



## **Process for SAME to Request Foundation Support**

The following document articulates the process for Communities of Interest and all SAME programs to request annual funding or support from the SAME Foundation in alignment with the goals established in the strategic plan. The process will help the Foundation Board better understand the usage of the funds as well as provide a means to report back to the SAME Foundation on outcomes and effects of the funding.

The timing will coincide with calendar year requests to the Foundation as this aligns best with annual SAME COI workplan development and facilitates approval of the requests by the National Board of Direction (BOD) in November of each year. Requests can be made across calendar years based on the timing of the need for funding and program being supported. Emerging requirements may be considered and will be addressed midyear and approved at the May BOD meeting.

### **Purpose**

This document will describe the SAME process for assembling, prioritizing, and requesting support from the SAME Foundation to support efforts of the Communities of Interest (COI) and Posts in achieving the goals set for in the SAME Strategic Plan.

### **Basic Guidelines and Process**

1. As part of their annual workplan development, Communities of Interest (COI) leads identify any resourcing requirements that they desire Foundation financial or resourcing support for. Posts can also generate requirements, and these will be compiled via Regional Vice Presidents.
2. COI Leads/Post Presidents will complete a basic application form (Attachment 1) to describe the need and communicate to the SAME Foundation impacts and outcomes anticipated from their support.
3. The National Vice Presidents will compile all requests from the COIs in preparation for meeting with the National Leadership Team to consolidate a request. The President Elect of SAME will serve as the lead of the Ranking and Review Committee.
4. The Ranking and Review Committee, composed of the President-Elect, National Vice Presidents, SAME National Staff Member, an RVP, one COI Lead, and one Elected Director, will review all requests and create a ranked list of all requests.
5. The Ranking and Review Committee will present their recommendation to the XC for review and approval prior to the November BOD meeting. Final consolidated and prioritized list of requests to be presented to the BOD for approval. Approval would be a consent agenda item.

6. SAME President will transmit a request to the SAME Foundation President NLT **15 December** of each year. Support in compiling the full package (formal request letter and supporting COI Application forms) will be provided by the SAME National Staff member assigned to the Foundation.
7. SAME Foundation to address the request in their January BOD meeting and report back via formal memo to National President on the programs and amount of funding for the upcoming calendar year.
8. Upon notification by the SAME Foundation, the President Elect, Chair of the Ranking and Review Committee, with support of the SAME National Staff member will notify all resource requestors of the level of support by the SAME Foundation. Unfunded requests will be shared with the SAME Executive Director for consideration of SAME funding.

## **Roles and Responsibilities**

### **National Leadership Team (NLT) and SAME President**

Reinforce the linkages to the strategic plan to BOD, COIs, and Posts as critical to development of their annual programs/ workplans and developing any formal requests for support from the Foundation. Provide any specific guidance or focus areas to the Society that may be useful in developing their annual work plan and programs at the COI and Post Level.

### **XC**

Will review presentation of the Ranking and Review Committee and vote and approve the annual request. Results will be then presented at the November BOD meeting.

### **Ranking and Review Committee**

A suborganization under the NLT that has the responsibility for assembling all the requests for Foundation support and creating a prioritized 1-n list.

- Committee to be composed of the President-Elect, National Vice Presidents, SAME National Staff Member, an RVP, one COI Lead, and one Elected Director, will review all requests and create a ranked list of all requests.
- Proposals with the strongest linkage to the SAME Strategic plan will be ranked higher.
- This committee will produce a prioritized list and presentation that will be given to the XC for approval.

### **National Office**

Serve as the administrative lead in assembling all requests for support from COIs, RVPs and posts. Participate in the Ranking and Review Committee. Maintain the Foundation Support Request Form. Prepare the final transmittal letter for the SAME President to send to the Foundation NLT **15 December** each year. Receive all impact reports from all entities that received Foundation Support and assemble into an annual report that the President can transmit to the Foundation. This summary will be included as part of the Presidents part of the December funds request submission.

### **COIS/RVPs/Posts**

Develop annual work plans and programs that support the objectives of the SAME Strategic Plan. Utilize the Foundation Support Request Form for an identified Foundation requests for support. Prepare an annual report/summary that highlights the impacts of the funding received

by the Foundation during the SAME Year (May to May). RVPs will assemble all requests from their posts and submit a prioritized list by region.

COI/RVP requests will be transmitted through the responsible National Leadership Team lead, via supporting SAME National Staff leads to aggregate and prepare to present to XC.

**Key Dates**

	NLT/National Staff	COIs	RVPs/ Posts	Foundation
January				Reviews requests/votes. Formal response back to President SAME
February		Program Implementation	Program Implementation	
March				
April				
May	Guidance to BOD/COIs – Reinforce Strategic plan. Prepare annual report of outcomes/impacts.			
June		Workplan development		
July				
August		Submit Requirements	Submit Requirements	
September	Assembles + Provides Prioritized Recommendation (Review Committee)			
October	XC Review of 1-n list			
November	Presentation to BOD - Consent Agenda item			
December	SAME Requirements to Foundation – NLT 15 Dec via Formal Letter from President SAME. Includes a summary of the outcomes from the previous year’s funding.			

**QUESTIONS**

Contact Rob Biedermann, SAME Program Director, at rbiedermann@same.org.



## Request for SAME Foundation Support Cover Sheet

### 1. REQUESTOR

COI Chair/RVP: \_\_\_\_\_

COI (if applicable): \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

### 2. DATE OF REQUEST: \_\_\_\_\_

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**Submit on a Separate Sheet with this cover.**

### 3. DESCRIPTION OF THE PROGRAM/SUPPORT REQUESTED

- Describe the initiative or program
- Include a linkage to the SAME Strategic Plan

### 4. AMOUNT REQUESTED

- Provide a basic budget. Include description of the funding usages such as travel, stipends, materials, software acquisition, contracted support, etc.
- Indicate if this is a one-time request or what the out-year support for the program/initiative is envisioned.
- Highlight any support that is also coming from the Society for the effort (i.e., mentors, leaders, other financial support)
- Provide timing on the required support.

### 5. EXPECTED OUTCOMES and HOW THEY WILL BE MEASURED

- Initiatives that can show clear and direct outcomes may compete better for the limited funding as the Foundation may not have resourcing to support all requests.
- Relate how this initiative supports the SAME Foundations compelling purpose to **foster engineering leadership for the nation.**
- Describe how outcomes will be measured or assessed. Focus on outcomes that be readily used by the Foundation to support telling the story in fundraising activities.
- Describe how you will report back out and when.

Submit to Rob Biedermann, SAME Program Director, at [rbiedermann@same.org](mailto:rbiedermann@same.org).