

Director of Chapter Relations: Onboarding

Welcome to the American Inns of Court! This document covers programs, procedures, and information relevant to Directors of Chapter Relations. You can review this now to get a general overview of what your position will entail and save a copy to reference in the future.

If you encounter duties or procedures in your work not explained here that you believe would be beneficial to include, please send your suggestions to [Michelle Runge](#).

Achieving Excellence

Achieving Excellence is a tiered achievement-based program that recognizes activities in which Inns are already involved and builds on an Inn's successes.

Each level recognizes an Inn's progress toward mastering effective practices in each of the five core competencies of Inn management: Administration, Communications, Program Development, Mentoring, and Outreach Activities.

Achieving Excellence Timeline

Early May	Directors of Chapter Relations finalize a list of their Inns that have reached an AE tier (Bronze, Silver, Gold, and Platinum). This list is saved in the Achieving Excellence folder .
Mid-May	The national office sends out emails to Inns' new Executive Committees encouraging them to opt-in to AE for the next Inn year. Directors also send out congratulatory emails to last year's presidents of AE Platinum Inns with links to order pins and sign up for the Inns of Distinction Gala; and separate emails to Gold Inns with the link to order pins.
May – July	Inns opt-in to AE for the upcoming Inn year, designating which tier they wish to pursue.
July	The Chapter Support Coordinator sends out congratulatory letters and pins. Directors update Inns' websites with new AE badges.
May 1 – April 30	Inns submit items for AE to the AE in-box with a cc to their Directors of Chapter Relations. Each item is logged in the Information tab of the Inn's iMIS record. Directors follow up prior to major deadlines reminding Inns that are missing items to submit them soon.

Useful Links

[Achieving Excellence homepage](#)

Leadership Summits

Leadership Summits are in-person, regional leadership training meetings that impart best practices supporting a high-quality Inn experience. At Leadership Summits, Inn leaders collaborate to think strategically about their Inns' unique value proposition and vision for the future. This better enables Inn leaders to implement best practices in their respective Inns, increasing the likelihood that the Inn will deliver a high-quality member experience.

Summits are one-day events, typically on a Friday in the springtime. Summits begin at 9:00am and finish around 1:00pm.

Leaders have the opportunity to:

- Network with other Inn leaders, sharing successes, challenges, and ideas,
- Generate new ideas to rejuvenate their Inns' education and mentoring programs, and
- Connect to the national American Inns of Court's tools and member benefits.

General Outline of a Leadership Summit

- Organizational strategic overview
 - AIC mission and vision
 - HQME
 - National office resources
- Inn SWOT analysis and discussion (small groups)
 - Identify internal and external weaknesses and threats
 - Report out
- Break
- Value proposition exercise (small groups)
 - Report out
- Next steps: planning and accountability (small groups)
- Wrap-up

Leadership Summit Timeline

August	Directors meet to review last year's Summits, what went well, what could be improved, survey responses, and suggestions for next year's Summits.
September	Directors meet to review and determine metrics for next year's Summits
October – December	Directors work to revise Summit content for next year and develop the post-Summit survey.
January – June	Email promotion of Summits to Inn leaders.
March – June	Directors of Chapter Relations host approximately three Summits per region.

Useful Links

[Leadership topics](#)

Inn Charters and Bylaws

Charter

An Inn's charter is the agreement that the Inn has with the national organization. The charter outlines that the Inn and its leadership agrees to:

- Be an unincorporated association;
- Conform to the mission and objectives of the national American Inns of Court;
- Sustain a minimum of three officers which will be President, Counselor (or Vice President), Secretary/Treasurer;
- Collect and remit membership dues to national (current dues are \$88 per person for active Master, Barrister, and Associate members);
- Remain affiliated with the national organization, meaning the Inn's members are also members of the national American Inns of Court;
- Conform the Inn's fiscal year to the national organization's fiscal year (July 1 – June 30); and
- Host at least six meetings per year.

Bylaws

Inn bylaws cover the local policies that an Executive Committee adopts to run the Inn. Bylaws are a "living document" that should be reviewed and amended over time; they are not required for an Inn to get started. Some of the policies that may be included in local bylaws are:

- Attendance policies,
- An outline of membership rules and regulations,
- How membership is determined (such as how many years of experience determine each membership category),
- If the Inn will allow law students to be members,
- The application process to join the Inn,
- Financial guidelines,
- When and how the budget will be drawn up and approved,
- Policies for making deposits and payments on behalf of the Inn,
- Who has access to the bank account,
- The reporting procedures of the Executive Committee,
- Governance of the Inn,
- How officers are chosen (such as by election or appointment),
- Term limits for officers, and/or
- A succession plan.

Bylaws Procedures

All bylaws must be approved by the national organization Board of Directors. In practice, a Director of Chapter Relations works with an Inn to develop the bylaws, and then issues a letter on behalf of the Board if the bylaws conform to best practices. The sequence ensures Masters of The Bench are not voting on a version of the bylaws that may not get national approval. The process is:

1. The Executive Committee (or a subset) drafts bylaws.
2. Once they have been drafted, the entire Executive Committee reviews and determines if the bylaws are ready to be submitted for approval.
3. The finalized draft of the bylaws is submitted to the national office.
4. The appropriate Director of Chapter Relations sends back the written letter of approval (emailed PDF).

5. The Masters of The Bench vote to adopt the bylaws.

When an Inn decides to create or amend its bylaws, Directors of Chapter Relations should offer to walk an Inn through the bylaws process and offer succinct, relevant feedback. Ultimately, bylaws need to conform to and reflect the Inn's charter to be approved.

Useful Links

[Inn Advisory Resource Documents](#) (includes chartered Inn next steps, moving an Inn from reorganizing to active status, combination and dissolution of Inns, etc.)

[Sample Local Bylaws](#)

[Sample Bylaws Confirmation Letter](#)

Inn Executive Committees

An Inn's Executive Committee acts by the majority vote of its members to uphold the Inn's charter, determine the size of each membership category of the Inn, collect and remit dues payments, confer and terminate memberships, and ensure the Inn runs well and upholds the mission and values of the national American Inns of Court.

Officer terms generally run from July 1 to June 30 (in accordance with the national organization's fiscal year). Sometimes, a Director of Chapter Relations will need to update Executive Committee roles for an Inn in iMIS. iMIS contains a list of predetermined roles; this list should be comprehensive enough to cover most officer titles an Inn may have, and in the case of an Inn having an officer title that is not listed, there should be an adequate substitute.

To update Executive Committee roles in iMIS:

1. Click **Find an Inn** and search for the Inn of which the person is a member.
2. Click on an existing Executive Committee member.
3. From their profile, under **Committees**, click the Inn's name.
4. If the person is already listed, click their name. If not, click **Add Member** and search for their name (last name, first name).
5. To add a new role, click **Add**. To edit an existing role, click **Edit** next to the appropriate role.
6. Find the correct role in the dropdown menu and enter the term dates (7/1/20xx to 6/30/20xx).
7. Click **Save and Close**.
8. Repeat as necessary for other Executive Committee officers.

Useful Links

[Inn Leadership Reference Guide](#)

Inn Management System (IMS) and Umbraco

Inn Management System (IMS)

The Inn Management System (IMS) is a tool designed to help Executive Committee officers administrate their Inns more effectively. The IMS has four primary modules: Members, Meetings, Dues, and Reports (which can be accessed from any of the other three modules). Inns can opt-in to use the IMS. The IMS also links to sites hosted by Umbraco, so an Inn's member roster, Executive Committee roster, and meeting schedule—if kept up to date in the IMS—will be automatically updated on its website.

Directors of Chapter Relations may be asked to provide training in the IMS for new Inn officers. Typically, this means hosting a video conference call during which the Director shares their screen and walks through the IMS user guide at a high level.

Umbraco

Umbraco is a website-building platform on which Inns may host their local websites.

To activate an Inn's site:

1. The Inn should designate someone as the Web Administrator on the Inn's Executive Committee. Add this person to the Inn's Executive Committee in iMIS.
2. Send the Deputy Executive Director an email requesting the new site be created, providing the URL that will be used. All Umbraco URLs start with <http://www.innsforcourt.org/inns/> and end with reference to the Inn's name, such as "firstdcainn". Request the Web Administrator (list their name, ID number, and Inn) to have administrative access to the Inn's Umbraco site.
3. Follow up with the Web Administrator in an email giving a quick overview of how Umbraco is set up, its connection to the IMS, and examples to Inn's sites. Offer to host Umbraco training (like the IMS training) and attach the user guide.

Useful Links

[IMS Help and Resources](#)

[Inn Websites](#)

[Umbraco Showcase](#)

Request for Information

From a Non-member

Occasionally, non-members will request information about joining in Inn through the American Inns of Court website. When a request is received, the Member Support Coordinator forwards the request to the appropriate Director of Chapter Relations, based on the physical address in the request. The Director sends two emails:

The first email is addressed to the President and Membership Chair (if applicable) of an Inn(s) near the person who submitted the request. In the email, the Director includes the potential member's contact information and asks that the Inn's membership committee contact the person directly, or lets the Director know if the Inn is not interested.

The Director then emails the potential member and lets them know their information has been forwarded to Inns in the area and they should expect to hear directly from those Inns in the next few weeks.

About Starting a New American Inn of Court

When someone requests information about starting a new Inn, the Director of Chapter Relations of that region will respond in an email with relevant materials.

Inn formation can occur swiftly or over a longer period, based on the engagement of the organizing committee. The organizing committee maps out the Inn's direction—determining its geographic footprint, affiliations with the bar association and/or nearby law schools, ideals/culture (for example, one Boston Inn has made it a requirement that members commit to the ideals of community service), size and composition of membership, frequency of meetings, member participation standards, and founding officers. One of the major questions the committee will need to answer is whether there are enough potential members in a specific location and surrounding counties to sustain an Inn. Ideally, the Inn should launch with between 40 and 60 members, comprised of a range of years in practices and on the bench. When the committee is comfortable with its plan for the Inn, the committee should present the plan to a group of potential Masters of the Bench (senior practitioners and judges) who are willing to support and commit to participating in the Inn. Once the plan has the endorsement of the "Benchers," the organizing committee will submit the Application for Charter. Normally, the chartering process takes about a week. The Director will work with the committee to ensure the submission answers all of the questions that would likely be posed by reviewers.

After the request for Charter is received and approved, the committee will need to develop a more detailed operating plan for the Inn, which should include a recruitment plan, an operating budget, a process for forming Pupillage Teams, and a process for how program topics will be decided and delivered at Inn meetings. The Director should provide examples of programs that have been presented by existing Inns and samples of Inn program development processes.

Throughout this process, the Director works with the organizing committee to guide them through the formation process, and to provide samples and other best practices to help ensure a smooth launch.

Useful Links

[What is an American Inn of Court](#)

[Value of Membership](#)

[History of the American Inns of Court](#)
[Creating an American Inn of Court brochure](#)

Inn Travel Tips and Best Practices

Directors of Chapter Relations travel frequently to attend Inn meetings and meet with Inn Executive Committees. Directors can prepare using the following tips and best practices.

Preparing Prior to Traveling

- Review the Inn Profile and Contact Activity in iMIS.
- Complete the Monitoring Inn Health Criteria worksheet.
- Print the Inn's charter and bylaws (if applicable) and any other relevant materials about the Inn.
- Review all materials just prior to the meeting.

During the Meeting: Questions to ask

- What is going well?
- What makes you most proud of your Inn?
- What is challenging right now?
- How would you describe the culture/atmosphere of your Inn?
- What resources do you need?
- Are there any questions you have for me?

After the Meeting

- Follow up with an email to the Inn leaders thanking them for their time and addressing questions or concerns they had. Attach any relevant resources to the email and include any relevant links.
- Record the outcome of the meeting on the Inn's Visit tab in iMIS.
- Check in with the Inn about how things have progressed. Determine if a second face-to-face meeting is needed to address any outstanding issues.

Useful Links

[Monitoring Inn Health Criteria worksheet](#)

Inn Taxes and Filing

Inns have the option of joining AIC's group exemption for federal taxes, as long as they a.) obtain their own EIN, and b.) comply with AIC's fiscal year of July 1 – June 30. However, all Inns must file either a 990-N (if the Inn's gross annual income is less than \$50,000) or 990-EZ (if the Inn's gross annual income exceeds \$50,000). If the Inn files a 990-N and has opted into the group exemption, we will do this for them.

Tax Considerations

- A local Inn of Court can obtain federal tax-exempt status by opting into the national group exemption, being included in the operations and finances of another exempt organization, like a law school, or obtaining the status independently by filing a Form 1023. The easiest route is opting into the national office's group exemption. An Inn is a separate legal entity classified as an unincorporated association and must obtain its own EIN before opting into the group exemption.
- All exempt organizations (regardless of how they obtained their exempt status) must file some version of Form 990.
 - a. Organizations with less than \$50,000 gross annual revenue (average over three years) can file a 990-N, also known as an e-postcard. This is an electronic-only filing. It does not contain any financial information and exists only to keep the IRS updated with the current status of the exempt organization. Because it does not require any financial information (other than to attest that they have less than \$50,000 in revenue), the national office can file on behalf of the Inn if they have opted-in to the group exemption.
 - b. Organizations with more than \$50,000 in revenue can file the 990-EZ. This version contains financial information, so the national office cannot file on behalf of the Inn. Most Inns that file the 990-EZ engage a tax preparer to file it for them.
 - c. If an organization exceeds \$200,000 in revenue (or \$500,000 in total assets), they must file the full Form 990. So far, no Inns meet this requirement.
- Most states do not require any filing from Inns unless they fundraise (Ohio and California are exceptions). Fundraising organizations are required to register as charitable organizations in most states. The national organization is registered in all states that require it, but that does not cover local Inns.
- Inns should only use their own EIN in any filing of any kind, and with any bank accounts. **A local Inn of Court should never use the national office's EIN for any purpose.**

Timeline

August - September	AIC emails the Treasurers of Inns that have opted into the group exemption to confirm that their financial information has not changed. If it has changed, Inns must complete the form and return it to the national office.
November 15	Inns must comply with IRS tax filing for the most recent tax year (ending June 30 of the current year).
	AIC files the group exemption with the IRS.

Useful Links

[Tax Exemption and Filing](#)

Celebration of Excellence

The Celebration of Excellence is held annually at the Supreme Court of the United States to honor individuals who have contributed their talent, time, energy, and resources to furthering the ideals of the American Inns of Court. The black-tie event begins with a reception, followed by the awards presentation in the Court Room and dinner in the Great Hall.

Invitees include award recipients and their guests, some Board members, and award presenters. Some staff members (the directors, Scholarships and Awards Coordinator, Executive Director, and Deputy Executive Director) assist with the event. The event takes place on a Saturday at the end of October.

General schedule of events

3:15 pm	Staff arrive
4:00 pm	Professional photographs for award recipients and their guests
5:00 pm	Cocktail reception in the East and West conference rooms
6:10 pm	Awards ceremony in the courtroom
7:30 pm	Dinner in the East and West Conference Rooms or the Great Hall
9:00 pm	Staff encourage guests to depart
9:30 pm	Staff depart after all guests have left

Useful Links

[Celebration of Excellence](#)

Inns of Distinction Gala

The Inns of Distinction weekend begins with an optional networking breakfast and educational program on a Saturday near the end of July. Later that same evening a black-tie event is held at the Supreme Court of The United States, beginning with a cocktail reception in the East and West Conference rooms followed by dinner and a recognition program in the Great Hall. Both the morning program and evening program require separate registration and are not interchangeable.

The evening event is designed to recognize high performing Inns from across the nation who have achieved excellence in Inn management and programming. Invitees include representatives of Platinum Inns and Inns that received Program Awards during the previous fiscal year. Some staff members (the Directors of Chapter Relations, Scholarships and Awards Coordinator, Executive Director, Director of Education and Mentoring Programs, and Deputy Executive Director) assist with the event.

General Schedule of Events

<u>Morning Event</u>	
9:00 am	Breakfast
9:30 am	Program
11:00 am	Post-program networking
<u>Evening Event</u>	
3:15 pm	Staff arrive
4:00 pm	Professional photographs for guests
5:00 pm	Cocktail reception in the East and West conference rooms
6:15 pm	Seated for dinner in the Great Hall
6:30 pm	Program and guest speakers
7:00 pm	Dinner service
8:30 pm	Guests leave
9:15 pm	Staff depart after all guests have left