



— OUR FOUNDATION —

is rooted in our heritage.



OUR FOUNDATION



will help lead us

into the future.



11/30/2021



**Society of American Military Engineers
National Foundation**



The Foundation's **Compelling Purpose:**
Fostering Engineering Leadership for the Nation



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National Foundation**



What is the Foundation?

- Nonprofit Corporation registered in the District of Columbia
- It is the separate and distinct charitable arm of the Society with its own governance, is responsible for Foundation stewardship and it reports directly to the Society President/Board of Directors
- Article 3: Purpose: The purposes for which the Corporation is organized are: charitable, educational, and scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code including but not limited to support of the educational and scientific purposes of the Society of American Military Engineers --- specifically, to **Foster Engineering Leadership for the Nation**
- Does not have members
- Does have a volunteer Board of Directors



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Why have a Foundation?

- Foster **Engineering Leadership** and **Education** for the Nation
- Serve the **broad objectives** of the Architectural Engineering and Construction (AEC) industry and other professional societies
- Support the overall **strategic goals** of the Society and the Posts
- Attract available **(broadly based)** resources
- Provide an **optional growth repository** for Post Scholarship Funds



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Society of American Military Engineers Foundation

Organization Chart, May 2021

Supported Programs (to date)
 Leader Development
 Camp Alumni Scholarships

SAME President/BOD
 Mark Handley

Foundation President/Chair
 Hal Rosen
Foundation Vice President
 Tony Leketa
Ex officio members of all committees

Executive Director
 Joe Schroedel

Treasurer
 TBD

Secretary
 Randy Gardner

SAME Staff
 Will Hoffman
 Asst. Treasurer

SAME Staff
 Eddie Gonzalez
 Program Manager & Asst. Secretary

SAME Staff
 Kathy Off
 Strategic Partnerships

Joint Investment Committee

Annual Budget
 Sal Nodjomian, Chair
 Gene Lupia, Tim Byers
 Tony Leketa

Investment Committee
 Tim Byers, Chair

Stewardship Committee
 Gene Lupia, Chair
 Tony Leketa
 Julie Fisher

Governance & Selection Committee
 Dave Nash, Chair
 Tony Leketa
 Bob Schlesinger
 Jane Penny

Supported Programs Committee
 Angie Martinez, Co-Chair
 Susan Thames, Co-Chair
 Randy Gardner, Vice-Ch
 Tim Byers
 Dave Nash

Annual Fund Drive Committee (External)
 Hal Rosen, Chair
 Tim Byers
 Gene Lupia
 Susan Thames
 Walt Gillette

Corporate Donor Drive Committee (External)
 Sal Nodjomian, Co-Chair
 Tony Leketa, Co-Chair
 Dave Nash
 Walt Gillette

Planned Giving Committee (Internal)
 Suzanne DiGeronimo, Chair
 Angie Martinez
 Tony Leketa
 Hal Rosen
 Walt Gillette

Annual Member Drive Committee (Internal)
 Bob Schlesinger, Chair
 Angie Martinez
 Jane Penny
 Walt Gillette

Corporate Donor Drive Committee (Internal)
 Tony Leketa, Co-Chair
 Sal Nodjomian, Co-Chair
 Tim Byers
 Angie Martinez
 Jane Penny
 Walt Gillette

Committee Volunteers
 Julie Fisher
 Walt Gillette
 John Mogge
 Sally Riker
 Ron Torgerson
 Roger Wozny

Marketing Committee
 Chair TBD
 Angie Goral
 Susan Thames
 Sally Riker

Communications Committee
 Jane Penny, Chair
 Ron Torgerson
 Roger Wozny

LEGEND

- Society Support Members
- Foundation Board
- Direct Relationship
- Indirect Relationship

How does the Foundation function and what work has been done?

- Small teams based on a broad strategy – outlined by the Foundation By-Laws
 - Clear alignment and distinction of the fiduciary differences between the Society and its Foundation
 - Ensure that the “**Compelling Purpose**” is correct and deployable
 - + Build the dialog and get the word out
 - Understand the competitive market for philanthropic activities
 - + Build a specific plan around the market conditions and our niche space in the market
- Build a communications plan to deploy the “need” to the target market
- Begin to generate more **broadly based** resources
 - Launch an internal pilot campaign
 - Target larger benefactors and organizations that identify with the compelling need



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What can you do to help the Foundation?

- Be knowledgeable and articulate about your Foundation
 - What it is and what it is not!
- Be an advocate for its broad purpose to individuals, corporations and organizations beyond our ranks
- Promote the “**Compelling Purpose**” – help identify the needy
- Volunteer to help the committees with their tasks – Foundation Board membership **is not** required to do this
- Stay current on the affairs of the Foundation – website monthly
- Make personal and/or corporate contributions to the Foundation and encourage SAME members and non-members to do so



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Frequently Asked Questions



1. How will the Foundation funds be spent?
2. Who can donate to the Foundation?
3. Can the Foundation accept Qualified Charitable Contributions?
4. Can one leave legacy bequests to the Foundation?
5. How are funds invested and managed?
6. Can restrictions be imposed on the way the money is spent?
7. What is the difference between unrestricted, temporarily restricted and permanently restricted support?
8. Can Posts transfer funds to the Foundation?
9. Can Posts draw funds for operational purposes?
10. Will Posts be charged a management fee?
11. After requested, how long will it take for a Post to receive funds placed with the Foundation?



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Frequently Asked Questions



1. How will the Foundation funds be spent?

Underwriting and supporting SAME to include, but not limited to the following:

- The **Leader Development Program** focused on tomorrow's engineering leaders
- SAME **Engineering and Construction Camps**
- **Science Technology Engineering Math (STEM)** - related activities
- Member **professional development and career advancement**
- **Scholarships** to students pursuing STEM-related degrees

2. Who can donate to the Foundation?

- Any SAME member, non-member, individual, firm or organization (public or private, for-profit or not-for-profit)
- This is **YOUR** Foundation!



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Frequently Asked Questions



3. Can the Foundation accept Qualified Charitable Contributions?

- The Foundation can accept Qualified Charitable Contributions if made directly from tax-deferred accounts i.e. 401k, 403B, Individual Retirement Accounts, etc. as well as appreciated securities. Contributions such as full or partial Required Minimum Distributions (RMD) made directly from the tax-deferred accounts can generally be counted as a qualified charitable tax deduction, however one should consult with their personal tax advisor for details.



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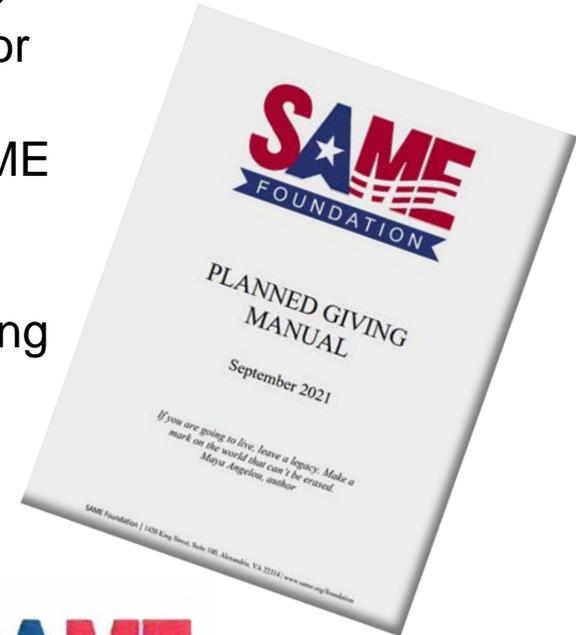


Frequently Asked Questions



4. Can one leave legacy bequests to the Foundation?

- **Absolutely!** By utilizing the Foundation's **Planned Giving Program** one can stipulate in a will, trust, annuity, life insurance policy or other legal document, that funds and/or assets are bequeathed in one's name to the Foundation, unrestricted or for a specific purpose i.e. camps, leader development, etc. The benefactor will be welcomed and inducted into the SAME Foundation Legacy League. Additional details about the Foundation **Planned Giving Program** can be accessed on the website <https://www.same.org/foundation> or by contacting the Society Executive Director regarding specific questions or guidance.



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Frequently Asked Questions



5. How are funds invested and managed?

- All Foundation assets are invested per the provisions of the **Foundation Investment Policy** (available for review upon request) and monitored by the Foundation Investment Management Committee stipulating a long term investment horizon
- Returns are compared to industry benchmarks to assess whether the fund is performing to expectations
- Investment Management Committee reviews performance quarterly and reports results to the Foundation Board
- A foundation-specialized investment management advisor is retained and the advisor's performance is reviewed annually
- Fund size allows investment manager/brokerage fee (currently 0.6%) which is below industry average and expected to decrease as Fund corpus grows



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Frequently Asked Questions



6. Can restrictions be imposed on the way the money is spent?
 - When money is contributed to the Foundation, the donor can limit the spending of the amount to a specific use or time criteria

7. What is the difference between unrestricted, temporarily restricted and permanently restricted support?
 - First, the Foundation welcomes all forms of support
 - **Unrestricted support** includes all contributions to the Foundation that can be invested and disbursed by the Foundation, within Foundation policy parameters



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Frequently Asked Questions



7. What is the difference between unrestricted, temporarily restricted and permanently restricted support? (continued)

- **Temporarily restricted** includes all contributions to the Foundation that can be expended but must be expended for a specific purpose (time or use)
- **Permanently restricted** support includes all contributions whose principal cannot be expended by the Foundation. The donors request that only investment earnings be expended and that the original donation corpus amount be retained permanently



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Frequently Asked Questions



8. Can Posts transfer funds to the Foundation?

- Yes, a Post can place its Scholarship funds with the Foundation as custodian
- Posts are able to leverage national investment management expertise
- Post funds placed with the Foundation as custodian are governed by the **Post Funds Policy** regarding fund spending and distribution which is available to any Post that wants to review it
- Post funds placed with the Foundation as custodian remain the property of the Post. The Post receives earnings – interest/dividends (or incurs losses) on its pro-rata share of funds placed with the Foundation. When amounts requested are forwarded to the Post, it is able to disperse them in order that the Post gets recognition and acclaim for the scholarship awards made by the Post



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Frequently Asked Questions



9. Can Posts draw funds for operational purposes?

- Funds required for Post annual operations **should not** be invested with the Foundation

10. Will Posts be charged a management fee?

- A modest management fee will be assessed Posts placing funds with the Foundation. It includes the investment advisor/brokerage fee (currently 0.6% as noted on Slide 10) and headquarters administration fee (currently 0.1%) for a total of 0.7%, which will be deducted from the Post's investment earnings
- The Foundation exists to support the overall strategic goals of the Society, which includes supporting the Posts
- Suggested minimum investment thresholds: Small Post: \$20K, Medium Post: \$30K, Large Post: \$50K



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Frequently Asked Questions



11. After requested, how long will it take for a Post to receive funds placed with the Foundation?

- Funds will be returned to a Post within thirty (30) days of receipt of a written request.



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Other questions – <http://www.same.org/foundation>

or please contact:

SAME Executive Director

SAME Foundation

1420 King Street, Suite 100

Alexandria VA 222314

(703) 549-3800



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The Foundation's **Compelling Purpose:**
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