

The Achieving Excellence program is designed to recognize Inns for effective practices in the five core competencies of Inn management and member engagement. Achieving Excellence is a tiered achievement-based program that builds on an Inn's successes, with each level recognizing the Inn's progress toward mastering the following core competencies:

**1. Administration:** ([www.innsocourt.org/administration](http://www.innsocourt.org/administration))

Effective and consistent administration is the key to a successful Inn. A strong foundation in administrative procedures ensures a smooth transition and operational stability from one year to the next as Inn leadership changes. Well-developed administrative procedures allow Inn leaders the flexibility to focus on creating a valuable Inn experience for members.

**2. Communications:** ([www.innsocourt.org/communications](http://www.innsocourt.org/communications))

Regular communication with Inn members and the broader community allows Inns to disseminate important information about the Inns of Court, solicit feedback to improve and enhance the Inn experience, and advance the mission of the American Inns of Court. These efforts assist in member recruitment and retention, and in projecting a positive image of the legal profession.

**3. Programs:** ([www.innsocourt.org/localinnprogramming](http://www.innsocourt.org/localinnprogramming))

Monthly programs are the cornerstone of each Inn, and provide the unique opportunity for all levels of the profession to come together, engage in discussion, and learn from each other. A well-organized program promotes professional development, collegiality among members of the legal community, and in many cases, satisfies members' CLE requirements in an interesting and engaging manner.

**4. Mentoring:** ([www.innsocourt.org/mentoring](http://www.innsocourt.org/mentoring))

Mentoring, on a formal or informal basis, is one of the best experiences for lawyers to build or refresh the knowledge and skills needed to become effective practitioners. By creating an environment for idea exchange and open discussion, the Inn of Court becomes the ideal place for new lawyers to learn from more senior members of the legal community, and for more seasoned professionals to expand their understanding of new approaches and technologies. Mentoring can provide fresh perspectives and insights, regardless of experience level.

**5. Outreach Activities:** ([www.innsocourt.org/outreach](http://www.innsocourt.org/outreach))

Outreach activities extend the mission of the American Inns of Court by providing exposure to the broader community and offering opportunities for Inn members to represent the ideals of the American Inns of Court.

For each competency, please keep in mind that we are asking for samples and sharable resources as submissions. Engaging in the Achieving Excellence Program contributes not only to the strength of your Inn, but also to our overall mission to strengthen all Inns. If you have any questions, don't hesitate to reach out to your [Director of Chapter Relations](#).

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### BRONZE LEVEL RECOGNITION

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- Recognized in *The Bench* and on the website
- Listed in the Inns of Distinction Gala recognition dinner event program
- Certificate of achievement
- A bronze Achieving Excellence web badge to display on Inn website

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### SILVER LEVEL RECOGNITION

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- Recognized in *The Bench* and on the website
- Listed in the Inns of Distinction Gala recognition dinner event program
- Certificate of achievement
- A silver Achieving Excellence web badge to display on Inn website

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### GOLD LEVEL RECOGNITION

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- Recognized in *The Bench* and on the website
- Listed in the Inns of Distinction Gala recognition dinner event program
- Certificate of achievement presented at Inn meeting
- Achieving Excellence pins presented to each member of the executive committee
- A gold Achieving Excellence web badge to display on Inn website

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### PLATINUM LEVEL RECOGNITION

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- Recognized in *The Bench* and on the website
- Listed in the Inns of Distinction Gala recognition dinner event program
- Certificate of achievement presented at Inn meeting
- Achieving Excellence pins presented to each member of the executive committee
- Early registration available for two Inn representatives or one Inn representative and guest to attend the Inns of Distinction Gala recognition dinner
- A platinum Achieving Excellence web badge to display on Inn website

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**BRONZE LEVEL REQUIREMENTS**

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- Become a chartered Inn and remain a chartered Inn in good standing
- Obtain an EIN (federal tax ID) and file with the national office
- File a Group Tax Exemption Option form with the national office (opt in or out)
- E-file copy of the Inn's approved bylaws with the national office
- Record any law school affiliation(s) with the national office
- Opt-in to the Achieving Excellence Program by May 30.
- **Core Competency: 1. Administration**
  - Comply with IRS tax filing by November 15:
    - **Option 1:** Inn has gross annual (July 1–June 30) income under \$50,000 and has instructed the national office to file the 990N on its behalf (*IRS Tax Filing Requirement Form*)
    - **Option 2:** Inn has gross annual (July 1–June 30) income under \$50,000, chooses to self file the 990N with IRS, and send copy to the national office
    - **Option 3:** Inn has gross annual (July 1–June 30) income over \$50,000, file 990-EZ and Schedule A with IRS, and send copy to the national office
  - **Requirements of IMS or Non-IMS Inns**
    - Inns using the Inn Management System (IMS)
      - » Post meeting dates, locations and program topics by October 1 (*minimum of six meetings required*)
      - » Maintain current membership roster (*Note: Dues are assessed on number of active members as of June 30.*)
      - » Update Inn leadership information for the current Inn year by June 30
    - Inns not using the Inn Management System (IMS)
      - » Submit Inn meeting dates, locations and program topics to the national office by October 1 (*minimum of six meetings required*)
      - » Submit Inn membership roster to the national office by November 30
      - » Submit Inn leadership information for the current Inn year to the national office by June 30

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## SILVER LEVEL REQUIREMENTS

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- Maintain Bronze Level requirements
- **Core Competency: 1. Administration**
  - National dues paid in full by January 31
- **Core Competency: 2. Communications**

The Inn must have and keep current one of the following items:

  - Inn Handbook—in printed or electronic format, which may include:
    - Local Inn history/biography of namesake
    - AICF national movement information
    - Inn bylaws
    - Inn policies
    - Inn calendar
    - List of officers
    - Member directory (with pictures, if available)—encourage members to complete/update individual profiles with practice specialty areas
  - Inn website—hosted by national office or other, which may include:
    - Local Inn history/biography of namesake
    - Link to [www.innsocourt.org](http://www.innsocourt.org) website (*if using external website host*)
    - Inn bylaws (*may be for members only*)
    - Inn policies (*may be for members only*)
    - Current calendar of meetings (*may be for members only*)
    - Current Inn leadership listing with contact information (*may be for members only*)
    - Membership information
    - How to join/application
      - » Who to contact
      - » Meeting guest attendee information
- New Member Orientation—held prior to first Inn meeting of the Inn year, submitted by November 30
- **Core Competency: 3. Programs**
  - Document monthly program development process by April 30\*

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## GOLD LEVEL REQUIREMENTS

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- Maintain Bronze and Silver Level requirements
- Develop and implement an Inn leadership succession plan\*
- Inn must display competency in either mentoring or community outreach:
- **Core Competency: 1. Administration**
  - Submit a draft of the Inn annual operating budget by November 30
- **Core Competency: 2. Communications**
  - Describe how your Inn engages Alumni, Emeritus, and Honorary members\*
  - Describe how your Inn promotes the American Inns of Court Diversity Policy\*
- **Core Competency: 3. Programs**
  - Submit a minimum of two programs to the national program library within 60 days of the presentation date.
- **Core Competency: 4. Mentoring**
  - Submit an outline of the Inn's formal or informal mentoring efforts to the national office. These may include:\*
    - Lawyer to Lawyer Support Programs
    - Leadership Development
    - Life Balance Programs
    - Student/Associate Mentoring  - Submit a description of mentoring evaluation process to the national office.\*
- **Core Competency: 5. Outreach**
  - Host an annual community outreach program that educates and promotes our mission to the legal community and general public. Submit a description of the Inn's community outreach program to the national office.
    - **Professional:** Presentations at local bar meetings, co-sponsored events with other professional organizations, presentations at law schools, etc.
    - **General Community:** Special programs put on for the general public, presentations for elementary/middle/high school students, building public awareness, legal aid, pro bono work, etc.
    - Mentor the organizing committee of a new Inn
    - Provide Inn to Inn support for new or troubled Inns
    - Engage in coaching opportunities with other Inn leaders

## PLATINUM LEVEL REQUIREMENTS

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- Maintain Bronze, Silver and Gold Level requirements
- Display competency in all five core areas, including:
  1. Administration as described above
  2. Communication: Actively seek member feedback for the prior Inn year utilizing a Membership Satisfaction Survey (printed or online). A copy of the survey should be submitted to the national office by June 30. *(NOTE: Summary highlights of the results or changes as a result of the feedback may also be submitted to the national office.)*
    - Submit current Inn news to the national office. News items should be articles, summaries, and/or photos of Inn activities suitable for publishing in *The Bench*. To be suitable for publication all news items must be submitted within 60 days of the event. Samples and editorial guidelines are available from your Chapter Relations Director *(NOTE: If Inn news has been published in your local or state media, please provide links or printed copies to the national office.)*
  3. Increase program submissions to the national program library from two to four programs submitted within 60 days of the presentation date.
  4. Mentoring as described above
  5. Outreach Activities
    - Document participation in and/or hosting of a joint meeting by April 30. This joint meeting may be with other Inns, local bar associations, specialty bar associations, or other similar legal organizations.

*\* These items may have previously been submitted to the national office and do not need to be submitted in their entirety again. Request a Recurring Items Form from your Chapter Relations Director.*