



SAME Membership Operations Policies, Processes, and Procedures

Per the SAME bylaws the Executive Committee will have governance and approval over the Dues and Annual Review Process in support of the Annual Budget Cycle.

Policies, Processes and Procedures will be approved by the SAME National Office Membership Director.

SAME National Membership Types and Annual Dues approved by the BOD July 19, 2021

Individual Memberships	Dues
Industry Regular	\$125
Industry Regular Corporate Rate	\$95
Industry Young Professional	\$75
Industry Young Professional Corporate Rate	\$60
Uniformed Service / Government	\$55
Uniformed Service / Government Young Professional	\$40
Academic/Non-Profit	\$55
Academic/Non-Profit Young Professional	\$40
Student (full-time, undergraduate aged 25 or younger)	\$0
Retired / Unemployed	\$55
Additional Post Fee, Per Post	\$10

Sustaining Member Company Memberships		
# of Employees	National Dues	Per Post Dues
1-10	\$325	\$80
11-50	\$650	\$150
51-100	\$800	\$180
101-500	\$950	\$225
501-1,000	\$1,200	\$300
1,001 – 5,000	\$1,450	\$350
5,001 +	\$1,700	\$350

Organization Memberships	
Type	Dues
Public Agency	\$325/3 years
Non-Profit Organization	\$325
Academic Institution	\$325

ANNUAL REVIEW PROCESS

The SAME National Office will regularly review all aspects of membership to make proactive judgements, select impactful initiatives and resource our decisions. The review will be presented to the Executive Committee yearly in conjunction with the planning and budgeting process. By doing so, we will be better equipped to retain current members, recruit new members, build value, and grow the organization.

GENERAL REVIEW

The SAME National Office will review and report on membership data and participation such as:

- Number of members in each category with prior year comparisons to reveal trends
- Retention rates within each category
- Revenue generated by each category
- Demographics such as primary responsibility (i.e. engineering, executive management, business development, etc.), seniority level, etc.
- Demographics relative to diversity, equity and inclusion
- Post affiliation
- Community of Interest selection
- National event and program participation

Resulting questions to ask may include:

- What is an acceptable retention rate? How does retention vary between categories? Is retention particularly low in certain categories?
- Are we providing programs, products, and services that deliver value to the major segments of our current membership?
- What are areas for growth, change, and opportunity?
 - Recruiting members
 - Adding value for underserved members segments
 - Sunsetting programs that are valued by only a small segment of members

STRUCTURE REVIEW

The Membership Structure will be reviewed to ensure the following outcomes:

- Membership operations, management, and data accuracy are operating efficiently and effectively.
- All individuals are treated equitably.
- Members have flexibility and can easily access benefits.
- Likelihood of engagement is easily measured.

What will be reviewed?

- Membership terms (i.e., length of membership)
- Member Benefits and value
- Operations, policies, procedures, and rules
- Member experience / direct feedback from members / member needs assessment survey

If improvement is needed, the SAME National Office membership team will recommend operational and/or structural changes and updates to the Executive Committee. Membership structural changes should be very infrequently needed.

DUES REVIEW

Performed annually in preparation and support of the SAME budget cycle. The end of the previous fiscal year budget will be used to calculate dues benchmarks.

Desired Outcomes for Membership Dues and Overall Membership Revenue Contribution to SAME

- Achieve a standard percentage of total organizational revenue generated by dues of 33%
 - This is the non-profit membership organization industry benchmark
- Substantially cover the cost of serving each member.
- Dues rates are equitably determined across member categories.
- Charge for the value provided and enable expansion of products and services.
- Maintain a simple SAME dues structure.

Process to determine if a dues change is recommended:

- A. Determine average dues per individual needed to meet two benchmarks:
 - 1) Generate 33% of total operating revenue from membership (association industry standard)
 - a. Calculate SAME's average operating revenue in a typical year (i.e.: \$7,400,000)
 - b. Determine target revenue from membership dues (i.e. \$7,400,000 x .33 = \$2,442,000)
 - c. Calculate rate per dues paying individual required to generate target revenue (i.e. \$2,442,000 / 25,000 = \$98)
 - 2) Cover membership operating expenses
 - a. Calculate total costs related to providing services to members in a typical year (i.e.: TME, database, email, IT, websites, RVP expenses, Post support, membership, Post Leaders Workshop, overhead & personnel, etc.)
 - b. Calculate rate per dues paying individual required to cover expenses.
- B. Compare current annualized rates to benchmark rates and determine if rates meet either or both benchmarks.
 - 1) YES, benchmarks met – no adjustment needed.
 - 2) NO, benchmarks are not met – adjustment recommended.
 - a. Propose new rates to meet one or both benchmarks and so combination of rates over entire membership more closely approaches benchmark 1.
 - b. Present proposal to the Executive Committee
 - i. If approved, Present to Board of Direction for Approval
 - ii. If not approved:
 1. Revise proposal based on input from the Executive Committee
 2. Gather additional feedback from member focus groups
 3. Re-evaluate dues benchmarks and revise proposal
 4. Limit increases to certain categories and revise proposal
 5. Table an adjustment until the following year
 - c. Present to Board of Direction for approval and implement at the start of the next fiscal quarter.

POLICIES, PROCESSES, and PROCEDURES

General Policies for all Membership Types

1. One member record per person.
2. Membership dues, once paid, are not refundable.
3. Memberships are not transferable.
4. Membership is valid for one year; renewal takes place on an anniversary date cycle.
5. Memberships are given a 60-day grace period for renewal. If a member has not renewed by paying the appropriate dues rate, the membership will be dropped.
6. To qualify for member rates for events, products, and services, the membership must be valid/paid in full at the time of delivery, not just at the time of purchase.

Individual Memberships

1. Individual memberships include membership in one Post, to be selected at the time of joining or renewing.
2. Membership in additional Posts may be purchased at a rate of \$10 per Post. An individual may join as many Posts as desired.
3. A member may change their Post memberships once during their membership year without paying an additional fee by contacting the National office.
4. A member may add Posts during their membership year at any time at a rate of \$10 per post. The rate will not be pro-rated.
5. If an individual changes employer during the course of their membership year which results in a change of dues type (i.e. government to private industry), the individual's membership type will be updated accordingly but will not pay an additional fee. The new member type rate will be charged at the earliest next renewal.
6. By joining SAME, individuals agree to uphold SAME's Code of Conduct.
7. Required fields to create individual member records are: name, job title, employer, mailing address, email address, and phone number. Uniformed service and government are requested to provide both a work and personal email address to both verify government status and to best communicate.
8. Uniformed Service Membership:
 - a. Applies only for those currently on Active Duty.
 - b. Reserve and Guard must join in their full-time employment category unless, when participating in SAME, they represent themselves only in the capacity of their Reserve or Guard capacity.
 - c. At time of renewal, Uniformed members must validate that they are still on Active Duty. If a Uniformed Service member does not provide such validation, they may no longer qualify for the Uniformed Service Membership.
 - d. Uniformed Service members who joined SAME prior to July 19, 2021 do not pay annual dues and membership remains active until they are no longer on Active Duty.
 - i. Around the join anniversary date of these Uniformed Service members, the SAME National Office will request validation of uniform status via email.
 - ii. If a Uniformed Service member does not provide validation after three contact attempts, the membership will be dropped.

- iii. Dropped “Grandfathered” Uniformed Service members may be reinstated if validation is provided that they are still on Active Duty, provided it is within one year of the record being dropped.
- 9. Government Civilian Membership:
 - a. Applies to those employed directly by a federal, state, or local government agency.
 - b. Contractors are not eligible for this member type.
- 10. Private Industry Membership:
 - a. Applies to those employed by a privately-owned company, government contractor, or are self-employed.
- 11. Non-Profit or Academic Institution Membership:
 - a. Applies only for those who are employed by:
 - i. A non-profit organization such as a 501(c)3 or 501(c)6.
 - ii. An academic institution such as a college or university, military academy or high school.
- 12. Retired / Unemployed Membership:
 - a. Applies only for those who are:
 - i. Fully retired and not working in any capacity
 - ii. Unemployed
 - iii. Full time students over age 40.
 - b. No company name or other employer-related information can appear on their record.
 - c. The email on record must be a personal email.
 - d. Retired military or civilian but working in the private or nonprofit/academic sector does not qualify for this membership.
- 13. Student Membership:
 - a. Applies only for those who are:
 - i. A full-time high school student
 - ii. A full-time undergraduate student
 - iii. Either of the above and aged 25 or younger.
 - b. The following are required to qualify:
 - i. Valid birthdate (month and year is adequate). Join process for students restricts age.
 - ii. A graduation year that is not more than four years from the time they join.
 - iii. A high school or college name indicated in the record.
 - iv. Any member who does not have the three required items will be made inactive and will receive an email in indicating that they need to fix the discrepancy. They will receive one reminder, and then 30 days later their membership will be dropped.
 - c. Anyone who has “aged out” will have to option to join as a young or other member type.
 - d. Student memberships will be valid until November 1 of their graduating year. If a student does not graduate, they must confirm they are still a full-time student and provide a new graduation date.
 - e. For a full-time student over the age of 25 but under age 40, the Young Professional Government rate applies.
 - f. For a full-time student over the age of 40, the “Not Working” member rate applies.
- 14. Young Professional Memberships:

- a. A Young Professional rate will be offered in each membership category except Retired/Unemployed.
- b. Individuals who are aged 39 and younger qualify for this rate.
- c. A birthdate is required to qualify for the young member rate.
- d. The full rate in the corresponding category will be billed at the first renewal after the member turns 40.

15. Life Memberships:

- a. A life membership may be granted to an individual member by an authorized party.
- b. As of July 19, 2021, life memberships cannot be purchased.
- c. Once granted, an individual holding a life membership is not required to pay dues to SAME.
- d. Life members will be grandfathered with the number of Posts on their membership as of July 21, 2021. Posts added after July 21, 2021 will incur a \$10 annual fee.
- e. The SAME National Office will conduct annual audits on life memberships to ensure information on file is accurate.

Company Memberships

1. Company dues are calculated based on the total number of employees for the entire company. SAME will regularly audit company employee counts via their DUNS.
2. If member companies merge, pro-rated dues will be credited to the new/combined company membership. SAME will regularly audit company employee counts via their DUNS.
3. Joint Venture memberships pay dues based on the total number of employees of all companies in the Joint Venture. SAME will regularly audit company employee counts via their DUNS.
4. Company membership includes membership in one post. Company Post memberships DO NOT include any individuals.
5. A company may purchase membership in additional posts for an additional fee. Rates are calculated based on the total number of employees for the entire company. A company may join as many posts as desired. SAME will regularly audit company employee counts via their DUNS.
6. Company memberships include six individual memberships.
 - a. Upon joining or renewal, the company will receive memberships for six individuals. These individuals are full-fledged individual members per the policies indicated in “Individual Memberships” above. The company can purchase additional individual memberships at a reduced corporate rate.
 - b. Once assigned, the individual membership is “owned” by the individual to which the membership was assigned and is non-transferable, regardless of who paid for the membership.
7. Companies may purchase individual memberships for its employees.
 - a. Upon joining, the company will provide names and full contact information for included and additional individual memberships it wishes to include on its membership invoice.
 - b. Upon renewing, the company can indicate which SAME individual members in the SAME membership database it wishes to include on its membership invoice.
 - i. The SAME National office will provide a list of individuals currently appearing on its corporate membership invoice to confirm continuance of corporate billing.
 - ii. The SAME National office will provide a list of individuals in the SAME database who do not currently appear on its corporate bill but who have paid independently for membership to either add to the corporate bill or confirm separate billing.
 - c. Individual membership is “owned” by the individual regardless of payment. If a corporate individual member departs a company prior to the expiration of their membership, they remain members of SAME until their membership expires at which point their membership will be billed to them directly or a different employer, if appropriate.
 - d. Individuals employed by a company that is a corporate member qualify for the corporate rate for their individual membership.
 - e. Individual members, including individual who are part of a company membership, can join as many Posts as desired. One Post is included with the individual membership; additional Posts can be added for \$10 each.
8. Companies will indicate an official point of contact (POC).
 - a. All official correspondence will be sent the official POC.
 - b. Companies may designate additional POCs for invoicing, event sponsorships/exhibiting or the CEO. These individuals are not members and will not be entitled to any member benefits.

- c. Changes to the company membership must be confirmed by the official POC. Individual members can change their information and Post membership as they desire.
- d. The POC does not have to be a member of SAME.

Public Agency, Non-Profit, and Academic Institution Memberships

1. Organization membership includes membership in one post.
2. An organization may purchase membership in additional posts for an additional fee. An organization may join as many posts as desired.
3. Organization memberships include six individual memberships.
 - a. Upon joining or renewal, the organization will receive coupons for complementary memberships for six individuals. These individuals will become full-fledged individual members per the policies indicated in “Individual Memberships” above. The organization can purchase additional individual memberships at the regular individual member rate for this category. Once assigned, the individual membership is “owned” by the individual to which the membership was assigned and is non-transferable, regardless of who paid for the membership.
4. Organizations may purchase individual memberships for its employees.
 - a. Upon joining, the organization will provide names and full contact information for any included and additional individual memberships it wishes to include on its membership invoice.
 - b. Upon renewing, the organization can indicate which SAME individual members in the SAME membership database it wishes to include on its membership invoice.
 - i. The SAME National Office will provide a list of individuals currently appearing on its membership invoice to confirm continuance of corporate billing.
 - ii. The SAME National Office will provide a list of individuals in the SAME database who do not currently appear on its membership invoice but who have paid independently for membership to either add to the organization invoice or confirm separate billing.
 - c. Individual membership is “owned” by the individual regardless of payment. If an individual member departs an organization prior to the expiration of their membership, they remain members of SAME until their membership expires at which point the individual will be billed for their membership or new employer, if appropriate.
 - d. Individual members, including individual who are part of a company membership, can join as many Posts as they want. One Post is included with the individual membership; additional Posts can be added for \$10 each.
5. Organizations will indicate an official point of contact (POC):
 - a. All official correspondence and invoices will be sent to the POC.
 - b. Organizations may name POCs for invoicing, event sponsorships/exhibiting or the CEO. These individuals are not members and will not be entitled to any member benefits.
 - c. Changes to the organization’s membership must be confirmed by the POC.
 - d. The POC does not have to be a member of SAME.

DUES PAID to POSTS

The SAME National Executive Committee of the National Board of Direction sets Post dues in accordance with the national bylaws and governance procedures.

- Post dues are calculated monthly and distributed quarterly via electronic funds transfer.
- Post dues will only be paid to Posts in good standing (Posts have submitted an annual report and financial statements).
- New Posts will be paid dues collected beginning in the quarter they become a Post.

Individual Dues Share

1. Posts receive \$5 for each paying individual member who joins or renews the Post during that month, regardless of their membership type.
2. If a member transfers their Post membership during their membership term, the new Post will not receive dues until the member renews.
3. If a member adds additional Post(s) during their membership term, the Post will receive their portion of the dues in the next quarterly payment.

Company and Organization Dues Share

1. Posts receive 15% of the Post Dues fee for each paying company or organization that joins or renews the post during that month.
2. If a company or organization adds additional Post(s) during their membership term, the Post will receive their portion of the dues in the next quarterly payment.

**Appendix: Historical Information
Membership Types and Prices**

2014-2021

Individual Memberships	Dues
Industry	\$100
Industry Young Professional	\$40
Government Civilian	\$45/3 yrs
Uniformed Service	\$60/time in uniform
Academic/Non-Profit	\$45/3 yrs
Student	FREE
Fully Retired	\$40
Life Memberships:	
• Public Sector Life Memberships	
○ Under age 40	\$350
○ Enlisted	\$300
○ Age 40-60	\$550
○ Age 60-65 + 25 Yrs member	\$300
○ Age 66-70 + 25 Yrs member	\$200
○ Over Age 71 + 25 Yrs member	\$0
• Private Sector Life memberships	
○ Under age 40	\$350
○ Age 40-60	\$850
○ Age 60-65 + 25 Yrs member	\$500
○ Age 66-70 + 25 Yrs member	\$300
○ Over Age 71 + 25 Yrs member	\$0

Sustaining Member Company Memberships			
# of Employees	National Dues	Per Post Dues	Additional Representative
1-10	\$275	\$120	\$60
11-49	\$550	\$275	\$60
50-99	\$660	\$285	\$60
100-249	\$770	\$300	\$60
250-499	\$880	\$310	\$60
501-2,499	\$990	\$320	\$60
2,500-7,499	\$1,100	\$330	\$60
7,500	\$1,200	\$340	\$60

Organization Memberships	
Type	Dues
Public Agency	\$75/year or \$225/3 years
Non-Profit Organization	\$250
Academic Institution	\$250

Monthly Quality Control Checklist

- Check join date
- Check term dates
- Birthdate
- Incomplete Applications
- Foreign/Invalid Countries
- No Post selected
- Properly formatted record information
- Send email new members
- Review payments for inactive/dropped members
- Bad Email
- Bad Mailing Address
- Donation Letters
- Verify new Student Member record information (DOB, School, Graduation date)
- TME Subscriptions
- No organization POC (new organizations)
- Send email to POC with instructions for online access

Monthly Membership Renewal Cycle

- Verify correct billing for member type
- Verify correct dues for company employee count
- Email POC/individual member renewal
- Mail invoice and/or list of employees to POCs
- Inactivate members 30 days past due
- Drop members 60 days past due
- Send list of dropped Orgs to appropriate staff
- Send email of dropped REPs of orgs that have been dropped