Local Society Toolkit

Purpose Statement

With the help of local echocardiography society leaders from across the United States, ASE has developed this toolkit as a resource for new, emerging, and established local echo societies (LES). This toolkit addresses a range of topics, including:

- the logistical components of forming a local echo society,
- ideas for building and engaging a membership base, and
- tips for hosting events, meetings, and conferences.

Supplemental resources, including templates and examples, are provided for board meeting agendas and minutes, industry outreach letters, member programming, and member scholarships. Various vendors are mentioned throughout this toolkit; these vendors come from LES leaders who have found success with their services while conducting LES operations. ASE does not endorse any vendors. These suggestions are solely meant to serve as potential options for your LES's needs. Additionally, this is not a comprehensive guide; it is a living document that may be edited by ASE at any time.

ASE

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Pre-Launch Tasks

Gather Your People

Recruit potential volunteers to help launch the LES and serve on the board of directors. It is recommended that you acquire the help of both a physician and a sonographer when starting a LES, unless the group is intended to solely focus on sonographers.

- Start by emailing and calling your existing contacts to gauge interest. Ask them to spread the word about your new LES and its need for volunteers.
  - Some individuals may prefer to stay in the background, while others may volunteer for board positions. It is important that those who are stepping into leadership roles understand the commitment required to build a group from scratch and that they are willing to be dedicated to this endeavor.
  - Everyone can play an important role in word-of-mouth recruitment to grow your LES.
- Once your LES is established, you can recruit new officers by making a call for volunteers in conjunction with one of your major events or conferences. Invite interested individuals to attend as guests and meet with them to discuss their interest and goals for their prospective role.

Recruit a physician champion to serve as the Medical Director.

- A practicing physician is required to participate in the planning of any educational activities that offer CME credit. This individual may already be a member of your board or a separate, outside physician if your LES is only sonographers.
- Look for someone who is passionate about echo and education. You can search for local Fellow of ASE (FASE) physicians on ASE's FASE page.

Typical Officer Roles

- **President:**
  Oversees contracts, like meeting space and service subscriptions; serves as the public face of the LES at your meetings.
- **Vice President/President-Elect:**
  Assumes responsibilities in the President's absence and typically succeeds the President at the end of a term.
- **Treasurer:**
  Manages the LES's finances and liaises with banks, accountants, and tax professionals. If resources are limited, consider allowing the vice president to assume treasurer duties.
- **Secretary:**
  Develops clear meeting agendas, takes meeting minutes and distributes them for review/approval, and supports ad hoc administrative tasks.

Depending on your LES's goals, size, and offerings, consider developing additional volunteer positions such as:

- **Education Coordinator:** Organizes CEU/CME process and certificates; assists individuals with limited lecturing experience by helping to organize their presentations (slide decks, speaking points, etc.).
- **Speaker Coordinator:** Conducts outreach and coordinates speakers for meetings and conferences; manages honoraria (if offered); assists the Education Coordinator.
- **Vendor Relations Coordinator/Director:** Interfaces with sponsors/exhibitors/industry and maintains a list of contacts; this person should have existing contacts or strong networking skills to maintain routine outreach efforts (i.e., reps working in the structural lab, machine reps, ultrasound enhancing agent reps, industry at other conferences, etc.).
- **Site Coordinator:** Works directly with onsite staff at events and conferences to ensure it runs smoothly (e.g., audiovisual (AV) operations, parking, delivery of equipment, preferred food vendors, table and chair options, room setup, etc.).
- **AV Coordinator (if no Site Coordinator):** Oversees AV operations for events and meetings.
- **Social Media Director/Champion:** Leads promotional efforts on social media channels and oversees all social media marketing content.
- **Email Coordinator:** Manages your LES's general email inbox to respond to inquiries and communicates in a timely and professional manner.
- **Volunteer Coordinator:** Recruits and communicates with volunteers; assigns tasks based on needs identified by board members; organizes setup and breakdown crews for events.
- **Scholarship Coordinator:** Secures funding for scholarships; generates creative ways to implement scholarships; monitors applications via email; provides feedback to applicants.
- **Members-at-Large:** Two to three positions within this title for dedicated members who are interested in future leadership opportunities within the LES.

Make It Official

Establish & Name Your LES

- [x] **File Articles of Incorporation in your state** to officially create and protect your LES's name. Incorporation also separates personal liability from the organization's actions.
  - **Name availability:** Ensure your desired LES name is available by checking your state's business registry.
  - **Draft the documents:** Use the state-specific form, typically found on the Secretary of State's website.
  - **Include specific purpose language:** For IRS 501(c)(3) eligibility, the purpose clause must explicitly state the organization is for educational purposes, and that assets will be distributed to another 501(c)(3) upon dissolution.
  - **File with the state:** Submit the documents online or by mail and pay the required filing fee (fee varies by state). Choose "Non-Profit Public Benefit Corporation."
  - **Appoint a registered agent:** Designate an individual or entity to receive legal documents. Typically, this will be your Treasurer.

Conduct a Meeting to Develop Bylaws

- Decide whether your LES will be a legal entity and understand how it may affect your ability to receive money and report taxes.
- Obtain an Employer Identification Number (EIN) tax ID number on the IRS website. This will be required to open a business checking account and for IRS filings. This is free.
- State your objective(s), such as providing education, funding scholarships, etc., and develop a mission/purpose statement.
- Make determinations about the board of directors: clarify their roles and terms, how you will replace board members (i.e., elections, appointments, etc.).
- Clearly define which decisions or actions require a vote, such as spending money, hiring services, amending the bylaws, selecting meeting sites, and who should vote (board members (only), all members, etc.).
- Finances, dissolution, and amendment processes should be clear to prevent issues in the future.
- Determine how often your local society meets.
  - There is not a specific number of times your group must hold meetings. A suggested number, however, is four times per year. Once your local society is up and running, your board of directors can decide the number of meetings that best meet the needs of the members.
- Determine how often the board of directors will meet. (See Board Meetings)

Determine Membership Categories & Dues Structure

- Membership dues help pay for events, mailings, meals, rentals, speaker honorariums, scholarships, etc., so it will be important to estimate your local society's costs before deciding on the price of dues. If your local society receives support from vendors, this can help offset the costs of member dues. Some local societies do not charge dues.
- Examples of member dues structures from established local societies. You may or may not decide to charge different amounts depending on profession.:
  - Discounted (as low as $10) or free student, fellow, and resident memberships.
  - $25–$50 for annual sonographer memberships; $100 for annual physician memberships.
  - Dues can be higher if you are offering *AMA Category 1 Credit*™ for physicians or CEUs for sonographers.
- Consider whether to set up recurring membership dues, "pay-as-you-go" admission to your events, or both.
  - Membership dues will require tracking to ensure accurate records of who has paid. Consider using a platform like Stripe to manage payments.
  - Event tickets can be managed through an online vendor like Eventbrite or Whova. This may be simpler, especially when starting out.
- Determine member benefits for each category (e.g., a student membership may include free access to two webinars; a sonographer membership might have access to all webinars + end-of-year event).
  - Examples of member benefits: Continuing education credit for attending meetings/events, eligibility for scholarships, free attendance at events (in-person and virtual), participation in educational conferences, access to online groups or email communications, reciprocity with other groups, etc.

Coordinate Other Logistics

- ☑ Open a business checking account. Banks will often reduce or remove fees for nonprofits. In some states, Articles of Incorporation may be required. Include the Treasurer and one other board member on the account. Some checks over a certain amount may require two signatures.
- ☑ Establish a dedicated mailing address for the local society. A PO box is recommended for setting up a nonprofit, bank accounts, etc.
- ☑ Create a platform to store important files, meeting minutes, etc. Google Drive is a popular option.
- ☑ Consider hiring a company to handle legal requirements to obtain nonprofit status, such as Harbor Compliance, which has a bootcamp for each step required in the process.
- ☑ Consider hiring an accountant to prepare the nonprofit tax return. Note that part of IRS filing is to obtain 501(c)(3) status.

Other Items to Address

- Enroll in a CME/CEU program through ASE, SDMS, ASRT, or local hospital or health professions schools. See ASE Resources in the Helpful Links section for more information on ASE's CEU Program.
- Create a logo. Consider asking volunteers to assist with the design or contact graphic designers. Upwork is an online platform for hiring freelance designers.
- Along with the logo, it is suggested to create a branding guide outlining the local society's colors, fonts, and visual style. This ensures that your website, flyers, social media graphics, and other marketing materials can maintain a consistent and professional appearance.
  - Canva is a free online graphic design tool to create event materials, QR codes, and social media graphics. With the Pro version, you pay a nominal fee to unlock more features, including a customizable Brand Kit template.

Create Your LES Digital Footprint



Website: Find a volunteer to manage the website or consider hiring a website manager, and add that cost to your budget. Many societies create and manage their own websites using web domain resources like WordPress, Squarespace, Wix, etc.

- These sites often have add-on features that help with membership, integration with Stripe, webinar fees, etc.



Email: Consider setting up two email accounts for the local society—one for board members/volunteers to share and one for members to contact.



Social Media Accounts: Consider your potential membership base when selecting your social media channels. Instagram is recommended for member recruitment and engagement, especially among younger audiences, while Facebook is still a valuable resource for events and promotion, especially among older demographics. LinkedIn is recommended to recruit speakers, engage with sponsors, promote events, etc.

Until the need grows for a social media director, consider allowing multiple people administrative privileges to help with posts and to respond to messages. It is a best practice to post regularly and consistently.

Content suggestions include formal announcements, advertising events, spotlighting members, sharing interesting cases/echo updates, etc. Try to include a graphic with posts and tag appropriate organizations or members to increase engagement and reach.

You can consider purchasing social media ads to promote your events. There is a cost associated with running any social media ad, but they can be a relatively inexpensive tactic to reach specific audiences.



Building a Membership Base

Grow Your Membership

- Host events that engage local hospitals' echo labs. Consider featuring an individual from each lab. A handful of staff from each lab will add up quickly, and you'll likely recruit more volunteers from the audience.
- Include educators from local or regional ultrasound training programs. The educators are likely well-connected, and their students will mutually benefit your local society.
  - Consider including program directors on your board of directors. This can help shape the direction and growth of your local society.
- Reach out to technical directors and cardiology service line administrators at hospitals within driving distance of your local society's location. An open, friendly welcome avoids any territoriality; even if the cross-town hospital is a "competitor," there are like-minded echo people there, too. Hospitals may even have funds to register their staff for accredited education events.
- Host a webinar for CME credit that can be attended by nonmembers for a fee.
- Always mention your local society's efforts and upcoming events/offerings during events, especially ones where you may have nonmembers in the audience. Create a PowerPoint slide with a QR code to your membership information or future event registration.
- Consider using a customer relationship management (CRM) tool to manage membership data and mailings.
  - HubSpot is one recommendation as it is free up to a certain number of contacts and mailings per year, but there are other options available depending on your local society's needs.
- A successful local society that maintains momentum is one that maintains its funding. Building vendor/industry relations is a collaborative effort that relies on social networking and leveraging everyone's contacts, and it can make a big difference in what a local society is able to achieve. Encourage your members to use their connections to help grow and sustain your local society.

Engage Your Membership

- Consider offering scholarships for sonographers to attend your regional conferences and/or national conferences, like ASE's Scientific Sessions. Involving students through a scholarship opportunity will get them excited about their career choice and joining the echo community (see Member Scholarship).
- Ask volunteers to start or join a committee.
  - They can assist with marketing, membership, event planning, social media, etc.
  - Creating committees early on is important for volunteer engagement and maintaining momentum to grow your society.
- Encourage younger members, or those with limited lecturing experience, to present at your meetings. This can give your members the opportunity to work toward their professional goals and improve their confidence/willingness to be more engaged.
- Host casual social events, like a trivia night, to encourage connections among members and demonstrate the value of being part of the local society.
- Host a case presentation contest and feature the winner on your website/social media. Consider providing a scholarship for the winner.
- Use social media to engage with current and potential members by spreading awareness of your local society and creating a space for local echo enthusiasts to connect with each other.
- Create a member newsletter that provides updates to your members on upcoming events and offerings, and spotlights current members. Feel free to use resources from ASE's website or member newsletters (e.g., new guidelines, upcoming webinars, events, etc.).
- If your members are attending other regional or national conferences, plan a meetup for your local society at those events.
- Create a mentorship program (see Mentorship Program).



Hosting Meetings, Events, and Conferences

Board Meetings

- Board meetings can take place at any time; many groups conduct theirs before or after pre-planned local society events.
- An agenda is essential for effective time management and to ensure all necessary items are discussed. (See Board Meeting Agenda)
  - The Secretary often puts the board meeting agenda together (in collaboration with the President) by reviewing the past agenda and minutes and asking board members for other items or issues to be included.
  - Organize information logically
  - Beware of information overload
  - Focus on topics that affect multiple areas
  - Share the agenda and any supporting materials ahead of time
- If the Secretary is not taking meeting minutes, assign somonen to take minutes ahead of the meeting.
- Minutes should be taken during the meeting and approved by all board members afterward. Note that board meeting minutes can be necessary files to have available in case the local society is audited. (See Meeting Minutes)
  - Minutes record what was done (motions, decisions, votes, action items), when it happened, who was present, and any required disclosures—without turning the document into a meeting transcript.
  - Match your minutes format to your agenda sections (e.g., Call to Order, Approvals, Committee Reports, Motions, Adjournment, etc.).
  - Flag decision points on the agenda in advance (items requiring a vote, approvals, or formal motions), so you know which topics are necessary to record.
  - Include clear owners and next steps for action items, so nothing gets lost post-meeting.
  - Use third-person language.
- Utilize meeting minute templates on Microsoft Word here or see Board Meeting Minutes Template.
- Store meeting agendas and minutes on your local society's document sharing platform.

Pre-Event Tasks

- [x] Determine the date of the conference—keep in mind ASE conferences that may occur around the same time.
- [x] Determine attendee registration costs, so the Treasurer can establish the budget.
- [x] Determine the location. It is highly recommended that someone on your event planning committee go to the potential space(s) ahead of time to ensure it will meet all your needs, especially the needs of your vendors who pay to be there.
  - Local societies have met in hospitals, hotels, restaurants, echo school campuses, etc. If your local society cannot find a location free of charge (some venues like hospital conference rooms and community colleges are free to nonprofits), then be sure to include the event space fee in your budget.
    - If a fee is involved, plan to negotiate. Coordinate with your financial professional to see what can be written off and helped by your nonprofit status. Lean on vendors for financial support.
  - Aim to select a convenient location. Consider members who may need to travel long distances. If the event is not at a hotel, you may want to provide information on nearby hotels and parking. Depending on the number of expected attendees, you may coordinate with hotels to secure a discounted room block.
  - Important considerations:
    - Some locations may require you to sign a contract and possibly get event insurance.
    - Make sure that your location has usable AV equipment and know whether an AV professional will be available on the day of the conference if you need help. Consider AV costs when determining registration fees for attendees.
    - Confirm the venue can accommodate the number of vendors you plan to have.
    - Check that there is sufficient power to support the scale of your event. (For instance, echo machines may require additional power.)
    - There will need to be a separate area for the vendors and any food offerings. If the event offers CME, there will need to be a wall that separates vendors from the learning area(s).
    - Prioritize parking for your event. Make sure there will be enough designated parking for attendees and that there is clear signage.

- [x] Determine the point person for your chosen location. If it is a hospital, try to find a sonographer or physician who can serve as your "onsite coordinator."
- [x] Develop your theme and format for the conference (e.g., pair a sonographer and physician for each topic with Q&A after each lecture).
  - Local society meetings promote opportunities for education, professional development, networking, and access to clinical and technical leaders. Popular meeting topics include clinical and technological advances, quality assurance, workplace trends, national and local payment policy, and legislative activities.
  - For programs focused on clinical education, consider a format that pairs a sonographer and physician for each topic with a Q&A after each lecture. These forums also allow the local echocardiography community to interact, share information, and learn from each other's experiences. Consider holding a case report presentation.
  - Deciding on a program format will enable your attendees to plan accordingly. Some local societies hold a brief business meeting to discuss issues and to make announcements. The business portion of the meeting may be followed by case presentations or a featured speaker.
  - If your local society needs ideas for topics or potential speakers, reach out to ASE.
- [x] Develop a simple agenda to provide in your vendor requests (see examples in Supplemental Materials). Vendor support will likely be your primary source of income to cover operational expenses for the event.
  - Potential vendors include ultrasound equipment manufacturers, software companies, pharmaceutical companies, publishers, and ultrasound schools.
  - Talk to your local echo labs' vendors, application specialists, and sales detail staff. They may be interested in sponsoring your events. They may also know local talent who give engaging talks.
- [x] Once your agenda is finalized, send your potential vendors a request to exhibit letter with your EIN tax ID number, the agenda, and the specifics of the conference day. (See Vendor Prospectus Letter) *Note: Some vendors require PDF formatted files.*
- [x] Once vendors have indicated interest, you can send them a follow-up letter with additional exhibitor information. (See Vendor Letter)
  - Determine the vendor fee, or if you would like to offer tiered vendor fees, determine the prices and perks associated with each. As your society grows, you will be able to increase vendor support.
    - LES are known to charge between $750-$1,500 per vendor, with those on the higher end offering perks like a 15-minute speaking window to promote a vendor's product or company.
  - Keep in mind that vendors can help cover food, etc. with an unrestricted educational grant.

- [x] Secure lecturers. Some local societies will offer an honorarium.
- [x] Distribute event flyers with your date and theme to local hospitals, so they can save the date and post to their website/social media accounts.
- [x] If funding is adequate, elevate your event by setting up a registration site, such as Eventbrite or Whova.
  - Whova offers features that can check people in, make name tags, and load logistics to attendees about parking and hotels.
  - All board members can have organizer privileges, too, so they can post directly from Whova to LinkedIn, Facebook, and Instagram.
- [x] Set up your CME account for the event (see Other Items to Address) and create a QR code for attendees to scan to complete their evaluation.
- [x] Consider creating an attendee survey to gather feedback on their experience, topics for future events, interest in volunteering with your LES, etc. You can use a free service like SurveyMonkey to create this survey. Plan dissemination of the survey at the conference or after (e.g., via QR code, an email, etc.).
- [x] Consider securing door prizes. You can send donation requests with your tax ID information, or the board members can donate prizes. Vendors are not allowed to provide anything of value.
- [x] Create signs to display during your event.
  - These signs could display the event schedule/lecture locations, promote your upcoming LES events or initiatives, display information on behalf of your sponsors, show a QR code that links to your event evaluation survey, etc.
  - You can have signs done at a local printing shop or an online vendor such as VistaPrint, so remember to include them in your budget.
- [x] Recruit volunteers to help on the day of the conference, including a setup and breakdown crew.
- [x] Order a table cover or sign with your logo for the registration table. If you plan to offer door prizes, consider ordering merchandise with your logo on it.
- [x] Remember to include speakers, vendors, and board members in the attendee count when ordering food for the conference.

- [x] Keep vendors updated monthly and then weekly leading up to the conference. Include logistical details about the conference location, such as when they can unload their equipment and where to find the electrical outlets in the vendor area.
  - Consider creating a vendor passport so that attendees can have their passport signed or stamped as they visit each vendor table. This gives the vendors more exposure and the attendees a chance to win a door prize—once their passport is full, they drop it into a door prize box for the chance to win a prize at the end of the day/event.
- [x] Prepare name tags with each attendee's name, credentials, and workplace. Consider color coding—different colors for board members, presenters, vendors, students, etc. A service like Whova can do this for you.

ASE Wants to Hear from You

- [x] Contact ASE at least one month prior to your event to request a box of promotional materials and potentially free giveaways. You can also reach out to other organizations, like ARDMS, to see if they have any items available to provide for your event.

- [x] Share event details and a promotional image (if unavailable, share your logo) with ASE to post on our Events & Courses Calendar.

Day-of-Event Tasks

- [x] Arrive early to set up.
- [x] Place wayfinding and registration signs near the registration table.
- [x] If applicable, remind attendees about the vendor passport/to scan QR code to submit CME evaluations.
- [x] Check in with each vendor. If applicable to your terms, let them know that you will send them an attendee list, and they will be added to your website/social media sites as a sponsor.
- [x] Consider securing a volunteer photographer to post photos to your website and social media accounts.
  - Keep your social media accounts updated throughout the event; Posting announcements, updates, and any changes in real time can be very helpful for attendees. Consider using an event or local society hashtag when posting and remember to tag ASE in your posts.
- [x] Announce volunteer needs for future conferences.
- [x] Share your local society's upcoming events and membership offerings to recruit potential nonmember attendees.

Post-Event Tasks

- [x] Send a follow-up email to all attendees thanking them for their attendance and provide a link to the feedback survey (if applicable).
- [x] Host a post-conference board meeting to review what worked during the event and any areas for improvement.
- [x] Review the cost of conference and budget status.
- [x] Follow through on all remaining aspects of your arrangements with vendors (e.g., sending attendee lists, adding logos to your website, featuring them on social media channels, etc.)
- [x] Review evaluations and brainstorm the next conference format based on feedback.



Helpful Links

Online Resources



- **Nonprofit Compliance/Startup Bootcamp**
  - Harbor Compliance
- **Website Domain Options**
  - Squarespace
  - Wix
  - WordPress
- **Customer Relationship Management (CRM) Tool**
  - HubSpot
- **Event Facilitation Tools**
  - Eventbrite
  - Whova
  - SurveyMonkey
- **Marketing Resources**
  - Canva
    - Free online graphic design tool to create event materials, including QR codes, and social media graphics.
    - The Pro version offers more features for a nominal fee, including a brand kit template.
  - VistaPrint
    - Online printing service to help you create and order custom marketing materials, signage, promotional products, event posters, etc.

ASE Resources

- ASE Local Society Webpage/ Directory
- External Education Endorsement Program
  - Application for ASE Endorsement (without CME) is open to cardiovascular ultrasound-focused events. ASE will consider endorsement of courses that contain a majority of multimodality or general cardiology content on a case-by-case basis.
  - The submitting organization must be an ACCME Accredited Provider responsible for the educational integrity of the program; the submitting organization is also responsible for providing CME and ensuring the activity is conducted in accordance with ACCME guidelines and policies.

- CEU Program Information
  - ASE partners with local echocardiography societies to provide CEU credit for monthly educational meetings.
  - ASE's credits are accepted by ARDMS and CCI toward registry requirements for sonographers.
  - Under the guidelines set forth by this program, sonographer attendees will be eligible for up to 12 ASE contact hours per year from attendance at these meetings.
  - The person submitting the application must be an ASE member in good standing with the Society.
  - All local society CEU materials (application, meeting requests, and attendance reports) need to be emailed to CEUProgram@ASEcho.org. You can download the application here.

- ASE Events & Courses Calendar
  - Email details about your upcoming conferences to ASE@ASEcho.org with a promotional graphic or local society logo. These details will be added to ASE's Events & Courses Calendar under the Local Society filter.
  - If you would like a package of free ASE materials, send a request and mailing address to ASE@ASEcho.org at least one month prior to your event.
- ASE Sonographer Resources
  - This content is an exclusive benefit for ASE members. Log into your ASE Portal to access these resources, including the Sonographer Career Ladder. If you are not yet an ASE member, take a look at our other member benefits and consider joining here.



Thank You & Supplemental Materials

ASE Wants to Hear From You

Tag ASE and Let Us Know What Your LES is Up To

Please share any LES questions, suggestions, and successes with ASE here.

Special thank you to the following LES Toolkit contributors:

Renee Carr (Three Rivers Echo Society), Debbie MacPherson (Willamette Valley Society of Echocardiography), Matthew Parker (New England Society of Echocardiography), Lynsy Friend (New England Society of Echocardiography), Zachary Bukowski (New England Society of Echocardiography), Amy Bankowski (Austin Area Echo Society), Brenda McMahon (The Pennsylvania Association for Sonographers), Jon Owensby (North Carolina Ultrasound Society), Geetanjali Dang (Northeast Florida Echo Society), and Megan Kraushaar (San Diego Society of Echocardiography)

Supplemental Materials

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