



# **Operations Manual**

for

## **Communities of Interest, Councils, Committees (C3), Groups, & National Programs**

**June 2026**  
*v1.0*

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# I. PURPOSE

This Operations Manual provides Society of American Military Engineers (SAME) Communities of Interest/Councils, Committees (C3), and National Programs with SAME Board of Direction guidance and standards for operations and support.

The unique and vital role of SAME C3 is two-fold:

1. Serve as an extension of the National Office's 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.

# II. DEFINITIONS

**Group:** A collective element of the Society aligned under a National Officer, working collaboratively toward the goals of the Strategic Plan. C3s and National Programs are all part of Groups, which aim to provide value to members and advance the goals of the Strategic Plan. A National Officer is assigned to lead and provide oversight.

**Committee:** A group with a specific operational focus.

**Community of Interest (COI):** A specialized entity within SAME, focused on a specific area of interest or discipline within the Architecture/Engineering/Construction (A/E/C) industry. COIs serve as *solution laboratories*, facilitating industry-government engagement (IGE) and supporting broader Society programs.

**Council:** A group within SAME's membership that serves and promotes a particular demographic. Councils operate similarly to Communities of Interest, with a focus on the specific needs of their demographic or membership.

**C3:** Encompassing all three entities: Councils, COIs, and Committees (C3) include the following key aspects:

- Membership is voluntary and tracked separately from Post affiliation. SAME individual members can participate in multiple C3s, with participation included as a member benefit.
- C3s are chartered by the Board of Direction to align with the SAME Strategic Plan and National Direction.
- Formation Process: A C3 may start as a Task Force or a Working Group within an existing C3 to assess viability before becoming a standalone entity. Establishment of a C3 requires National Leadership Assembly approval.
- Sunset Process: A C3 may dissolve at the request of the Chair or by order of the Board of Direction due to changing strategic value or failure to meet requirements. A C3 could also become a Working Group under a different C3.

**Industry Government Engagement (IGE):** Collaboration between government and industry organizations and individuals to provide solutions and raise awareness about A/E/C issues affecting national security. According to Strategic Plan 2030, *SAME drives partnerships through focused industry-government engagement, delivering solutions for critical infrastructure and mission readiness challenges.*

**Industry Government Engagement (IGE) Project:** A focused effort to address a topic affecting both industry and government. An IGE project team consists of SAME members and non-members who represent both sectors and are typically subject matter experts or decision-makers in the relevant topic areas. Each IGE project should be aligned with and sponsored by a COI or Council, which serves as the project's organizational home and provides oversight, support, and accountability. This approach allows for tracking progress, maintaining a clear line of ownership, and ensuring alignment with SAME's strategic priorities.

**National Program:** Created and exists to serve a very specific purpose or produce a specific outcome. Examples are the Leader Development and National Camp programs. Typically, the programs are organized as part of a COI or Council for support.

**Steering Committee (SC):** The governing body of a C3, with members and roles defined in its charter. The SC provides leadership, subject matter expertise, and operational support for the C3. It is led by a Chair, who also serves as a member of the National Leadership Assembly and may be appointed by the President to serve on the National Board of Direction.

**Task Force (TF):** The Board of Direction may establish a TF for a specific purpose. Each TF will have a Chair, a defined mission, and a set timeframe to complete its work – included in a Charter. A TF may evolve into a C3, but this transition requires Board approval.

**Working Group:** Working Groups are extensions of a C3, formed to focus on specific areas of interest. They operate under the oversight of the C3 and its Steering Committee. Chairs have the authority to establish one or more Working Groups as needed to support their activities or initiatives -no Officer approval is required. While Working Groups may or may not be defined in the C3 Charter, they must be included as part of the Work Plan.

**C3:** Enrollment in a C3 may include any member interested in the C3 subject area.

**Steering Committee (SC)**

The SC is responsible for governance and programming of the COI

**Subcommittees**

A subcommittee is an extensions of a committee - i.e. task force/special interest group within a committee

**Working Group (WG)**

The WG is an extension of the SC and created as needed to focus on a specific area of interest within the COI.

### III. SOCIETY STRUCTURE

The Society is organized into various elements to serve the membership and advance the goals of the strategic plan. These entities are Groups, C3s, and National Programs. (See *Section II. Definitions* for more details)

| Workforce Development Group                                                                                                                                                                                                                                                                                                                                                                           | Membership Group                                                                                                                                                                                                          | Project Lifecycle Group                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Chair:</b> National Officer                                                                                                                                                                                                                                                                                                                                                                        | <b>Chair:</b> National Officer                                                                                                                                                                                            | <b>Chair:</b> National Officer                                                                                                                                                                                                                                                                                                       |
| <b>Member Chairs</b>                                                                                                                                                                                                                                                                                                                                                                                  | <b>Member Chairs</b>                                                                                                                                                                                                      | <b>Member Chairs</b>                                                                                                                                                                                                                                                                                                                 |
| <ul style="list-style-type: none"> <li>• Camps COI</li> <li>• College Outreach</li> <li>• K-12 STEM Outreach</li> <li>• STEM Pathways</li> <li>• Leader Development COI</li> </ul> <b>Program Chairs</b> <ul style="list-style-type: none"> <li>• Camps Program</li> <li>• Leader Development Program</li> <li>• STEM Pathways Program</li> <li>• Career Transition Workshop &amp; Program</li> </ul> | <ul style="list-style-type: none"> <li>• Membership Committee</li> <li>• Small Business Council</li> <li>• Young Professionals Council</li> <li>• Uniformed Council</li> <li>• Awards Committee</li> <li>• AOF</li> </ul> | <ul style="list-style-type: none"> <li>• Architectural Practice COI</li> <li>• Construction COI</li> <li>• Energy Security COI</li> <li>• Environmental COI</li> <li>• Facility Asset Management COI</li> <li>• Resilience COI</li> <li>• Warfighter Engineer COI</li> <li>• <i>Working Groups</i></li> <li>• <i>IGEs</i></li> </ul> |

## IV. ROLES and RESPONSIBILITIES

### National Officer

At the start of each annual governance cycle (May 1–April 30), the National President appoints three elected National Officers to oversee Groups, C3s, and National Programs. National Officer appointments are for a one-year term and may be renewed at the discretion of the National President.

To ensure continuity and effective leadership transitions, incoming National Officers should work closely with the outgoing National Officer, Staff Liaison, and assigned Group, C3, or National Program leaders to gain an understanding of ongoing initiatives, annual deliverables, strategic priorities, and governance requirements. Likewise, outgoing National Officers are encouraged to support the transition process by providing relevant background information, historical context, and status updates on active efforts.

These leaders are responsible for:

- Providing oversight and strategic direction.
- Assisting with succession planning and governance.
- Monitoring work plan accountability.
- Maintaining cadence on annual deliverables (reference Section VII. Annual Deliverables).
- Supporting leadership transitions and onboarding incoming leaders.
- Serving as a liaison between the Board of Direction, National Office staff, and assigned Groups, C3s, and National Programs.

### C3

#### Chair

The Chair is appointed by the National President based on the recommendation of the overseeing National Officer, in collaboration with the Steering Committee. The Chair typically serves a two-year term. Refer to *V. OPERATIONS, Operationalizing C3s* for details of the appointment and extension of term process.

In collaboration with the National Office Staff Liaison, the Chair is responsible for:

- Serving on the National Leadership Assembly and Board of Direction (typically a one-year term), if appointed, as a representative of the C3.
- Recruiting members and leading the Steering Committee.
- Maintaining an up-to-date Charter (see Appendix D: Sample C3 Charter).

Additionally, on an annual basis, the Chair, in collaboration with the National Office Staff Liaison, must:

- Develop and report progress on the Annual Work Plan.
- Develop the Quad Chart based on the Annual Work Plan.
- Submit a Resource Request (if needed).

- Review the Charter and recommend changes if necessary.
- Maintain and report on strategic partnerships.
- Review and update the Steering Committee composition and succession plan.

## Vice Chair/Chair-Elect

The Vice Chair supports the Chair in leading activities and ensuring the smooth and effective operation of the entity. **The term is typically two years.** Responsibilities include:

- Assisting with the management of meetings, tasks, and projects
- Acting as the Chair in their absence
- Working collaboratively to advance the group's mission

This role requires strong organizational skills and a commitment to leadership. The Vice Chair is expected to transition into the Chair role in the future.

## Immediate Past Chair

The Immediate Past Chair provides continuity and guidance to the current Chair and Vice Chair, offering institutional knowledge and advice based on their previous experience. This advisory role, served for one-year immediately after serving as chair, helps to ensure smooth transitions of leadership and sustained progress on long-term initiatives.

The Immediate Past Chair plays a supportive role by offering counsel, mentoring current leaders, and assisting with specific tasks as needed.

## Vice Chair, Secretary

Plays a critical role in supporting operations by ensuring accurate record-keeping and effective communication. This individual is responsible for documenting meeting minutes, maintaining records, and facilitating communication among members. The Secretary works closely with the Chair and other members to ensure the work is well-organized and that key decisions and actions are properly recorded.

## Vice Chair, C3 / Program Liaison

Serves as communication bridge with other entities within SAME. The Vice Chair, C3 / Program Liaison is responsible for:

- working with various liaisons to ensure information flows smoothly and accurately between entities
- facilitating collaboration
- supports organizational alignment

The Vice Chair works closely with the Chair to represent the C3 or Program's interests. They report on activities and foster relationships that advance the SAME's mission.



## Vice Chair, National Programs and Events

The Vice Chair, National Programs & Events, is responsible for overseeing the planning, development, and execution of key events, including the Small Business Conference (SBC) and the Joint Engineer Training Conference (JETC). This role works closely with the Chair, staff liaison, and other leadership members to ensure programs and events are well-organized, impactful, and aligned with SAME's mission.

As a leadership position, the Vice Chair, Programs & Events, requires strong organizational, project management, and communication skills to drive successful event execution and member engagement and deliver targeted value to the constituents of its community.

## Vice Chair, Communications

The Vice Chair, Communications, is responsible for developing and executing a communication plan to ensure activities, events, and achievements are effectively shared with both internal and external audiences.

This role focuses on enhancing visibility, engagement, and outreach through various communication channels, including SAME *Engage*, social media, newsletters, website content, and press releases. SAME *Engage* should serve as the primary platform for member communications, collaboration, and information sharing within the C3. C3 leaders are encouraged to utilize *Engage* to document meeting materials, project updates, decisions, and other key activities to create a historical record of the C3's work and support leadership transitions.

The Vice Chair works closely with the Chair and other leadership members to ensure messaging aligns with the mission and goals of SAME.

## Vice Chair, Post Liaison

The Vice Chair, Post Liaison, is responsible for strengthening communication and collaboration between the C3 or Program and SAME Posts. This role ensures that goals, initiatives, and programs are effectively shared and coordinated across Posts, highlighting how they can provide value and support.

Working closely with the Chair, Post leaders, and other stakeholders, the Vice Chair fosters consistent messaging, collaboration, and resource sharing to enhance engagement and alignment throughout the organization.

## Vice Chair, Education

The Vice Chair, Education, is responsible for developing and implementing educational initiatives, including webinars and white papers. This role involves collaborating with C3 or Program members, as well as external partners, to design and deliver high-quality educational content that aligns with SAME's mission and serves the needs of its members and target audiences.

## Vice Chair, Technology & Innovation

Serves as a lead advocate for innovation and the integration of emerging technologies, methods, and practices that support the COI's mission. Promotes awareness and thoughtful adoption of advancements across the COI and its working groups as they evolve. Works in collaboration with other C3 Technology & Innovation Vice Chairs to share insights, align efforts, and advance innovation across communities.

## National Office Staff Liaison

The Executive Director will assign each entity a National Office Staff Liaison to assist and facilitate requirements aligned with the SAME Strategic Plan. The Staff Liaison will be a designated member of the Steering Committee and include and facilitate the following duties:

- Coordinate activities with internal National Office staff.
- Assist with C3 or Program leadership transitions and interpreting national direction and guidance.
- Update SAME web pages with information provided by the Chair/Steering Committee.
- Provide templates to comply with National SAME standards/branding for work plans, webinars, marketing plans, and email blast formatting.
- Send e-mail blasts to members.
- Manage the conference call numbers and access to online seminar scheduling.
- *SAME Engage* Administrator.
- Support C3 Meetings and maintain awareness of issues and topics within the C3.

## Steering Committee (SC)

Led by an individual C3 Chair, the Steering Committee is formed based on the needs of the C3. It establishes operations, schedules, and a calendar to fulfill the C3's purpose. The SC is responsible for:

- Communicating with C3 members
- Collaborating with SAME National entities to support strategic plan outcomes
- Developing a work plan and overseeing its implementation
- Coordinating webinars and programs with the National Office

The SC is composed of volunteers who may also be appointed to advance technical and strategic goals or serve as leaders for IGE Projects.

# V. OPERATIONS

## Operationalizing C3s

C3s put ideas into action by engaging volunteer leaders to maximize benefits for SAME members and the A/E/C community. Through strategic initiatives, collaborative efforts, and targeted programs, they create measurable, beneficial impacts that support SAME's mission

and enhance industry engagement. Examples include:

- **Translating abstract concepts** into measurable, accessible, repeatable, and iterative processes to grow beneficial impact. Examples include:
  - Training C3 leaders to effectively use *SAME Engage* to grow community engagement, value, and technical capacity.
  - Developing and delivering relevant program content.
  - Engaging members and increasing leadership opportunities.
  - Managing stakeholders, including strategic partners.
  - Leveraging National LDP projects.
  - Delivering measurable progress and content.

## C3 Chair Succession and Appointment Process

C3 Chairs (whether extending their term or transitioning out of the role) are responsible for proactive succession planning. Chairs should identify a Vice Chair/Chair-Elect no later than the conclusion of their first year, of the two-year term, to ensure continuity of leadership.

To support a smooth transition, the following steps should be followed:

- **Initiate Discussion:** The Chair will discuss term extension or succession plans with the steering committee, assigned National Officer, and staff liaison.
- **Submit Recommendation:** The Chair will submit either a request for term extension or a recommendation for a Vice Chair/Chair-Elect, including justification, via email. The email will be sent to the National Officer and staff liaison.
- **Approval Process:** Upon approval by the designated national office authority, including the SAME National President, the incoming Chair will be formally recognized and tracked accordingly.
- **Timeline:** Succession planning discussions should begin at the start of the calendar year, with all decisions finalized no later than April to allow adequate time for onboarding, event participation planning (e.g., JETC), and travel coordination.

## Awards & Recognition

C3s may be called upon to:

- Submit members for SAME recognition as part of the annual governance cycle.
- Recognize community members who contribute to SAME's mission, particularly those supporting the C3 Annual Work Plan.
- Highlight member contributions through communications and the award nomination process.

## Call for Presentations (CFP) Support (as applicable)

C3s may be responsible for conducting abstract reviews for National Events such as JETC and

SBC and other conferences. Review responsibilities are assigned based on educational tracks aligning with the C3's expertise.

## Financial Reporting

Any entity receiving financial support from the SAME National Office or engaging in fundraising must:

- Provide detailed annual accounting to the National Officer overseeing the entity and the National Office Controller.
- Follow specific financial reporting requirements set by the SAME Controller.
- Prepare an impact report detailing the results of the effort. Due to Kathy Off at the conclusion of the program and no later than 15 March.

## Program Support

C3s may be called upon as subject matter experts to:

- Recommend speakers and participants for Industry-Government Engagement Workshops.
- Provide additional programmatic or other support as needed. Requests for support will be clearly defined.

## Strategic Relationships & Partnerships

C3s and programs are encouraged to establish and maintain strategic relationships with relevant organizations and government agencies to advance their goals.

- Establishing partnerships must follow the [SAME Strategic Partnership Policy](#).
- Recommended strategic partners should align with C3 or program objectives.
- Responsible C3s and programs must actively manage relationships, maintain regular communication, and identify shared goals and initiatives.
- Best practice: Schedule quarterly check-ins with partners and regular check-ins with Strategic & Stakeholder Relations at the National Office to assess partnerships.
- Current Strategic Partners are listed [here](#).

## VI. Webinars

COIs and Councils regularly develop and host webinars to:

- Provide professional development and technical training.
- Support Annual Work Plan initiatives.
- Contribute to the SAME Strategic Plan.

## Webinar Guidelines

- Webinars cannot replace Steering Committee monthly meetings.

- Most COIs and Councils are encouraged to host webinars as part of the *Webinar Wednesdays* program.
- Webinars may qualify for Professional Development Hours (PDH) if they include 3-4 learning objectives in the COI Webinar Request Form and are at least an hour in length.
- AIA credit can be requested using the Fillable AIA Course Info Form (*Appendix F*), submitted to the Staff Liaison at least six weeks before the webinar.
- Additional webinars beyond Webinar Wednesdays are encouraged but must be coordinated with the Staff Liaison to avoid scheduling conflicts.

## Webinar Request Process

The Webinar Request Form must be used for all webinars to ensure proper registration, logistics, and marketing. The form can be accessed here: [SAME Webinar Request Form](#). A completed form is required before a webinar can be scheduled. Incomplete forms will be returned for correction, and webinar requests submitted in any other format will not be processed.

To allow sufficient time for promotion and maximize participation, the **Webinar Request Form should be submitted at least six weeks in advance** of the scheduled webinar date.

## National Office Support for COI & Council Webinars

The National Office staff provides the following support:

- Updating the COI or Council web page with webinar details.
- Setting up online registration.
- Managing the webinar platform and hosting both the dry run (practice session) and the live webinar.
- Providing speakers with the SAME-branded *Webinar Wednesday* PowerPoint template or other SAME standard template (no other format or branding is permitted).
- Supporting speakers and moderators throughout the process.
- Adding the webinar to the National Calendar.
- Sending marketing email blasts or other communications to targeted demographics.
- Updating the Webinar page post-event with PDH certificates and recordings.

## Dry Run (Rehearsal)

Every webinar must include a dry run with the points of contact (POCs), speakers, and Staff Liaison to ensure:

- All participants can connect with video and audio.
- Speakers are familiar with the webinar platform.

Dry runs last approximately 30 minutes and are scheduled approximately one week before the webinar.

## VII. C3 MEETINGS, NOTE-TAKING, & RECORDING

### C3 Meeting Coordination and Structure

C3s maintain two primary meeting types to support collaboration, leadership coordination, and member engagement: Steering Committee meetings and C3-wide meetings. Each meeting type serves a distinct purpose and is coordinated at different levels to ensure consistency across the program.

#### Steering Committee Meetings

**Steering Committee meetings are coordinated and facilitated by the C3 Chair** and are intended for the C3's leadership team. These meetings provide an opportunity for the Chair, Vice Chair(s), and other designated leadership roles to coordinate C3 activities, discuss priorities, review ongoing initiatives, and plan upcoming engagement opportunities such as webinars, workshops, and collaborations with other C3s or SAME programs.

The frequency and format of Steering Committee meetings may vary based on the needs of the C3; however, regular meetings are encouraged to maintain alignment and momentum within the leadership team.

#### C3-Wide Meetings

**C3-wide meetings are coordinated and scheduled by National Office staff.** These meetings are open to all members engaged in the C3 and are designed to provide opportunities for knowledge sharing, member discussion, and engagement around topics relevant to the community's focus area.

National Office staff will manage scheduling logistics, meeting invitations, and administrative coordination to ensure consistency across C3 programming. C3 Chairs work in collaboration with National staff to identify meeting topics, potential speakers, and agenda content that align with the C3's strategic priorities and the Society's broader goals.

### Artificial Intelligence (AI) Note-Taking Assistants

SAME encourages participation and collaboration while respecting individual privacy. As outlined in the [SAME Artificial Intelligence \(AI\) Policy](#), AI software "bots" (AI note-taking assistants) are not permitted to attend public or private virtual meetings. This policy applies to all SAME meetings.

Meeting notes will be prepared by the assigned Staff Liaison using an approved AI note-taking assistant only after obtaining permission from attendees at the start of the meeting or as participants join. These notes will be posted in the appropriate *SAME Engage* library for use by members, Chairs, and Steering Committee members. Any alternative AI note-taking options require coordination with the Staff Liaison. Note-taking assistants joining without prior approval will be removed from meetings.

## Meeting Recordings

Recording meetings must be coordinated in advance with the assigned Staff Liaison, Chair, or Steering Committee member. SAME uses Microsoft Teams as its official meeting platform. Participants must provide consent to be recorded at the beginning of the meeting or upon joining.

- If requested, recordings will be posted in the *SAME Engage* library for a period not exceeding 90 days.

## Meeting Communications & Scheduling

C3s and programs are responsible for communicating their impact and needs to their communities, SAME members, Posts, and Regions, with support from their National Staff Liaison.

- **Steering Committee Meetings:** Recommended monthly but held at the discretion of the C3 Chair and Steering Committee.
- **General C3 Member Meetings:** Recommended at least quarterly to update members on initiatives and activities, scheduled at the Chair's and Steering Committee's discretion.
- **Other Meetings:** Such as Industry-Government Engagement (IGE) project-focused meetings scheduled at the discretion of the Chair and Steering Committee.
- **In-Person Steering Committee Meetings:** Typically held at the Joint Engineer Training Conference (JETC) for recruitment, administrative, operational, and coordination purposes, not technical discussions. Ideas for technical content should be submitted through the event Call for Presentations process.

## Regular Communication

Timely updates on Industry-Government Engagement efforts, Strategic Partner activities, Annual Work Plan progress, professional development opportunities, recognition, and other relevant topics should be communicated through the following channels:

- ***SAME Engage*** (Primary communication tool): Supports day-to-day responsive interactions between members, the Steering Committee, and other SAME members. Features include discussion forums, library resources (including Governance and Meeting Records), event listings, and direct member messaging.
- **Email Blasts:** Can be requested by a Steering Committee member for promoting webinars, meetings, or significant updates. To prevent member fatigue, email blasts should be used sparingly.
- **Newsletters:** Some C3s or programs may distribute regular newsletters with messages from the Chair, upcoming events, and other member-focused information.
- **Website:** Primarily serves as a permanent more durable resource for C3 or Program-related information. Websites are updated annually at the start of the governance cycle (~May–June) based on input from the Chair and Steering Committee. Additional updates require coordination with the assigned Staff Liaison.



# Marketing and Communication Policy

Effective communication and branding are essential to representing SAME professionally and maintaining consistency across all entities. This policy provides guidance on marketing, communications, and social media use while ensuring alignment with SAME's national standards.

## 1. Representing SAME Professionally

- All communications, including emails, presentations, social media posts, and public statements, should align with SAME's mission, values, and professional standards.
- Content shared on behalf of an entity should be relevant, accurate, and appropriate for SAME's audience.
- Leaders and members should avoid making statements that could be interpreted as endorsements, policy positions, or official SAME stances unless explicitly approved by SAME National.
- Follow SAME's brand standards when creating materials. Branding guidelines and logo usage details can be found at [SAME Brand Standards](#).

## 2. Social Media and Online Engagement

- SAME strongly encourages the use of *SAME Engage*, the Society's dedicated platform for member engagement, as a primary tool for discussions and collaboration.
- Every social media account must include an SAME National Office staff member in an admin or co-admin role to ensure continuity and alignment with SAME's broader communications strategy.
- Entities have control over their LinkedIn groups but should coordinate with SAME staff when in doubt about content, branding, or messaging.

## 3. Seeking Approval or Clarification

- If there is uncertainty about certain content, initiatives, or public communications align with SAME's policies or messaging, leaders should seek clarification before proceeding.
- Questions or concerns should be directed to the designated SAME staff liaison or communications representative.
- When launching new communication channels or significant initiatives, leaders should coordinate with SAME National to ensure alignment with existing efforts.

By following these guidelines, we can maintain a consistent and professional representation of SAME while fostering meaningful engagement within specific communities.

# VIII. ANNUAL DELIVERABLES

Reference section *IV. ROLES and RESPONSIBILITIES* to fully understand the requirements of each action item. The C3 annual cycle follows the governance cycle of May 1 – April 30.



| Due Date   | Action                                                                                                            | Deliverables                                                                                                                                                                                                                                    |
|------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| March 15   | Submit <b>FINAL</b> to Kathy Off (copy Staff Liaisons)                                                            | <b>Impact Report</b> <ul style="list-style-type: none"> <li>- Leader Development Program</li> <li>- Credentialing Assistance Program</li> </ul>                                                                                                 |
| April 30   | Submit <b>DRAFT</b> version to National Officers for review (copy Staff Liaisons)                                 | <b>C3 Workbook</b> <ul style="list-style-type: none"> <li>- C3 Assessment</li> <li>- Work Plan</li> <li>- Quad Chart</li> </ul>                                                                                                                 |
| June 30    | Submit <b>FINAL</b> version to National Officers for review and endorsement (copy Staff Liaison)                  | <b>C3 Workbook (year-end)</b> <ul style="list-style-type: none"> <li>- Work Plan</li> <li>- Charter Review &amp; Update (if applicable)</li> <li>- Steering Committee Review &amp; Update</li> </ul> <b>Resource Request(s)</b> (if applicable) |
| October 15 | Submit <b>Mid-Year Report</b> to National Officers for review and endorsement (copy Staff Liaison for NLA Report) | <b>C3 Workbook</b> <ul style="list-style-type: none"> <li>- C3 Assessment</li> <li>- Work Plan</li> </ul>                                                                                                                                       |

## Work Plan Review & Update

The Work Plan serves as a structured roadmap outlining the specific actions a COI or Council will take to support the SAME Strategic Plan. It details timelines, resource requirements, expected impact, and measurement criteria to ensure alignment with organizational goals. A comprehensive Work Plan should include:

The 5 W's: What, Who, When, Where, Why

- **What:** What will the COI or Council be doing, and how does it align with the Strategic Plan?
- **Who:** Who is leading the action? Are there other entities or Strategic Partners involved?
- **When:** What is the timeline for implementation?
- **Where:** Will the action take place at the Post level, National level, or virtually?
- **Why:** What is the intended impact at each level?

The 2 H's: How x 2

- How is the action resourced? Are there financial requirements?
- How will impact and success be measured?

Additional Considerations

- **Progress Report:** Summarize achievements over the past year and note any challenges encountered.
- **Working Groups:** Describe any contributions from Working Groups within the COI or Council.
- **Strategic Partners:** Outline how Strategic Partners are engaged and integrated into initiatives.

The Work Plan is structured as separate tabs within the C3 Workbook that demonstrates how these elements can be structured and applied. Reference Appendix A: *Annual Work Plan*.

## Annual Work Plan Submission

The submission of Annual Work Plans follows the Annual Deliverables schedule outlined above. Recognizing that new leadership and committee members may bring fresh perspectives, minor adjustments to the plan may be made within the first 30 days of the new term. However, to maintain momentum, a foundational work plan must be in place at the start of the program year. These critical submissions include:

- **DRAFT Work Plan** – Due April 30 (prior to JETC)
- **FINAL Work Plan** – Due June 30
- **Mid-Year Work Plan Review & Comments** – Due October 15th (prior to SBC)

## Submission & Review Process

1. The DRAFT Work Plan must be submitted to the National Officer overseeing each COI or Council, with a copy to the assigned Staff Liaison, before JETC (April 30th).
2. The FINAL Work Plan must be submitted to the appropriate National Officer with a copy to the assigned Staff Liaison by June 30th each year.
3. The Mid-Year Work Plan Review & Comments must be submitted to the National Officer with a copy to the assigned Staff Liaison by October 15<sup>th</sup>, prior to the Small Business Conference (SBC).

## National Leadership Assembly (NLA) Review & Approval

- FINAL Work Plans are presented to the National Leadership Assembly (NLA) (typically at the NLA meeting during JETC).
- The National Officer overseeing C3 reviews each Work Plan and provides feedback to Chairs if revisions are needed.
- The National Officer prepares and presents a summary of key points from each Work Plan to the NLA.
- Work Plans are generally accepted as presented, but if revisions are required, the National Officer collaborates with the Chair to finalize updates.
- At mid-year, National Officers provide an update on progress to the NLA (typically during SBC).

## Charter Review & Update

Each Chair and Steering Committee must review the Charter annually as part of the development of their FINAL Work Plan. Necessary updates or changes should be made at this time and documented within the FINAL Work Plan submission.

A **sample Charter** is available in **Appendix D** for reference.

## Strategic Partner Review & Update

Each Chair and Steering Committee must review and update Strategic Partnerships annually. COIs and Councils hold primary responsibility for engaging and fostering relationships with their associated Strategic Partners.

The **National Office** supports these efforts through the **Office of Strategic and Stakeholder Relations**.

## Steering Committee Review & Update

Chairs must review and submit Steering Committee assignments and succession plans (if applicable) annually in conjunction with the development and submission of their FINAL Work Plans. This annual review ensures that C3 Steering Committee positions and volunteer records remain accurate, allowing the Staff Liaison to update critical records and communication channels necessary for effective operation.

To facilitate this process, the Steering Committee Review & Update should also include:

- Requested schedules for Steering Committee meetings
- General C3 membership meeting schedules

These schedules are often communicated through various channels to ensure broad participation. The **Steering Committee template** is located as a tab in the C3 Workbook and is available in the *SAME Engage* National Leadership Assembly (NLA) library.

## Resource Request(s)

Resource Requests should be submitted alongside the Work Plan but may also be considered if funds become available later in the year. However, there is no guarantee that requests submitted outside of the annual Work Plan process will be reviewed or funded.

Additional details on the **Resource Request process** can be found in **Appendix C**. All requests must be submitted using the SAME Resource Request template, which is available in the *SAME Engage* Board of Direction library.

## C3 Annual Workbook

Each Chair and Steering Committee must complete the C3 Annual Workbook throughout the year according to the following schedule:

- **Draft Workbook** – No later than April 30

- **Mid-Year Workbook** – No later than October 15
- **Final Workbook** – No later than June 30

The Chair's assessment helps inform the National Officer, who then prepares an assessment for presentation at the National Leadership Assembly (NLA) meetings during JETC and SBC. The National Officer will collaborate with the Chair to complete the assessment as needed.

Previously referred to as the **Assessment**, this document has been expanded to include the C3 Work Plan and Steering Committee Roster. To reflect its broader purpose as a planning, reporting, and governance tool, the document has been renamed the **C3 Annual Workbook**. The workbook serves as a comprehensive record of each C3's leadership, activities, goals, and progress throughout the governance year.

A **sample C3 Workbook** is available in **Appendix E**.

## **IX. APPENDICES**

**APPENDIX A: ANNUAL WORKPLAN AND UPDATE**

**APPENDIX B: STEERING COMMITTEE REVIEW & UPDATE**

**APPENDIX C: RESOURCE REQUEST FORM**

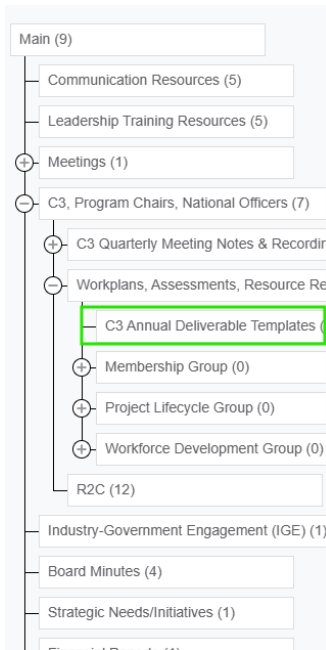
**APPENDIX D: SAMPLE CHARTER**

**APPENDIX E: C3 ANNUAL WORKBOOK**

**APPENDIX F: WEBINAR REQUEST FORM & AIA COURSE  
INFORMATION FORM, AND PDH FORM**

## APPENDIX A: ANNUAL WORKPLAN AND UPDATE

The current *SAME Annual Work Plan* can be found as a tab within the C3 Workbook located in the [SAME Engage National Leadership Assembly \(NLA\)](#) Library.



## APPENDIX B: STEERING COMMITTEE REVIEW & UPDATE

**Submit the steering committee review and update no later than June 30<sup>th</sup>** annually with the Work Plan to the National Officer and Staff Liaison. The latest version can be found as a tab within the C3 Workbook located in the [SAME Engage National Leadership Assembly \(NLA\)](#) Library. The template is shown below:

|                    | Standard Steering Committee Positions  | Name and company |
|--------------------|----------------------------------------|------------------|
| STEERING COMMITTEE | Chair                                  |                  |
|                    | Vice Chair                             |                  |
|                    | Immediate Past Chair                   |                  |
|                    | Vice Chair, Secretary                  |                  |
|                    | Vice Chair, Programs                   |                  |
|                    | Vice Chair, National Programs & Events |                  |
|                    | Vice Chair, Communications             |                  |
|                    | Vice Chair, <i>Post Liaison</i>        |                  |
|                    | Vice Chair, Education                  |                  |
|                    | Vice Chair, Technology & Innovation    |                  |
|                    | National Office Staff Liaison          |                  |

|                    | Additional Steering Committee Positions<br>(add positions as needed) | Name and company |
|--------------------|----------------------------------------------------------------------|------------------|
| STEERING COMMITTEE |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |
|                    |                                                                      |                  |

|                | Working Group Positions | Name and company |
|----------------|-------------------------|------------------|
| WORKING GROUPS | WG Chair                |                  |
|                | WG Vice Chair           |                  |
|                |                         |                  |
|                |                         |                  |
|                |                         |                  |

**C3 MEETING TRACKING TABLE:** To support coordination across C3s, C3 Chairs are responsible for completing and maintaining the Meeting Tracking table to document the cadence and timing of their Steering Committee and C3-wide meetings.

| Meeting Type          | Week of the Month & Day |  | Time | Frequency | Month | Scheduled by Staff (Y / N) | Notes |
|-----------------------|-------------------------|--|------|-----------|-------|----------------------------|-------|
| Steering Committee    |                         |  |      |           |       |                            |       |
| General C3 Membership |                         |  |      |           |       |                            |       |

Example Meeting Summary

| Meeting Type          | Week of the Month & Day |     | Time       | Frequency | Month           | Scheduled by Staff (Y / N) | Notes                                                                                          |
|-----------------------|-------------------------|-----|------------|-----------|-----------------|----------------------------|------------------------------------------------------------------------------------------------|
| Steering Committee    | 1 <sup>st</sup>         | MON | 2:00 PM ET | Monthly   | N/A             | N                          | 1st Monday of each month at 2:00 PM ET set up by a steering committee member on Teams, other   |
| General C3 Membership | 2 <sup>nd</sup>         | TUE | 3:00 PM ET | Quarterly | 2 <sup>nd</sup> | Y                          | 2nd Tuesday of the 2nd month of the quarter at 2:00 PM ET set up by the staff liaison on Teams |



## APPENDIX C: RESOURCE REQUEST & FORM

The current *SAME Resource Request Policy & Procedure* governs resource requests from C3s, Programs, and Posts. The latest version can be found in the [SAME Engage Board of Direction library](#). The template is shown below:

|                                                                                   |                                                                                                                             |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
|  | <b>SAME Resource Request</b><br>(for Communities of Interest (COIs), Councils, Programs, and Posts)<br>August 1, 2024; r1.9 |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|

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

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

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

**DESCRIPTION OF THE PROGRAM/SUPPORT REQUESTED:**  
Click or tap here to enter text.

**EXPECTED OUTCOMES / IMPACTS:** What will the program accomplish, what outcome or impact will be achieved?  
Click or tap here to enter text.

**HOW WILL OUTCOMES / IMPACT BE MEASURED:** Describe how outcomes will be measured or assessed.  
Click or tap here to enter text.

**HOW DOES THIS REQUEST SUPPORT THE SAME STRATEGIC PLAN AND/OR POST STRATEGIC PLAN:**  
Describe how this request specifically supports the SAME Strategic plan and/or your Post Strategic Plan.  
Click or tap here to enter text.

**HOW DOES THIS REQUEST SUPPORT THE ANNUAL WORK PLAN:** Specifically, how does this request support one or more elements of your Annual Work Plan?  
Click or tap here to enter text.

**TYPE OF SUPPORT REQUESTED:** Indicate whether the request is for *monetary* and/or *other* support  
Click or tap here to enter text.

**AMOUNT OR QUANTITY REQUESTED:**

- Provide a basic budget (enter or by attachment), description of the funding usages such as travel, stipends, materials, software acquisition, contracted support, work hours, etc.:  
Click or tap here to enter text.
- One-time request or ongoing support: Is the request for a one-time or ongoing program?  
Click or tap here to enter text.

## APPENDIX D: SAMPLE CHARTER

Below is a sample of the Charter. The full version template is available in the [SAME Engage Board of Direction library](#).



### *Society of American Military Engineers* **Leader Development** **Community of Interest Charter** **(as of 5/26/2020)**

**Mission.** The mission of the SAME Leader Development Community of Interest (LD COI) is to develop, execute, and track leader development (LD) activities across the SAME enterprise in support of the 2025 SAME Strategic Plan – Securing America’s Future, Together. Specifically, the LD COI will lead efforts to enhance leadership development and cultivate the talent necessary to address the nation’s grand challenges ensuring the enduring stewardship of the A/E/C profession.

**Membership.** Membership in the LD COI is open to all members of SAME. Leadership for the COI shall be composed of the Leadership Team, as defined below. Positions may be added to or removed from the Leadership Team at the discretion of the COI Chair.

The community will be composed of LD POCs from each Post as identified on the Post Change of Officers Form filed with SAME National office annually. Any SAME member interested in leader development can also join the LD COI community.

#### **Strategic Alignment**

##### ***Goal 1: Strengthen Industry-Government Engagement***

*Lead efforts to foster communication and build relationships among military, public, academic, and professional organizations; further collaboration to identify issues and develop solutions in support of National security.*

LDP provides a platform for industry and government members to grow professionally in a mutually supportive environment. Industry and government professionals interact under a common theme. The program also offers members of government and industry the opportunity to support the program as instructors and mentors.

##### ***Goal 2: Build and Sustain Resilient Communities***

*Lead efforts to prepare communities to absorb, recover, and adapt from natural and man-made threats, fortify our nation’s resolve directly where people work and live.*

Leadership is key to decision-making. When faced with tough circumstances, a leader’s ability to respond to threats helps determine their resilience. LDP enhances that ability.

##### ***Goal 3. Develop Leaders for the Profession***

*Lead efforts to enhance leadership development and cultivate the talent necessary to address the nation’s grand challenges; ensure the enduring stewardship of the A/E/C profession.*

Leader development is core to the Leader Development Program.

## APPENDIX E: C3 ANNUAL WORKBOOK

The C3 Workbook serves as the primary planning, reporting, and assessment document for each C3. The workbook includes the annual assessment, Work Plan, and Steering Committee Roster.

The C3 Workbook template is available in the [SAME Engage National Leadership Assembly \(NLA\)](#) Library.

## APPENDIX F: WEBINAR REQUEST FORM & AIA COURSE INFORMATION FORM

The C3 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.

1. Sponsoring C3
2. Point of Contact (POC). Include name and email
3. Originator (if different from POC). Include name and email
4. Webinar Date & Time (including time zone)
5. Dry Run Date & Time (including time zone)
6. Webinar Title (10 words or less)
7. Webinar Description (200 words or less)
8. Speaker 1 Full Name, Title, Organization, Bio, Photo
9. Speaker 2 Full Name, Title, Organization, Bio, Photo
10. Speaker 3 Full Name, Title, Organization, Bio, Photo
11. Moderator Full Name, Title, Organization, Bio, Photo
12. Request COI notification email blast? Yes or No
13. If so, which COI(s) should be notified?
14. Email blast text
15. PDH Offered
16. Learning Objectives (3-5 required for PDH, 4 for AIA)
17. Registration is required for all webinars. Is there anything beyond this form that Registration should know about this webinar?

The following is the American Institute of Architecture (AIA) Course Information Form detailing the required course information including at least 4 learning objectives. Prior to the webinar, the AIA form is submitted by national staff to AIA, and once approved, is made available to members and non-members attending the 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

Professional Development Hours (PDH) certificates are also made available to members and attendees for all webinars offered by SAME COIs and Councils. The PDH is available to download during webinar production and is made available with the webinar recording once posted on the website. Please see below the template for the certificate.



THE SOCIETY OF AMERICAN MILITARY ENGINEERS

## PROFESSIONAL DEVELOPMENT HOURS (PDHs) CERTIFICATE

**PARTICIPANT:**

Enter Your Name Here

DATE: | TIME: PM EST | LOCATION: Online Webinar

EDUCATIONAL PROGRAM:

**Name of Speaker/ ENTER Speaker NAME**

TOTAL PDHS AWARDED: 1.0

TOTAL AIA CREDITS AWARDED: 0.0

*IMPORTANT: The attendee is responsible for applying for his or her own PDHs after the conference.  
SAME cannot guarantee that all boards will accept all PDH credit; please check with your licensing  
board for more information.*

**SPONSORING COI:**

**Name of chair/ ENTER COI CHAIR NAME**