists: Posts may download Post rosters from the SAME website to a Microsoft Excel spreadsheet. Designated Post Leaders (president, secretary, membership, communications roles) have access to Post rosters via the Post Roster link found on left menu of their member account. You can access this information using the following link: https://my.same.org
The contact information on the rosters is dynamically linked and pulled from the membership database at SAME National. Information can be updated by:

- **a.** All current individual SAME Members can update their membership record online via their member account or they may contact SAME National for assistance at the following email: member@same.org.
- **b.** Non-members should be kept on a separate list from paid members, so that Posts may track membership more easily.
- **c.** **Member lists may only be used for official Post activities.** They may not, under any circumstances, be sold or provided to any commercial interest, or non-profit organization.

Website: Each SAME Post is required to have a current website. To be considered current, the website must have at a minimum:

- a. List of current Post Officers and Directors with at least one contact email that is regularly checked by a member of the board.
- b. Calendar of events with times and location and address of events/meetings
- c. "Join SAME" with link to the SAME National website (www.same.org)

SAME National offers website hosting and maintenance platforms for Post websites at no cost. The website service includes use of a design template, hosting and software maintenance and updates. Posts are expected to update and maintain their own sites. SAME National serves as the overall "webmaster" and updates portions of all Post websites with relevant society content.

Posts that opt to develop their own websites are responsible for regularly updating the site, having a link to the SAME National website and for ensuring compliance with SAME website content and communication standards. For details on SAME-hosted websites, contact webmanager@same.org.

Communications: Email is the preferred communication vehicle for Posts. Post communications styles vary widely across SAME. The main objective is to have, at a minimum, a communication that provides the essential elements of "who, what, when, where" for Post meetings and events. Prior to every communication a list of current members should be pulled and used to ensure new members are included.

- **a.** Posts that produce newsletters should send them to all Post members.
- **b.** Newsletters should not be sent to non-members as it is a member benefit. Meeting announcement may be sent to non-members to promote participation and membership growth.
- **c.** Members should receive meeting/event announcements at least four weeks in advance of the event date. More lead time may be necessary for special functions or activities. Posts should ensure that their RVP, adjacent Posts, and prospective Post members are notified of large or special events.
- **d.** All Post events should be listed on the national website calendar.
- **e.** Posts may request a member from the National Leadership to attend and speak at their event.

Requests should be sent at least 45 days in advance of the event to posts@same.org

Social Media: Publicize announcements of meetings, awards, and other recognition items on your Post's social media sites such as LinkedIn, Facebook, or Instagram. You may also post information about Post news and events on the SAME National LinkedIn Group utilizing the following link: https://www.linkedin.com/groups/2633/

Social Media and Email Best Practices

Social media channels provide a great way to communicate news, information, updates and more with your audience.

Content

Keep it Short and Simple - Length of posts depends on the best practices of the specific channel but should typically be no more than 250 characters for Facebook and LinkedIn. For Twitter, although there is a 280-character count limit, keeping it to no more than 130 characters will make it easy to share.

Include a Call to Action - All posts should include a call to action to incite the reader to engage with the post (share or comment), your chapter
(Register for an event or volunteer) or the main association (read an article or view a page on the site).

Style - Due to the limitation of characters by some social networks the following styles are acceptable when posting to social media channels:

- Use contractions whenever possible.
- Shorthand symbols such as >, =, &, % and @ are allowed.
- Use numerals, not words, for all numbers.
- Use am and pm rather than a.m. and p.m.
- No Copyright/Trademark/Registration symbol is used in character-restricted communication.
- Use acronyms whenever applicable making sure to link to content that defines the acronym.

Hashtags - Hashtags allow you to streamline discussions and make it easier for people to follow and engage in conversations related to your topic or event. While extremely popular (and originated) on Twitter they have spread to Facebook, LinkedIn, and many other social channels.

Create hashtags that are short but meaningful – if hashtags are too long they will be harder for people to use in retweets and engagements. If the hashtag has no meaning to the message, it will be easily forgotten and not used.

Graphics/Images

It is always a good rule of thumb to include graphics/images with your post. It has been shown that posts including graphics/images generate more reach and engagement.

Relevancy - The graphic/image you use should be relevant to the content you are posting.

Copyright Policies - It is illegal to post a graphic from any source, including Google Images, to display on social media, even if you credit the source. For this type of usage, you must first obtain permission from the owner in writing. If you are unsure, do not post it.

Links

Social media posts should include a link that directs the user to your call to action – register, view articles or visit a page.

Simple URLs - When posting a link that is not used to generate a preview (see below) the link should be a simple URL or a *bit.ly* link. This is the best way to post links to social channels and allows you to easily track traffic to the link.

Generated Link Previews - When posting, allow the link preview to generate and then delete the link from the text. Replace the preview thumbnail with an appropriately sized graphic or photo. Then, adjust *Title* and *Summary* by clicking on that text and changing the wording to best fit your topic.

Posting

When crafting your post, keep in mind that social media profiles are viewed as an official voice of your chapter group, and you should always use the pronoun "we."

Frequency - There is a lot of noise and a continuous stream of information being posted. Plan and schedule your posts with the use of a free platform like Hootsuite. It is good to put out reminders (at least once a week) to catch those fans/followers that may have missed previous updates. But remember you should also be posting about other topics as well. It is recommended to keep promotional posts to 20%. Too much self-promotion can be seen negatively.

Be Available - Do not promote your own content and then not be available for people to reach out to you with questions and comments. Reply to all the comments made on your posts and engage (like, comment) with the posts you are tagged in. If you are consistently posting content, you should also consistently interact with your readers. Sometimes they will reach out to you, but other times you will be initiating the conversation.

Law of Reciprocity - You cannot expect people to share your content and promote your ideas if you are not doing the same for others. Spend time reading through your channel feeds to find thought-provoking content that you feel compelled to share. Tag companies and people in your post if they are mentioned or if they are in the photo. Those people/companies will be notified and are more inclined to share and engage.

Emails

Emailing your members is a great way to keep in touch, create awareness of events and provide news and information. Below are the keys to keeping your readers excited to see your email in their inbox!

CAN-SPAM

The most important thing to keep in mind is staying compliant with the CAN-SPAM act and avoiding SPAM and phishing words and phrases.

1. Make sure you stay compliant with *CAN-SPAM*. Here are the seven main requirements:
2. Don't use false or misleading header information
3. Don't use deceptive subject lines
4. Identify the message as an ad if you are marketing an event or soliciting funds
5. Tell recipients where you're located – provide a mailing address
6. Tell recipients how to opt-out of receiving future email from you
7. Honor opt-out requests promptly
8. Monitor what others are doing on your behalf

Avoid SPAM, Trigger Words and Phishing Phrases
A spam filter is trying to remove commercial advertisements and promotions so words that are common in such emails should be avoided or used sparingly. Additionally, avoid phrases that would appear as an attempt to get the reader to click on a link to a malicious site or download a file where malware awaits, or phishing phrases.

Addressing
The FROM Field - Address the reader directly as you from the FROM field. Vague FROM fields such as Chapter Leader or Contact from Chapter can lead your email right to the SPAM folder or even worse to the TRASH.

The TO Field - If you are not using an email service provider do not include all email addresses in the TO or CC fields. Not only can this lead to the SPAM folder but also are providing the full email addresses of your subscribers to all receivers. This can lead to sensitive or private email addresses becoming public. This also makes your reader feel less important. Utilize the BCC field to protect yourself and your subscribers.

Content
Short and Skimmable - Emails should contain short, bite-sized content blurbs. The readers should be able to skim through the email content and have a basic understanding of the content. Emails that require the reader to thoroughly read the email and are less likely to perform well.

Related Theme/Topic - Focus on one main theme or topic for emails, such as current news or an event. Keeping the content similar in nature helps the reader understand and focus on the purpose of your email.

Include a Call to Action - All emails should include a call to action to provider the reader with directions as to the next step. Get the reader to engage with the content (share or forward), your chapter (register for an event or volunteer) or the main association (read an article or view a page on the site).

Layout
Headlines and Subheads - Utilize great headlines, subheads, and link text for ultimate readability. Large amounts of text with no breaks can make an email daunting and your reader is less likely to read and understand the content.

Text to Image Ratio - You want to utilize a good text to image ratio. Make sure your email doesn't appear as an advertisement by containing only images, but it is always helpful to include an image or two that is related to your content to keep readers engaged and help with the flow of the content.

Preview - Design your email for the preview pane because that is how it will most likely be viewed and read. Take an extra minute to test your email by sending it to yourself and viewing it in your own preview pane.

Chapter 8: K-12 STEM and College Outreach

K-12 STEM Outreach

The K-12 STEM Outreach Community of Interest supports efforts throughout the society. You can find an overview of the COI and its efforts at https://www.same.org/membership-communities/communities-of-interest-list/k-12-stem-outreach-community/.

The COI provides a place for an exchange of information about national STEM programs such as Future City, ACE Mentoring, Facilithon and others that Posts can support at the local level. The COI does this through regular meetings that include informational segments from our various partners. Posts share how they have implemented outreach and discuss questions.

Past topics include:

- Girl Day, sponsored by DiscoverE
- Challenger Centers
- STARBASE, sponsored by the DoD
- Air & Space Forces K-12 STEM Outreach
- Engineering For Us All (E4USA)

SAME STEM/Engineering and Construction Camps

SAME has conducted camps for more than 20 years. Campers gain a sense of what it takes to become a STEM professional and what options exist to explore these interests from high school to college and beyond. Each camp has a unique curriculum that features hands-on activities that are conducted in competitive environments that promote teamwork, leadership, project management, and problem solving. Post may choose to sponsor camper(s). *See Chapter 2: Administration for specific details*.

Posts can be involved with camps in several ways. First, they can spread the word about the camp program to their local high schools. Secondly, Posts can offer financial assistance to campers. And finally, Posts can encourage young professionals to attend camps as mentors. A listing of the camps, the application form and mentor application can be found at https://www.same.org/camps/.

STEM Pathways for Indigenous Youth

Since 2020, SAME has worked to engage American Indian/Alaska Native youth in STEM activities. Supported by the SAME Foundation, United Engineering Foundation, and other grants, STEM Pathways fills a vital need for communities in Alaska, New Mexico, Oklahoma, and Florida. For more information about working with AI/AN audiences, visit https://www.same.org/events-programs/aian-stem/.

College Outreach
The College Outreach Community of Interest supports efforts throughout the society. You can find an overview of the COI and its efforts at https://www.same.org/membership-communities/communities-of-interest-list/college-outreach-community/. Each Post should have a POC to the College Outreach COI to share your best practices and learn from other Post leaders.

Student Memberships
Student members represent the next generation of innovative STEM thinkers ready to take on society's challenges. Recognizing the need to cultivate this asset, SAME offers FREE membership to all full-time students, under age 25, enrolled in high school, 2-year or 4-year colleges and universities (through the undergraduate level), trade schools, and military academies. This membership enables students to attend JETC and SBC for free, and to participate in COIs. Being a member of a local student chapter doesn't automatically enroll someone as a SAME member. They need to join at https://www.same.org/membership-communities/join/student-membership/.

Scholarships
Scholarships are a Post-level decision. SAME Posts collectively award almost $1million annually for academic scholarships to student members. Posts can help each other by contacting student members who may have received a scholarship from one Post but are attending a school in another area of the country to provide mentoring throughout the school year.

Mentoring
Mentoring is a key component to SAME engagement efforts to maintain leadership in the A/E/C industries and ensure the country has the STEM professionals it needs to secure the nation. Research shows that mentoring support increases the likelihood of someone completing a STEM degree. Mentoring also offers an excellent opportunity for leader development by the mentor and the mentee. From camp mentoring to mentoring of LDP participants to engaging with student members and young professionals at SAME national events, SAME is working to advance mentoring across the Society. More information can be found online at: https://www.same.org/career-leadership/mentorship-opportunities/.

Student Chapters
The College Outreach COI also supports the network of Student Chapters. Posts are encouraged to engage with students at local colleges, universities, and trade schools to foster their pursuit of careers in the A/E/C field. Toward this goal, Posts can sponsor a Student Chapter or Chapters at a local college or university that has a program for students in engineering, architecture, or construction. Such arrangements should be formalized with the creation of a Student Chapter Charter. For more information on establishing and maintaining a Student Chapter, visit https://www.same.org/student-resource-center/.

Best Practice:
Posts should provide funding for at least one student leader to attend an annual national SAME event, such as JETC or SBC, both offer free registration to student members.

Chapter 9: Awards & Recognition

Post Awards. Posts should establish an awards program that represents and rewards the diversity of membership of the Post. Some of the awards should feed nominations to the SAME National Awards program. Nominations for national awards are due in January each year. Press releases to local media and other professional organizations about the recipients are a good way to get recognition for the individual or company, as well as SAME.

Plaques and anniversary pins are available for Member recognition programs from the online SAME Store. There are several different plaque sizes and styles available. Some feature the SAME insignia or come with an engraving plate. Posts are encouraged to plan and order awards at least two weeks prior to needing the award(s). Additional lead time for engraving may be necessary.

Certificates with the SAME insignia are available in both portrait and landscape format from the online SAME Store. These certificates may be used with all laser printers. Certificate holders in wood with a clear insert attached are also available from the online SAME Store.

Regional Awards. RVP'S may award medals, known as "RVP Medals", to Post members who have made significant contributions within the region. Post Presidents should consult with their RVP about presenting this award to a Post member. This is a very prestigious award, presented in very limited numbers within the region, each year. RVPs also may use RVP coins to recognize outstanding contributions at the Post or Regional level.

National Awards. Nominations for SAME National awards are due February 1 of each year, and are presented during a special honors luncheon at the Joint Engineer Training Conference & Expo (JETC), held each spring. Posts are encouraged to review the national awards and submit nominations.

SAME Store. SAME National maintains a store with a small quantity of SAME merchandise, certificates, plaques and pins for recognition. Contact ocarter@same.org for availability of merchandise.

Best Practices:
Model some of the Post awards after the national awards so the Post award recipient can then be nominated for the national award. The complete list of national awards is on the SAME website.

Incoming Post Presidents should ensure that outgoing officers are recognized. A customizable certificate of recognition is available in the Post Resource Center Document Exchange. RVPs may also recognize outgoing Presidents and/or officers.

National Leader Visit Request. *The Post is responsible for coordinating with the National Leader on the specifics of the engagement once confirmed.*
Email **posts@same.org** to request a visit or participation from one of SAME's National Leadership Team.
The request needs to include:

- Time/Date/Location of the event or meeting
- How you would like them to participate? (Keynote address, State of SAME, Board Swearing in, IGE event etc.)
- Primary contact information: name, email, phone
- Any other pertinent information that would be helpful to the leader

The National Leadership Team meets regularly to review requests and determine who might be available for your meeting or event. A National Office staff contact will be in touch regarding the request. National Leadership Team includes President, President-Elect, Vice Presidents, Immediate Past President, and Executive Director.

Appendix

- Board Continuity Checklist
- Officer Installation Pre-Checklist
- Code of Conduct
- Post Officer Installation Procedure
- Post Roster Access
- PDH Certificate Template

Other Resources

- Post Resource Center
- Post Leader Quick Reference Guide (PLW2023)
- Post Officer Change Report
- Bylaws Template
- Awards Manual
- Streamers Program Information
- Streamers Portal
- Web Master Training & Resources
- Membership COI
- Individual Member Online Directory (requires member login)
- Company Member Online Directory
- Equipment Request Form
- Post Notes TME Submission Form
- SAME Bylaws
- SAME Strategic Plan 2025
- SAME IRS Determination Letter
- SAME Certificate of Incorporation
- IRS W-9 Form

Post Board Continuity Checklist

The Post board should have multiple people with access to or knowledge of all the following as it applies to the Post. The knowledge and information should be passed on to new board members. Those positions, such as Treasurer, should have a hand-off meeting to ensure continuity and understanding of finances.

- [ ] IRS 990 tax return filings – due by May 15 – who has access to the online IRS account?
- [ ] Annual Budget – should be prepared and approved before the end of the year.
- [ ] PayPal or online credit card processor – where are funds deposited or who has authority to move funds?
- [ ] Bank accounts – who has signatory authority? Who has access to statements?
- [ ] Scholarship fund
- [ ] SAME Foundation fund
- [ ] Post Mailing Address – where are bank statements, IRS correspondence, billing invoices etc. sent?
- [ ] Contracts – monthly meeting space, events, fundraisers – who maintains and where are they kept?
- [ ] Annual Audit – conducted internally or externally, not by anyone with access to funds or accounts
- [ ] State Registration, if required
- [ ] Post email account – login information, access to membership lists
- [ ] Administrative login to the Post website
- [ ] Logins for event registration sites
- [ ] Social media login and schedule of what is posted
- [ ] Post Officer report update to National Office
- [ ] SAME Annual Report filings – due March 31
- [ ] Streamer Portal access and who is responsible for updates/final submission
- [ ] Post Bylaws- review and updated every five years
- [ ] Student Chapter operation
- [ ] Field Chapter management
- [ ] Post banner, flag, Streamers

Post Officer Pre-Installation Checklist

- ☐ SAME Membership of all incoming officers are active and in good standing.,
  - Please check the Post membership roster or reach out member@same.org to confirm active membership.
- ☐ Post Officer has read the SAME Code of Conduct.
- ☐ Post Officer has not held this position for more than 3 consecutive years.
- ☐ All information from outgoing officers has been shared with incoming officers.
- ☐ Incoming leaders have explored the Post Resource Center: https://www.same.org/post-resource-center/
  - *Post Operations Manual*
  - *Post Leaders Quick Reference Guide*
  - *Post Website Management*
  - *2025 Streamers Program*
- ☐ Incoming leaders know their member login information, as well as how to access the Membership Rosters if they are the President, Secretary, Communications POC or Membership POC.
- ☐ Term dates have been communicated with the incoming officers.
- ☐ Leadership position has been updated on the Post website. If you need assistance updating your officer listing, please contact webmanager@same.org
- ☐ New officer roster has been submitted to SAME National Office:https://www.same.org/Online-Forms/Change-of-Post-Officers-Report
- ☐ If your Post has additional positions you may email the information, including position, officer name and email to Posts@same.org

Code of Conduct

SAME is committed to providing a safe and welcoming experience for all participants, regardless of race, ethnicity, disability, religion, political affiliation, gender, gender identity or expression, sexual orientation, and any other characteristic protected by applicable federal, state, or local laws, regulations, or ordinances. SAME does not tolerate discrimination, intolerance, harassment, aggression, or ill-will of any kind, whether presented in-person, digitally, or via another method.

When engaged in any SAME activities or representing the Society, all members, participants, sponsors, employees, and staff are expected to:

- Maintain the highest professional standards of ethical behavior
- Respect the dignity, health and safety of themselves and others
- Be positive, friendly, and welcoming to others
- Support diversity and inclusion
- Attend in-person meetings and events only when in good health
- Maintain the confidentiality of Society business and its members. Directories, mail lists and membership information shall be used only for their expressly stated purpose

Consequences of Code Violations

Violations of this Code will not be tolerated. When suspected violations are reported, we act. Violators are subject to remedies determined as below. In addition to other remedies, in the case of in person events, violators are subject to expulsion from the event, at SAME's sole discretion, without refund. Further, SAME Bylaws specifically address membership termination for cause (Article III, para 5) and SAME Ethics Standards (Article XI, para 3).

Reporting Alleged Code Violations

Alleged violations will normally be reported at the level at which they occur (i.e. Post, Region, National). Post or regional leadership can elevate issues to a higher level for assistance or resolution at their discretion.

Resolution of Alleged Violations

Alleged violations will be remedied at the lowest level possible. The SAME Executive Director has the national level authority to resolve alleged violations of this code, including lower level Post violations that are elevated to National. If National level resolution is required, the SAME Executive Director, or his designated inquiry official, will gather all necessary facts, including an opportunity for the alleged violator to present information both in writing and in person. Based on that inquiry, the SAME Executive Director will make a final determination or recommendation of corrective action on the matter. The Executive Director's determination can be appealed to the SAME National President, assisted by the National Leadership Team. The SAME National President will then make a final determination on the matter. Termination of SAME membership remains the authority of the SAME Executive Committee (SAME Bylaws, Article III, para 5).

https://www.same.org/about-same/same-code-of-conduct/

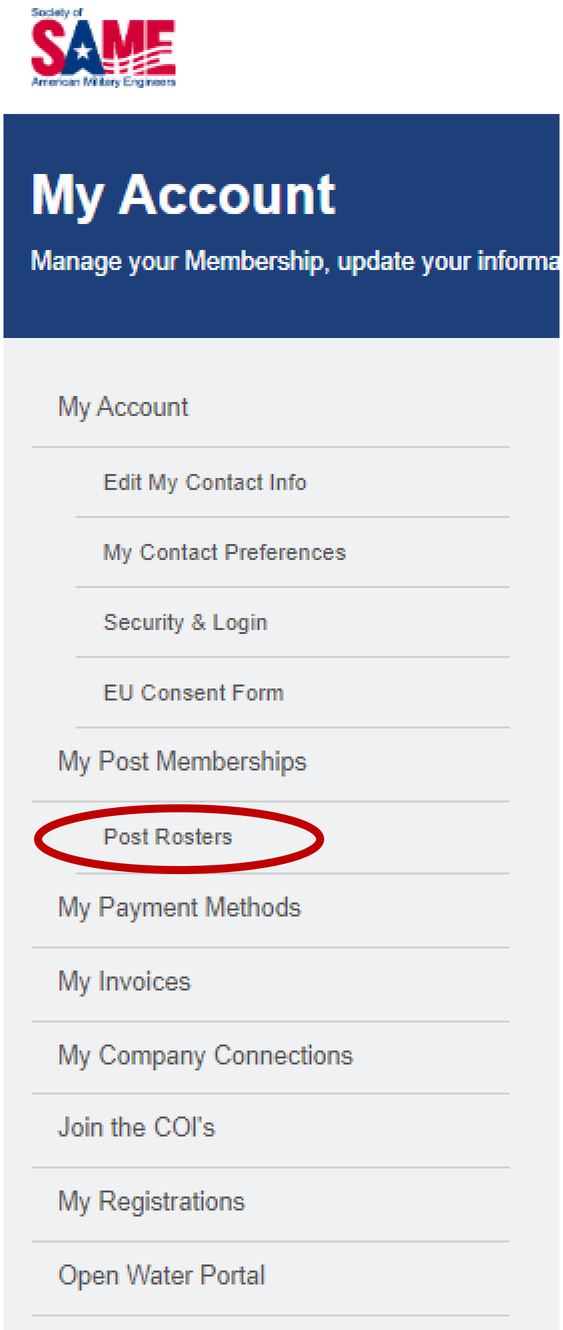
Installation of Officers

The presiding officer (such as the outgoing Post President) introduces the installing officer who is normally a Society officer or director (such as an RVP), or a senior member of the Post.

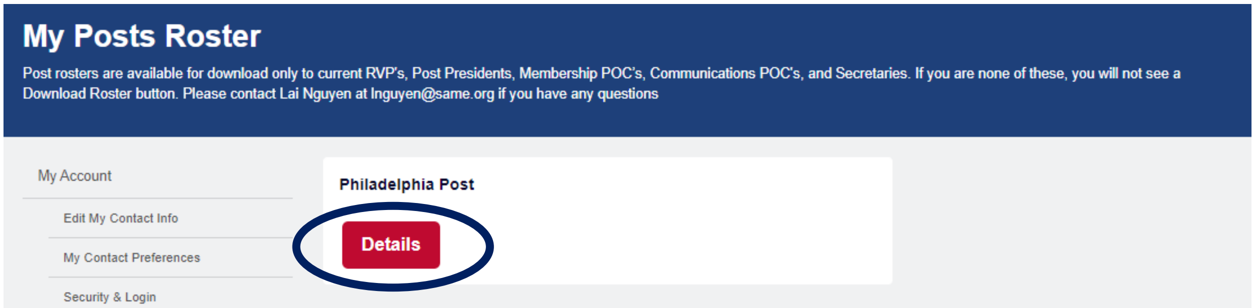
1. The installing officer asks the new officers (except the President-Elect) to come forward and stand at his/ her left in this order: Vice President, Secretary, Treasurer, and Directors. (If there are additional officers, they should form in the line at the appropriate places.)
2. The installing officer introduces these newly elected officers and asks them as a group: "Do you pledge yourselves to support the Society's *Strategic Plan* and carry out faithfully the duties of the offices to which you have been elected or appointed?"
3. All the new officers respond: "I do."
4. The installing officer asks the outgoing and new President to come forward. (They do so and stand at the "installer's" right; the new President next to the "installer.")
5. The installing officer asks the outgoing President to present the Post Charter and Post Bylaws to the President-Elect. (This is done.)
6. The installing officer asks the new president: "Do you pledge yourself to support the Society's *Strategic Plan* and carry out the duties of the President of the_________Post to the best of your ability?"
7. The new President responds: "I do."
8. The installing officer then states: "I now declare the newly elected officers and directors of the Post to be duly installed."
9. The installing officer may then make any appropriate remarks about the ceremony, the outgoing group, or the newly installed group. These may include laudatory remarks about the Post's accomplishments, or perhaps challenge the newly installed group to achieve certain goals or objectives.
10. By prior mutual agreement, either the presiding officer, or the outgoing or new Post President, then takes control of the meeting to close and remind the members of the next meeting date, time, and location

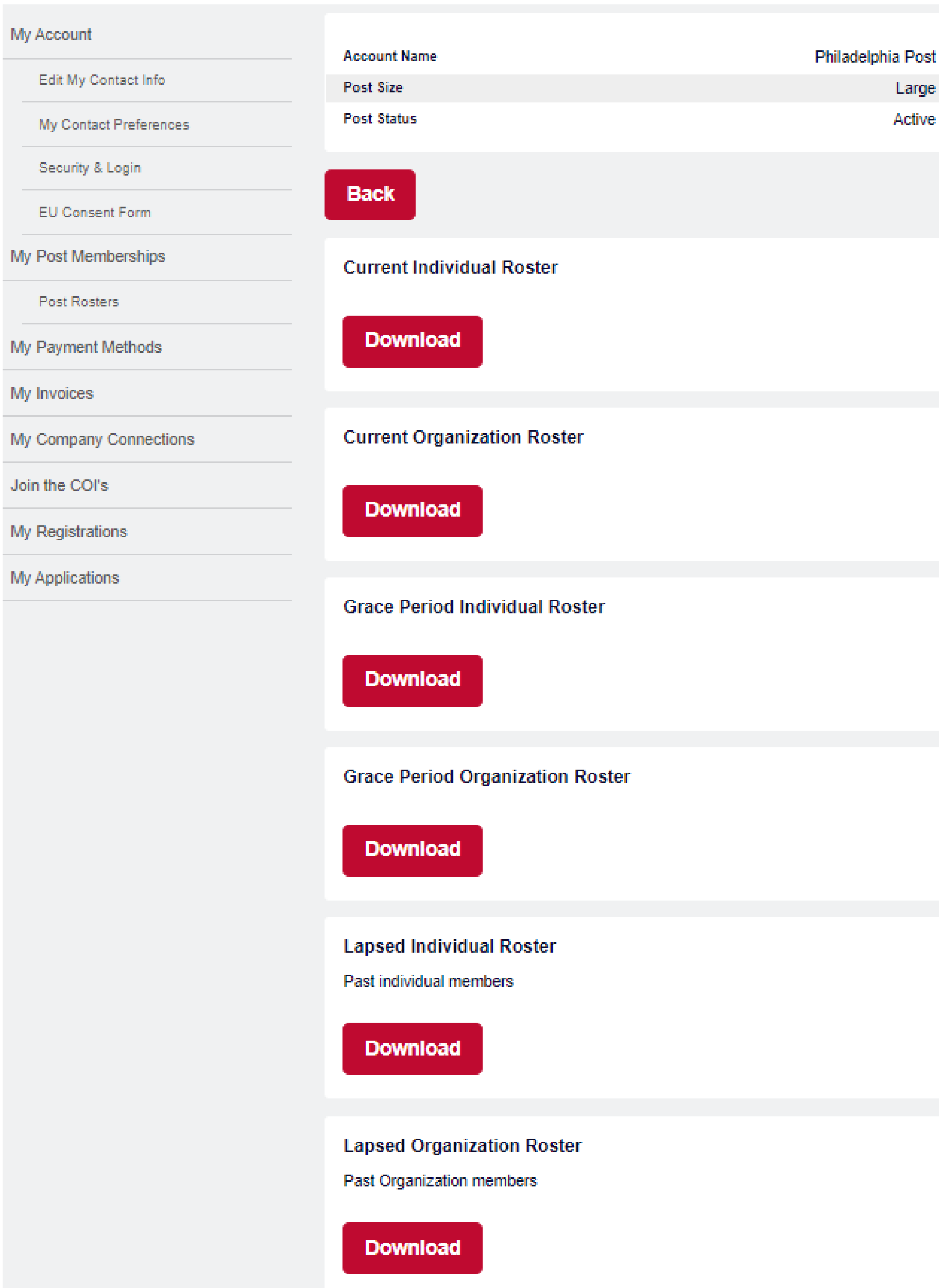
Accessing Post Rosters

The following Post Officers have access to download Post rosters from their online member account: President, Secretary, Membership POC, Communications POC.



- Login your Member Account at www.same.org
- Once logged in, click Member Account at the top of the page.
- Look for Post Rosters on the left menu.
- Click the buttons to access your Post information and rosters.


My Posts Roster
Post rosters are available for download only to current RVP's, Post Presidents, Membership POC's, Communications POC's, and Secretaries. If you are none of these, you will not see a Download Roster button. Please contact Lai Nguyen at lnguyen@same.org if you have any questions
My Account
Edit My Contact Info
My Contact Preferences
Security & Login
Philadelphia Post
Details


My Account
Edit My Contact Info
My Contact Preferences
Security & Login
EU Consent Form
My Post Memberships
Post Rosters
My Payment Methods
My Invoices
My Company Connections
Join the COI's
My Registrations
My Applications
Account Name
Philadelphia Post
Post Size
Large
Post Status
Active
Back
Current Individual Roster
Download
Current Organization Roster
Download
Grace Period Individual Roster
Download
Grace Period Organization Roster
Download
Lapsed Individual Roster
Past individual members
Download
Lapsed Organization Roster
Past Organization members
Download

Professional Development Certificate Sample

THE SOCIETY OF AMERICAN MILITARY ENGINEERS

PROFESSIONAL DEVELOPMENT HOURS (PDHs) CERTIFICATE

PARTICIPANT:

Enter Your Name Here

DATE: | TIME: EST | LOCATION: Online Webinar

EDUCATIONAL PROGRAM:

ENTER PRESENTER AND DESCRIPTION/LEARNING OBJECTIVES HERE

TOTAL PDHS AWARDED: 1.0

TOTAL AIA CREDITS AWARDED: XXX

IMPORTANT: The attendee is responsible for applying for his or her own PDHs after the conference.
SAME cannot guarantee that all boards will accept all PDH credit; please check with your licensing board for more information.

SPONSORING COI:

ENTER COI PRESENTING TH

ENTER COI CHAIR NAME