



# Resource Request Policy

The Society of American Military Engineers (SAME) Resource Request Policy establishes clear guidelines for those seeking monetary or non-monetary support from SAME and the SAME Foundation. This policy reflects SAME's commitment to transparency, accountability, and effective resource allocation aligned with the 2030 SAME Strategic Plan. The policy applies to all internal and external organizations, partners, and stakeholders, referred to as “entities,” requesting resources to support programs that advance SAME's mission to lead collaboration in support of national security priorities. Requests must demonstrate substantive program impact contributing to SAME's strategic goals of driving partnerships, delivering solutions, and developing people. Additionally, to receive funding from the SAME Foundation, requests must demonstrate impact to the SAME Foundation’s mission to “Foster Engineering Leadership for the Nation.” All financial transactions are executed in accordance with SAME Financial Policies.

## Governance and Decision-Making Authority

This governance structure ensures that funding decisions align with donor intent, Foundation priorities, and the Society's strategic objectives.

- **Resource Review Committee (R2C):** Primary evaluation body that reviews and prioritizes all resource support requests from external partners. The R2C prepares recommended funding allocations for review by the SAME Board of Direction (BOD).
- **SAME Board of Direction (BOD):** Holds final approval authority for all funding allocations as part of the Society's annual budget cycle
- **SAME Foundation Board:** Provides strategic input for philanthropic operations and ensures compliance with donor intent

## Eligibility and Request Principles

Requirement	Description
Program Alignment	Substantiate program impact that contributes to the SAME Strategic Plan and demonstrates clear alignment with SAME's mission and vision. For the Foundation, must align with Foundation mission.

Requirement	Description
Programmatic Support	Requests must be for programmatic support rather than one-off events or individual assistance
Financial Compliance	Agree to expend funds in accordance with donor or Board-designated restrictions and maintain appropriate records of expenditures
Impact Reporting	Provide annual impact reporting detailing outcomes of funded programs. Unused funds will be returned to the funding source (Society or Foundation).

## Application Process and Timeline

Due Date	Item	Responsible Party	Description
March 15	Impact Report	Posts, C3s that received funds	Prepare and submit an <b>Impact Report</b> detailing the success and financial expenditures of the previous FY Foundation-funded programs to the National Office Staff Liaisons
March 31	SAME Foundation Support Annual Report	National Office	Submit <b>SAME Foundation Support Annual Report</b> summarizing where funding was used and who it impacted to the Foundation.
JETC	Annual Workplan Progress Report	C3s	Prepare and submit FINAL <b>Annual Workplan Progress Reports</b> reporting on results of the previous year's workplan to National Officers and National Office Staff Liaison
	*DRAFT Resource Requests and Annual Workplans	C3s	COIs prepare and submit <b>DRAFT Annual Workplans</b> and <b>Resource Requests</b> (for following calendar year's efforts) to National Officers and National Office Staff Liaison
June 30	*FINAL Resource Requests and Annual Workplans	C3s	COIs submit <b>FINAL Annual Workplans</b> and <b>Resource Requests</b> to National Officers for review and endorsement and copy National Office Staff Liaison
	Resource Requests	Posts	Posts submit <b>Resource Requests</b> to RVPs for review and endorsement
July 15	*ENDORSED Resource Requests	National Officers/RVPs	Submit <b>ENDORSED Resource Requests</b> to National Office
	Denied Resource Requests	National Officers/RVPs	Notify requestors of any requests not receiving endorsement
July 31	DRAFT Ranked Allocation List	R2C	Host R2C meeting to review all <b>Resource Requests</b> and create a DRAFT ranked allocation list for BOD review and TENTATIVE approval
		National Office	Provides <b>DRAFT ranked allocation list</b> to the Foundation (for information purposes only)
	Tentative BOD Ranked Allocation list Approval	BOD	BOD reviews and <b>TENTATIVELY approves</b> the DRAFT ranked allocation list

Due Date	Item	Responsible Party	Description
August PLW: BOD Meeting		National Office	National Office <b>informs requesters</b> of priorities <u>highlighting final approval PENDING</u> based on Foundation funding amount and final BOD budget approval
October 15	Funding Available	SAME Foundation	Notifies the National Office of <b>amount of funding</b> made available for execution during the upcoming FY
October 31	FINAL Program Funding Recommendation	R2C	Reconvenes to consider the Foundation's funding decision; determines <b>final program funding</b> recommendation to the BOD
December: BOD Budget Meeting	Final Budget Approval	BOD	National Office prepares and <b>submits final budget</b> incorporating the final R2C funding decisions to the BOD for approval
December: Upon budget approval	Funding Memos	R2C	<b>Issues Funding Memos</b> to requestors of approved requirements, funding source (Society and/or Foundation) restrictions or Board-designated restrictions
	Final Funding Allocation	R2C	Provides the Foundation with <b>allocation of Foundation funding</b>
Program mid-point	Projected vs Actual Spend Check	Posts, C3s that received funds	The entity receiving funding will provide a budget check at some point in the planning process to determine if funds are sufficient or in excess of needs. Information <b>due to National Officer and staff liaison.</b>

\* On-going programs who have received permission from the National Office may submit a budget for the following year at the completion of the current year's program in lieu of a formal resource request.

## Resource Request & Impact Forms found here:

<https://www.same.org/resource-requests-guide/#h-additional-r-2-c-information>

## Contact Information

For questions about the SAME Resource Request Policy, application procedures, or eligibility requirements, entities should contact Kathy Off, Director of Governance & Philanthropy.

Email: [koff@same.org](mailto:koff@same.org)

Phone: (703) 549-3800