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Chapter 1: Governance, Ethics and Organization

1. National Governing 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 Uniformed Services Advisory Group (USAG) were established and the terms of the national Vice Presidents were changed from one year to two years.
   c. SAME bylaws. The bylaws have been updated annually to reflect mostly minor changes adopted by the Board of Direction.
   d. SAME Strategic Plan (2015 – 2020). The SAME Strategic Plan is updated regularly to reflect changes in focus as SAME adapts to the priorities of the nation and national security. It includes a Mission and Vision statement, Values, Goals and Objectives.

   **SAME Mission.** SAME leads collaborative efforts to identify and resolve national security infrastructure-related challenges.

   **SAME Vision.** SAME is recognized as the multi-disciplined integrator of military, public, private, and academic national infrastructure-related capabilities to produce viable solutions for America’s national security.

2. Post bylaws. Each Post is required to approve bylaws consistent with a template provided by SAME National. This document describes the organization of the Post as well as its operating requirements. It should include the proper election of Post Officers and Directors, and their terms of office. Post Officers should read it carefully when taking office. At a minimum, Posts should review their bylaws every five years with consideration for revision, or whenever substantive changes are made to the SAME bylaws. Posts should have the latest updated copy of their Post bylaws on file with SAME National and submit updated Post bylaws every five years. If there are no changes to the bylaws, Post should submit their current bylaws with a date that reflects the five-year review. The latest template version of the Post bylaws is available online.

3. Organizational Structure

   **National Level—SAME is governed by a Board of Direction and managed by an Executive Director and a headquarters staff located in Alexandria, VA. Each March, SAME members vote to elect a President-Elect, two Vice Presidents, and four Directors. National Committee and Council Chairs are appointed by the National President for two-year terms, which can be extended up to four years. The National Board of Direction meets twice a year 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 twice a year: in
March, May and in August. 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. 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 17 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.

Post Level. The basic operating element of SAME is the Post. Posts are subsidiary organizations 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 manner in which the Post is governed and operates. A Post bylaws Template is located on the SAME website and is provided as a guide. A copy must be submitted to SAME National.

An exception to the above is where a Post is separately incorporated. While SAME National does not encourage Posts to be separately incorporated, as this has implications for both insurance and filing with the IRS (see the Financial Guidelines and Insurance Sections of this Handbook for more information).

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

- i. Small Post: 0 - 175
- ii. Medium Post: 176 - 450
- iii. Large Post: 451 +

a. Key Post Positions. Each Post should at a minimum establish the following positions in its bylaws to manage the Post and to have access to the Chapter Leaders Access System (CLAS), which is the SAME membership database, and receive the SAME National Post Leaders emails sent regularly. The Post bylaws will establish the roles, responsibilities and terms of these positions.

i. **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, and a two-year term is encouraged since it often is difficult for a Post President to learn the position and make a difference in one year.

ii. **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 preside over Board meetings in the absence of the President. Often, the Post has a succession plan in which case the 1st Vice President is nominated to become the President in the following year. This position is designed as one of the six positions having access to CLAS.

iii. **Secretary.** The Post Secretary is responsible for maintaining the correspondence and records of the Post, sending out notices of meetings (unless there is a
Communications Committee), recording the proceedings of all Board and membership meetings, and maintaining a record copy of the Streamer and Award submissions. The Secretary is also responsible for submitting the Change of Post Officer Report to SAME within 30 days after a change in Post leadership.

iv. **Treasurer.** The Post Treasurer is the comptroller of the Post accounts under the direction of the President, and is responsible for submitting the annual Post Annual Report, 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).

v. **Membership Points of Contact:** Post Membership Points of Contact (POCs) for Individual and Sustaining Members are recommended to track and support the recruitment and retention of all members.

**BEST PRACTICE:** Membership POCs are responsible for reviewing the Post roster on a monthly basis to ensure the Post welcomes new members and reaches out to dropped members.

SAME encourages Posts to utilize the SAME membership database (CLAS) for up to date rosters to communicate with members. Posts should to maintain a separate listing of non-member prospects to invite to Post activities and events and should be encouraged to join SAME.

b. **Post Committees:** Posts should establish standing committees to support programs and activities. 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:

i. **Programs.** Responsible for providing a plan for the calendar year to including general membership meetings, field trips, technical workshops and social events.

ii. **Communications.** Responsible for sending out emails for Post events, providing current information to the Post web manager, to SAME National for major Post events and accomplishments, and to the news media.

iii. **Awards and Recognition.** Responsible for establishing or maintaining a Post awards program, submitting nominations for national awards to SAME National, and working with Post Fellows on nominations of individuals to be elevated to the grade of Fellow.

iv. **Finance Committee.** Provides oversight to the Post investment accounts, and annual financial audit of accounts.

v. **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.

vi. **Nominations.** Generates the slate of officers and directors for election.

**BEST PRACTICE:** Elections for officers should be held no less than 45 days prior to the end of the current officer terms. Change of Post Officer Report is due to SAME National office 30 days after the change in officers.

c. **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.

d. **Post Officer Transition:** SAME National recommends a transition period for Post Officers in May/June or Dec/Jan. 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 of Direction; however, other members of the Board may be elected or appointed positions, consistent with the Post bylaws. It is important that the Secretary submit a Change of Post Officers Report within 30 days of the installation of new officers.

e. **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 Board of Direction or Post Board of Directors, or a senior member of the Post. The RVP is frequently invited by the Post President to perform the installation.

**BEST PRACTICE: Recognition of Outgoing Post Presidents** - Incoming Post Presidents should ensure that outgoing officers are recognized. Upon receipt of the Change of Officers Report, SAME National will send the new Post President a welcome message and a Certificate of Appreciation for the outgoing Post President.

f. **Field Chapters.** Field Chapters are ideal for locations where membership numbers may not be sufficient or the situation precludes the ability to establish and maintain a full Post with a functioning Board. If there is expressed interest and a desire to belong to SAME, locations can become affiliated with an active Post, which will be designed a “Host Post” for the Field Chapter. Conditions of a Field Chapter include:

i. Field Chapter members are included as members of the Host Post.

ii. The Field Chapter will not have a Board of Direction, but rather should have a Field Chapter President or Leader who should serve on the Host Post Board of Directors. This individual should be listed on the SAME website as the Point of Contact for the Field Chapter.

iii. There are no bylaws for the Field Chapter, only a charter signed by Field Chapter and Host Post Presidents.

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.
g. **Student Chapters**  
   Student Chapters must be "sponsored" by a local Post.  
   **Requirements for student chapters:**  
   - **Minimum of 10 students** - SAME Membership is free to full-time college students when they sign up for a SAME membership on the SAME website  
   - **Student Chapter Application** – submitted to the Host Post for review and approval, then forwarded to SAME National for formal recognition as a student chapter.  
   - **Board of Directors** – the student chapter needs to elect a board to govern the chapter.  
   - **Faculty Advisor** - on-campus faculty that will assist in overseeing the student chapter along with the Host Post.  
   - **Post Point of Contact** – closely monitors the student chapter ensuring succession of officers and that graduating students are transitioned to young members  

**BEST PRACTICE:** Posts should provide funding for at least one student leader to attend an annual national SAME event, such as JETC. *(See the College Outreach webpage at www.same.org/college-outreach for information on establishing and maintaining a Student Chapter.)*

4. **Leadership Workshops.** SAME National sponsors the following workshops for SAME leadership development:  
   a. **Post Leaders Workshop.** SAME National offers one annual workshop in August. The workshops provide two Post board 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. National covers the cost for the lodging, food and beverage during the two-day event. The Post is responsible for transportation costs to/from the workshop and any other incidentals they may choose to cover. Workshop participation is a requirement for the Leadership and Mentoring Streamer.  
   b. **Student Leaders Workshop.** SAME National, in collaboration with the College Outreach Committee, may offer a workshop for up to two Student Leaders, the faculty advisor and Post Mentor/POC from each of the SAME Student Chapters. The workshops provide Student Chapter leaders with information on best practices and allows them to share ideas for achieving the Distinguished Student Chapter Streamers program.  

**BEST PRACTICE:** The Student Chapter President should be one of the attendees and the other a junior whom the Chapter plans to become the President in his/her senior year.

5. **Ethics—SAME Relationship with Government Organizations and Officials.**  
   a. While the Joint Ethics Regulation (JER), which governs the relationship between Non-Federal Entities (NFEs) such as SAME and the government, has existed for many years, recent interpretations have resulted in the need for care to be taken by SAME Posts to ensure that their operations are consistent with the JER.  

   Questions should be referred to the SAME Executive Director.
Chapter 2: Administration

1. **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.

   **BEST PRACTICE**: Posts should not use a government mailing address, government resources or logistical support for a Post.

2. **Post Goals and Objectives**: Post Presidents and the Post Board of Directors should align the Post goals, objectives and activities with the SAME Streamers, which are designed to help Posts support the *SAME Strategic Plan*. Posts should aspire to become a Distinguished Post. The requirements for being a Distinguished Post vary based on Post size and are specified in the Streamer criteria in the online Post Resources Center.

3. **Post Membership.** All dues are collected by SAME National. A portion of the dues collected from Individual Members and Sustaining Members, Public Agency Members, and Non-Profit Organizations are distributed quarterly.

4. **Process to Establish a Post.** SAME Members are encouraged to establish new Posts 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 establish the Post and provide for leadership succession
      
      ii. A sustainable company base—a minimum of three Sustaining Member companies.
      
      iii. A sustainable Individual Membership base—a minimum of 20 active members.
      
      iv. Prepare Post bylaws using the Post bylaws template in the online Post Resources Center.
   
   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.

5. **SAME Store.** SAME National maintains an online store available for both Post and individual orders of SAME merchandise, certificates and plaques. Many Posts order memorabilia in support of special functions, such as golf tournaments and member recognition. Others use items featuring the SAME insignia as presentation gifts to speakers and visiting dignitaries. Depending on the item and quantity ordered, Posts may receive a discount. Post names also may be printed on certain items for a reasonable, one-time fee.
6. **Post Stationery.** Posts may design and print Post stationery locally. The names of Post officers are normally a part of the letterhead, along with the SAME insignia or logo. Artwork and guidance on use of the SAME logo and insignia are available on the SAME website.

7. **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 events to webmanager@same.org.

**BEST PRACTICE:** Submit any information on major events that have a broad appeal, such as Industry Days, to the SAME national online calendar, so that any SAME member may take advantage of the education and networking opportunities.

**BEST PRACTICE:** Check the SAME Calendar of Events online to preclude major conflicts with national, regional or other Post events.

Posts are requested to not schedule major events in the month when their region is hosting a regional conference or in May when SAME National hosts the annual Joint Engineer Training Conference & Expo (JETC) or the week of the Small Business Conference (SBC) in November.
Chapter 3: Financial Guidelines

1. 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 a tax identification number separate from the parent Society and file federal and state tax forms, as required based on the amount of gross receipts normally received by the Post. Posts need to obtain their tax-exempt status from each state for income, franchise, sales, and other taxes. If Posts host major events, exemption from state sales tax could be particularly important if major taxable expenditures are involved.

   c. As a subordinate of SAME National, all Posts are required to submit an annual financial report to SAME National by March 31. SAME National files a Group Exemption Report to the IRS each September listing all subordinate Posts affiliated with SAME National’s 501(c)(3) status allowing them to be considered tax-exempt by association, provided the subordinate meets certain requirements. The Post Financial Report provides information SAME National needs to file the Group Exemption Report. Posts will lose tax-exempt status if not listed as a subordinate on this report.

   d. To maintain exemption under SAME National’s 501(c) (3) status, all Posts must file a Form 990 Return of Organization Exempt from Income Tax with the IRS. Gross annual receipts will determine which version of the form. Posts that do not file an annual return with the IRS for three consecutive years will automatically lose their federal tax-exempt status. To regain tax-exempt status, the Post must file Form 1023 to secure separate tax-exemption which may not be automatically granted by IRS.

2. Completing the Annual Report and IRS Report. Posts are required to submit an Annual Financial Report to SAME National by March 31 each year and must file or extend a Form 990, 9900-EZ or 990-N each year with the IRS by May 15. SAME National will withhold the Post portion of dues paid by SAME members if the financial report is not completed 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. Delinquent financial reports and IRS reports are a basis for deactivating a Post. If a Post does not file an annual return for three consecutive years their tax exemption is automatically revoked. Please visit www.irs.gov/eo for further instructions and information. To complete the Post Financial Report, go to www.same.org and then to Post Operations. Please provide a valid e-mail address for Post Treasurer and the Post mailing address that is used on Form 990.
3. **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:


   b. The fund will have a separate tax identification number from the Post and the Post also must file with the IRS annually for the separately incorporated fund.

4. **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 on file the current bank account number, transit number and bank name in order to make the EFT dues payments. Post should send SAME National a copy of a voided check showing the Post’s bank account and routing number if changes in accounts are made. The name and contact information for the Post Treasurer must be kept current as the POC for any dues payment correspondence.

   c. The fiscal year for all Posts and SAME National is the calendar year.

   d. The Treasurer of the Post, or other person or committee designated by the Post Board of Directors, 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, that would require a person other than the check signer reconcile the bank statements, or dual signatures are 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, but care must be taken in how the event is advertised.

   g. All Post accounts should be established using the Post Tax ID Number. 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.

5. **Standard Accounts:** The Post should establish the following standard bank accounts, which shall be considered under the control and direction of the Post Board of Directors. Administration of bank accounts should not be delegated to other individuals or committees unless specifically delegated in the Post bylaws; additional accounts may be established for other specifically designated purposes: The Post Board of Directors should establish the level of authority for the Treasurer to sign checks, and an approval process for expenditures. Two signatures are
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; however excess funds may be placed in short term Certificates of Deposit or Treasury Bills. Since this account will draw little interest, only sufficient funds necessary for monthly Post Operations should be maintained in this account.

b. 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 National 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 National Foundation is still under the spending direction and authority of the individual Post. If the Post opts not to use the National 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 a corpus 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 portion of the portfolio may be invested in mutual funds or similar investments in order to grow the corpus without yielding current dividends and interest. SAME does not recommend investing in individual stocks unless it has more than $500,000 and hires a financial firm to manage the account. The Education and Mentoring Fund should be used solely for supporting education and mentoring activities of the Society, including but not limited to:

I. Scholarships to college students.

II. Sponsor high school students to attend SAME’s Engineering & Construction Camps and Society events and sponsoring high school or college STEM related programs and competitions. (e.g., MATHCOUNTS)

III. Stipends for Young Members and Noncommissioned Officer/Enlisted members to pursue professional certifications or attend Society events.

IV. Stipends for student members to attend SAME conferences.

V. Expenditures for fund-raising activities for the Education and Mentoring Fund.

6. Post Financial Responsibilities: The Board of Directors 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 the investments in the Education and Mentoring Fund. The Board of Directors must ensure an audit of Post accounts is conducted annually (before March 31), or whenever the Treasurer changes, and the results reported to
the Board of Directors.

**BEST PRACTICE** – the Treasurer should not be the sole signatory for Post accounts. All disbursements over $500 should require two signatures.

7. **Responsibilities of Post Treasurer:**
   a. Prepare and submit the Annual Financial Report to National Headquarters by March 31 for the previous fiscal (calendar) year. If Education and Mentoring Fund is separately incorporated, please note it on the annual report.
   b. Preparation of Annual Budget for approval by Post Board of Directors.
   c. Control and accountability for all revenue and expenditures.
   d. Provide reports on revenue and expenditures to the Board of Directors at regularly scheduled meetings
   e. 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 to SAME National
   f. Coordinate annual audit as described below.
   g. Formal Transfer of Records to Successor.

**BEST PRACTICE** – Treasurers should serve no more than four consecutive years without a break.

8. **Financial Policies:**
   a. **Collection.** Only SAME National is authorized to collect dues. Posts have no authority to collect dues or other assessments from members. Dues distributions from SAME National to Posts are considered “unrestricted” and may be used for either operating expenses or transferred to the Education and Mentoring Fund when not needed for operational needs. All receipts, including donations to the Education and Mentoring Fund, shall be considered as gross revenues for tax reporting purposes.
   b. **Fees.** Posts may establish fees for the various events and activities it sponsors, and may differentiate between different categories of members. Every effort should be made to subsidize Student Members, Young Members and government employees to increase their level of participation. 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 low first-time guest fee to introduce potential new members to the Society.

9. **Fundraising:** Use creative activities that engage the local community as well as your Post members to build your Post Education and Mentoring Fund. Some ideas for fund raising techniques and opportunities include, but are not limited to:
   a. Golf Tournaments
   b. Contests, raffles and lotteries – Check your state’s rules regarding raffles and lotteries to ensure they are permitted.
c. Host Posts designating a major share of Joint Engineering & Training Symposium (JETS) proceeds to Post Education and Mentoring Funds

d. Soliciting Sustaining Member contributions and "by name" scholarships

10. 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 an 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 at 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 level of check signing authority established (e.g., require second signature on cash disbursements over a certain dollar amount).

d. Posts should ensure related party transactions (i.e., vendors who have a relationship with a member of the Board of Directors) are approved by an individual independent of the transaction and approved by the Board of Directors.

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 its accounts.

f. Posts should set up accounts in established institutions and understand the risks in using brokerage or banks and whether or not they are federally insured.

g. The Board of Directors should approve a fiscal year budget in December of the previous year to guide the Posts in its expenditures. Variances in the budget should be reviewed periodically by the Board of Directors. 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 personnel or 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.

11. Audit. Posts must conduct an annual audit preferably by the end of February each year but no later than March 31 when the Annual Financial Report is due to SAME National. Accounts must 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 who are independent of 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 company to perform the audit, prepare the SAME Financial Report and IRS reports.

12. Role of the Finance Committee: Unless the assets are invested with SAME National Foundation, the Post Finance Committee should be comprised of with at least one member of
the Board of Directors to oversee and recommend to the Board the investment strategy for the Education and Mentoring Fund. The Finance Committee should consider utilizing a brokerage firm and its financial services to assist in making wise 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.

c. Investments should be made in fixed revenue instruments and mutual funds. Posts should not invest in individual stocks.
Chapter 4: Programs

1. **Opening Ceremony.** Posts should include the Pledge of Allegiance to the national colors at the opening of each meeting or activity (excluding social events). The American flag and Post flag (or banner) should be used at all events. Invocations are optional, but if used, should be non-denominational since SAME is composed of individuals of all religious faiths.

2. **Post Programs Committee:** The mission of the Post Programs Committee is to plan, develop and oversee the programs presented at Post meetings and workshops. These may include both regular Post meetings, workshops and joint meetings with other professional associations and societies. The committee should review and implement a schedule of programs at least six months ahead; preferably, programs will be scheduled for an entire calendar year to align with the **SAME Strategic Plan** and the Streamer program. The committee chair selection is responsibility of the Post President.

3. **Programs 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 don’t work, give it more time or try another approach.
   a. Think about ways to draw public sector participation, considering topic, price, time and location. Consider subsidizing public sector participation through sponsorships and pricing initiatives. Eliminating registration fees for government members will facilitate their attendance.
   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 one of three reasons:
      i. Professional Development
      ii. Networking/Connecting
      iii. To Give Back
   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 or politician. 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 benefit from theirs.
   e. Webinars are a cost effective way to communicate valuable information to your target audience. Web-based seminars enable presenters to conduct virtual seminars for anyone to participate as long as they have a PC with an internet connection. Webinars can produce revenue for the Post by charging a registration fee or offered at no cost with a sponsor.
   f. Reservation 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.
g. Establish a reminder system for meetings and other Post events. Members should receive notices at least two months before events. As the event date approaches, an e-mail reminder keeps the event in members’ minds and satisfies reservations.

h. Posts are encouraged to hold periodic joint meetings or events with other organizations, with which they wish to have an ongoing established relationship. Many Posts conduct joint meetings or workshops each year with other professional associations. The purpose of joint meetings is to provide value to members of both organizations, and facilitate synergy between the organizations’ membership. A two- to four-hour technical workshop is a better forum than lunch meetings for joint events in that it provides for more technical content and awarding of professional development hours (PDHs).

The following organizations are those that have a formal relationship with SAME National:

- American Institute for Architects (AIA)
- Construction Management Association of America (CMAA)
- Diversity in Action
- Drexel University
- International Code Council
- National Council of Examiners for Engineering and Surveying (NCEES)
- Society for Marketing Professional Services (SMPS)

The following organizations are those that have an informal relationship with SAME National:

- American Society of Civil Engineers (ASCE)
- Army Engineer Association (AEA)
- Design-Build Institute of America (DBIA)
- International Facility Management Association (IFMA)
- National Society of Professional Engineers (NSPE)

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 PRACTICE**: SAME Post leaders are encouraged to publicize the recent activities and accomplishments of their Posts by submitting 500 word articles and high-resolution photos for publication in the various SAME publications including, Real TiME newsletter, Bricks and Clicks blog and TME magazine. Post leaders may submit their articles in Word format with up to three photos to editor@same.org.

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

   a. Selecting convenient times and places for Post events and meetings;
   
   b. Determining types of meals and price ranges preferred;
c. Determining member interest in special meetings and workshops;
d. Assessing preferences for an evening or daytime awards ceremony;
e. Prioritizing preferences for types of programs to be included; and
f. Identifying technical and general topics of interest to members for program planning.

5. **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 also 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.

6. **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.

7. **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.

8. **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, civilian and contractors who have been overseas.

   b. **Banquets.** Many locations offer a range of officer clubs or elegant and interesting restaurants serving a variety of domestic, international or ethnic foods. Such an event can be tied in with a meeting of general interest, such as the installation of Post officers, a visit from the RVP or the presentation of Post Awards.

   c. **Holiday Parties.** A nice idea, but watch for overloaded social schedules during the holiday season; 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 Education and Mentoring Programs.

   e. **Other Ideas.** Wine tasting parties, progressive dinner parties, river cruises, sporting activities, cookouts, theatre, and many other events are opportunities for a Post with imagination. Find ways to combine professional development with some excitement!
9. **Professional Development Hours**: Awarding PDHs for Post and regional activities is an appropriate, and highly recommended, method to provide professional development support to members. While there are administrative requirements, 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* on the SAME website. 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.

a. **Technical Workshops**. Posts are encouraged to host two- to four-hour Technical Workshops that offer individuals who are not attending luncheon meetings to participate in a SAME sponsored event that provides PDHs without the networking opportunities of a luncheon meeting, and without the cost of the lunch. Charging a nominal fee will provide the Post with some revenue and a service to SAME members.

b. **Continuing Education Courses Sponsored by SAME National**. Posts should consider periodically (annually or semi-annually) hosting a one-day continuing education course using SAME National CEP instructors. SAME National will assist with the logistics for shared profit or a Post can choose to handle all the logistics themselves.

c. **Webinars**. 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 also will assist with the logistics of setting up these opportunities.

d. **Committee-Sponsored Webinars**. Posts should consider encouraging members to become involved with SAME Mission Committees or Councils, which sponsor educational webinars that typically provide 1 to 1.5 PDHs. Posts leaders can also assist in advertising topics relevant to all their membership when a committee is producing a webinar, providing members more education options without any real logistical or administrative burden to the Post.

10. **Working with Other Organizations**:

a. **Public Agencies**. Positive relationships with the six uniformed services within the local Post area are needed. Also investigate, and forge relationships with, National Guard, Reserves and other state and local public agencies in a close proximity to the Post.

b. **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. The faculty and staff should be encouraged to
join as Individual Members. Refer to the College Outreach Committee Webpage for information regarding working with college students.

11. **Young Members:**

   a. Young Members should be fully integrated into the leadership positions and committees of the Post. Many Posts specify that a Young Member fills at least one Director Position.

   b. Young Members are defined as those members of SAME who are age 39 years or younger.

   c. Many Posts conduct special programs for Young Members, dealing with professional development or professional registration. Some Posts assign the entire conduct of certain meetings to Young Members. This includes the planning, development of the program, coordination and execution of the meeting, plus any follow through required.

12. **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 NCO to serve on their Board of Directors.
Chapter 5: Communications

1. **E-mail Lists**: Posts may access and download Post rosters online as Excel spreadsheets to create targeted email lists. Six designated Post Leaders have access to view Post membership information via CLAS at www.same.org/clas:
   - President
   - Secretary
   - Treasurer
   - Individual Member POC
   - Sustaining Member POC
   - Vice President

The contact information on the CLAS 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 at the [www.same.org/member-account](http://www.same.org/member-account) or they may contact SAME National for assistance [member@same.org](mailto:member@same.org).
   
   b. Sustaining Member Representatives must contact their company’s Primary POC for changes to their membership record or they may contact SAME National for assistance [member@same.org](mailto:member@same.org).
   
   c. Non-members should be kept on a separate list from paid members, so that Posts may track membership more easily.
   
   d. 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.

2. **Website**: Each SAME Post is required to have a current website. To be considered current, the website must have at least:
   
   a. list of current Post Officers and Directors with contact emails
   
   b. calendar of events with times and location of events/meetings
   
   c. “Join SAME” with link to the SAME National website ([www.same.org](http://www.same.org))

SAME National has transitioned to a new hosting and maintenance platform for Post websites. The new website service includes use of a design template, hosting and software maintenance and updates. The easy-to-use content management system enables Posts to update their own sites, if desired, or have SAME National serve as the overall “webmaster” and update the site with content provided by the Post. Content updates must be provided on a regular basis—at least once monthly.

Posts that opt to develop their own websites are responsible for regularly updating the material presented, for creating 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](mailto:webmanager@same.org).
3. **Newsletters**: Newsletters are important for getting the "word" out! Post newsletter styles vary widely across SAME. The main objective is to have, at a minimum, a newsletter that serves as a meeting flyer to communicate the essential elements of “who, what, when, where”, and so forth.

   a. Many Posts have developed newsletters from one-page meeting flyers into a comprehensive Post newsletter of four to eight pages. The newsletter (or flyer) should be sent directly to all Post members, so everyone can count on being informed. Newsletters should not be sent to non-members, since this detracts value for dues-paying members. Meeting announcements, separately produced from the Post newsletter, may be sent to non-members to promote participation and membership growth.

   b. Make sure newsletters and meeting announcements are sent well in advance of meetings to allow members to schedule attendance. In general terms, members should receive newsletters and announcements at least four weeks in advance of a meeting. More lead time may be necessary for special functions or activities. Posts should ensure that their RVP, adjacent Post Presidents and prospective Post members are regularly notified of meetings.

13. **Publicity**: Apart from the Post newsletter and flyers, consider sending announcements of awards and other recognition items to local papers. For example, a member who has been awarded by the Post or RVP for significant contributions may be recognized with a news release to media outlets serving the local area. Many local papers are eager to recognize professionals who have accomplished important things in the community.
Chapter 6: K-12 and College Outreach

1. **K-12 Outreach.** Following are suggested K-12 Outreach Programs:
   
   a. *Engineering and Construction Camps.* The annual SAME Engineering & Construction Camps provide Posts with an opportunity to mentor students interested in engineering or a related field. Additionally, sponsoring students to attend the camps may help increase membership. More information may be found online: [www.same.org/STEMCAMPS](http://www.same.org/STEMCAMPS)

   b. *Boy Scouts of America.* The Boy Scouts of America has a strong “Merit Badge” program that is a required element for rank advancement and achieving the coveted rank of “Eagle Scout.” Posts and members can volunteer to serve as a Merit Badge counselors for badges related to SAME’s mission, including Environmental Science, Engineering, Architecture, Energy, Landscape Architecture, Sustainability, Soil and Water Conservation and many more. Additional opportunities exist to host a Merit Badge Day, or oversee Engineering Merit Badge completion as part of Engineers Week activities.

   c. *Girl Scouts of America.* The Girl Scouts of America has a focus area on STEM for scouts of all ages—Daisies through Ambassadors. Three leadership “journeys” are available. Information on these journeys may be found at [http://www.girlscouts.org/en/about-girl-scouts/girl-scouts-and-stem.html](http://www.girlscouts.org/en/about-girl-scouts/girl-scouts-and-stem.html).

   d. *MATHCOUNTS.* MATHCOUNTS is a national competition that promotes middle school mathematics achievement. Students participate in math competitions that challenge their math skills, develop self-confidence and reward achievement. The program involves more than 17,000 volunteers annually. It has received two White House citations as an outstanding private sector program. [www.mathcounts.org](http://www.mathcounts.org)

   e. *Learning for Life.* The purpose of Learning for Life’s Engineering Exploring program is to provide the youth of America the opportunity to explore engineering as a career choice and to participate in engineering activities. Engineering Explorer Posts are involved in a variety of programs and projects featuring training, skill development and service project. [www.learningforlife.org](http://www.learningforlife.org)

   f. *Science Fairs.* SAME Posts can provide judges and help set up such events. Science fairs are a way to publicize the SAME mission and its dedication to mentoring. Many schools also seek judges for science and STEM fairs so consider volunteering.

   g. *Career Days.* These do not have to be limited to engineering. There are many engineering-related professions to support. Between the military and Sustaining Member arenas, there is no limit as to the possibilities associated with exposing youth to a wide range of engineer specialties and associated career fields.

   h. *Student Engagement and Mentoring.* Invite Student Members to all Post functions! The current SAME model gives two options when working with college students. Local Posts can sponsor and assist students at nearby colleges or universities. Sponsorship includes inviting students to become SAME Student members (free of charge); providing assistance with job searches and resumes; assisting with student competitions (e.g., Concrete Canoe races); and helping to arrange field trips or other engineering-related activities.
i. **Community Service.** Check your local area for specific information about these and other programs that provide a great way to get Student Chapters engaged in an activity while networking with professionals. There are many worthwhile organizations.

2. **College Scholarships.** See Scholarship Program Guidelines on the SAME Society Operations website.

3. **College Outreach.** Mentoring is one the Society’s most important goals, and toward that end Posts are encourage to develop College Outreach plans to involve local college and university students and encourage their pursuit of careers in the A/E/C field. There are two ways Posts can work with students toward this goal:

   a. 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 a creation of a Student Chapter Charter. For more information on establishing and maintaining a Student Chapter see the College Outreach webpage.

   b. Host programs or activities that involve students from a local college or university that has a program for students in engineering, architecture or construction. The main goal of the activity or program should facilitate mentoring of students.
Chapter 7: Membership

1. SAME 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.

2. Post Membership Reports: Post Membership POCs should always keep abreast of current and past Post Members. Post POCs must log-in to CLAS using their email address in their member profile (record) and member ID. If you have not used CLAS and need training, please contact member@same.org

   You may download Post rosters at www.same.org/CLAS. Rosters that are available include:
   a. Individual Members (This does not include any company or agency representatives, or students or faculty advisors.)
   b. Student and Faculty Advisor Members (These people do NOT count towards the Membership Streamer.)
   c. Company and Agency Representatives (Including Sustaining Reps, Public Agency Reps, Academic Reps)
   d. New Individual Members
   e. New Company or Agency Representatives
   f. Expired Individual Members
   g. Expired Company and Agency Representatives

Chapter Leader Access System (CLAS). the following Post officers will have access to CLAS:
   - President
   - Secretary
   - Treasurer
   - IM POC
   - SM POC
   - Vice President (designated)

   When you log in, CLAS will welcome you by name and ask what you would like to do. If you serve on more than one Post Board of Directors, you will be asked to confirm the Post you want to work with. In CLAS you will see a table with choices—view Post information will get you to the main page that offers up rosters, officer info and committee info.

3. Membership Marketing Materials. Posts may submit requests for membership marketing materials, including member recruitment kits, giveaways such as pens and other promotional items to the SAME Member Support Specialist shumes@same.org.

4. 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 membership areas in need of improvement and develop membership outreach programs.
5. **Individual Membership Development Initiatives.** The Post Welcoming Committee or designated individual greets all new Post members. Ideally, a designated individual will personally inviting 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 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 to 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.

6. **Sustaining, Public Agency and Academic Membership Initiatives.**

a. *Meeting and Greeting*—make arrangements to personally meet with representatives from the new Sustaining Member company and provide a checklist of member benefits.

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

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

d. *Networking*—Networking is a key benefit to Sustaining Member companies. Ask Sustaining Member companies to leave copies of their firm’s brochures for other members.
Chapter 8: Awards & Recognition

1. **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.

   a. Plaques, pins and gifts 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. Post Presidents and Secretaries are encouraged to plan ahead and order awards early. Lead time for engraving locally must be considered, if ordering an item with an engraving plate.

   b. Certificates with the SAME insignia are available in both portrait and landscape format from the online SAME Store at no charge. These certificates may be used with all laser printers. Certificate holders in wood with a clear insert attached and a linen paper folder are also available from the online SAME Store. Quantities of 10 folders are available to each Post yearly at no charge; there is a nominal charge for any supplemental orders.

2. **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 SAME Certificates of Appreciation or regional coins to recognize outstanding contributions at the Post or Regional level. The certificate should be signed by the RVP.

3. **National Awards.** Nominations for awards are typically due around the end of January of each year, and a vast majority of awards are presented during a special honors luncheon at the Joint Engineer Training Conference & Expo, held each spring. Posts are encouraged to review the national awards and submit nominations.

**BEST PRACTICE** - 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.
Chapter 9: Insurance

1. SAME National Coverage. Posts have adequate insurance coverage from SAME National policies such that there is no requirement for Posts to purchase the following coverages except for special events that may require additional coverage:

   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. D&O coverage is not automatic for each Post. For this coverage the Post can secure its own insurance, choose to go without D&O coverage, or submit an application to be added to SAME National D&O policy (subject to underwriting review). 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.

2. Certificate of Insurance. Posts will need a Certificate of Insurance from SAME National if a facility in which the Post is holding a meeting, workshop or conference requests such 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 shumes@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 Novick Group has generated the Certificate of Insurance, they will e-mail a copy of the certificate to the requesting Post and SAME National.

3. Contact SAME Director of Finance for all other questions regarding insurance coverage.