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PURPOSE

This Operations Manual will provide Society of American Military Engineers (SAME) Communities of Interest (COIs) with SAME Board of Direction guidance and standards for operations and support. COIs are one of the national entities that serve SAME Regions, Posts and Members. The SAME national entities include the National Board of Direction and its National Officers, the National Office, the SAME Foundation, and the Academy of Fellows. Their collective purpose is to:

- Support Regions, Posts, and Members
- Support the National Direction (Strategic Plan)
- Enhance SAME’s National Reputation

The unique and vital role of SAME COIs is two-fold:

1. Serve as an extension of the National Office capabilities by leveraging member technical expertise to assist in developing best-in-class programs; and
2. Provide individual members with avenues to develop their professional interests and expertise by leveraging SAME’s role in the global community of interest.

DEFINITIONS

- **Community of Interest (COI):** A segment of SAME membership that shares a common interest or discipline within the Architecture / Engineering / Construction (A/E/C) industry. Member affiliation with COIs is voluntary and declared in the individual’s membership record independent of Post affiliation. A COI is chartered by the Board of Direction to promote the SAME Strategic Plan and National Direction. COIs may begin as a Task Force or a sub-group (Working Group) of an existing COI to determine viability.

- **Industry Government Engagement (IGE):** Collaboration between government and industry organizations and individuals to provide solutions and/or awareness to A/E/C issues affecting our National Security.

- **Operationalized COIs:** COIs in action engage volunteer leaders to maximize benefit to SAME members and the A/E/C community to create measurable, beneficial impact.

- **Steering Committee (SC):** The governing body of a COI with members and roles defined in the COI charter. Steering Committees will constitute the leadership and operational force for the COI. The COI Chair will lead the Steering Committee and be a member of the National Board of Direction.

- **Task Force (TF):** The Board of Direction may form a TF for any purpose with a Chair, mission, and timeframe. A TF may evolve to become a COI but to do so requires Board approval.

- **Working Group:** Working Groups are extensions of the COI formed to focus on a particular
area of interest and are accountable to the COI and Steering Committee.

**ROLES & RESPONSIBILITIES**

- **National Officer**: There are three elected National Officers who oversee COIs and provide oversight based on the National President’s direction starting in May with the beginning of the governance cycle. These leaders provide the following functions:
  - Provide oversight and direction.
  - Assist with succession planning and governance.
  - Monitor work plan accountability.

- **Community of Interest (COI) Chair**: The COI Chair is appointed by the National President at the recommendation of the National Officer providing oversight, in collaboration with the other members of the COI Steering Committee. The Chair normally serves a 2-year term, but may request, in writing to the National President, a one-year extension. A best practice is to groom a Vice Chair to become Chair and keep the departing Chair as the Immediate Past Chair to help with continuity. The COI Chair is responsible for the following:
  - Serve on the Board of Direction to represent the COI
  - Recruit COI members as active participants and lead the COI Steering Committee
  - Maintain a current COI charter (COI Charter Template, Appendix A)
  - Responsible for annually (for more detail, see *Operations*):
    - Develop Annual Work Plan

Enrollment in COIs may include any member or guest interested in the COI subject area.

Working Groups are extensions of the Steering Committee and created as needed to focus on a specific area of interest within the COI. Working Groups may or may not be defined in the COI charter but must be addressed as part of the Annual Work Plan.

The Steering Committee is responsible for governance and programming of the COI.
• Develop Resource Request (if required)
• Review COI Charter
• Review and maintain Strategic partnerships
• Review and update COI Steering Committee composition and succession plan
  o Serve as a subject-matter expert within the COI and the Society

• **Steering Committee (SC):** Collectively, the Steering Committee, led by the COI Chair, must be formed according to the needs of the COI. The Steering Committee establishes operations and an operational schedule and calendar to fulfill the purpose of the COI. The Steering Committee is responsible for communicating with COI members and teamwork among SAME National Entities to maximize Strategic Plan outcomes and efficient day-to-day coordination. The Steering Committee appoints volunteer members to act as Steering Committee administrative secretary and communications directors to assist in publishing meeting minutes, drafting correspondence, creating a communications plan, managing conference calls, and coordinating webinars and programs with the National Office. The Steering Committee may also appoint volunteers to further the technical and strategic goals of the work plan or to serve as leads for IGE Projects. The following Steering Committee positions are recommended, and the only positions identified on various SAME channels. Other Steering Committee positions may be added as needed by the Chair:
  o Chair
  o Vice Chair
  o Immediate Past Chair
  o Vice Chair, Secretary
  o Vice Chair, COI Liaison
  o Vice Chair, Programs & Events
  o Vice Chair, Communications
  o Vice Chair, Post Liaison
  o Vice Chair, Education

• **National Office Liaison:** The Executive Director will assign each COI a National Office Liaison to assist and facilitate National Entities’ requirements aligned with the SAME Strategic Plan. The National Office Liaison will be a designated member of the COI Steering Committee and include and facilitate the following duties:
  o Coordinate activities with internal National Office staff.
  o Assist with COI leadership transitions and interpreting national direction and guidance.
  o Update SAME web pages with information provided by the COI Chair/Steering Committee.
  o Provide templates to comply with National SAME standards/branding for work plans, webinars, marketing plans, and email blast formatting.
  o Send e-mail blasts to COI members.
  o Manage the conference call numbers and access to webinar scheduling for COI use.
LISTING OF CURRENT COMMUNITIES OF INTEREST: A listing of current Communities of Interests and their associated websites can be found at: https://www.same.org/membership-communities/communities-of-interest-list/

OPERATIONS

Operationalizing COIs – a definition: COIs in action engaging volunteer leaders to maximize benefit to SAME members and the A/E/C community to create measurable, beneficial impact.

- Translate abstract concepts into measurable, accessible, repeatable, and iterative processes to grow beneficial impact.
- Examples:
  - Train COI’s to effectively use the AMS Community module to grow community engagement, value, and technical capacity.
  - Develop and deliver relevant program content.
  - Engage members, increase leadership opportunities.
  - Manage stakeholders – strategic partners, etc.
  - Leverage National LDP projects.
  - Deliver measurable progress, content.

ANNUAL DELIVERABLES

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 30: DRAFT COI Work Plan Deadline</td>
<td>COIs prepare and submit DRAFT Annual Work Plans to National Officers and National Staff Liaisons</td>
</tr>
<tr>
<td>June 30: Final COI Work Plan and Resource Request</td>
<td>COIs submit final version of Annual Work Plans with any accompanying Requests for Resource Support to National Officers for review and endorsement and copy National Staff Liaison</td>
</tr>
</tbody>
</table>

- Charter Review & Update (Appendix A): COI Steering Committees must review the COI Charter on an annual basis in conjunction with the development of their Annual Work Plans. Any changes should be made at this time and noted as part of the Work Plan.
- COI Annual Work Plan (Appendix B): The Work Plan will outline specific actions that the COI will take to support the SAME Strategic Plan, a timeline for those actions, any resource requirements, and the impact the action will have and how it will be measured. Work Plans should be specific and include the following information:
    - What will the COI be doing, and how will it support the Strategic Plan?
    - Who is taking the lead on the action? Who are the other COIs that might want or need to collaborate? Who are the Strategic Partners that should be included?
    - When is this action taking place – is there a timeline?
    - Where is the action occurring – Post level, National level, virtually?
    - Why are we doing this – what is the desired impact at every level?
• 2 Hs: How x 2
  • How is action resourced? Is there a financial requirement (see governance cycle table)?
  • How are impact and success measured?
• Progress Report
  • What progress was made on the action over the past year? Identify any issues encountered with completing the action.
• Working Groups: Working Group contributions must be described as part of the Annual Work Plan.

The submission of Annual Work Plans follows the Annual Timeline for Work Plans and Resource Requests detailed below. Critical submissions include both DRAFT and FINAL Annual Work Plans. The DRAFT Annual Work Plan must be prepared and submitted to the National Officer overseeing each COI and copying the assigned National Office Liaison PRIOR to the Joint Engineering Training Conference (JETC). The FINAL Annual Work Plan must be prepared and submitted to the appropriate National Officer no later than June 30 of each year.

The Annual Work Plans are presented to the Board of Direction (usually in conjunction with JETC at the SAME Annual Meeting). The National Officer providing COI oversight of each COI reviews each work plan and provides feedback to COI Chairs if revisions are necessary. The Vice President prepares and presents a summary of significant points of each workplan to the Board of Direction. Typically, annual Work Plans are accepted by the Board of Direction as presented. However, if revisions are necessary, the Vice President will work with the COI Chair to resolve.

• Resource Request (Appendix C): COIs should submit Resource Requests as part of the “How – Resourcing” section of the Annual Work Plans. Resource Requests may only be submitted through the Annual Work Plan and will not be considered at any other time during the year. Additional information about the Resource Request process and Submission Form can be found in Appendix C.

• Steering Committee Review & Update: COI Chairs must review steering committee assignments and succession plans on an annual basis in conjunction with the development of their Annual Work Plans. Changes to Steering Committee members do not require approval. However, changes to the Chair Elect should be discussed with the National Officer overseeing the COI prior to communication and publishing. Any changes should be noted to the National Staff Liaison to ensure items such as the website and management system are updated, etc.

Awards & Recognition
COIs may be called upon to review National streamer and award submissions and are responsible for submitting COI members for SAME recognition as part of the annual governance cycle. If appropriate, COI Chairs are responsible for submitting members of their Steering Committee for recognition at the Joint Engineer Training Conference (JETC) on an annual basis. COI chairpersons, officers, and members will recognize community members that support the interests of the community and the Society, especially when in support of the COI Annual Work Plan. Members will be recognized in communications and through the award nomination process.
Call for Presentations (CFP) Support (as applicable)
COIs may be called upon to conduct abstract reviews for National and other events and conferences. COIs will be assigned review responsibilities based on the planned educational tracks aligning with COI expertise.

Financial Reporting
Any COI provided with financial support from the SAME National Office, or otherwise engaged in raising funds to support COI functions shall provide annual detailed accounting information to the National Officer overseeing their COI and to the National Office Controller. The SAME Controller will provide specific requirements.

Program Support
Regions and Posts may call upon COIs as subject matter experts to recommend speakers and participants for Industry-Government Engagement Workshops. There may be additional needs that will require programmatic or other support from COIs. Any requests will be clearly defined.

Strategic Relationships
COIs are responsible for maintaining strategic relationships with key stakeholders to include established Strategic Partners and relevant Government Agencies. COIs may recommend organizations for Strategic Partnership with SAME and collaborate with unofficial partners as needed. Responsible COIs actively lead and manages the relationship and maintains open and regular dialog with each partner, identifies common areas of interest, shared concerns and efforts.

Webinars
COIs are expected to develop and host webinars pertaining to their subject areas on a regular basis with an emphasis on professional development, supporting various efforts of the Annual Work Plan, and contribute to the COI’s efforts supporting the overall COI contribution to the SAME Strategic Plan. Webinars may not take the place of Steering Committee monthly meetings.

If the intent of a webinar is educational, a Professional Development Hour (PDH) will be awarded. To qualify for PDH credit, the COI must include 3-4 learning objectives as part of their COI Webinar Request submission. Additionally, COIs may request AIA credit by completing the Fillable AIA Course Info Form (see Appendix E) and submitting to their National Office Liaison at least 6 weeks prior to the webinar.

Most COIs will be required to host webinars throughout the year. SAME will develop an annual webinar schedule listing which COIs are responsible for the weekly webinar (Webinar Wednesdays). If COIs want to host additional webinars, they should discuss those with National Office Liaisons before completing the online request form to determine a date that will not conflict with other webinars or National SAME events.

The Webinar Request Form should be used for all webinars as it provides necessary
information for registration, logistics, and marketing. The online form is: https://www.same.org/community-of-interest-webinar-request-form/. A completed webinar form must be received before the webinar can be scheduled. An incomplete form will not be processed and returned for correction.

The Webinar Request Form must be submitted at least six (6) weeks in advance of the webinar date to allow for adequate marketing to ensure maximum participation.

National Office staff provide the following support for COI webinars:
  - Update the COI web page with webinar information.
  - Set up online registration.
  - Add to the online National Calendar.
  - Send marketing e-mail blasts to target demographics.
  - Update the Webinar page after the webinar with PDH certificates & recordings.

Dry Run (rehearsal): Every webinar should have a dry run scheduled with the POCs, speakers, and SAME support staff. The purpose of the dry run is to ensure everyone is able to connect with video and audio and is familiar with the webinar platform. Dry runs typically last about 30 minutes.

Communications
COIs are responsible for communicating their impact and needs to their community, general SAME members, Posts, and Regions with the help of their National Staff Liaison.

- Regular Steering Committee meetings are recommended monthly but are held at the discretion of the COI Chair and Steering Committee.
- General COI meetings are scheduled at the discretion of the COI Chair and Steering Committee and are primarily to inform the membership of ongoing initiatives and other activities.
  - Other COI meetings such as IGE project-focused meetings are held at the discretion of the COI Chair and Steering Committee.
  - In-person Steering Committee meetings are typically conducted at National Conferences (JETC and SBC) and may take many forms. These meetings are for conducting COI recruitment, administrative, operational, and coordination activities and not technical in nature. Ideas for technical content should be submitted through the event Call for Presentations process.
- Calls for Steering Committee volunteers should be open to all COI members and include a short job description and time commitment.
- Regular communication to COI members in the form of an e-mail blast and/or newsletter can occur on a monthly, bi-monthly, or quarterly basis. This communication should be an update on any Industry-Government Engagement, Strategic Partner activities, impact the COI has made on the Annual Work Plan, upcoming professional development opportunities, COI recognition, and other areas as needed.
- COIs conduct regular communication with members at-large via established National Office mediums such as RealTiME e-newsletter (monthly), The Military Engineer (TME) Magazine (bi-monthly) and coordinated marketing efforts with the SAME National marketing team.
(as needed).

- COIs are responsible for ensuring their web page is up-to-date and providing any changes necessary to the National Staff Liaison.
APPENDICES

APPENDIX A: COI CHARTER

APPENDIX B: ANNUAL WORK PLAN

APPENDIX C: RESOURCE REQUEST FORM

APPENDIX D: WEBINAR REQUEST FORM & AIA COURSE INFORMATION FORM
APPENDIX A – COI CHARTER

The following represents an example Community of Interest Charter:

Society of American Military Engineers
Leader Development
Community of Interest Charter
(as of 06/02/2020)

Mission: To maintain the SAEM Leader Development Community of Interest (COI) in order to develop and maintain leadership development (L&D) programs and services that support the Society’s strategic objectives and vision, including increasing knowledge and awareness of leadership development opportunities and challenges facing the membership of the SAEM profession.

Membership: Membership in the COI is open to all SAEM members who are interested in leadership development. The L&D team will be comprised of the leadership team defined below. There may be opportunities for involvement from the Leadership Team to the SAEM charts.

The SAEM charts will provide opportunities for leaders to provide feedback and support the development of the SAEM charts.

Strategic Alignment:

Goal 1: Strengthen Industry-Community Connections

In order to strengthen industry-community connections with the Society, the SAEM COI will:

- Foster partnerships with local and national organizations to promote leadership development opportunities
- Support industry events to promote leadership development opportunities

Goal 2: Build a Leadership Development Community

In order to build a leadership development community, the SAEM COI will:

- Create a community to foster networking and collaboration among leadership development professionals
- Support leadership development professionals in their pursuit of continuous improvement

Goal 3: Support the Profession

In order to support the profession, the SAEM COI will:

- Support the Society’s mission and vision by promoting leadership development opportunities
- Support the Society’s strategic objectives and vision by promoting leadership development opportunities

Leadership development is critical to the successful implementation of the SAEM COI. The following guidelines are recommended for leadership development:

1. Leadership Development Programs:
   - The SAEM COI will offer leadership development programs to provide opportunities for leadership development professionals to explore and develop their leadership skills.
   - The SAEM COI will collaborate with Industry-Community Connections to develop leadership development programs.

2. Leadership Development Resources:
   - The SAEM COI will provide resources to support leadership development professionals in their pursuit of continuous improvement.
   - The SAEM COI will collaborate with Industry-Community Connections to develop leadership development resources.

3. Leadership Development Assessment:
   - The SAEM COI will assess the effectiveness of leadership development programs and resources.
   - The SAEM COI will collaborate with Industry-Community Connections to assess the effectiveness of leadership development programs and resources.

4. Leadership Development Evaluation:
   - The SAEM COI will evaluate the impact of leadership development programs and resources.
   - The SAEM COI will collaborate with Industry-Community Connections to evaluate the impact of leadership development programs and resources.

Leadership development professionals:

- Will be encouraged to participate in the SAEM COI
- Will be encouraged to develop leadership development programs and resources
- Will be encouraged to evaluate the impact of leadership development programs and resources

The SAEM COI is committed to supporting leadership development professionals in their pursuit of continuous improvement and promoting leadership development opportunities within the Society.

APPENDIX A – COI CHARTER

The following represents an example Community of Interest Charter:
The Chair and Secretary will be responsible for the Chair and Secretary of the LPGLE Trust, this Chair may identify for the team.

Meeting Frequency: The Trust will set a schedule for regular meetings with the Chair at least four times a year.

The Chair will schedule a meeting with the second Trustee to attend to finance at the meetings.

The Chair will schedule monthly community outreach sessions to discuss and address community objectives.

Prior to the meeting, members of the Board will be informed of the agenda.

Communication: Communications will be in writing, and all actions of the Board will be documented.

Chapter 3: Responsibilities of the Chair

The Chair may be its own principal or individually or individually to the Board of Trustees.

The Chair may authorize a contract or other instrument executed on behalf of the Board of Trustees.

The Chair may authorize:

- The Trust to enter into contracts.
- The Trust to execute documents.
- The Trust to enter into agreements.

The Chair may execute:

- The Trust to execute documents.
- The Trust to enter into agreements.

The Chair may authorize:

- The Trust to execute documents.
- The Trust to enter into agreements.

The Chair may execute:

- The Trust to execute documents.
- The Trust to enter into agreements.
APPENDIX B – ANNUAL WORK PLAN

Annual Work Plans will be specific and include the following information:

  o What will the COI be doing, and how will it support the Strategic Plan?
  o Who is taking the lead on the action? Who are the other COIs that might want or need to collaborate? Who are the Strategic Partners that should be included?
  o When is this action taking place – is there a timeline?
  o Where is the action occurring – Post level, National level, virtually?
  o Why are we doing this – what is the desired impact at every level?

- 2 Hs: How x 2
  o How is action resourced? Is there a financial requirement (see governance cycle table)?
  o How are impact and success measured?

- Progress Report
  o What progress was made on the action over the past year? Identify any issues encountered with completing the action.

- 1-2 actions (one slide per action)

- Subsequent Work Plans should include outcomes of previous actions.

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<table>
<thead>
<tr>
<th>Strategic Line of Effort</th>
<th>Support Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>What</td>
<td>What will the COI be doing and how will it support the Strategic Plan?</td>
</tr>
<tr>
<td>Who</td>
<td>Who is taking the lead on the action? Who are the other COIs that might want or need to collaborate? Who are the Strategic Partners that should be included?</td>
</tr>
<tr>
<td>When</td>
<td>When is the action taking place – is there a timeline?</td>
</tr>
<tr>
<td>Where</td>
<td>Where is the action occurring – Post level, National level, virtually?</td>
</tr>
<tr>
<td>Why</td>
<td>Why are we doing this – what is the desired impact at every level?</td>
</tr>
<tr>
<td>How - Resources</td>
<td>How is action resourced? Is there a financial requirement?</td>
</tr>
<tr>
<td>How - Metrics</td>
<td>How are impact and success measured?</td>
</tr>
<tr>
<td>Progress Report</td>
<td>What progress has been made on the action over the past year? Identify any issues encountered with completing the action.</td>
</tr>
<tr>
<td>Building Resilient Communities &amp; Enhancing IGE</td>
<td>The Resilience COI will partner with ICC on ANCR to produce a standard for resilient communities.</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>What</td>
<td>ANCR is a project spearheaded by the International Code Council to provide benchmarks for communities to be resilient. SAME will support this effort through collaboration and subject matter experts in A/E/C fields.</td>
</tr>
<tr>
<td>Who</td>
<td>The COI Chair will personally oversee this action, assisted by all members of the Steering Committee. Other COIs may be asked to assist with specific community benchmarks. ICC will be the primary partner involved.</td>
</tr>
<tr>
<td>When</td>
<td>This will be a multi-year endeavor...timeline to be provided in November.</td>
</tr>
<tr>
<td>Source</td>
<td>This action will primarily be accomplished virtually at the National Level.</td>
</tr>
<tr>
<td>Why</td>
<td>The final product will be a tool for Posts to build their own resilient communities. This action will support Posts, support the National Direction, and also enhance SAME’s national reputation.</td>
</tr>
<tr>
<td>How - Resources</td>
<td>There are no resourcing requirements at this time.</td>
</tr>
<tr>
<td>How - Metrics</td>
<td>This action will be complete and successful when ANCR is complete and published for local use.</td>
</tr>
<tr>
<td>Progress Report</td>
<td>This is the first year of this action. Progress will be provided in the 2020-2021 Work Plan.</td>
</tr>
</tbody>
</table>
APPENDIX C – RESOURCE REQUEST & FORM

The SAME Resource Request Policy & Procedure governs resource requests from Communities of Interest, Programs, and Posts. Submissions must be submitted in accordance with this policy and procedure. Please note all submission dates listed as submissions require several levels of review and approval in accordance with SAME governance policies and procedures. The latest revision of the SAME Resource Request Policy & Procedure can be found on the SAME Governance webpage at https://www.same.org/about-same/governance-policies. Below is an example SAME Resource Request Policy & Procedure.

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 (RRC).
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 (RRC): The RRC 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 RRC reviews and prioritizes support requests...
SAME Resource Request Policy & Procedure
July 12, 2023; r1.4

[monetary & non-monetary] from CDIs, 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. Requesters: IAW the timeline noted below:
   a. CDIs: In accordance with the SAME Governance cycle, CDI 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 resource 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, CDIs and Programs to the Ranking and Review Committee. The R&C reviews all requests, and creates a ranked list for approval by the SAME XC.

5. Decision:
   a. The XC reviews and approves the R&C-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 R&C 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.
### Timeline:

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

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?
The COI Webinar Request Form is found online at: https://www.same.org/community-of-interest-webinar-request-form/#

The information below outlines the questions you will be asked to complete the online form. Forms with missing information, will not be considered complete and will not be scheduled.

- Sponsoring COI
- Point of Contact (POC). Include name and email
- Originator (if different from POC). Include name and email
- Webinar Date & Time (including time zone)
- Dry Run Date & Time (including time zone)
- Webinar Title (10 words or less)
- Webinar Description (200 words or less)
- Speaker 1 Full Name, Title, Organization, Bio, Photo
- Speaker 2 Full Name, Title, Organization, Bio, Photo
- Speaker 3 Full Name, Title, Organization, Bio, Photo
- Moderator Full Name, Title, Organization, Bio, Photo
- Request COI notification email blast? Yes or No
- If so, which COI(s) should be notified?
- Email blast text
- PDH Offered
- Learning Objectives (3-5 required for PDH, 4 for AIA)
- Registration is required for all webinars. Is there anything beyond this form that Registration should know about this webinar?
AIA Course Information Form

**Course Information**

Course Name: Click or tap here to enter text.

Course Level: Choose an item.

Course Credits: Choose an item.

HSW Justification (only if requesting HSW credit):
Click or tap here to enter text.

Description:
Click or tap here to enter text.

Prerequisite Knowledge:
Click or tap here to enter text.

**Learning Objectives**

Learning Objective 1: Click or tap here to enter text.

Learning Objective 2: Click or tap here to enter text.

Learning Objective 3: Click or tap here to enter text.

Learning Objective 4: Click or tap here to enter text.

**Category and Sub-Category**

Check 1 Category and 1 Sub-Category only.

☐ Practice Management
  ☐ Business Operations
  ☐ Business Development
  ☐ Firm Finances & Risk Management
  ☐ Practice Methodologies

☐ Art & Architecture
  • No sub-categories

☐ Codes and Regulations
  • No sub-categories

☐ Construction & Evaluation
  ☐ Construction Administration
  ☐ Construction Observation
☐ Preconstruction Activities
☐ Project Closeout & Evaluation

☐ Programming & Analysis
☐ Building Analysis & Programming
☐ Environmental & Contextual Conditions
☐ Site Analysis & Programming

☐ Project Development & Documentation
☐ Integration of Building Materials & Systems
☐ Construction Documentation
☐ Construction Cost Estimates
☐ Project Manual & Specification

☐ Project Management
☐ Project Team Management
☐ Contracts
☐ Communications Management
☐ Implementation & Evaluation
☐ Project Quality Control

☐ Project Planning & Design
☐ Building Systems, Materials, & Assemblies
☐ Building Design
☐ Project Costs & Budgeting