



WELCOME!

SAME Post Leaders Leadership Workshop

**2006 Joint Engineer Education and
Training Conference & Expo**

**New Orleans, LA
May 31, 2006**



Effective Organizations

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Trust-Based Relationships

**Control
of
Destiny**

COMMUNICATIONS

Strategic Focus

**Execuational
Excellence**

Values Driven Leadership

From *Discovering the Soul of Service*

Post Operations Workshop “Back to the Posts”

Stephen Shepard

**SAME Director of Training and
Post Operations**



Agenda

- ★ Post Administration
- ★ Post Finances
- ★ Education and Training
- ★ Relationships and Recognition
- ★ Communications and Outreach
- ★ AMS



The Big ?

How Do I Run a Post With A Full Time Job?



TIME

BALANCE



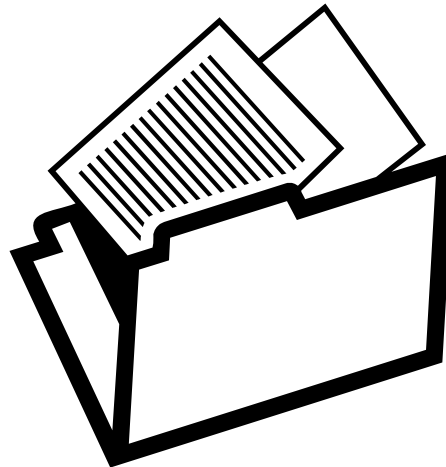


Proposed 2006-07 Focus Areas



- ★ Develop and implement national, regional and post programs that support public sector participation
- ★ Revitalize and realign SAME's readiness program to support the National Response Plan
- ★ Facilitate industry support to the uniformed services in the development and realignment of military installations
- ★ Assess the role of SAME in K-12 Outreach programs to support the nation's education of engineers

Post Administration





Important To Do's



Required to be on File at HQ

- Post Bylaws – revised version was due by May 31, 2005. Should be reviewed and updated every 5 years or so.
- Post Financial Report – Due by March 1
 - Post dues will not be distributed to the Post until this is received
 - Copy of any Tax forms associated need to be submitted
- Change of Post Officers Report
- Post POC Report – Link to selected National Committees





Post Organizations

(As of May 06)

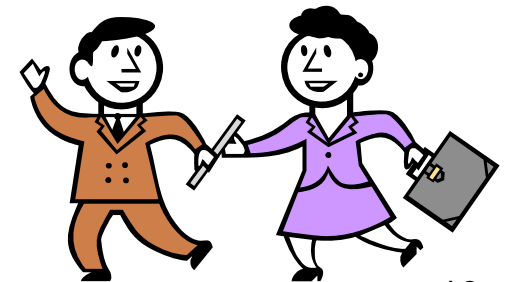


Active Regular Posts	Small 10 - 75	Medium 76-249	Large 250 +	Total
U.S. & Territories	30	39	35	104
Outside the U.S.	15	4	0	19
TOTAL (May 06)	46	42	35	123
Student Chapters				
	1	0	9	10
Updated By-laws				
	29	30	33	92
'05 Financial Reports				
	28	34	30	92



Leadership Transition

- ★ Handing off the baton without dropping it
- ★ Required time frames are May/June (preferred) or Dec/Jan.
- ★ Installation of Officers
- ★ Recognition of Outgoing Officers
- ★ Leadership Workshops
 - January 2007
 - August 2007





Post Support from HQ

Rena MacLeod – Post Operations Specialist

rmacleod@same.org or ext. 151

Post Support

Reports

Newsletters and Best Practices

Michael Mayhew – Training and Event Specialist

mmayhew@same.org or ext. 152

Event Registration

Hotel Support

Events Calendar

Kathy Off – TPO Support Specialist

koff@same.org or ext. 153

National Committee Support

Summer Camp HQ Liason

Education and Training Calendar

John Hagaman – Operations Support Specialist

jhagaman@same.org or ext 154

SAME Store

Membership Supplies

Speaker Gifts

Special Orders - apparel w/Post name

Awards and Medals

SAME Booth or Flag Requests

Conference Ribbons

At Your Service!



Insurance

- ★ General Liability is to cover bodily injury and/or property damage to a third party due to negligence, not coverage for members.
- ★ Posts Directors and Officers are covered by the SAME HQ D & O coverage.
- ★ There are Liability Exclusions: For specifics see Chapter I of Post Operations Manual.
- ★ Proof of Coverage Request Form



Proposed Streamer Changes for 2006

★ National Security

- All Posts outside the U.S. will be de facto awarded the National Security Streamer as these Posts support forward deployed forces and should be given credit for national security by virtue of their mission.
- Fast Start Plan now a desired element rather than required, but the criteria of conducting 3 meetings with 3 of the below listed Public Sector entities will remain required.
- National Readiness and Homeland Security Committee will revamp entire Streamer for approval at 2006 Fall Board Meeting and implementation will be in January 2007



Proposed Streamer Changes for 2006



★ Outreach and Communication

- Outreach to Deployed Engineers and Their Families Required Streamer Element in 2006

★ Membership

- Post will be awarded the Membership Streamer if they maintain or show growth in both categories of members affiliated with Post:

- Individual Members, including Life Members, Regular Members, NCO Members and Young Members (Excludes Student Members)
- Sustaining Member, Public Agency and Academic Institution Representatives

Note: Members who are both an Individual and Sustaining Member Representative will be counted twice.



SAME Member Profile

- ★ **Private industry: 14,020 (65%)**
- ★ **Federal Government: (21%)**
 - DOD: 4,050 (19%)
 - Non-DOD: 450 (2%)
- ★ **State/local Gov't: 530 (2%)**
- ★ **College Students: 1,070 (5%)**
- ★ **Fully Retired: 840 (4%)**
- ★ **Unidentified: 540 (3%)**

- ★ **TOTAL = 21,500 (100%)**



As of 4/30/06

Post Financial Guidelines





Basics

- ★ Posts are part of Parent 501(c)(3) organization, but should have own tax ID and tax exempt form if state allows.
- ★ Fiscal Year = Calendar Year
- ★ Working from an Annual Budget
- ★ Standard Accounts:
 - Operating
 - General Reserve (20% of annual budget)
 - Education and Mentoring
 - Investments - need a Committee to oversee
 - Annual Distribution
 - Develop a plan



Basics

- ★ Treasurer should report monthly as BOD is ultimately responsible for finances
- ★ Annual Audit
 - Internal or hired
 - Completed by end of Feb. and w/in 30 days of a change in Treasurer
- ★ Investment Committee
 - Develop goal for investing
 - Made in fixed revenue instruments and mutual funds, not individual stocks
- ★ IRS 990 to be filed if gross receipts avg. greater than \$25,000/yr immediately preceding three tax years

Education and Training





Post Programs

- ★ Diversity is important in order to create involvement from members
- ★ Quality not quantity
- ★ Partner with other organizations (e.g. AEA, IFMA, NSPE)
- ★ If you offer PDH's you **must** have a Professional Development & Education Committee POC.
 - Should be a P.E. or have access to some for program review
 - Understand State Licensure requirements
 - Very familiar with *SAME Guide to Continuing Professional Competence*

Relationships and Recognition





Recognition

- ★ Post Awards Program
 - Feed a National Award (reference matrix in packet)
 - Feed winners to local press
 - Represent Post diversity
 - Submit Fellow nomination
- ★ A Job well done!
 - Certificate
 - Letter to a supervisor
- ★ Plan Ahead!



Recognition

★ Individual Members

- Longevity pins available free of charge
- HQ will send out certificates and pins at the 25 and 50 year marks as well as list names on the Website.

★ Sustaining Members

- Certificate in a wood slip in plaque mailed to POC when joining the Society.
- New certificates will be sent at 5 year intervals.

★ Life Members

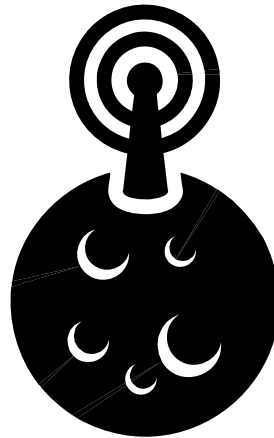
- Pin and certificate mailed when registration is received.



Relationships

- ★ National Partnerships with
 - AEA: Army Engineer Association
 - IFMA: International Facilities Mgmt Assoc.
 - NSPE: National Society of Professional Engineers
 - CMAA: Construction Management Association of America
 - Working on
 - CSA: Contract Services Association
 - DBIA: Design Build Institute of America

Communication and Outreach





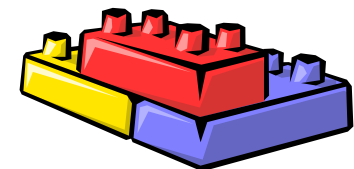
SAME K – 12 Committee



★ Currently Supporting

- Engineering and Construction Camps
- Learning For Life
- MathCounts

★ 2006/07: K-12 Task Force - Chair Clay Kelly, Strand Assoc.





College Outreach

Post College Outreach Programs:

- Student Chapter Supported by a Regular Post
 - Charter represents partnership between Post & school.
 - Requires student leadership.
- Post Mentoring Program with One or More Local Colleges
 - Program brochure.
 - No college leadership required.





Elements of the Student Council

- ★ **Organization.** Under direction of the College Outreach Committee and the SAME XD. It will be led by a President, Secretary and Vice President positions, and committees may be formed as needed to support Council programs.
- ★ **Appointment of Student Leaders.** A one page letter of interest submitted to the College Outreach Committee that outlines their qualifications and their commitment to a leadership position with some ideas on how the Council can support student members.



Post Communications

Effective Posts

- ★ Keep members informed
- ★ Recognize Post/Member achievements
- ★ Recognize supporters
- ★ Attract new members
- ★ Contact renewing Members

Means of Communication

- ★ **Post Website: Home Page (at a minimum)**
 - Post officers list
 - Activity schedule and information
 - 5 MB space—free (for Posts and Regions)
- ★ **Email List Serve**
- ★ **Newsletter – Electronic vs. Mailed**
- ★ **Publicity via local media**
- ★ **Master Calendar (Chapter II)**
- ★ **News releases noting individual or Post recognition and achievement should be sent to local publications and to HQ for possible publication**



SAME Brand

★ Branding builds pride in the Society

- It is more than a logo

★ Components of Branding

- Mission
- Values
- Story

★ Insignia—it is important to use the correct insignia





SAME Logo



★ Logo

- Based on acronym, “SAME”
- **Does not** replace insignia

★ **Insignia and logo are two, complementary graphics for Post use in marketing**

★ **Follow the “Standards Guide” found at same.org/postops**



AMS

★ What is AMS

- Association Management System
- CRM for the association world
- Multiple software tools combined into one integrated, thin client system
- Picked Euclid Technology

★ What does it cost?

- Initial investment = \$243,690
- Yearly Maintenance = \$18,930 (in 2008)



AMS Functional Capabilities

	HQ	Posts	Members
Membership Management	X	X	X
Post Management		X	
Committee Management	X	X	X
Event Management	X	X	X
Exhibit Management	X	X	X
Directories	X	X	
Member Dashboard			X
Post Dashboard		X	
Online Store w/Shopping Cart	X	X	X
TME Subscriptions	X		X
Advertising	X		
Financial Management	X		



AMS



★ What is the timeline?

- Back office November 20, 2006
- Web Dashboard for Members and Posts
January 1, 2007

★ More to come to Post leaders as transition progresses.



Questions?



THANK YOU!
THANK YOU!
THANK YOU!

