

SAME Resource Request Policy & Procedure

July 12, 2023; r1.4



PURPOSE:

This document provides the implementing instructions for Posts, Communities of Interest (COIs), and other Programs to request support from the National Office and potentially the Society of American Military Engineers (SAME) Foundation. Posts, COIs, and other Programs are encouraged to request needed monetary or non-monetary support to execute their programs through this process. For COIs, this procedure yields the resource request to accompany the Annual Work Plan.

Additionally, this document integrates National Office procedures for considering SAME Foundation support. SAME Foundation support requests will only be transmitted to the Foundation by the National Office in accordance with this process. Instructions for implementing the 24 November 2020 Memorandum of Understanding (MOU) between the SAME and the SAME Foundation, specifically, the terms pertaining to SAME Foundation financial support for SAME Programs are included herein.

PRINCIPLES:

1. Scope: This policy and procedure provides instructions for monetary and non-monetary support requests for all SAME Posts, Communities of Interest (COIs), and other Programs.
2. Society Benefit: Requests must substantiate program impact that contributes to the SAME Strategic Plan.
3. Programmatic Requests: Requests must be for programmatic support versus one-off events or individual support.
4. Impact: Impact and return on investment will be measured by both the Society and the Foundation on an annual basis at a minimum. The Society must report annually detailing impact of the programs funded by the Foundation.
5. Funding: All resource requests from COI's, Regions, Posts and other SAME programs submitted in conjunction with Annual Work Plans are considered for resourcing by the Ranking and Review Committee (R2C).
6. Authority: The SAME Executive Committee approves funding requests as part of the Society's annual budget approval process.
7. Proponent Department: The Programs Department of the Society is the proponent for this policy and implementation of this procedure.

PROCEDURE:

In general, the Programs Department of the National Office annually:

The following actions are completed in accordance with the program *Timeline* noted below.

1. Ranking and Review Committee (R²C): The R²C is comprised of appointees made by the SAME President and includes as voting members the National Past President / Vice President (Chair), one Regional Vice President (RVP), one Community of Interest (COI) Chair, and one Elected Director, and a non-voting National Office Staff member. The R²C reviews and prioritizes support requests

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(monetary & non-monetary) from COIs, Posts, Regions, and other programs within SAME and determines:

- a. Priority of each request
 - b. Determines which requests:
 - i. Included in a consolidated funding request to the Foundation
 - ii. Incorporated into the Society budget
 - iii. Rejected
2. Requestors: IAW the timeline noted below:
 - a. COIs: In accordance with the SAME Governance cycle, COI Chairs identify any resource requirements as part of their *Annual Work Plans*; prepare *Resource Request* and submit to the appropriate National Officer for review and endorsement; National Officers consolidate and submit to the National Office.
 - b. Posts: Post Presidents identify resource requirements and submit to the appropriate RVP for review and endorsement; RVPs consolidate and submit to the National Office.
 - c. Programs: Program Volunteer Leaders identify any resourcing requirements and submit to the appropriate National Officer for review and endorsement; National Officers consolidate and submit to the National Office.
3. Requests: All requests will follow the *SAME Request for Resource Support* (see APPENDIX 1). Incomplete requests will be returned for correction prior to consideration.
4. National Request: The National Office aggregates and submits all valid requests from Posts, COIs and Programs to the Ranking and Review Committee. The R²C reviews all requests, and creates a ranked list for approval by the SAME XC.
5. Decision:
 - a. The XC reviews and approves the R²C-submitted priorities.
 - b. National Office prepares a consolidated funding request for programs approved by the XC for the President's submission to the Foundation.
 - c. The Foundation provides the Society with an approved level of funding.
 - d. The R²C reconvenes to consider the Foundation funding level and recommend final application of funding.
 - e. XC approves the final Society budget to include programs with full or partial Foundation funding.
6. Governing Policy: Financial transactions will be executed in accordance with SAME Finance Policy.
7. Reporting: The Society prepares an annual report to the Foundation detailing the impact of the programs funded by the Foundation for the previous fiscal year.

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TIMELINE:

Due Date	Action
NLT March 15	Posts, COIs report success of the previous FY Foundation-funded programs to the National Office Staff Liaison
NLT March 31	National Office submits <i>SAME Foundation Support Annual Report</i> to the Foundation
NLT JETC: DRAFT COI Workplan Deadline	COIs prepare and submit DRAFT <i>Annual Workplans</i> (for the next year's efforts) and <i>Annual Workplan Progress Reports</i> (reporting on results of the previous year's workplan) to National Officers and National Office Staff Liaison
NLT EOM June: COI Workplan, Resource Request Deadline	COIs submit <i>Annual Workplans</i> with any accompanying <i>Requests for Resource Support</i> to National Officers for review and endorsement and copy National Office Staff Liaison
	Posts submit <i>Requests for Resource Support</i> to RVPs for review and endorsement
NLT July 15: VP, RVP Resource Request Deadline	National Officers, RVPs submit endorsed <i>Requests for Resource Support</i> to National Office; National Officers, RVPs notify requestors of any requests not receiving endorsement
NLT EOM July: R ² C Meeting	R ² C reviews all <i>Requests for Resource Support</i> , creates a ranked list for XC consideration
	National Office provides DRAFT ranked list to the Foundation (for information purposes only)
August: XC Meeting	XC reviews and approves ranked resource request list
	National Office informs requestors of priorities highlighting final approval pending based on Foundation funding amount and final XC budget approval
NLT 15 October	SAME Foundation notifies the National Office of amount of funding to be made available for execution the upcoming FY
NLT EOM October	R ² C reconvenes to review the Foundation's funding decision against the request; determines final program funding recommendation to the XC
December: XC Budget Meeting	National Office prepares and submits final budget incorporating the final R ² C funding decisions to the XC for approval
December: Upon budget approval	National Office (Programs) informs requestors of approved requirements and funding source (Society and/or Foundation)
	National Office provides the Foundation with allocation of Foundation funding

APPENDIX 1:

SAME Request for Resource Support

(Communities of Interest (COIs), Posts and other Programs)

NOTE:

SUBMIT THE COMPLETED REQUEST IN ACCORDANCE WITH THE TIMELINE TO BOTH THE APPROPRIATE NATIONAL or REGIONAL OFFICER AND NATIONAL OFFICE STAFF LIAISON

DATE of REQUEST: Click or tap to enter a date.

REQUESTOR: Indicate COI / Post / Program and Point of Contact: Click or tap here to enter text.

DESCRIPTION OF THE PROGRAM/SUPPORT REQUESTED:

Click or tap here to enter text.

EXPECTED OUTCOMES / IMPACTS: What will the program accomplish, what outcome or impact will be achieved?

Click or tap here to enter text.

HOW WILL OUTCOMES / IMPACT BE MEASURED: Describe how outcomes will be measured or assessed.

Click or tap here to enter text.

HOW DOES THIS REQUEST SUPPORT THE SAME STRATEGIC PLAN AND/OR POST STRATEGIC PLAN:

Describe how this request specifically supports the SAME Strategic plan and/or your Post Strategic Plan.

Click or tap here to enter text.

HOW DOES THIS REQUEST SUPPORT THE ANNUAL WORK PLAN: Specifically, how does this request support one or more elements of your Annual Work Plan?

Click or tap here to enter text.

TYPE OF SUPPORT REQUESTED: Indicate whether the request is for *monetary* and/or *other* support

Click or tap here to enter text.

AMOUNT OR QUANTITY REQUESTED:

- Provide a basic budget (enter or by attachment), description of the funding usages such as travel, stipends, materials, software acquisition, contracted support, work hours, etc.:

Click or tap here to enter text.

- One-time request or ongoing support: Is the request for a one-time or ongoing program?

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Click or tap here to enter text.

TIMING FOR THE REQUESTED SUPPORT: When is the support needed and over what period?

Click or tap here to enter text.

FOR PROGRAM, POST OR REGIONAL SUPPORT, WHAT SUPPORT IS NEEDED FROM COIs: How can COIs provide assistance with speakers (Knowledge Network), webinars, and other non-monetary support?

Click or tap here to enter text.