

Operations & Administration – A Stable Base

Ann McLeod | Jill Murphy

If you can't do the little things right, you will never do the big things right.

- Adm. William H. McRaven, USN (Ret.),

Post Bylaws

Outline the way the Post is governed and operates

Should be updated *at least* every five years!

Reasons to revise and update:

- Ensures Post is acting in compliance with current laws
- Ensure compliance with internal governance practices
- Ensure reasonable governance practices
- Remove provisions or language better suited in separate documents
- Too specific, don't reflect current reality

ALL board members should be familiar with them!

Updates should be submitted to the National Office upon approval

Are Your Bylaws in Line with the Times?

Things to check:



Outdated Terminology

Replace 'Sustaining Member Company' with 'Corporate Member' to reflect current terminology.



Membership Details

Check whether the number of Post memberships included with each membership type is correct.



Virtual Meetings

Is there reference to conducting business virtually?



Inclusivity

Do bylaws promote inclusivity and reflect current values?



Legal Compliance

Verify that bylaws comply with current legal standards and regulations.



Review Process

Establish a regular review process for updating bylaws to keep them relevant.

Post Officers

Required Positions:

- President
- Vice President (at least one, may have more with defined duties)
- Secretary
- Treasurer
- Membership POC

Additional positions to lead any mission committees

ALL must be an SAME member in good standing (please verify!)

Roles and Responsibilities of Post President



Responsible for supervision and overall operation of Post.



Signs contracts and official documents on behalf of the Post.



Presides over meetings to ensure smooth operations.



Should have routine communication with RVP for alignment.



Ensures compliance with bylaws and organizational regulations.



Participates in National “President to Presidents” quarterly meetings and Post Presidents meeting held at JETC.

Role and Responsibilities of Vice President

1

Officiates meetings in absence of President, ensuring smooth operations.

2

Often succeeds President at end of President's term, providing great succession planning.

3

There can be multiple Vice Presidents with specific roles such as communications, membership, and committee leads.

Role of the Secretary



Maintains Correspondence

Responsible for handling all communication, both internal and external, ensuring timely responses.



Maintains Post Records

Keeps accurate and updated records. Note: The National Office database is the official database of record.



Takes Meeting Minutes

Records detailed minutes during meetings to document discussions and decisions.



Submits Change of Officer Report

Files a report immediately whenever there is a change in officers to ensure records are current.

Treasurer Responsibilities

Treasurers should serve for no longer than three years



Financial Oversight

Controller of all Post's financial accounts, ensuring accuracy and compliance.



Report Filing

Ensures filing of required reports, including tax returns (990) and SAME Post Annual Report, due March 31.



Payments and Acknowledgements

Distributes payments for Post and sends acknowledgements for any donations or sponsorships.



Board Reporting

Prepares and presents regular financial reports to the Post Board.

Membership POC Responsibilities

01

Review post rosters and report membership stats to the Board.

02

Welcome new members to make them feel valued and included.

03

Help retain current members.

04

Maintain a prospective member list to encourage new memberships.

05

Bring membership materials to post events.

06

Connect with the Membership COI to align efforts and strategies.



Other Crucial Roles

Web Administrator

Communications Chair

Camp POC

Small Business Liaison Officer

Streamer POC

Young Professional POC

Other COI POCs

Don't forget micro-or short term volunteer roles!

- EVENTS: Meeting Greeter | Set up/tear down
- Awards & Nominations
- Audit Committee

Post Officers Report Form

Your Name

First Last

Post Name

Your Email

Officer Installation Date

Term through Date

Incoming President's Name

President's Email

1st Vice President

1st Vice President Email

2nd Vice President

2nd Vice President Email

Secretary Name

A Change of Officers Report should be filed yearly & as soon as there is a change of officers!

Without the Post Officers Report, we cannot communicate effectively with your Post. It's crucial to remember to update the website with new officer information immediately after any changes occur. Keeping this information current ensures smooth communication and operation.

Committees

Help you carry out the Strategic Plan

Support programs, activities, events and more

Establishment outlined in Bylaws...make sure they're current and allow for flexibility

Task Forces can be established to achieve specific goals; short-term

Examples:

- Programs
- Communications
- Awards & Recognition
- Finance, Audit
- Nominating

Posts “In Good Standing”

- Affiliate Agreement with National Office is fully executed
- Submits Streamer Report by January 31 of each year
- Submits Annual Financial Report by March 31 of each year
- Files federal and state IRS forms by May 15 of each year

Failure to meet these requirements = No dues sent



Post Dues

For individuals: Post receives \$5 per PAID individual member

For organizations: Post receives 15% of the post dues based on company employee size

Paid quarterly by ACH

All members pay dues to the National Office...Posts should not collect dues or applications.

Important Financial Guidelines



Invoice Scams

Beware of invoice paying scams and gift card purchase requests. Always verify the source before proceeding.



Annual Audit

Conduct an annual audit with at least 3 individuals to ensure financial integrity and accuracy.



Internal Controls

Implement internal controls such as dual signature authority for purchases and payments over a specified amount.



Budget Planning

Plan your budget with your programs to ensure proper allocation of resources and financial sustainability.



Board Review

Post finances should be reviewed as part of every Board meeting to ensure transparency and accountability.



Risk Mitigation

Posts with significant savings should consider housing with the SAME Foundation to mitigate risks.

7:38



Maj. Gen. Mike... Saturday
To: Ann McLeod >

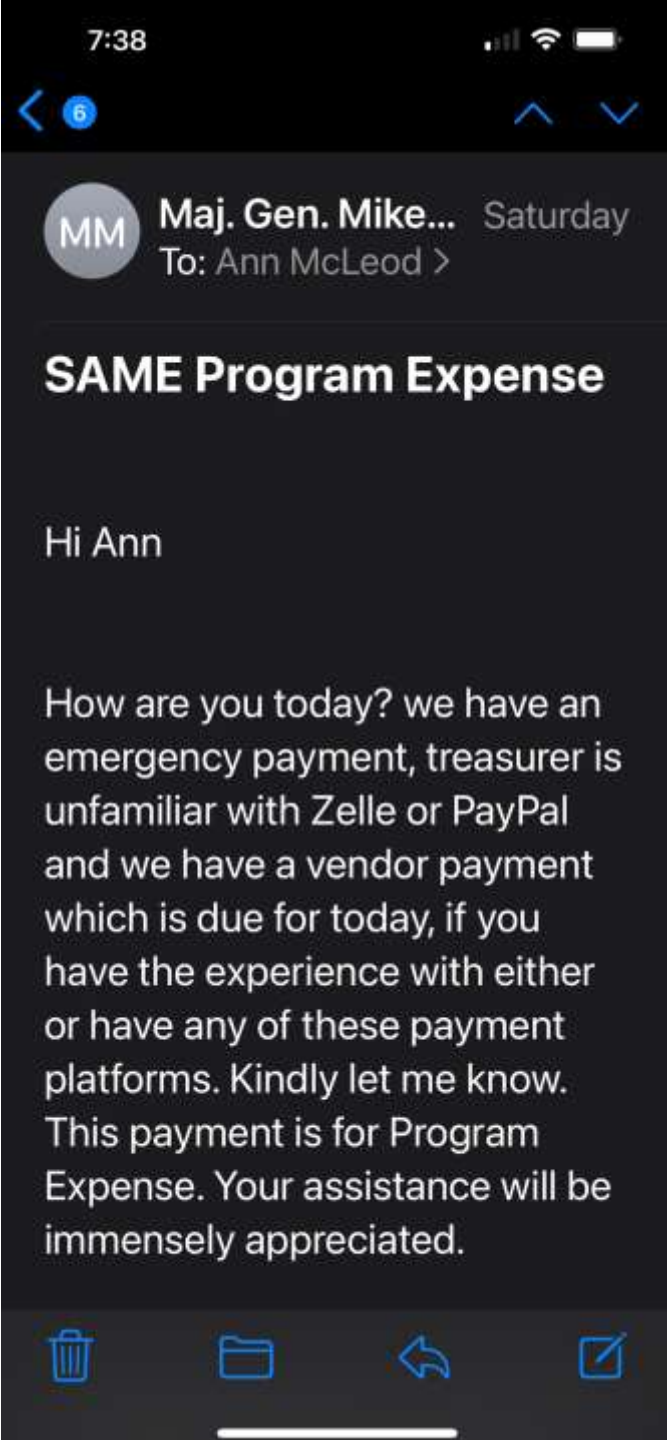
SAME Program Expense

Hi Ann

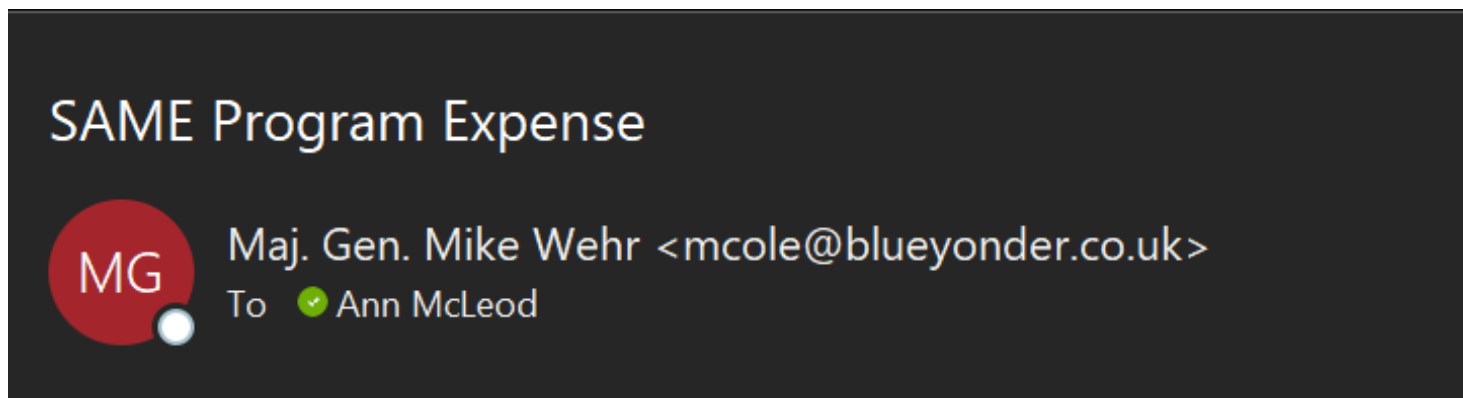
How are you today? we have an emergency payment, treasurer is unfamiliar with Zelle or PayPal and we have a vendor payment which is due for today, if you have the experience with either or have any of these payment platforms. Kindly let me know. This payment is for Program Expense. Your assistance will be immensely appreciated.



OH NO!!!!!!!!!!!!!!!!!!!!



Expand the sender to see the email address...



SAME carries general liability and “directors & officers” insurance for Posts

If you need a Certificate of Insurance for an event:

Email
posts@same.org
for a certificate
request form

Many facilities will
provide language
needed for the
certificate – ask for
it!

Additional coverage
available if needed,
Post covers any
additional related
expense

Requests need 5
business days to
process

Membership Dues – Did You Know?

- Dues rates require approval by the National BOD
- Dues rates are reviewed annually
- Two benchmarks used to determine dues adjustments:
 - Generate 1/3 of National revenue from dues
 - Cover cost to serve a member
- Last dues adjustments:
 - July 1, 2024
 - July 1, 2021
 - ?? 2015



SAME Individual Member Stats

Individual members	Number
Government	4,341
Private Industry	15,049
Life	2,016
Non-Profit & Academic	391
Retired / Unemployed	227
Student	1,528
TOTAL	22,583



Life member breakdown	Number
Government	316
Private Industry	517
Academic	28
Non-profit	11
Retired	1,140



Insights into our Individual Members

Primary Occupation*	% of Respondents
Architecture	4%
Business Development / Marketing	13%
Construction	10%
Engineering	47%
Environmental	4%
Executive Management	3%
Facility Management	3%
Project Management	5%

Seniority Level	% of Respondents
Executive	31%
Senior Level	32%
Mid-Level	22%
Staff Level	15%

Work for a SB?	# of Respondents
YES	912
Did not answer	21,426



SAME Organization Members

Organization members	Number
Public Agency	30
Private Sector	1,550
Non-Profit Organization	37
Academic Institution	11
TOTAL	1,628



Insights into our Corporate Members

Top NAICS Codes	% of Respondents
541330	44%
236220	17%
541620	15%
541310	14%
562910	13%
541611	9%
541370	9%
541690	9%
237990	8%
*475 companies responded	

Private Sector members	Number
Small Business	979
-checked SB on profile	616

SB Designation	Number
8(a) Certified	62
Emerging Small Business	13
Hubzone	32
Minority Owned	27
Native American Owned	7
Service-Disabled Veteran Owned	86
Small Disadvantaged Business	99
Veteran Owned	54
Woman Owned	98
*390 companies responded	



Who are YOUR Members?

Use data

Post roster (we have added more demographic fields!)

SAME directories

Add demographic questions to event registration forms

Watch trends

Understand what is important to them

Value is personal...people care about what is in it for them and their own professional and personal success

ASK! Surveys, face to face conversations, post-event feedback, etc.

Communicate how your Post's value proposition meets their needs...or what you plan to do to deliver more/different benefits

Help Us Get to Profile Completion!

Why Profile Completion Matters

- The more data we have on our members, the more relevant we can be and the more we can grow.
- Encourage your members to complete their profiles and your Post can WIN BIG!
- More on that later ;)



When planning activities, ask:

- Does it relate to the Society's strategic plan?
- Is it relevant to our Post's members?
- What resources can we use?
- Did we use the most recent information?