



*Operations
Manual*

Revised February 2023

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Chapter 1: Governance, Ethics and Organization

1. Space Coast Post Governing Documents:

- a. Society Formation. SAME was formed in 1920 and was incorporated in the District of Columbia on December 5, 1924.
- b. Post Bylaws. Each Post is required to approve Bylaws consistent with a template provided by SAME National. This document describes the organization of the Post as well as its operating requirements. It should include the proper election of Post Officers and Directors, and their terms of office. Post Officers should read it carefully when taking office. At a minimum, Posts should review their Bylaws every five years with consideration for revision, or whenever substantive changes are made to the SAME Bylaws. Posts should have the latest updated copy of their Post Bylaws on file with SAME National and submit updated Post Bylaws every five years. If there are no changes to the bylaws, Post should submit their current Bylaws with a date that reflects the five-year review. The current Post Bylaws, approved by the Post membership on 26 September 2015, is available online.
- c. SAME Code of Conduct. SAME is committed to providing a safe and welcoming experience for all participants, regardless of race, ethnicity, disability, religion, political affiliation, gender, gender identity or expression, sexual orientation, and any other characteristic protected by applicable federal, state, or local laws, regulations, or ordinances.
- d. Post Mission, Goals, and Annual Metrics. The Post adopted the following Mission, Goals, and Annual Metrics on 24 September 2013.
 - i. Post Mission. We are public and private sector engineers and related professionals whose mission is to promote interest and activity in the architectural, engineering, and construction industries in the Central Florida community, for the purpose of readiness and national security, by promoting professional and personal growth, facilitating relationships between military, government, and businesses, and developing future engineers.
 - ii. Post Goals.
 - Readiness and National Security. Establish relationships and collaborations with military entities and organizations that support the armed forces, readiness, and national security in Central Florida.
 - Professional and Personal Growth. Facilitate continuing education events that help maintain members' credentials and provide up-to-date information on advances in the architectural, engineering, and construction fields.

- Facilitating Relationships. Promote forums and opportunities for professional networking and relationship-building between military, government, and private organizations.
- Developing Future Engineers. Create scholarship opportunities and support initiatives that foster students' interest of and pursuit into the architectural, engineering, and construction professions.

iii. Annual Post Metrics.

- Professional and Personal Growth.
 1. Schedule educational forums for continuing education requirements of State of Florida architectural and engineering professional licenses that award at least 4 PDHs annually.
 2. Schedule at least 1 discounted or free continuing education opportunity for SAME SCP members outside of SAME General Membership meetings annually.
 3. At least one post member submits an article for publication annually in The Military Engineer or other professional journal.
 4. Establish and implement an annual Post Awards Program.
 5. Send a Post Board member to a Post Leaders Workshop and support NCOs or Young Members to attend JETC or a SAME Regional Conference.
- Facilitating Relationships
 1. Organize the Annual SAME Golf Tournament annually.
 2. Schedule at least 1 event every month, whether a golf tournament, social, or General Membership meeting.
 3. Schedule at least 1 social per year, excluding the golf tournament's social.
 4. Maintain communications with members and SAME National through e-mails and the website.
- Developing Future Engineers
 1. Award at least 4 High School Scholarships and 1 College Scholarship annually.
 2. Provide at least 1 SAME Camp Sponsorship annually.

3. Fund at least 1 event each with the UCF and FIT SAME Student Chapters annually.
 4. Conduct 1 event annually for mentoring young members.
- e. Post Jurisdiction. SAME SCP's jurisdiction is illustrated in the map below.



2. Post Organizational Structure

The basic operating element of SAME is the Post. Posts are affiliates to SAME and as such, are legally bound to the SAME Constitution and bylaws and are expected to support the *SAME Strategic Plan*. However, each Post is required to adopt its own bylaws, which set forth the way the Post is governed and operates. A Post bylaws Template is located on the SAME website and is provided as a guide. Bylaws should be reviewed and updated every five years. A copy of the current bylaws must be submitted to SAME National. Each Post is also required to sign an Affiliate Agreement with the National Office.

An exception to the above is where a Post is separately incorporated.

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

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

- a. **Post Board of Directors. All Post leaders must be SAME members in good standing.** Each Post should at a minimum establish the following positions in its Bylaws to manage the Post and receive the SAME National Post Leaders emails sent regularly. The Post Bylaws will establish the roles, responsibilities, and terms of these positions.

- i. **President.** The Post President is responsible for general supervision of Post affairs and shall preside over Post meetings. A President may serve more than a one-year term, and a two-year term is encouraged since it often is difficult for a Post President to learn the position and make a meaningful difference in one year.
- ii. **1st Vice President.** The 1st Vice President will officiate Board meetings in the absence of the President.
- iii. **2nd Vice President.** The 2nd Vice President will officiate Board meetings in the absence of the President and 1st Vice President.
- iv. **Secretary.** The Post Secretary is responsible for maintaining the correspondence and records of the Post, sending out notices of meetings (unless there is Communications Committee), recording the proceedings of all Board and membership meetings, and maintaining a copy of the Streamer and Award submissions. The Secretary is also responsible for submitting the Change of Post Officer Report to SAME within 30 days after a change in Post leadership.
- v. **Treasurer.** The Post Treasurer is the controller of the Post accounts under the direction of the President and is responsible for submitting the Post Annual Report to the National office, filing tax returns, and financial reporting to the Board of Directors. The Board of Directors is required to specify the level of authority for the Treasurer to sign checks and obtain the President's or Board's approval prior to obligating the Post to financial obligations. Normally, checks over a specified amount should be co-signed by the Treasurer and another Board member. (See additional guidance in the Financial Guidelines Chapter). Post Treasurers should serve no more than three consecutive years.
- vi. **Directors.** The following directors are identified as part of the Post Board of Directors.
 - **Director of Programs.** The Director of Programs is responsible for providing and executing a plan for the calendar year to include general membership meetings, field trips, and technical workshops and trainings.
 - **Director of Development.** The Director of Development is responsible for the golf tournament, including planning, fundraising, sponsorship outreach and recognition, and securing venues. The Director shall work with the Post President on venue selection and dates and the Treasurer on finances.
 - **Director of Operations.** The Director of Operations is responsible for overseeing and deconflicting all other activities not related to Post Programs and the Post Golf Tournament.

b. Post Committees: Standing committees are established to support programs, activities, and finances. The specific names of these Committees are decided by each Post to best support its members, as provided by its Bylaws. Post Standing Committees are recommended and may be appointed by the Post President, with approval from the Post Board of Directors, as follows:

- i. **Membership.** The Membership Chair and Committee are Points of Contact (POCs) for Individual and Sustaining Members to track and support the recruitment and retention of all members. Membership POCs are responsible for reviewing the Post roster monthly to ensure the Post welcomes new members and reaches out to inactive and dropped members. The Committee should maintain a separate listing of non-member prospects to invite to Post activities and events and should be encouraged to join SAME.
- ii. **Communications.** Chaired by the Post Secretary, the Committee is responsible for sending out emails for Post events, maintaining and updating information on the Post website and social media channels, adding events to the SAME National calendar, providing information for major Post events and accomplishments to the SAME National Communications Team. Members of the Communication Committee include the following positions.
 - Post Webpage Manager
 - Post Social Media Manager
- iii. **Awards and Recognition.** The Awards and Recognition Chair and Committee are responsible for establishing or maintaining a Post Awards program, submitting streamers and nominations for National Awards to SAME National, and working with Post Fellows on nominations of individuals to be elevated to the status of Fellow.
- iv. **Finance.** Chaired by the Post Treasurer, the Committee provides oversight to the Post investment accounts and conducts the annual financial audit of accounts.
- v. **Audit.** The Board is responsible for appointing an Audit Committee to annually review the Posts financial records, or when there is a change in Treasurer, or hiring an external auditor.
- vi. **Nominations.** The Nominations Committee generates the slate of officers and directors for election. It is preferred, but not required, that members of this committee not be members of the Board.
- vii. **Programs.** Chaired by the Programs Director, the Committee organizes all general membership, field trips, and technical workshops and training, arranges continuing education documentation for attendees at these events, and works with the Post Secretary and Communications Committee to publicize these events.
- viii. **Golf.** The Golf Chair and Committee work with the Director of Development to plan and run the annual golf tournament.
- ix. **Scholarship.** The Scholarship Chair and Selection Committee advertises the

Post Scholarship Program, reviews scholarship applicants, and selects scholarship recipients. The Scholarship Chair and Committee also interfaces with Eastern Florida State College and the University of Central Florida on the status of Post endowments established at those institutions.

- x. **Small Business.** The Small Business Chair and Committee organize the annual Post Small Business and Industry Expo.
 - xi. **Young Professionals.** The Young Professionals Chair and Committee organize Young Professional events and encourages Young Professional involvement in Post leadership.
 - xii. **Socials.** The Socials Chair and Committee organize Post Socials.
 - xiii. **Resilience.** The Resilience Chair and Committee ensures the completion of resilience streamer by organizing activities and integrating resilience streamer elements into Post activities.
 - xiv. **Bylaws.** The Bylaws Chair and Committee reviews the Post Bylaws and governing documents every 5 years.
 - xv. **Community Outreach.** The Community Outreach Chair and Committee organizes the Wounded Warrior Fund 50/50 raffle, reviews and recommends community grant fund requests to the Board, and organize STEM K-12, college veteran, and other community outreach. Members of the Community Outreach Committee includes the following positions.
 - SAME Camps Liaison
 - Post STEM K-12 Liaison
 - Post College Liaison
 - xvi. **Leader Development.** The Leader Development Chair and Committee fosters mentoring arrangements, plans leader development speakers, and works with Post leadership to incorporate leadership development.
- c. Task Forces.** In addition to Standing Committees, Posts may establish Committees, Task Forces or Working Groups to accomplish specific activities or events, with a sunset clause when the requirement no longer exists.
- d. Post Officer Transition:** SAME National recommends a transition period for Post Officers. All prospective Post Officers must be members, in good standing of SAME upon nomination and remain so throughout their term. Post Officers must be elected to the Board of Direction; however, other members of the Board may be elected or appointed positions, consistent with the Post Bylaws. It is important that the Secretary submit a Change of Post Officers Report as soon as officers are sworn in.
- e. Installation of New Officers:** The procedure for the installation of new Post Officers is located at the end of this Post Operations Manual. Use this document as a reference for post officer installation ceremony requirements. The installing Officer may be a Member of the National Board of Direction or Post Board of Directors, or a senior member of the Post. The RVP is frequently invited by the Post President to perform the

installation.

f. Student Chapters Student Chapters must be sponsored by a local Post.

Requirements for Student Chapters:

- **Minimum of 10 students** - SAME Membership is free to full-time college students when they sign up for a SAME membership on the SAME website.
- **Student Chapter Application** – Submitted to the Host Post for review and approval, then forwarded to SAME National for formal recognition as a Student Chapter.
- **Board of Directors** – The Student Chapter needs to elect a board to govern the chapter.
- **Faculty Advisor** - On-campus faculty that will assist in overseeing the student chapter along with the Host Post.
- **Post Point of Contact/Mentor** – Closely monitors the student chapter ensuring succession of officers and that graduating students are transitioned to Young Members.
- **Student Chapters** are required to file a status report twice annually.

3. **Post Leaders Workshop.** SAME National offers one annual workshop in August. The workshops provide two Post Board Leaders from each Post with information on best practices and allow Post Leaders to share ideas for achieving the goals outlined in the *SAME Strategic Plan and Streamers* program. National covers the cost of lodging, food, and beverage during the two-day event. The Post is responsible for transportation costs to/from the workshop and any other incidentals they may choose to cover.

4. Ethics—SAME Relationship with Government Organizations and Officials.

- a. The Joint Ethics Regulation (JER) governs interaction by individuals with Military Associations. Interpretation of regulations is guided by the intent of the regulation then acted upon by decisions of the commander. Interpretation of the JER should focus on how an individual can ethically participate, versus declaring why not. For more information, please contact the SAME Strategic & Stakeholder Relations Officer.

Questions should be referred to the SAME Executive Director.

Chapter 2: Administration

- 1. Post Mailing Address:** The current Post mailing address is 1224 Jupiter St, Patrick SFB, FL 32925. SAME SCP may consider switching to a P.O. Box as a mailing address to avoid changes as Post Leaders change office.
- 2. Post Goals and Objectives:** The Post Board of Directors should align the Post goals, objectives, and activities with the SAME Streamers, which are designed to help Posts support the *SAME Strategic Plan*. Posts should aspire to become a Distinguished Post. The requirements for being a Distinguished Post are specified in the Streamer criteria in the online Post Resources Center. Streamer input is required as part of the Post's Annual Report.
- 3. Post Membership Dues.** All dues are collected by SAME National. A portion of the dues collected from Individual Members and Company, Public Agency, and Non-Profit Organization members are distributed quarterly to Posts that are in good standing, by submitting their Annual Report. If a Post receives a dues payment in error, the check should immediately be forwarded to the National Office at 1420 King St, Suite 100, Alexandria, VA 22314.

- 4. Post Calendar of Events.** The Post Calendar of Events should be maintained on the Post website. Send Post events to SAME National for at least six months into the future, and if possible, for the full calendar year, to align with the Streamer evaluation period. This listing should include contact information for event organizers. The calendar should contain all key events and meeting dates, as well as critical dates for submitting reports and nominations to SAME National. Please submit Post or Regional/Joint Post events to webmanager@same.org.
- 5. Post Deactivation.** Should the Post become inactive and no longer sustainable, the RVP will work with the National Office and any remaining members to determine whether the Post should be shifted to a Field Chapter or deactivated. The RVP will conduct a formal assessment, including outreach to all members and research to determine if any funds remain in account(s). Should it be determined that, the Post will be deactivated, any remaining funds will be returned to the SAME National Office. Should there be a separate Education and Mentoring account, those funds will be turned over to the SAME Foundation.

Chapter 3: Field Chapters

1. Organizational Structure:

- a. Composed of Individual and Sustaining Member Companies, Field Chapters may be formed at locations where uniformed and civilian members of the uniformed services exist but where there are insufficient resources to maintain an active Post. Members of the Field Chapter shall become members of a Post in proximity to the chapter which will serve as the Field Chapter sponsor or "Host Post." The Post shall develop and execute a charter that creates a partnership between the Post and Field Chapter. Normally, at least one Post meeting each year should be held at the location of the Field Chapter. Field Chapters only require approval from the Regional Vice President.
- b. Field Chapters are ideal for locations where membership numbers may not be sufficient, or the situation precludes the ability to establish and maintain a full Post with a functioning Board. If there is expressed interest and a desire to belong to SAME, locations can become affiliated with an active Post, which will be designed a "Host Post" for the Field Chapter. Conditions of a Field Chapter include:
 - i. Field Chapter members are included as members of the Host Post.
 - ii. The Field Chapter will not have a Board of Direction but should have a Field Chapter President or Leader who should serve on the Host Post Board of Directors. This individual should be listed on the SAME website as the Point of Contact for the Field Chapter.
 - iii. There are no Bylaws for the Field Chapter, only a charter signed by Field Chapter and Host Post Presidents. A template is available on the SAME website.
 - iv. The Host Post should agree to hold at least one event per year at the Field Chapter location and to provide financial support to the Field Chapter.
 - v. Field Chapters may host events separately from the Host Post.
 - vi. Field Chapters may not hold bank accounts or collect dues. The Host Post will hold funds with separate accounting for the Field Chapter.

Chapter 4: Financial Guidelines

1. Tax-Exempt Status.

- SAME National has been granted tax-exempt status under IRS section 501(c)(3). All Posts, unless separately incorporated, are exempt from federal income tax under SAME National Group Exemption (Group Exemption Number 1278). Group exemption does not include foundations and separately incorporated entities such as scholarship funds.
- Posts are required to obtain a Tax Identification Number (TIN) separate from the National Office and file Federal and State tax forms, as required based on the amount of gross receipts normally received by the Post. Posts need to obtain their tax-exempt status from each state for income. If Posts host major events, exemption from state sales tax could be particularly important if major taxable expenditures are involved.
- SAME National files a Group Exemption Report with the IRS each September listing all the affiliated Posts. This Group Exemption Grants Posts their tax-exempt status, provided the certain requirements are met. The Post Financial Report provides information SAME National needs to file the Group Exemption Report. Posts will lose tax-exempt status if not listed as a subordinate on this report.
- To maintain exemption under SAME National's 501(c)(3) status, all Posts must file a Form 990 Return of Organization Exempt from Income Tax with the IRS. Gross annual receipts will determine which version of the form.

2. Completing the Annual Report and IRS Report. The Post is required to submit an Annual Financial Report to SAME National by **March 31** of each year and must file or extend a Form 990, 9900-EZ or 990-N each year with the IRS by **May 15**. If the Post Financial Report is not received by April 1 until the Financial Report is received, and if SAME National does not receive a copy of the report filed with IRS by **May 30**, SAME National will withhold payment of the Posts portion of dues. Delinquent Financial Reports and IRS Reports are a basis for deactivating a Post. If a Post does not file an annual return for three consecutive years their tax exemption is automatically revoked. To regain tax-exempt status, the Post must file Form 1023 to secure separate tax-exemption which may not be automatically granted by IRS. Please visit www.irs.gov/eo for further instructions and information. To complete the Post Financial Report, go to www.same.org and then the Post Resource Center. Please provide a valid e-mail address for Post Treasurer and the Post mailing address that is used on Form 990.

- **IRS Tax Filing Requirements:** All Posts must file and send copy or confirmation of the filing to SAME National Office: Post Operations. As non-profit organizations, all Posts must now annually file a Form 990 with the IRS - the specific Form 990 that your Post files will depend upon your Post's gross receipts. Please review the IRS page for non-profits for more information and forms: <https://www.irs.gov/charities-and-Non-Profits>
- **IRS Guidance and Forms:** The group exemption number is 1278. This will be needed on IRS Form 990. The specific Form 990 that your Post files will depend upon your Post's gross receipts.

- Posts with average gross receipts for the prior three years of \$25,000 or less file the Form 990-N (known as the e-Postcard).
- Those with higher annual gross receipts than that will continue to file a Form 990 or Form 990-EZ as required for their circumstances by the IRS regulations.
- SAME encourages Posts to consult with a Professional Tax Adviser as they address their IRS filing requirements.

3. Separately Incorporated Funds. SAME does not recommend that Posts separately incorporate Scholarship, Education and Mentoring, or a Special Fund. However, if the Post has a separately incorporated fund, the following provisions apply:

- The Post must submit a separate Financial Report for that fund in addition to the Post Financial Report submitted each year.
- The fund will have a separate Tax Identification Number from the Post. Also, the Post must file with the IRS annually for the separately incorporated fund.

4. Accounting Policy and Procedures:

- Posts should be using standard accounting practices on a cash or accrual basis.
- Posts dues are paid by Electronic Funds Transfer (EFT). It is the Post's responsibility to notify SAME National of any changes to the Post banking information. SAME National must have the current bank account number, transit number and bank name to make the EFT dues payments. Posts should send SAME National a copy of a voided check showing the Post's bank account and routing number if changes in accounts are made. The name and contact information for the Post Treasurer must be kept current.
- The fiscal year for all Posts and SAME National ends **December 31**.
- The Treasurer of the Post, or a designated official to the Post, or Committee designated by the Post Board of Directors, should prepare an Annual budget and have it approved by the Post Board of Directors. Expenditures should be authorized in accordance with the approved budget or by exception in accordance with Post operating procedures.
- All Posts should have proper segregation of controls over the expenditure process, that would require a person other than the check signer reconcile the bank statements, or dual signatures are required on all checks.
- If the Post conducts events to raise money solely for the Education and Mentoring Fund or Scholarship Fund, the net revenue from the event must be placed in the Education and Mentoring or Scholarship Account. However, events can be conducted to put partial proceeds into the Education and Mentoring Fund, but care must be taken into account how the event is advertised.
- All Post accounts should be established using the Post Tax ID Number. The filing of a tax return should reflect the overall revenue and expenses of the Post regardless of the nature of the revenue or expense.

5. Standard Accounts: The Post should establish standard bank accounts, such as checking and/or, savings/money markets, which shall be considered under the control and direction of the Post Board of Directors. Administration of bank accounts should not be delegated to other individuals or committees unless specifically designated in the Post Bylaws. Additional accounts may be established for other specifically designated purposes, such as a Scholarship or Education and mentoring fund. The Post Board of Directors should establish the level of authority for the Treasurer to sign checks, and an approval process for expenditures. Two signatures are recommended for checks over an amount established by the Board.

- **Operating Account.** This account supports the ongoing operations of the Post. This account needs to be liquid so that checks can be drawn from either a checking or money market account.
- **Education and Mentoring or Scholarship Accounts.** All Posts have the option to maintain their own Education and Mentoring Funds, or to invest in the SAME Foundation. The benefit of the SAME Foundation is it mitigates the Post's risk of investment decisions and management and allows Posts to leverage the lower fees dues to the overall size of the investment. Money invested in the SAME Foundation is still under the spending direction and authority of the individual Post. If the Post opts not to use the SAME Foundation, SAME National prefers for Posts to establish an Education and Mentoring Fund Account rather than a Scholarship Account to allow the Post more flexibility on the use of the funds to support a variety of education and mentoring initiatives. This account should include all funds not required for the Operating Account or for the purposes of sponsoring the education and mentoring activities of students and members. Once funds are placed in this account, they may be used only to support Post Education and Mentoring activities. If the Post intends to establish a amount from which the dividends and interest will be used each year to support education and mentoring activities, the corpus should be invested in fixed revenue securities that will provide dividends and interest. A Post has a fiduciary duty to appropriately manage the funds and should therefore seek non-profit investment advice if considering investments beyond CDs and mutual funds. The Education and Mentoring Fund should be used solely for supporting education and mentoring activities of the Post, including but not limited to:
 - I. Scholarships to college students.
 - II. Sponsor high school students to attend SAME's Engineering & Construction Camps and Society events and sponsoring high school or college STEM related programs and competitions. (e.g., MATHCOUNTS)
 - III. Stipends for Young Members and Enlisted members to pursue professional certifications or attend SAME events.
 - IV. Stipends for student members to attend SAME conferences.
 - V. Expenditures for fund-raising activities for the Education and Mentoring Fund.

6. Post Financial Responsibilities: The Board of Direction is responsible for ensuring the financial integrity of Post accounts. The Treasurer should have specific responsibilities defined in the Post Bylaws, be knowledgeable of accounting practices, and be willing to

commit the time to maintain accurate accounting of all revenue and expenses. The Post should establish a Finance Committee to oversee any investments. The Board of Direction must ensure an audit of Post accounts is conducted annually (before March 31), or whenever the Treasurer changes, and the results reported to the Post Board of Direction.

- The Treasurer should not be the sole signatory for Post accounts.
- All disbursements over \$500 should require two signatures.

7. Specific Responsibilities of the Post Treasurer:

- Prepare and submit the Annual Financial Report to National Office by March 31 for the previous fiscal (calendar) year. If Education and Mentoring Fund is separately incorporated, please note it on the annual report.
- Preparation of Annual Budget for approval by Post Board of Direction.
- Maintain Audit trail for all revenue and expenditures.
- Provide reports on revenue and expenditures to the Post Board of Direction at a minimum of quarterly at board meetings.
- Treasurers are responsible for completing any required state reporting forms such as
 - Filing IRS Form 990, 990-EZ or 990-N and State Tax Returns as required by their State Tax regulations by May 15 and providing a copy or confirmation to SAME National.
 - Coordinate annual audit as described below.
 - Formal Transfer of Records to Successor.
- Treasurers should serve no more than three consecutive years without a break.

8. Financial Policies:

- **Collection.** Only SAME National is authorized to collect dues. Posts have no authority to collect dues or other assessments from members. If dues are erroneously sent to the Post, the Treasurer should not deposit the check and forward it to the National Office. Dues distributions from SAME National to Posts are considered “unrestricted” and may be used for either operating expenses or transferred to funds when not needed for operational needs. All receipts, including donations to any special funds, shall be considered as gross revenues for tax reporting purposes.

BEST Practice: Posts should acknowledge any donations with a confirmation email or letter that includes the name of the donor, amount, date and a confirmation that no goods or services were received in exchange for the donation.

- **Fees.** Posts may establish fees for the various events and activities it sponsors and should differentiate rates between different categories of members.
 - **Member of the Post**
 - **Member of SAME**
 - **Young Member/Enlisted**
 - **Non-members** - Fees for Non-members should be substantially higher than for members to encourage membership and some events may be open only to members, as appropriate. Posts also may establish a first-time guest registration fee to introduce potential new members to SAME.

9. Fundraising: Engage in creative activities that involve the local community as well as your Post members to build an Education and Mentoring Fund.

10. Internal Controls. The Post must establish controls to ensure transactions are authorized and assets are properly safeguarded.

- The Board should generally approve expenditures based on an approved budget—unbudgeted expenditures over a specific dollar amount (set by the Board) should not be allowed without Board approval (which can be accomplished by email).
- The Post must establish accountability for collecting and depositing funds at Post sponsored functions. Maintain supporting documentation for funds collected (e.g., number of people attending, total funds collected, and deposit record) and cash disbursements.
- The Board of Directors should designate specific individuals with the authority to commit funds and to approve invoices before they are submitted to the Treasurer for payment. Approvals should be documented and level of check signing authority established (e.g., require second signature on cash disbursements over a certain dollar amount, typically \$500).
- Posts should ensure related party transactions (i.e., vendors who have a relationship with a member of the Board of Direction) are approved by an individual independent of the transaction and approved by the Board of Direction to avoid conflict of interests.
- Posts shall **never** set up personal accounts using personal social security numbers and shall **never** issue personal loans. Posts shall use only the Post Tax ID Number to set up its accounts.
- Posts should set up accounts in established institutions that are federally insured. OCONUS Posts must have a U.S. based bank account.
- The Board of Directors should approve a fiscal year budget before January 1 to guide the posts in its expenditures. Variances in the budget should be reviewed periodically by the Board of Direction. The budget should only be adjusted for major changes so that the Board can monitor performance against the original fiscal yearplan.
- Document internal accounting controls. Written procedures and policies serve to train Post

volunteers and assist with the review of accounts in the annual audit.

- Posts must ensure that all revenue and expenditures are consistent with SAME's tax exempt purpose.

11. Audit. Posts must conduct an annual audit preferably by the end of February each year but no later than March 31 when the Annual Report is due to SAME National. Accounts must also be audited within 30 days of a change in Treasurer. The audit may be performed by an internal audit committee of at least two members appointed by the President and approved by the Board, who are independent of any financial responsibility. At least one audit committee member should be knowledgeable of accounting practices. Another audit option is for the Post to hire an independent professional or company to perform the audit, prepare the SAME Financial Report and IRS reports.

12. Role of the Finance Committee: Unless the assets are invested with SAME Foundation, the Post may have the Finance Committee oversee and recommend to the Board the investment strategy. The Finance Committee should consider the SAME Foundation for its investments.

- The Finance Committee should develop an investment policy to guide the Post investments. Such policy should indicate that the goal of the Post is to minimize the risk to principal while earning interest or providing capital appreciation and should establish a general portfolio allocation of fixed revenue and equity investments.
- The Finance Committee should periodically review the Posts investment portfolio against its investment policy and reallocate as appropriate.

Chapter 5: Programs and Socials

1. **Opening Ceremony.** Posts should include the Pledge of Allegiance to the National Colors – Red, White, and Blue at the opening of each meeting or activity (excluding social events). The American Flag and Post Flag (or banner) should be used at all events. Invocations are optional, but if used, should be non-denominational since SAME is composed of individuals of all religious faiths.
2. **Post Programs Committee:** Led by the Programs Director, the Post Programs Committee will plan, develop and oversee the programs presented at Post meetings, events, and workshops. These may include both regular Post meetings, workshops and joint meetings with other Posts or professional associations and societies. The committee should review and implement a schedule of programs at least six months ahead; preferably, programs will be scheduled for an entire calendar year to align with the *SAME Strategic Plan* and the Streamer program. The committee chair selection is the responsibility of the Post President.
3. **Program Concepts.** There is no one solution to designing Post programs. The Programs Committee must determine the target audiences and design programs to meet their needs. Having a monthly meeting to which only a small portion of the Post membership attends is not the best approach to involving and serving the Post membership. Be innovative, creative and try new approaches—if they do not work, give it more time, or try another approach.
 - a. Think about ways to draw public sector participation, considering topic, price, time and location.
 - b. Variety is important for program types and locations, since different members enjoy doing different things. Make Post activities a magnet for **all** members and remember, people are involved in any society for these reasons:
 - i. Networking with others in the profession
 - ii. Professional and technical development
 - iii. Relationship building in the industry
 - iv. Industry knowledge
 - c. Always have a contingency plan for a back-up speaker, particularly if the invited speaker for a Post program is in a high-ranking position, such as a senior government official. Sometimes unexpected scheduling conflicts arise for people in these positions.
 - d. Exchange information with other Posts, even those outside of the region. This helps introduce new ideas to other Posts and to reap benefit from their new ideas.
 - e. Webinars are a cost-effective way to communicate valuable information to your target audience. Web-based programs enable presenters to conduct virtual seminars for anyone to participate as long as they have an internet connection. Webinars can produce revenue for the Post with a sponsorship.
 - f. Reservation procedures should be spelled out in **every** meeting notice. Since participation can turn into membership, encourage members to bring guests. Introduce guests at meetings to make them feel welcome.

- g. Establish a reminder system for Post meetings and other events. Members should receive notices at least one month before events. As the event date approaches, an e-mail reminder keeps the event in members' minds and helps drive registrations.
- h. Posts are encouraged to hold periodic joint meetings or events with other Posts as well as conduct joint meetings or workshops each year with other professional associations. The purpose of joint meetings is to provide value to members of both organizations and facilitate synergy between the organizations' membership. Longer technical programs with Professional Development Hours (PDH) are a better forum for joint events.

The list of all the organizations that have a formal relationship with SAME National is available on the SAME website: <https://www.same.org/Grow-Professionally/Strategic-Partnerships>

- i. In many areas, national "Engineers Week" ends in February with an Awards Dinner for members of engineer organizations. SAME should be represented at such events. The Post should decide on how to participate locally by going into schools, promoting engineering activities or sponsoring Engineers Week events.
- j. If geographic conditions permit, Posts may want to consider the possibility of hosting joint meetings with other Posts or Field Chapters in the vicinity. The "lead" Post should be clearly identified, so that responsibility for the program and other arrangements is established.

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

- a. Understanding why members attend Post meetings, events, or activities
- b. Selecting convenient times and places for Post events and meetings
- c. Determining interest in types of meetings, workshops, technical tours, and events
- d. Identifying technical and general topics of interest
- e. What factors may limit member participation

5. Potential Speakers and Topics. Speakers and topics should reflect a variety of specialties within engineering and related fields. Presentations on local capital improvements, programs and projects that directly affect members in your area also will draw good attendance. Occasional "just for fun" programs with motivational speakers, humorists or other notables provide a relaxing atmosphere for members and draw potential new members as well.

6. Public Sector Program Briefings. Posts should plan on hosting briefings that forecast anticipated federal, state, county, and city construction projects in the area for the coming year and future year's programs. Briefings should feature program and contracting speakers who can provide information on doing work with their agencies.

7. Field Trips. Some of the most popular activities for Post members are field trips to construction sites or recently completed engineering projects. These types of functions are especially interesting to Student Members. Before any field trip starts, a safety briefing should be given. If necessary, arrange for an insurance certificate to address any liability issues. Please contact the SAME Post Operations Specialist for an insurance certificate template.

8. Socials. The Socials Committee plans social and is limited by the interest and imagination of the

members, budget, and the private and commercial facilities available in the area. It is good practice to include spouses and guests in at least one social event per year. The following types of programs have been of interest—and successful—at various posts.

- a. *Troop Recognition.* Plan an event to recognize military, civilian and contractors who have been overseas.
- b. *Banquets.* Many locations offer a range of officer clubs or elegant and interesting restaurants serving a variety of domestic, international, or ethnic foods. Such an event can be tied in with a meeting of general interest, such as the installation of Post officers, a visit from the Regional Vice President (RVP) or the presentation of Post Awards.
- c. *Holiday Parties.* A nice idea but watch for overloaded social schedules during the holiday season; some clubs and restaurants require banquet room reservations as far as 12 months in advance.
- d. *Golf Outings or Tournaments.* These have great appeal for many members and are a great way to raise funds for Education and Mentoring Programs.
- e. *Other Ideas.* Wine tasting parties, river cruises, sporting activities, cookouts, theatre, and many other events are opportunities for a Post with imagination.

9. Professional Development Hours: Awarding PDHs for Post and regional activities is an appropriate, and highly recommended, method to provide professional development support to members. While there are administrative requirements, they are not terribly burdensome. The term “professional development hour” or “professional development hours” (both abbreviated PDH) is defined by the National Council of Examiners for Engineering and Surveying (NCEES) as a contact hour (nominal) of instruction or presentation. Each Post should be giving out PDHs for programs that follow the guidelines as outlined in the ***Guide to Continuing Professional Competency*** on the SAME website. PDH certificates may be awarded using the following guidelines (excepting where a state has established different or more stringent criteria):

- **1 PDH** = a **minimum** of 50 minutes for presentation and/or participation per hour.
 - **.5 PDH** = a **minimum** of 30 *uninterrupted* minutes for presentation and/or participation.
- a. ***Technical Workshops.*** Posts are encouraged to host two- to four- hour Technical Workshops that offer individuals who are not attending luncheon meetings to participate in a SAME sponsored event that provides PDHs without the networking opportunities of a luncheon meeting, and without the cost of the lunch. Charging a nominal fee will provide the Post with some revenue and a service to SAME members.
 - b. ***Continuing Education Courses Sponsored by SAME National.*** Posts should consider periodically (annually or semi-annually) hosting a one-day continuing education course using SAME National CEP instructors. SAME National will assist with the logistics for shared profit or a Post can choose to handle all the logistics themselves.
 - c. ***Webinars.*** Posts should consider using webinars to leverage the internet’s capacity to deliver continuing education at a low cost (no travel costs or time away from the office). A 60-minute webinar, offering 1 PDH, is an excellent way to reach the many Post members who are unable to attend Post meetings. SAME National can assist with the logistics of

setting up these opportunities.

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

10. Working with Other Organizations:

- a. **Public Agencies.** Positive relationships with the Uniformed Services within the local Post area are necessary along with National Guard, Reserves and other state and local public agencies in a proximity to the Post.
- b. **Academic Institutions.** These institutions can offer speaker options, interdisciplinary activities or discussion groups, and many other opportunities. These institutions should be encouraged to join as Academic Members to include faculty and staff. Refer to the College Outreach Committee webpage for information regarding working with college students.

11. Young Professionals:

- a. Young Professionals should be fully integrated into the leadership positions and committees of the Post. The Post should fill at least one Board position with a Young Professional.
- b. Young Professionals are defined as those members of SAME who are 39 years or younger.
- c. The Young Professionals Committee conducts programs and events for Young Professionals, dealing with soft skills, networking, professional development or professional registration. This includes the planning, development, coordination, and execution of the meeting or event, plus any follow through required.

12. Enlisted/Noncommissioned Officers (NCOs). Posts in the vicinity of military installations should encourage enlisted member participation. Enlisted member participation can be drawn by planning programs with a focus on activities of interest to them or planning separate activities that will satisfy their professional development needs. The Post is encouraged to elect an enlisted member to serve on their Board of Directors. The Enlisted COI may serve as an additional resource for the Post.

Chapter 6: Communications

1. **E-mail Lists:** To create targeted email lists, Posts may access and download Post rosters from the SAME website to a Microsoft Excel spreadsheet. Designated Post Leaders have access to view Post membership information via the Post Leader Dashboard found on their member account.
2. The contact information on the rosters is dynamically linked and pulled from the membership database at SAME National. Information can be updated by:
 - a. All current individual SAME Members can update their membership record online via their member account or they may contact SAME National for assistance at the following email: member@same.org.
 - b. Sustaining Member Representatives must contact their company's Primary POC for changes to their membership record or they may contact SAME National for assistance at the following email: member@same.org.
 - c. Non-members should be kept on a separate list from paid members, so that Posts may track membership more easily.
 - d. Member lists may only be used for official Post activities. They may not, under any circumstances, be sold or provided to any commercial interest, or non-profit organization.
3. **Website:** Each SAME Post is required to have a current website. To be considered current, the website must have at a minimum:
 - a. List of current Post Officers and Directors with contact emails
 - b. Calendar of events with times and location of events/meetings
 - c. "Join SAME" with link to the SAME National website (www.same.org)

SAME National offers website hosting and maintenance platforms for Post websites at no cost. The website service includes use of a design template, hosting and software maintenance and updates. Posts are expected to update and maintain their own sites or have SAME National serve as the overall "webmaster" and update the site with content provided by the Post. Content updates must be provided on a regular basis—at least once monthly.

Posts that opt to develop their own websites are responsible for regularly updating the material presented, for creating a link to the SAME National website and for ensuring compliance with SAME website content and communication standards. For details on SAME-hosted websites, contact webmanager@same.org.

4. **Communications:** Email newsletters or communications are important for getting the "word" out! Post communications styles vary widely across SAME. The main objective is to have, at a minimum, a communication that provides the essential elements of "who, what, when, where" for Post meetings and events.
 - a. Many Posts have developed newsletters from one-page meeting flyers into a comprehensive Post newsletter of four to eight pages. The newsletter (or flyer) should be sent directly to all Post members, so everyone can count on being informed. Newsletters should not be sent to non-members since this detracts value for dues-paying members. Meeting announcements, separately produced from the Post newsletter, may be sent to non-members to promote participation and membership growth.
 - b. Make sure newsletters and meeting announcements are sent well in advance of meetings to allow members to schedule attendance. In general terms, members should receive newsletters and announcements at least four weeks in advance of a meeting. More lead time may be necessary for special functions or activities. Posts should ensure that their RVP, adjacent Post Presidents, and prospective Post members are regularly notified of meetings.
 - c. For larger events Posts may request a member from the National Leadership to attend and speak at their event. Requests should be sent at least 45 days in advance of the event to posts@same.org
13. **Social Media:** Publicize announcements of meetings, awards, and other recognition items on your Post's social media sites such as LinkedIn, Facebook, Twitter, or Instagram. You may also post information about Post events on the SAME National LinkedIn Group utilizing the following link: <https://www.linkedin.com/groups/2633/>

Chapter 7: STEM K-12 and College Outreach

1. **K-12 Outreach:** The Community Outreach Committee organizes STEM K-12. The following are suggested SAME National K-12 outreach programs:
 - a. **Engineering and Construction Camps.** The annual SAME Engineering & Construction Camps provide Posts with an opportunity to mentor students interested in engineering or a related field. Additionally, sponsoring students to attend the camps may help increase membership. Posts can also sponsor mentors at the camps. More information may be found online: www.same.org/stemcamps.
 - b. **Science Fairs and Career Days.** Many schools seek judges and exhibitors for science and STEM fairs. SAME Posts can provide judges and help set up such events. These are a great way to make relationships with schools and to publicize the SAME mission and its dedication to mentoring. To learn more, visit the K-12 STEM COI page: <https://www.same.org/STEM-Community>.
 - c. **Community Service.** Check your local area for specific information about these and other programs that provide a great way to get Student Chapters engaged in an activity while networking with professionals. There are many worthwhile organizations. To learn more, visit the K12 STEM COI page: <https://www.same.org/STEM-Community>.
 - d. **ACE Mentor Program.** Founded in 1994, the ACE Mentor Program of America (ACE) is a free, award-winning, after-school program designed to attract high school students into pursuing careers in the Architecture, Construction and Engineering industry, including skilled trades. ACE is a federation of more than 70 affiliates (chapters), operating in 37 states and largely based in metropolitan areas, which deliver the program. A national office coordinates and assists affiliates. To learn more, view the “STEM Partnership” section of the K12 STEM COI page: <https://www.same.org/STEM-Community>.
 - e. **DiscoverE.** DiscoverE is the backbone organization behind Engineers Week (established 1951), Introduce a Girl to Engineering Day (established in 2001), World Engineering Day (established in 2016, formerly known as Global Day of the Engineer), the Global Marathon (established in 2005), and the Future City Competition (established in 1993). DiscoverE programs and resources have been adopted and adapted by individuals and organizations around the globe. To learn more, view the “STEM Partnership” section of the K12 STEM COI page: <https://www.same.org/STEM-Community>.
 - f. **MATHCOUNTS.** The MATHCOUNTS Foundation is a 501(c)3 non-profit organization that reaches students in grades 6-8 in all U.S. states and territories with fun extracurricular math programs. More than 160,000 students participate in MATHCOUNTS each year. MATHCOUNTS runs 3 programs—the MATHCOUNTS Competition Series, National Math Club and Math Video Challenge—and also creates numerous free math resources, available at www.mathcounts.org. To learn more, view the “STEM Partnership” section of the K12 STEM COI page: <https://www.same.org/STEM-Community>.
 - g. **National Consortium of Secondary STEM Schools (NCSSSS).** A strategic partner of SAME, the National Consortium of Secondary STEM Schools (NCSSSS) was established in 1988 to provide a forum for specialized secondary schools focused on science, technology, engineering, and mathematics (STEM) disciplines to exchange

information and program ideas. Posts are encouraged to engage member schools

directly and reference this MOA to share opportunities and expand the aperture of STEM careers for our youth. This partnership represents another tool for developing future engineers through the STEM pipeline. To learn more, view the “STEM Partnership” section of the K12 STEM COI page visit: <https://www.same.org/STEM-Community>

- h. **SkillsUSA.** SkillsUSA empowers its members to become world-class workers, leaders and responsible American citizens. We improve the quality of our nation’s future skilled workforce through the development of SkillsUSA Framework skills that include personal, workplace and technical skills grounded in academics. Our vision is to produce the most highly skilled workforce in the world, providing every member the opportunity for career success. To learn more, view the “STEM Partnership” section of the K12 STEM COI page visit: <https://www.same.org/STEM-Community>.
2. **Scholarships.** SAME Posts collectively award more than \$1.2 million annually for academic scholarships to student members. Posts looking to establish or grow your scholarship program can access the Scholarship Program Guidelines at: <https://www.same.org/scholarships>.
3. **Student Members.** Student members represent the next generation of innovative STEM thinkers ready to take on society’s challenges. Recognizing the need to cultivate this asset, SAME offers FREE membership to all full-time students, under age 25, enrolled in high school, 2-year or 4-year colleges and universities (through the undergraduate level), trade schools, and military academies. Posts are encouraged to recruit student members and host programs or activities that engage them in engineering, architecture or construction themes, careers, and projects, like aiding with job searches and resumes; assisting with student competitions (e.g., Concrete Canoe races); and helping to arrange field trips or other engineering-related activities. SAME is also creating a student experience at our national conferences (JETC, FMW, PLW, SBC). Posts can consider sponsoring students to attend. More information can be found online at: www.same.org/student-members.
4. **Student Chapters.** Posts are encouraged to engage with students at local colleges, universities, and trade schools to foster their pursuit of careers in the A/E/C field. Toward this goal, Posts can sponsor a Student Chapter or Chapters at a local college or university that has a program for students in engineering, architecture, or construction. Such arrangements should be formalized with a creation of a Student Chapter Charter. For more information on establishing and maintaining a Student Chapter, visit www.same.org/student-chapters.
5. **Virtual Student Chapter.** For students who want to explore more professional development options, SAME has formed the Virtual Student Chapter (VSC). The Virtual Student Chapter is a boundaryless chapter that provides virtual professional development opportunities for all students at the high school and college level to foster engineering leadership for our nation. VSC webinars and events are open to all students. To find out the latest VSC webinar schedule, go to: <https://www.same.org/college-outreach>.
6. **Competitions.** SAME student members represent the next generation of innovative STEM thinkers ready to take on society’s challenges. For this reason, the Society will hold an annual challenge competition to identify and recognize the next great ideas. More information can be found online at: www.same.org/competitions.
7. **Mentoring.** Mentoring is a key component to SAME engagement efforts to maintain

leadership in the A/E/C industries and ensure the country has the STEM professionals it needs to secure the nation. Mentoring also offers an excellent opportunity for leader development by the mentor and the mentee. From camp mentoring to mentoring of LDP participants to engaging with student members and young professionals at SAME national events, SAME is working to advance mentoring across the Society. More information can be found online at: www.same.org/mentoring.

Chapter 8: Membership

- 1. Post Membership Committee.** The Post Membership Committee are the Post Membership POCs who lead recruitment and retention efforts, relying on the support of SAME National. SAME has a very diverse membership, and Posts should designate a lead person for Individual Members and a lead for Sustaining Members. If the Post has the need, a POC can be designated for Public Agencies, Noncommissioned officers, Young Members, or other segments of SAME membership.
- 2. Post Membership Reports:** All Post officers have access to the member reports for their Post. Login to your member account using your email and password.

You may download Post rosters in excel format from the Post Leader Dashboard. Rosters that are available include:

- a. Individual Members (This does not include any company or agency representatives, or students or faculty advisors.)*
 - b. Company and Agency Representatives (Including Sustaining Reps, Public Agency Reps, Academic Reps)*
 - d. New Individual Members*
 - e. Sustaining Member Company and Agency National POCs*
 - f. Expired Individual Members*
 - g. Expired Sustaining Member Companies and Agencies*
 - h. Email only roster – this list is GDPR compliant and only contains email addresses of all Post members.*
- 3. Membership Marketing Materials.** Posts may submit requests for membership marketing materials, issues of TME, pens and SAME lapel pins. Please email your request to: posts@same.org.
 - 4. Retention:** Retention efforts begin the moment the member joins SAME. A new member's first experience can determine whether they renew their membership. Personal contact helps to increase membership retention. Use your Post roster to identify membership areas in need of improvement and develop membership outreach programs.
 - 5. Individual Membership Development Initiatives.** The Post Welcoming Committee or designated individual greets all new Post members. Ideally, a designated individual will personally invite each new member to the next Post event and answer any new member questions. Other best practices include:
 - a. Targeted E-mails*—send targeted e-mails to your members to keep them informed of your activities, events, and efforts.
 - b. Focus Groups*—conduct special membership focus groups occasionally to learn what your

Post members need or want.

- c. *Mentoring System*—Develop a mentoring system for Young Members and Student Members. The goal is to provide the new member a resource for their questions and to

help them develop lasting member relationships.

- d. *Engage your Members*—Studies indicate that individuals actively engaged in their organization maintain their membership and become membership advocates.
- e. *New Member Orientations*—Host a new member orientation quarterly. This networking opportunity will help acquaint your new members to Post leadership, in addition to learning about Post and Society history and culture.
- f. *Contact Sheets*—Provide contact sheets containing e-mail addresses and/or telephone numbers of Post leadership.
- g. *Member Surveys* – Periodic surveys of member needs gives members the opportunity to have their voice heard and provides valuable feedback for Post leadership.

6. Company, Public Agency, and Academic Membership Initiatives.

- a. *Meet and Greet*—make arrangements to personally meet with representatives from the new Member companies and provide a flyer or list of member benefits.
- b. *Participation*—Encourage Company Member firms to submit white papers or technical papers and presentations at Post programs.
- c. *Recognition*—Recognize Member companies, public agencies, colleges, and universities for accomplishments. Allow these organizations to showcase at meetings; for example, create a “Company Member Spotlight” during special meetings.
- d. *Networking*—Networking is a key benefit to Member companies. Develop programs with enough time for people to network before and after or for day long programs, in between sessions.

Chapter 9: Awards & Recognition

1. **Post Awards and Recognition Committee.** The Post Awards and Recognition Committee establishes an awards program that represents and rewards the diversity of membership of the Post. Some of the awards should feed nominations to the SAME National Awards program. Nominations for national awards are due in January each year. Press releases to local media and other professional organizations about the recipients are a good way to get recognition for the individual or company, as well as SAME.
 - a. Plaques, pins and gifts are available for Member recognition programs from the online SAME Store. There are several different plaque sizes and styles available. Some feature the SAME insignia or come with an engraving plate. Post Presidents and Secretaries are encouraged to plan and order awards early. Lead time for engraving locally must be considered, if ordering an item with an engraving plate.
 - b. Certificates with the SAME insignia are available in both portrait and landscape format from the online SAME Store at no charge. These certificates may be used with all laser printers. Certificate holders in wood with a clear insert attached and a linen paper folder are also available from the online SAME Store. Quantities of 10 folders are available to each Post yearly at no charge; there is a nominal charge for any supplemental orders.
2. **Regional Awards.** RVPs may award medals, known as “RVP Medals”, to Post members who have made significant contributions within the region. Post Presidents should consult with their RVP about presenting this award to a Post member. This is a very prestigious award, presented in very limited numbers within the region, each year. RVPs also may use SAME Certificates of Appreciation or RVP coins to recognize outstanding contributions at the Post or Regional level.
3. **National Awards.** Nominations for awards are typically due around the end of January of each year, and a vast majority of awards are presented during a special honors luncheon at the Joint Engineer Training Conference & Expo (JETC), held each spring. The Post Awards and Recognition Committee should review the national awards and submit nominations.

Chapter 10: Insurance

1. **SAME National Coverage.** Posts have insurance coverage from SAME National policies. Posts may require additional coverage for special events as requested by the venue. Posts may purchase coverage through SAME National's policy.
 - a. General Liability coverage is for bodily injury or property damage to a third party (third party is an invited guest or general public, NOT coverage for Post members or employees). Some activities are excluded from this coverage.
 - b. Directors and Officers (D&O) coverage is for volunteer leaders. D&O coverage is not automatic for each Post. For this coverage, the Post can secure its own insurance, choose to go without D&O coverage, or submit an application to be added to SAME National D&O policy (subject to underwriting review). If the Post is separately incorporated, upon receipt and review of the application, a quote will be provided for a separate policy as separately incorporated chapters are not eligible for coverage under the National policy. Criminal offenses and intentional acts are also not covered under D&O insurance.
2. **Certificate of Insurance.** Posts will need a Certificate of Insurance from SAME National if a facility in which the Post is holding a meeting, workshop, or conference requests such a certificate. The facility may require the Post to show it as an "Additionally Insured" party. To obtain a certificate showing the coverages:
 - a. E-mail the Certificate of Insurance Request to posts@same.org
 - b. If the event falls outside the general administrative need, a Special Event Questionnaire Form may be required. SAME National will provide the form for additional information. There may be an additional premium for special event coverage.
 - c. Once the insurance agent has generated the Certificate of Insurance, they will e-mail a copy of the certificate to the requesting Post and SAME National.
3. Contact SAME National Finance Department for all other questions regarding insurance coverage.

Chapter 11: Best Practices

1. Governance, Ethics and Organization:

- a. Elections for officers should be held no less than 45 days prior to the end of the current officer terms. Change of Post Officer Report is due to SAME National office 30 days after the change in officers. **All officers must be a SAME member in good standing.**
- b. **Recognition of Outgoing Post Presidents** - Incoming Post Presidents should ensure that outgoing officers are recognized. A customizable certificate of recognition is available in the Post Resource Center Document Exchange. RVPs may also recognize outgoing Presidents and/or officers.
- c. **Student Outreach** - Posts should provide funding for at least one student leader to attend an annual national SAME event, such as JETC. (See the *College Outreach* webpage at www.same.org/collegeoutreach for information on establishing and maintaining a Student Chapter.)

2. Administration:

- a. Submit any information on major events that have a broad appeal, such as Industry Government Engagement (IGE) events, Small Business events etc., to the SAME national online calendar, so that any SAME member may take advantage of the education and networking opportunities.
- b. Check the SAME Calendar of Events online to preclude major conflicts with national, regional, or other Post events.
- c. Posts are requested to not schedule major events in May when SAME National hosts the annual Joint Engineer Training Conference & Expo (JETC) or the week of the Small Business Conference (SBC) in November.

3. Financial Guidelines:

- a. Treasurer should not be the sole signatory for Post accounts. All disbursements over \$500 should require two signatures.

4. Programs:

- a. SAME Post leaders are encouraged to publicize the recent activities and accomplishments of their Posts by submitting articles and high-resolution photos for publication in the various SAME publications including, *Real TIME* newsletter, [Bricks and Clicks](#) blog and The Military Engineer (TME) magazine. Post leaders may submit their articles in Word format with up to three photos to the editor at editor@same.org.

5. Awards & Recognition:

- a. Model some of the Post awards after the national awards so the Post award recipient can then be nominated for the national award. The complete list of national awards is on the SAME website.

Appendix

Governance, Ethics and Organization

- [2025 Strategic Plan](#)
- [SAME Bylaws](#)
- Code of Conduct
- Post Officer Installation Procedure
- Officer Installation Pre-Checklist

Administration

Field Chapters

- Charter Template

Financial Guidelines

- [501C3 Letter](#)
- [Sample Audit Report](#)
- [IRS W-9](#)

Communications

- Social Media & Email Best Practices

Insurance

- [Insurance Certificate Request Form](#)

CODE OF CONDUCT

SAME is committed to providing a safe and welcoming experience for all participants, regardless of race, ethnicity, disability, religion, political affiliation, gender, gender identity or expression, sexual orientation, and any other characteristic protected by applicable federal, state, or local laws, regulations, or ordinances. SAME does not tolerate discrimination, intolerance, harassment, aggression, or ill-will of any kind, whether presented in-person, digitally, or via another method.

When engaged in SAME activities or representing SAME, SAME expects all members, participants, sponsors, employees, and staff to:

- Maintain the highest professional standards of ethical behavior.
- Respect the dignity, health and safety of themselves and others.
- Be positive, friendly, and welcoming to others.
- Support diversity and inclusion.
- Attend in-person meetings and events only when in good health.
- Maintain the confidentiality of Society business and its members. Directories, mail lists and membership information shall be used only for their expressly stated purpose.

Consequences of Code Violations

Violations of this Code will not be tolerated. When suspected violations are reported, we act. Violators are subject to remedies determined as below. In addition to other remedies, in the case of in person events, violators are subject to expulsion from the event, at SAME's sole discretion, without refund. Further, SAME Bylaws specifically address membership termination for cause (Article III, para 5) and SAME Ethics Standards (Article XI, para 3).

Reporting Alleged Code Violations

Alleged violations will normally be reported at the level at which they occur (i.e.. Post, Region, National). Post or regional leadership can elevate issues to a higher level for assistance or resolution at their discretion.

Resolution of Alleged Violations

Alleged violations will be remedied at the lowest level possible. The SAME Executive Director has the national level authority to resolve alleged violations of this code, including lower-level Post violations that are elevated to National. If National level resolution is required, the SAME Executive Director, or his designated inquiry official, will gather all necessary facts, including an opportunity for the alleged violator to present information both in writing and in person. Based on that inquiry, the SAME Executive Director will make a final determination or recommendation of corrective action on the matter. The Executive Director's determination can be appealed to the SAME National President, assisted by the National Leadership Team. The SAME National President will then make a final determination on the matter. Termination of SAME membership remains the authority of the SAME Executive Committee (SAME Bylaws, Article III, para 5).



INSTALLATION OF OFFICERS

- 1) The presiding officer (such as the outgoing Post President) introduces the installing officer who is normally a Society officer or director (such as an RVP), or a senior member of the Post.
- 2) The installing officer asks the new officers (except the President-Elect) to come forward and stand at his/ her left in this order: Vice President, Secretary, Treasurer, and Directors. (If there are additional officers, they should form in the line at the appropriate places.)
- 3) The installing officer introduces these newly elected officers and asks them as a group: "Do you pledge yourselves to support the Society's *Strategic Plan* and carry out faithfully the duties of the offices to which you have been elected or appointed?"
- 4) All of the new officers' respond: "I do."
- 5) The installing officer asks the outgoing and new President to come forward. (They do so and stand at the "installer's" right; the new President next to the "installer.")
- 6) The installing officer asks the outgoing President to present the Post Charter and Post Bylaws to the President-Elect. (This is done.)
- 7) The installing officer asks the new president: "Do you pledge yourself to support the Society's *Strategic Plan* and carry out the duties of the President of the _____ Post to the best of your ability?"
- 8) The new President responds: "I do."
- 9) The installing officer then states: "I now declare the newly elected officers and directors of the _____ Post to be duly installed."
- 10) The installing officer may then make any appropriate remarks about the ceremony, the outgoing group, or the newly installed group. These may include laudatory remarks about the Post's accomplishments, or perhaps challenge the newly installed group to achieve certain goals or objectives.
- 11) By prior mutual agreement, either the presiding officer, or the outgoing or new Post President, then takes control of the meeting to close and remind the members of the next meeting date, time, and location



Officer Installation Pre-Checklist

- SAME Membership is active
 - If this is in question, please check the member directory or reach out member@same.org to confirm active membership
- Post Officer has read the SAME Code of conduct
- Post Officer has not held this position for more than 3 consecutive years
- All information from outgoing officer has been shared with the incoming officer
- Incoming leaders have explored the Post Resource Center
 - Link: <https://www.same.org/post-resource-center>
 - [Key things to explore include: Post Operations Manual, Post Website Management, and 2025 Streamers Program](#)
- Incoming leaders know their login information, as well as how to access the Membership Rosters
- Start and end dates have been communicated with the incoming Officers
- Leadership position has been updated on the POST website and in SAME system
 - Submit new officers here: <https://www.same.org/Online-Forms/Change-of-Post-Officers-Report>
 - If your Post website is hosted by SAME and you need assistance updating your officer listing, please contact webmanager@same.org
 - [If your Post has additional positions you may email the information, including position, officer name and email to Posts@same.org](#)



CHARTER TEMPLATE FOR SAME FIELD CHAPTER

(May Be Modified to Fit Local Needs)

Chapter Name Field Chapter of the **Post Name** Post Society of American Military Engineers

Article I: Name and Chapter Activities

1. The name of the Chapter shall be the **Chapter Name** Field Chapter of the **Post Name** Post, Society of American Military Engineers.
2. Meetings and other activities such as field trips and technical programs shall be developed between the **Post Name** Post and the **Chapter Name** Field Chapter to accomplish the objectives set forth below.

Article II: Objectives

The objectives of the **Chapter Name** Field Chapter of the **Post Name** Post are to:

- a. Jointly achieve the Society's goals and objectives as prescribed in its Strategic Plan;
- b. Link more remote military installations or military Officers with Architecture, Engineering and Construction (AEC) professionals at an established Post;
- c. Responding to the needs of SAME members in remote locations;
- d. At least once per year, conduct a high quality, professionally oriented program or activity at the Field Chapter location that engenders camaraderie, and facilitates and improves communication among SAME members, the military services and private sector AEC firms;
- e. Field Chapter members can meet informally on a regular basis to conduct SAME meetings or activities outside the scope of the host Post.

Article III: Membership

1. **Classification:** Field Chapter members will be listed by their membership type (i.e. individual, sustaining, young member etc.) under the host Post's membership roster.
2. **Dues.** Members pay National dues. The Field Chapter may collect fees for activities as approved by the Field Chapter leadership and/or the host Post.
3. **Discrimination Policy:** No one may be denied membership on the basis or race, color, age, disability, religion, gender, national origin, marital status, political affiliation, sexual orientation or any other unlawful reason.

Article IV: Government

1. The government of the **Chapter Name** Field Chapter of the **Post Name** Post shall be vested in a Leadership Team, which shall consist of at minimum a Field Chapter Point of Contact, but ideally a Director who has a position on the host Post's Board of Direction.

2. The Field Chapter will not maintain any separate financial accounts. The Field Chapter will request funds from the **Post Name** Post, and collect fees from SAME members, as required to support Field Chapter activities. The **Post Name** Post will provide some funding for Field Chapter activities. The host Post and Field Chapter should come to an agreement on the financial support (if any) that the host Post will provide for any Field Chapter activities.

Article VII: Charter Approval and Amendments

The Charter may be initially approved or amended by the **Post Name** Post Board of Direction, following review of the charter or amendments by appropriate parties at the **Chapter Name** Field Chapter, as required to meet the requirements of SAME member activities at the **Chapter Name** Field Chapter.

President, **Post Name** Post

Representative, **Chapter Name** Field Chapter

Social Media and Email Best Practices Guide

Social Media

Social media channels provide a great way to communicate news, information, updates and more with your audience.

Content

Keep it Short and Simple

Length of posts depends on the best practices of the specific channel but should typically be no more than 250 characters for Facebook and LinkedIn. For Twitter, although there is a 280-character count limit, keeping it to no more than 130 characters will make it easy to share.

Include a Call to Action

All posts should include a call to action to incite the reader to engage with the post (share or comment), your chapter (Register for an event or volunteer) or the main association (read an article or view a page on the site).

Style

Due to the limitation of characters by some social networks the following styles are acceptable when posting to social media channels:

- Use contractions whenever possible.
- Shorthand symbols such as >, =, &, % and @ are allowed.
- Use numerals, not words, for all numbers.
- Use am and pm rather than a.m. and p.m.
- No Copyright/Trademark/Registration symbol is used in character-restricted communication.
- Use acronyms whenever applicable making sure to link to content that defines the acronym.

Hashtags

Hashtags allow you to streamline discussions and make it easier for people to follow and engage in conversations related to your topic or event. While extremely popular (and originated) on Twitter they have spread to Facebook, LinkedIn, and many other social channels.

Create hashtags that are short but meaningful – if hashtags are too long they will be harder for people to use in retweets and engagements. If the hashtag has no meaning to the message, it will be easily forgotten and not used.

Graphics/Images

It is always a good rule of thumb to include graphics/images with your post. It has been shown that posts including graphics/images generate more reach and engagement.

Relevancy

The graphic/image you use should be relevant to the content you are posting.

Copyright Policies

It is illegal to post a graphic from any source, including Google Images, to display on social media, even if you credit the source. For this type of usage, you must first obtain permission from the owner in writing. If you are unsure, do not post it.

Links

Social media posts should include a link that directs the user to your call to action – register, view articles or visit a page.

Simple URLs

When posting a link that is not used to generate a preview (see below) the link should be a simple URL or a [bit.ly](#) link. This is the best way to post links to social channels and allows you to easily track traffic to the link.

Generated Link Previews

When posting, allow the link preview to generate and then delete the link from the text. Replace the preview thumbnail with an appropriately sized graphic or photo. Then, adjust *Title* and *Summary* by clicking on that text and changing the wording to best fit your topic.

Posting

When crafting your post, keep in mind that social media profiles are viewed as an official voice of your chapter group, and you should always use the pronoun “we.”

Frequency

There is a lot of noise and a continuous stream of information being posted. Plan and schedule your posts with the use of a free platform like Hootsuite. It is good to put out reminders (at least once a week) to catch those fans/followers that may have missed previous updates. But remember you should also be posting about other topics as well. It is recommended to keep promotional posts to 20%. Too much self-promotion can be seen negatively.

Be Available

Do not promote your own content and then not be available for people to reach out to you with questions and comments. Reply to all the comments made on your posts and engage (like, comment) with the posts you are tagged in. If you are consistently posting content, you should also consistently interact with your readers. Sometimes they will reach out to you, but other times you will be initiating the conversation.

Law of Reciprocity

You cannot expect people to share your content and promote your ideas if you are not doing the same for others. Spend time reading through your channel feeds to find thought-provoking content that you feel compelled to share. Tag companies and people in your post if they are mentioned or if they are in the photo. Those people/companies will be notified and are more inclined to share and engage.

Social Media and Email Best Practices Guide

Emails

Emailing your members is a great way to keep in touch, create awareness of events and provide news and information. Below are the keys to keeping your readers excited to see your email in their inbox!

CAN-SPAM

The most important things to keep in mind is staying compliant with the CAN-SPAM act and avoiding SPAM and phishing words and phrases.

1. Make sure you stay compliant with *CAN-SPAM*. Here are the seven main requirements:
2. Don't use false or misleading header information
3. Don't use deceptive subject lines
4. Identify the message as an ad
5. Tell recipients where you're located
6. Tell recipients how to opt-out of receiving future email from you
7. Honor opt-out requests promptly
8. Monitor what others are doing on your behalf

Avoid SPAM Trigger Words and Phishing Phrases

A spam filter is trying to remove commercial advertisements and promotions so words that are common in such emails should be avoided or used sparingly. Additionally, avoid phrases that would appear as an attempt to get the reader to click on a link to a malicious site or download a file where malware awaits, or phishing phrases.

Addressing

The FROM Field

Address the reader directly as you from the FROM field. Vague FROM fields such as Chapter Leader or Contact from Chapter can lead your email right to the SPAM folder or even worse to the TRASH.

The TO Field

If you are not using an email service provider do not include all email addresses in the TO or CC fields. Not only can this lead to the SPAM folder but also are providing the full email addresses of your subscribers to all receivers. This can lead to sensitive or private email addresses becoming public. This also makes your reader feel less important. Utilize the BCC field to protect yourself and your subscribers.

Content

Short and Skimmable

Emails should contain short, bite-sized content blurbs. The readers should be able to skim through the email content and have a basic understanding of the content. Emails that require the reader to thoroughly read the email and are less likely to perform well.

Related Theme/Topic

Focus on one main theme or topic for emails, such as current news or an event. Keeping the content similar in nature helps the reader understand and focus on the purpose of your email.

Include a Call to Action

All emails should include a call to action to provide the reader with direction as to the next step. Get the reader to engage with the content (share or forward), your chapter (register for an event or volunteer) or the main association (read an article or view a page on the site).

Layout

Headlines and Subheads

Utilize great headlines, subheads, and link text for ultimate readability. Large amounts of text with no breaks can make an email daunting and your reader is less likely to read and understand the content.

Text to Image Ratio

You want to utilize a good text to image ratio. Make sure your email doesn't appear as an advertisement by containing only images, but it is always helpful to include an image or two that is related to your content to keep readers engaged and help with the flow of the content.

Preview

Design your email for the preview pane because that is how it will most likely be viewed and read. Take an extra minute to test your email by sending it to yourself and viewing it in your own preview pane.

Bottom Line

By taking a few extra minutes and utilizing the above tips, your email and social communications will be effective, personal and keep your readers wanting more! Contact us for more information.