



Toolkit for Starting a Local or Regional Menopause Society

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01 Step One

Have a clear framework and vision

The first step is to identify the goals and target audience of your society. A society's goals may include: improving the profile of menopause and midlife women's health through public and government advocacy, networking, information sharing, mentoring, career opportunities, leadership training or professional development. This is a core part of identifying the 'vision' of the society (its purpose and aspirations) which is important to guide your 'strategy' (the practical steps to achieve the vision) [1]. This, in turn, determines the processes and resources required.

The questions you need to ask yourself at this stage are similar to those a new business needs to address:

- What 'products' or 'services' are you going to offer? These could include: conferences, seminars, publications, networking events, student scholarships or public advocacy.
- Who are your intended members/beneficiaries, in terms of profession, scientific discipline, geographic region, and career stage?
- What 'benefits' is your society going to provide to these members/beneficiaries?
- How will your proposed society differentiate itself from other local societies so that it will attract members? If other societies exist in related areas, you need to make sure you offer something unique, but at the same time, look for opportunities to partner with other societies, for example through joint meetings.

The answers to these questions will form the business plan of your society, and like any business plan, it will need to be revisited at regular intervals as the society and its landscape evolve.

An outline for a business plan can be found [here in Appendix 1](#).





02 Step Two

Start an annual or biennial meeting

An annual or biennial meeting, such as a conference [2] or a workshop [3,4], will move you forward. The meeting provides a focus for your interactions and an opportunity to interact regularly throughout the year as you plan the event. An annual in-person meeting provides an opportunity to build relationships and generate spontaneous ideas for improving your community's offerings. Consider offering awards that will add engagement and prestige to your meeting.

When planning the meeting, form an organising committee that spans the geographic region, and that includes diverse perspectives (public and private universities, government research facilities, medical research labs and industry). Encourage members to seek support from their home institutions in the form of co-sponsorship for the event. Invited keynote speakers should include some individuals from the region. If possible, try to partner with an international society to leverage their expertise and to help with event promotion.

Example standard operating procedures for organising meetings can be found [here in Appendix 2](#).

03 Step Three

Document Everything



Documenting your activities and governance lends credibility. Plan to archive the webpages of all of your society's major events, especially your annual meetings. Internal documentation is also essential, both for transparency of decision-making and succession planning as the society changes over time and new officers come on board. Archive all meeting minutes and contact information, including that of officers and sponsors.

Example documentation management procedures can be found [here in Appendix 3](#).

04 Step Four

Start small or build on existing scientific and professional networks

A professional society cannot be fully designed by a single scientist alone: it requires consensus, as well as the exchange of ideas, expertise, and skills. Utilise the experience available in existing societies who are members of the International Menopause Society's Council of Affiliated Menopause Societies (CAMS).

In most cases, starting with a small number of members is more efficient than trying to be all-encompassing. It makes it easier to collaborate and share a common vision, assign duties and make consensus decisions. Starting small does not mean that you should remain small. A strategy for growing regularly by adding new members or involving more institutions must also be defined (for example, through scientific events that grow larger from year to year, involve a range of participants, and are located where potential members are).

An example membership strategy can be found [here in Appendix 4](#).

05 Step Five

Set up your governance structure

Formalising the structure of the society is an essential step for stability and growth. It is best to start with a simple set of terms of governing articles (referred to as terms of reference, bylaws, or constitution) and grow from there. You may want to seek inspiration in the governing articles of other CAMS members.

One generally successful approach is to choose an initial Executive Committee, made up of committed volunteers and with an emphasis on inclusivity and diversity. A typical Executive Committee structure includes a **President**, a **General Secretary** whose role is to keep records and minutes and a **Treasurer** who focuses on financial aspects.

The Executive Committee can then formulate: the initial governing articles, covering executive terms and election procedures, a code of ethics and can create relevant subcommittees. Organisation management is not a standard scientific skill, so don't plan to do everything yourself, and be ready to seek advice. As the society (and its finances) grow, hiring a dedicated executive professional may become necessary.

Example governing articles (constitution) can be found [here in Appendix 5](#).

Example role profiles for Executive Committee members can be found [here in Appendix 6](#).

06 Step Six

Be inclusive

To be successful, the society needs to include a diverse range of professions, specialisms, personalities, ages and profiles, from all over the region/country. It must be easy for all to join and it needs to be perceived as being a benefit to the community.

Many successful societies have a student-focused component aimed at graduates and early career scientists, often run by the students themselves [5]. This can take the form of local student-run chapters, dedicated seminars/workshops, and even local journal clubs [6]. Creating a solid support structure, along with finding a motivated group of students to get things started, is critical for the development of student-run activities. The students of the society are its future leaders. The student journey must be meaningful from the start and include student representation in the leadership of the main body of the society.

An example strategy for diversity and inclusion can be found [here in Appendix 7](#).

An example strategy for involving students/trainees can be found [here in Appendix 8](#).



07 Step Seven

Plan the funding sources and financial management aspects

The most common funding sources for societies are membership fees and conference proceeds, but you should also investigate what grants and funding schemes are available in your region. In many countries, state, institutional, and philanthropic grants are available for purposes such as improving communication and networking between scientists, strengthening a particular scientific discipline, or meeting professional education needs. Such grants can provide a great source of funding for one-off projects or piloting a new initiative and are often easier to obtain than major research grants. However, they are not always well-publicised, and it's a good idea to set up a fundraising taskforce, with members from a wide range of institutions, that keeps an eye out for funding opportunities.

It is important to ensure that any grant providers and the conditions of the grant are aligned with the code of ethics of your society. If your society is going to manage funds, this must be done via a clear financial management plan that follows the laws of your country.

An example fundraising plan can be found [here in Appendix 9](#).

An example financial management plan can be found [here in Appendix 10](#).

08 Step Eight

Design a clear communication strategy

Communication is key to a successful society. A professional society website is important as the main source of information on the society's aims, governance, events, and membership information. An annual calendar of events is a relatively low-maintenance resource that can draw existing and potential members to the website and advertise the society's events. The society should decide whether these sites will be open to the public or restricted to its members only. A mailing list is essential for reaching all members, and this must be kept up to date. You need to keep in contact with members throughout the year, letting them know of any meetings or events.

A social media presence needs to be maintained, not only for people to hear about meetings and activities, but also for communication between members. It would be a great idea if you had a moderator to ensure that only appropriate postings are made.

It is important to develop your branding and some marketing materials, such as brochures and posters that can be displayed at conferences to inform members about the society and to attract new members. Marketing can also be achieved through publications, such as IMS and other CAMS members' newsletters, or through regular society newsletters.

An example communications strategy can be found [here in Appendix 11](#).



09 Step Nine

Seek partnerships and affiliations with other societies

All scientific societies have a goal of improving networking and communication in their areas. Significant synergies can be generated by partnering with more established societies. Benefits will include access to their expertise and experience. Any society whose goals include advocacy for its scientific discipline will gain a lot of traction by being able to call on the strength of a larger group. Your society may also be able to access some specific funding schemes and grants through partnership with a larger organisation. The IMS aims to support these partnerships.

An example partnership agreement can be found [here in Appendix 12](#).



10 Step Ten

Have fun: Enjoy science and make friends

Academic societies are a serious business that promote crucial scientific collaboration. But at the same time, they provide opportunities for socialising and networking. Your society will be more sustainable if the members not only find the society's activities meaningful, but also find them enjoyable. One of the greatest benefits of your society is for like-minded individuals to meet, have conversations and become friends.

Once your society is established with at least five members, join the IMS's Council of Affiliated Menopause Societies (CAMS) to broaden your network and opportunities at a global level.

More information and the application form can be found on the [CAMS pages of the IMS website](#).



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