

Having a proper plan for the Inn year and carrying out that plan is one of the first steps to ensuring a successful year for your Inn. Here are some of the things you and your executive committee should consider when planning your Inn's calendar of events.

Annual Activities:

■ July—New Inn Year Begins!

- Masters meet to select new members and pupillage teams
- Send first installment payment of national dues to the national office, if applicable
- Register Inn for Inn Management System (IMS), if not already enrolled

■ August

- Program Committee meets to assign program topics
- Executive Committee meets to plan first meeting
- Send first meeting notice to all members including date and location
- Determine dues billing schedule and set due date for payment
 - Send dues invoice to members—include due date for payment
 - Send first dues reminder to members—send out 2 to 3 weeks after dues invoice
 - Send final dues reminder to members—send out 2 weeks after first dues reminder

■ September

- Conduct new member orientation
- Hold first meeting
- Collect annual dues from members
- If publishing a handbook for your Inn, determine a production schedule. A typical production schedule may include the following items:
 - Send a notice to members to update their contact information with a deadline for completion
 - Update content not related to member information
 - Select a method of publication for the handbook (*i.e.: printed and/or electronic*)
 - Set a deadline for when the materials need to be completed
 - Determine a release date and method of distribution

■ October

- October 1—Submit Inn meeting dates, locations and program topics to the national office (*or updated in IMS*)
- October 1—Determine and implement structure for monthly program development and document by October 1
- October 31—Deadline for dues collection from members

■ November

- November 15—File 990-N (*if Inn chooses to self-file and has gross income under \$50,000*) **OR** file 990-EZ and Schedule A (*Gross annual income over \$50,000*) with IRS and send a copy to the national office by November 15
- November 30—Submit completed Inn roster to the national office (*if not using IMS*)
- November 30—Submit annual operating budget to the national office
- Submit programs within 60 days of presentation for Program Awards consideration

■ December

- Hold holiday dinner meeting (*no program*)
- Submit programs within 60 days of presentation for Program Awards consideration

■ January

- January 31—Deadline to pay national dues in full to the national office
- Submit programs within 60 days of presentation for Program Awards consideration

■ February

- Submit programs within 60 days of presentation for Program Awards consideration

■ March

- Hold nominations for next year's Inn leadership
- Appoint committee to prepare various awards nominations and submissions
- Professionalism Award nominations due (*deadlines vary by circuit—consult our website*)
- Submit programs within 60 days of presentation for Program Awards consideration

■ April

- Elect new leadership for next Inn year
- Develop and implement an Inn leadership succession plan
- Select individuals to serve on Inn committees (*Membership, Program, Social, etc.*)
- Professionalism Award nomination due (*deadlines vary by circuit—consult our website*)
- Submit programs within 60 days of presentation for Program Awards consideration
- April 30—Submit/confirm a description of mentoring evaluation process to the national office
- April 30—Submit/confirm a description of the Inn's community outreach program to the national office
- April 30—Document participation in and/or hosting of joint Inn meeting

■ May

- If working with a law school, set a date and visit law students to promote Inn membership
- Recruit new members, if necessary
- Professionalism Award nomination due (*deadlines vary by circuit—consult our website*)
- May 31—If not done monthly, submit all original programs to the national office for inclusion in the Program Library
- Submit programs within 60 days of presentation for Program Awards consideration

■ June

- Begin work on Leadership Information submission
- Hold closing dinner meeting (*no program*)
- Collect membership renewal forms from members that will continue next year
- Membership Committee meets to review member applications, determine openings and prepare new member recommendations
- June 1—Deadline for Warren E. Burger Prize submissions
- June 1—Deadline for National Awards nominations
- June 30—Deadline to submit Leadership Information to national office or updates to Executive Committee (*IMS Inns*)
- June 30—Deadline to submit April, May, and June programs to the national office for Program Award consideration
- June 30—Deadline to submit all special projects to the national office
- June 30—Submit IRS Tax Filing Requirements form to the national office
- June 30—Submit/confirm an outline of the Inn's formal or informal mentoring efforts to the national office
- June 30—Deadline to circulate membership satisfaction survey to members; submit results to the national office

Monthly Activities:

- Schedule regular Executive Committee meetings
- Set deadline dates for financial reports and meeting minutes to be distributed
- Select Inn monthly program dates
- Set up a regular schedule of Inn meeting notices
 - Initial notice—3 weeks prior to meeting
 - Reminder notice—1.5 weeks prior
 - Confirmation of Registration—2 to 3 days prior
 - Menu confirmation and meal counts—2 to 3 days prior
- Encourage Pupillage Teams to schedule regular meetings
- Submit original Inn program to the national office for Program Library
- Encourage committees (*Membership, Program, etc.*) to meet several times a year
- Submit current Inn news to the national office within 60 days of event
- Maintain and update the Inn's website if applicable
- Maintain the Inn roster (*If using the IMS*)

For more information on any of these items or recommendations, please log in to www.innsocourt.org or contact your Director of Chapter Relations. A list of the directors is available at www.innsocourt.org.