



2019 Leadership Summit Resources



Governance, Administration & Finance



Governance & Administration

The American Inns of Court is a tax exempt organization as defined in section 501(c)(3) of the Internal Revenue Code. Further, the American Inns of Court has been granted a group exemption ruling that may include any of its "subordinate organizations." Inns may opt to be included in this group exemption.

An Inn is governed overall by two documents:

When the Inn first organized, your Inn applied for and was granted an **Organizational Charter** from the national foundation. The Charter is a set of written guidelines providing a strong foundation for the local Inn to operate which are consistent with American Inns Court Foundation's Articles of Incorporation, Bylaws and policies. It covers the basics of the Inn organization: Objectives; Organization, including governing body and officers; Membership; Finances; Meetings and activities; and Pupillage groups.

Second, the **Local Inn Bylaws** are a written organizational structure by which the Inn is administered. This document outlines: Organizational structure; Membership; Meetings and attendance; Voting and Elections; Fiscal Matters; and Adoption and Amendments.

Besides local Inn Bylaws, your Inn should have or should develop policies and procedures for: Membership--including member rotation, recruitment processes, and attendance; Mentorship practices; Educational programs and pupillage team participation; Meetings and activities planning; and Due structure and payments.

Governance Structure

The ultimate authority major policy and organizational decisions within each Inn rests with the Masters of the Bench. The Masters determine the policies of the Inn in order to accomplish its purpose as set forth in the Inn's Charter.

The executive committee and/or Inn leadership exercise the authority of the Masters between Masters of the Bench meetings. The enthusiasm and commitment of the leaders of the Inn provide an important role model for the other members. The health and vitality of the Inn depend directly on the vigor and vision that the executive committee brings to the running of the Inn.

The Masters of the Bench should review and adopt Inn bylaws to document procedures to be followed by the Inn. One such procedure is the determination of leadership positions and election process whereby the officers are selected for the executive committee. Although the Masters of the Bench are responsible for



establishing the procedure for electing leaders, they may choose to delegate this authority to a vote of the full Inn membership on some or all of the officer positions.

If your Inn has not drafted bylaws, a set of sample bylaws is available from the national office to use as a guide. Once drafted, the bylaws should be reviewed and approved by the Inn's Masters of the Bench and submitted for approval by the national Board of Trustees through the national office.

Leadership Roles

The following are brief descriptions of the various officers that an Inn may have, including: President, Counselor, Secretary/Treasurer, Administrator, Program Committee Chair, and Membership Committee Chair. A written job description should be created and provided to each officer.

Samples of these job descriptions are found on the Inns of Court website. Your Inn may have additional roles that may be key to successful operations. Be sure your governance documents, including your bylaws and policies support and define these roles.

The **president** provides general leadership and guidance to the officers and membership of the Inn. In addition, the president performs the following duties:

- Preside at all Inn functions
- Ensure that the officers and the executive committee perform their duties
- Maintain contact with the national office and national board of trustees
- Sees that the Inn adheres to the policies of its charter and other policies promulgated by the national board of trustees
- Lead the executive committee in participation of the Achieving Excellence Program and progress toward goals.
- Works towards creating and supporting opportunities for a high quality membership experience throughout all Inn activities; focusing on member needs and values.

The **counselor, vice-president or president-elect** as some Inns prefer, assists the president in all of his or her duties. Experience has shown that it is beneficial that either the president or counselor be a judge. The counselor also performs the following duties:

- Execute the functions of the president in his or her absence
- Establish and maintain liaison with the local federal and state courts

Resources:

[Sample Inn Leader
Job Descriptions](#)

[President](#)
[Counselor](#)
[Secretary-Treasurer](#)
[Administrator](#)
[Program Committee Chair](#)
[Membership Committee
Chair](#)
[Mentoring Committee
Chair](#)



- Oversee, in conjunction with the program committee, the operation of the pupillage teams
- Support the President’s role in delivering member value and a high quality member experience

The **secretary/treasurer**, whose duties may also be divided between a secretary and a treasurer, regularly accounts to the executive committee, and if requested, to the Masters of the Bench, for all monies collected and spent. In addition, he or she may perform the following duties unless specifically assigned to the administrator.

Treasurer’s duties include:

- Maintain all financial accounts – establish the Inn’s budget, invoice members, collect dues and pay all bills
- Provide requesting members with IRS form W-9
- Ensure member dues to the national organization are held in reserve from the operating income and submit member dues to national: Full payment due by 1/31 of each year
- Ensure the appropriate tax form is filed annually with the IRS. If the national office files on behalf of the Inn, the treasurer confirms the filing information is correct (form provided by the national office). If the Inn files directly with the IRS, the treasurer must submit a copy of the filing to the national office.

Secretary’s duties include:

- Send notice of each Inn meeting, Masters of the Bench meeting, and executive committee meeting
- Record and circulate meeting minutes
- Maintain member attendance records
- Update, maintain and submit annual membership rosters and leadership information to the national office by due dates.

Many Inns employ an administrator who performs some or all of the administrative duties of the secretary/treasurer on a permanent basis. When the administrative duties of the secretary/treasurer pass yearly from person to person, records can be lost and succeeding officers may not easily be able to follow previous procedures. For this reason, Inns have found a permanent administrator to be of great value.

The **Administrator** need not be an attorney or a member of the Inn. In many cases, local Inns pay an outside administrator to handle these functions. The position may require six to ten hours per month, depending on the duties assigned. Some of those duties may be:

- Perform many or all of the administrative responsibilities of the secretary/treasurer



- Arrange for catering for Inn meetings and other events
- Provide staff support to Inn committees
- Serve as an important contact point for the national office, assuring that the leadership information and the membership roster are submitted in a timely manner.

The **Program Committee Chair** leads the program committee, which is composed primarily of members who are not officers. The program committee directs the educational component of the Inn. Committee duties include:

- Devise a general framework for the year's programs in advance of the first Inn meeting with the approval of the executive committee
- Create pupillage teams ensuring a balance of Masters, Barristers, Associates and Pupils on each team to foster informal mentoring
- Select program theme and topics, and assign them to the pupillage teams
- Supervise and consult with the pupillage teams as necessary while they develop the details of their programs
- Submit program materials, with a completed Program Submission Form to the national office for inclusion in the Program Library
- Collect and review program evaluations for each program
- Incorporate feedback into future programs to ensure that members' needs are addressed.

The **Membership Committee Chair** leads the membership committee, which may include members from each membership category. While the Masters of the Bench or the executive committee make the final decisions about invitations to new members, a small membership committee can serve the valuable function of building a file of potential members for future consideration. The membership chair and committee may be responsible to:

- Coordinate presentations at local or state bar meetings to recruit new members
- Screen applicants and make recommendations for new members
- Maintain the list of eligible candidates for membership.
- Maintain a record of Inn members by years of experience to signal when each member should be advanced from Associate to Barrister, Barrister to Master and Master to Emeritus. This information should be part of a membership review to determine the number of vacancies in each membership level annually.
- Ensure that membership recruiting efforts support the Inn's membership balance



Other Team Members

Additionally, many Inns have a number of other officers to assist in managing the Inn’s administrative functions. Some of these include:

- President-elect to ensure a smooth transition in leadership from year to year
- Reporter to regularly submit news items and photographs of the Inn’s activities for publication in *The Bench* and other news outlets
- Web Administrator to update and maintain the information published on the Inn’s web site

The president or the executive committee may appoint members to chairs or other subcommittees to accomplish specific tasks. These may include: mentoring, law school liaison, court liaison, and social.

Effective Leadership Strategies

Effective Inn leadership should be an intentional process, as the leaders of the Inn set the tone, expectations, and culture. All Inn leaders should “model the way” and be the example that they expect all members to follow in terms of comportment, collegiality, decorum, inclusiveness, and to provide a welcoming and inspiring membership experience. There are many strategies that can be put in place to maintain effective leadership. Several strategies can help to maintain effective Inn leadership. Consider:

- Rotating leadership to keep your Inn strong by consistently developing new leaders.
- Setting term limits for officer positions to avoid burnout. A typical term is two years. Occasionally, the Treasurer or Administrator roles can have longer terms, but the Executive Committee should plan for officers to rotate out as the Inn grows and matures.
- Elect officers and appoint committee chairs/members before the Inn adjourns for the summer. This allows the new leadership to plan for the coming year, learn about their officer responsibilities and fill membership vacancies.
- Enlist volunteers and delegate the tasks and responsibilities of running an Inn. Many Inns appoint co-chairs for committees with staggered terms of office to help ensure continuity is maintained in the position. This has many benefits:
 - Avoids one individuals carrying too heavy of a burden;
 - Allows one co-chair can continue operations if the other is unable to fulfill his or her responsibilities; and
 - Cultivates new leaders.



- Look for engaged and enthusiastic leadership volunteers at all membership levels. Officer and leadership roles can be held by most membership levels – Masters, Barristers and Associates, even Pupils.
- Consider designating an Inn Administrator role without specified term limits to support operational continuity and consistency from year to year.

Leadership and the High Quality Member Experience:

One of the primary responsibilities of Inn leadership is to consistently deliver a high quality member experience. Inn officers and committee chairs should constantly ask themselves whether to program, activity, policy or actions provides the valuable experience members expect from their Inn.

A few questions leaders should ask themselves:

- Are we doing all we can to provide a collegial environment at Inn meetings?
- Are our programs engaging, entertaining and relevant to our member’s needs?
- Are our Inn activities helping to raise our members’ professional profiles?
- Are we supporting and encouraging participation in mentoring activities?
- Do our outreach efforts have the desired outcome of contributing to the mission of the Inns of Court?
- Are our efforts meeting member needs as expressed in the most recent Member Satisfaction Survey?

As these questions are asked and as improvements to programs and opportunities are made, leaders will have fostered a culture that is supportive of and integral to delivering a high quality member experience.

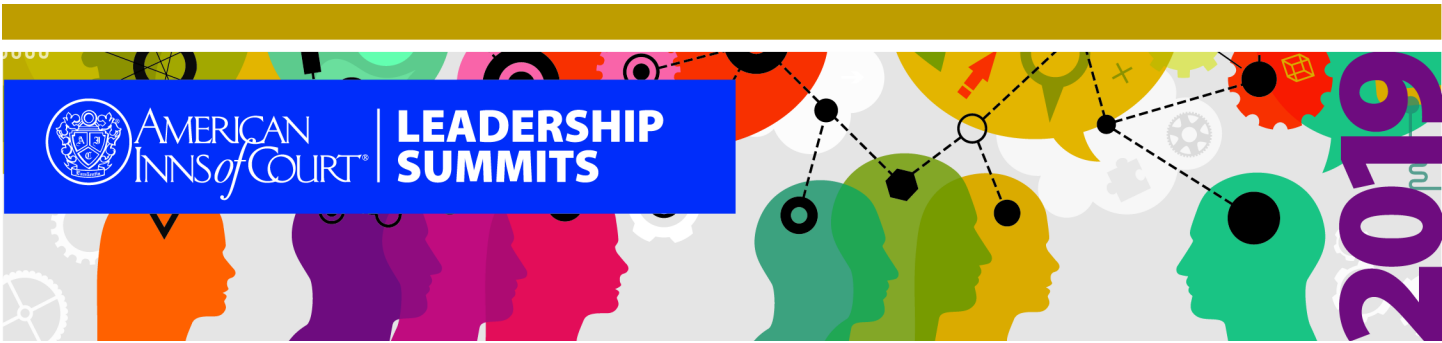
Recognition

And finally, remember that holding an office or providing other volunteer time requires work and personal sacrifice, and should be rewarded. Members who have assumed these responsibilities deserve recognition. Consider how your Inn will recognize and reward their hard work. Efforts such as sending ‘Thank You’ letters or acknowledging volunteer service at a year-end dinner or final meeting are a few ways to recognize members’ service to the Inn.

Resources:

[Plaques and Certificates](#)

[AIC Merchandise](#)



Support and Resources

You are not alone in your service and efforts. There are resources that you can call upon for help. Any member of the national office staff will happily assist you with a question. However, your **Director of Chapter Relations (CRD)** is dedicated to supporting local Inns and their members. The CRDs serve as the primary liaisons between Inns and the national office. Contact the [Director of Chapter Relations for your region](#) on questions about improving your Inn's performance, and to learn about services or programs of the Foundation.

Directors of Chapter Relations



Ernest Barrens, CAE
Northeast Region
ebarrens@innsofcourt.org
571.319.4702

Pam Wittmann, CAE
Southeast Region
pwittmann@innsofcourt.org
571.319.4708



Anne Paul, CAE
Midwest Region
apaul@innsofcourt.org
571.319.4707

Caryn Worcester, CAE
Western Region
cworchester@innsofcourt.org
571.319.4709





FINANCE, BUDGETING and TAXES

Inn Tax Status

The American Inns of Court was granted 501(c)(3) status because it is considered a non-profit corporation of a charitable nature that does not engage in political activities or lobbying. As a result, the American Inns of Court Foundation is not required to pay federal or state tax on income related to its central mission, and dues paid to and contributions made to the American Inns of Court are considered tax-deductible.

Deductibility of Dues or Other Payments to the Inn

If your Inn has opted to be included in the national organization's group exemption, it is considered a 501(c)(3) tax-exempt organization. Contributions to the Inn are considered tax deductible.

The non-meals portion of the dues, including the amount that is remitted to the national organization, may also be deductible. The Inn should be prepared to provide a breakdown of how much of a member's dues payment went to meals versus other expenses.

Members should always consult their tax advisor before taking any deduction.

Policy, Planning and Tracking

Creating and maintaining a budget is a best practice in Inn administration. The budgeting process ensures that your Inn plans and prepares for its financial obligations. It also is a clear demonstration that the leadership team is actively working to create a solid financial footing for the upcoming Inn year and a model for future generations of Inn leaders to follow.

Budgeting brings to life the policies of an Inn. Many typical Inn policies have financial implications, and therefore, must be reflected in an Inn's budget. A budget also tests policies for reasonableness and practicality.

Common policies and considerations that must be reflected in a budget may include:

A. Membership

- How many members will the Inn have? Is there a set minimum or maximum?
- How much will members pay? How many members in each dues category are expected?
- Are there other sources of revenue to help offset dues?

B. Meetings

- How many meetings, meals and programs will the Inn have each year?



- What type of meals will the Inn provide? Are members willing to pay for the type of meals the Inn wants to have?
 - Will the Inn hold a special holiday event or end-of-year banquet?
- C. Programs
- What types of programs will be presented and where?
 - If the Inn has its meetings at a restaurant, will the restaurant charge for the room or audio-visual equipment?
 - Will the Inn pay guest speaker fees or travel expenses?
- D. Scholarships
- Will the Inn underwrite the cost of students?
 - Will the Inn provide scholarships for members who otherwise can't afford to join?
- E. Operational Expenses
- What additional expenses will the Inn incur during the year (e.g., administrative support, leadership meetings and training, etc.)?

How these and others questions are answered, and knowing that the answer to one question may affect the answer to other questions, are the first necessary steps in creating a budget.

A budget allows for an Inn to plan for the future. Inns may wish to plan for certain financial objectives, such as building a reserve fund or establishing a scholarship fund. These objectives are not going to be achieved by accident, and often require years of planning and fiscal control. Many Inns conduct community service projects, such as publishing a city judicial guide or conducting programs in local schools. It is important for an Inn considering such projects to be aware of the costs and plan for them so as to not affect the essential operations of the Inn.

Most important, a budget allows an Inn to track its income and expenses in context. Reporting on actual income and expenses every month is not particularly useful unless there is a context in which those figures can be measured. "The Inn took in \$5000 in dues in September." Is that good? Should it have taken in \$10,000? Unless there is a budget in place, it is impossible to gauge the Inn's financial position accurately.

Tracking income and expenses against a budget provides a reality check to the Inn's plans, especially if the Inn is planning any kind of aggressive income growth or expense reduction. By comparing that plan to reality, an Inn can see whether the plan was realistic. Knowing how your plans are measuring up to reality allows Inn leaders to adjust their actions. Had the Inn planned on 80 dues-paying members, but only ended up with 60?



That's a big difference in income, the loss of which could wipe out a planned surplus, or make it impossible to have a paid speaker. It's better to know that you can't afford to invite a speaker early in the year than to extend the invitation and have to scramble for emergency funds.

Once the Inn has been tracking income and expenses against a budget for a couple of years, it will be easier to predict how much is needed and when it is needed. Identifying cash flow patterns can be important, especially when trying to build a reserve fund.

Who's Involved

While any single person could sit down and put a bunch of numbers on a page, the budgeting process can and should be a collaborative effort. The numbers must be meaningful and realistic, and rarely will one person have all of the knowledge necessary to put together an accurate budget. Additionally, the more involvement you can get early in the process, the more support you will have later.

The Treasurer will most likely take the lead role in developing the budget. Planning and tracking the Inn's income and expenses is a key duty of the Treasurer and budgeting plays a primary role. The other key person in the process will be the Secretary or Administrator. The Secretary or Administrator will often be dealing with the caterer or venue, and will have information about meal expenses (usually the largest budget category).

Other collaborators may include the chairs of the Membership Committee and the Program Committee. The Membership Committee chair will be able to provide the Treasurer with the number of returning members, the number of anticipated new members, and to which membership/dues category those members belong. Often, the Membership Committee is also responsible for determining how many scholarships will be awarded. The Program Committee chair will be able to provide the Treasurer with the number of meetings to be held, the venue where they will be held, and any special needs they may have, such as paid speakers or audio-visual expenses.

It is wise for the Treasurer to speak to each executive committee member early in the process to determine if they have any input or special requests that may have budgetary implications. While these requests will need approval by the entire executive committee, and may ultimately not be possible, the committee member may support the budget nevertheless because their input was at least sought.

Dues Structure & National Dues

Inns of Court are self-supported from dues charged to their members. Most Inns choose a tiered structure for dues: Masters of the Bench and Barristers pay more than Associates and Pupils. If the amount charged to



Associates and Pupils does not cover their costs, the Masters of the Bench and Barristers are, in effect, subsidizing a portion of the Associates' and Pupils' expenses, and should be made aware of that fact. If the Inn uses a tiered dues structure based on membership categories, it is important to know how many members there will be in each of those categories. If the more senior categories are effectively subsidizing the more junior categories, this may have some impact on how many junior members the Inn can have and how many senior members the Inn will need.

While costs can vary depending on the type of meal and the area of the country, a typical dues structure is \$200-\$500 for Masters of the Bench, \$175-\$300 for Barristers and Associates, and \$75-\$95 for Pupil members. It is strongly recommended that all active members pay dues (including members of the judiciary), if only a nominal amount. This encourages members to feel more invested in the Inn. Emeritus and Honorary members who periodically participate in Inn activities are typically charged a nominal annual fee or may only pay for the meals of the programs they attend.

Inns are required to collect and remit \$88 per active member (Masters of the Bench, Barristers, and Associates) for national dues. This amount should be considered restricted income in the Inn budget. National dues are calculated based on the number of active Inn members (excluding Pupil, Honorary and Emeritus members) during the preceding fiscal year (July 1-June 30). Invoices are mailed to the Inn Treasurer in July. National dues should be paid in full no later than the following January 31.

Collecting Information

There are a number of detailed pieces of information necessary to the budgeting process, the most important of which is the number of members anticipated in each membership category. For most Inns, membership dues payments are the only source of income. The treasurer should be aware of any stated minimum or maximum number of members established by the Inn which can affect overall income.

Working with the Membership Committee, the Treasurer will determine the number of new and returning members and the anticipated dues revenue to be collected from them. As a best practice, Inns should distribute renewal forms at the end of the program year to any member who is eligible to return the following year, and ask them to indicate their plans by a specific deadline. With this information, the Membership Committee and the Treasurer can determine how many new members would be required to have a full membership roster and meet the Inn's income requirements.



Next, you will need to know how many meetings are planned for the year, where they will be held, and what type of meals will be provided at the meetings. Typically, an Inn’s largest expense category is food and beverage. Meals may range from very simple hors d’oeuvres stations to plated multi-course dinners. The Inn needs to decide what kind of meal members want and are willing to pay for before checking prices with a caterer or restaurant. It may be more economical to offer buffet-style versus plated dinners, and a cash bar versus a full, open bar.

Determine how many meetings at which meals will be served, then estimate how many members will actually attend any given meeting. If the Inn has 80 members, but only 85% attend meetings on average, based on that average, the Inn only needs to budget for 68 members. Include any venue costs in your calculation (e.g., room rental, security, valet parking, etc.) Restaurants are often less expensive than outside caterers. If using an outside caterer, look for venues that may be free or lower cost.

If the Inn is planning a special holiday or end of year banquet, a determination has to be made whether the costs should be included in the members’ annual dues or paid separately. Will members be able to bring spouses or guests? If the Inn gets a better attendance percentage at banquets than regular meetings, the estimated attendance must be adjusted.

Finally, the budget should include the Inn’s total administrative costs. (e.g., Inn Administrator salary, photocopying or other printing expenses, postage, newsletters, leadership meeting expenses, etc.) Estimates for all of these administrative expenses should be included, along with any other expenses authorized by the executive committee.

Often, administrative costs can be absorbed by an Inn member’s court or firm. These expenses, however, should still be estimated and the donation of those services should be listed as an in-kind donation. In most cases, such a donation may be tax deductible. Having these services donated is an easy way to trim the Inn’s expenses.

Creating the Budget

With the necessary information collected, creating an annual budget document can be as easy as creating an Excel spreadsheet or as complex as using third-party financial software like Quickbooks or Microsoft Money. Income should include items such as dues payments from members, donations, and sponsorships. Expenses should include the cost for monthly programs (meal,

Resources:

[Inn Budget Development and Sample Inn Budget](#)



venue cost, A/V costs, speaker fees, etc.), special events that the Inn may host, national events that Inn members attend, national dues, printing, postage, and administrative costs.

Implementing the Inn's Budget

The budget needs to be approved by the Inn. Depending on the Inn's structure, this could mean the executive committee, Masters of the Bench, or the entire membership. It is important that the approving body understand what is in the budget, how it was created and the policies that are reflected in the budget.

Once the budget is approved, it should be communicated to the entire Inn. While most members will not pay attention to the details of a budget, they will appreciate knowing their leaders are planning thoughtfully. This also can help the leaders later if reality causes them to alter their plans, as the members will have already been provided a chance to review and understand the budget.

The budget is a living document that requires updates and interaction. After the budget has been approved, it needs to stay on the table. Each month, the Treasurer needs to review the income and expenses of the Inn and compare each item to the budget. Any significant variance needs to be identified and explained. The Treasurer should present a budget report to the executive committee at each meeting, and be prepared to explain variances. Not only will the executive committee need that information to be able to adjust operations, but they may also identify opportunities to address any imbalance.

Inns that participate in the national **Achieving Excellence Program** must submit a draft of the Inn's annual operating budget as a requirement for attaining Gold level recognition in the program. The deadline for submitting the budget to the national office is November 30.



Membership



Membership

Having a diverse and engaged membership is a cornerstone to a high-quality member experience. The following topics will help Inn leaders recruit and retain Inn members:

- Integrating Membership efforts and the High Quality Member Experience
- Membership Categories
- Member Status
- Membership Targets, Ratios and Rotation
- Membership Diversity
- Structured Recruiting Efforts
- New Lawyers: Handle with care
- Judicial Recruitment and Membership
- Member and Community Engagement
- Member Orientation
- Marketing Your Inn
- Membership Satisfaction
- Leadership and Succession Planning

Integrating Membership efforts and the High Quality Member Experience (HQME)

In 2016, the American Inns of Court undertook an extensive research project to determine what factors motivate members to join and remain active in Inns of Court. An analysis of the survey responses resulted in a series of attributes members identified as comprising a High Quality Member Experience (HQME). The findings are summarized below. Inn Membership Chairs and Executive Committees should consider the how each of the attributes can be applied to all areas of the Inn. Membership Chairs can also consider incorporating these reasons and attributes when creating any presentations or marketing materials for membership recruitment.



- **Collegiality:** We are a welcoming, engaging, and passionate community of legal professionals fostering career growth and discovery.



- Innovation: We inspire our members – and the profession – through innovative learning opportunities and cutting-edge content that ensures ongoing excellence and professionalism in the field.
- Respect: For more than 35 years, we have been driving the standard of excellence, civility, and professionalism in the legal profession.
- Education: For decades, the legal profession has relied on AIC to develop future leaders through progressive, accessible, and quality education that fosters respect, ethics, and excellence.
- Connection: We are the only place where the Bench and Bar come together through local programs to collaborate, share knowledge, and develop relationships that lead to professional and personal growth.
- Mentorship: We are a trusted source for unparalleled career support and life-long mentoring that challenge our members to grow, connect, and give back to the profession.

Offering, fostering and ensuring these elements of the HQME will create a vibrant Inn of Court and will further our ability to advance our shared mission. While this responsibility should be shared by all members of the Inn’s Executive Committee, the Membership Chair role can be pivotal to a successful HQME and vibrant Inn.

Membership Categories

Active membership in an American Inn of Court may be in one of four categories as determined by years of experience. The experience levels indicated here are guidelines only. Each Inn may determine its own experience requirements within the membership categories. These are typically captured in the Inn’s bylaws and/or membership policies.

- Masters of the Bench—consisting of lawyers with at least 10 to 15 years of experience, judges and law professors;
- Barristers—consisting of lawyers with at least five years of experience;
- Associates—consisting of lawyers with zero to five years of experience; and,
- Pupils—consisting of law students.

National Dues

Inns are required to collect and remit national dues from each active member each year. Inns receive an invoice in July each year based on the number of Active members (Master of the Bench, Barrister and Associate categories) from the prior year.

Inns do not pay dues for members whose status was Honorary, Emeritus, Pupil, or Alumni during the year. Pupil members are considered fully active and receive all of the benefits of membership from the national organization. However, they are not included in the count for national dues billing.



The Inn must weigh the need for a diverse membership against the realities of the community it is serving. The charter requires the Inn to have a mix of active members in all categories: Master of the Bench, Barrister, Associate and Pupils, if available. Inns are not required to have law school affiliations or pupil members, although the majority of Inns do enjoy this element of the Inn experience.

This intentional ratio of member experience levels fosters mentoring, creates more diverse programs and frankly is one of the few things that separates the Inn of Court experience from a bar association.

Intentionality in creating your Inn's membership is a key element to the Inn of Court's ability to achieve its mission.

Member Status

Beyond their membership level, each member of an Inn has a membership status. These statuses are: Active, Emeritus or Honorary. Former members of an Inn are considered Alumni.

Active members are those who currently pay dues, attend meetings, and participate in the program presentations and mentoring activities.

Emeritus members are those individuals who have served as a Master of the Bench for at least 5 years, and may be retired or less active in practice and have been granted Emeritus status by the Inn's Executive Committee. These members are exempt from attendance requirements and do not participate on pupillage teams.

Honorary members are designated by Inn's Executive Committee, and are granted this status on the basis of distinguished service to the bench or bar, in furtherance of the American Inns of Court's mission, or other noteworthy achievements. Honorary members need not be in the legal profession, and this status is sometimes extended to the family members of the Inn's namesake. Honorary members are also exempt from Inn meeting attendance requirements.

Alumni members are individuals who are no longer actively participating in the Inn and its activities. These former members may have rotated out of the Inn due to term limits (i.e., some Inns require Associates or Barrister members to serve a specific length of time before "graduating" from the Inn) or have withdrawn for other reasons and do not attend meetings or pay dues.



Emeritus, Honorary and Alumni Member Engagement

Although Emeritus, Honorary and Alumni members are not considered “active” membership statuses for the purposes of national dues billing, it is still important for the Inn to extend opportunities for these individuals to participate in or support the Inn. Here are a few ways Emeritus, Honorary or Alumni members may be engaged in the Inn:

- Invite them to Holiday or end of the year banquets
- Invite them to participate in community outreach events
- Include Emeritus members in mentoring opportunities, whether formal or informal
- Feature Honorary members as speakers in Inn programs

Emeritus and Honorary members can still contribute and participate in Inn functions, and the Executive Committee should have an engagement policy in place as a best practice.

While there are many reasons a member may become an Alumnus of the Inn, they can remain involved and give back to the American Inns of Court through the national Alumni Association.

Alumni Association

*The American Inns of Court has a national [Alumni Association](#), designed to allow alumni to maintain a level of engagement with the American Inns of Court. Alumni Association members retain access to the national website, receive *The Bencher* magazine, and receive information about select programs open to current and alumni members. Members of the Alumni Association may contribute directly to the American Inns of Court national organization, with a portion of the contribution remitted directly to the alumnus' former Inn.*

Membership Targets, Ratios and Rotation

The Executive Committee, working with the Membership Chair, should set targets for membership, including how many members should be maintained in each membership category. Setting membership targets gives the Membership Committee clear objectives that support the overall operation of the Inn. The maximum number of active members of each local Inn should not exceed the number of people who can participate actively in programs, discussions, and other activities of the Inn. That number is generally thought to be approximately 80 members, while the average Inn has approximately 70 members.

When we discuss ratio, we are talking about the number of active members that must be spread among the categories of membership. This works best when it is related to the number of pupillage teams. For example,



each pupillage team might have one judge, two or three additional masters, two barristers, two associates and two pupils. If the Inn has eight meetings and eight pupillage teams with 10 members, this would keep the total active members to 80.

Membership rotation provides opportunities for practitioners to experience Inn membership, while keeping the Inn at a manageable size. Masters of the Bench may continue in Inn membership indefinitely or for at least five years. Associates and Barristers may have a membership term of 2-5 years, as established by the Master of the Bench. These members may then be allowed to reapply for extensions of their memberships, based on their levels of participation and contribution to the Inn experience. Pupil members join the Inn for one year, possibly two. Inns should strive to maintain a waiting list of qualified applicants who may fill slots as they become available.

Membership Diversity

One of the attributes of a high quality member experience is engaging with colleagues in an environment that is cordial and welcoming – one that is open to diverse ideas that foster professional and personal growth. Inn membership should reflect the diversity of the community in which it operates.

- Personal diversity: Inn membership should reflect the open and equal opportunities available to all segments of the population.
- Professional Diversity: An equally important consideration is the inclusion of as many segments of the legal community as possible. Federal and state judges, law school deans and professors, and law students should be included in the membership structure of the Inn where ever possible. It is important to include a cross section of legal practices, such as solo or small practice attorneys, large firm attorneys, plaintiff’s bar, defense counsel, public defenders, prosecutors and other government attorneys. This balance of legal practice should be deliberately and methodically encouraged.

Resources:

[Diversity Policy](#)

[Samples of Diversity Policy promotion](#)

By attracting and retaining a diverse membership, Inns encourage the success of our unique organization as well as our respective professional pursuits. Therefore, the American Inns of Court are committed to creating and maintaining a culture that promotes and supports diversity not only throughout the organization, but in the profession as well.



As part of the Achieving Excellence program, Inns are asked to promote the national diversity policy at the Inn level. This is far from a “test of diversity” but rather a request to communicate one of the fundamental tenets of our organization’s culture and mission. Samples of how Inns have accomplished this are available on the Inns of Court website.

Structured Recruiting Efforts

A successful Inn continually strives to retain its existing members, and to fill any vacancies with committed, quality people. Finding and keeping members should be a year-long, thoughtful process. Inn leaders work to fully understand why their members joined and then work to deliver on that expectation.

Members look to their Inn experiences to enhance their professional lives and to connect them with peers and colleagues in the legal field. Based on recent research on the HQME, Inn members see their Inns as welcoming and engaging communities that support career growth and discovery. Recruiting efforts should highlight the Inn’s efforts to promote and nurture professional development through interesting and innovative programming and mentoring opportunities with the best legal minds in the community. Most importantly, Inn leaders actively work toward ensuring that their Inn delivers on its promise to members, and seeks on-going feedback from members on their needs.

Approaching membership recruitment in a systematic way ensures this important function occurs regularly, and that the Inn will have a full complement of members when the new Inn year begins. Vibrant Inns typically have a Membership Committee that reviews applications or nominations. The chair of the committee is part of the Inn’s executive committee. The committee meets periodically throughout the year to review and assess the waitlist, membership openings and applications or nominations.

It is important that whatever process is implemented, whether nominations or applications, it should be followed consistently and fairly. If the Inn strays from a consistent approach to recruiting and admitting members, it can be perceived as elitist, exclusionary or even discriminatory. A sample membership application can be found on the Inns of Court website. Inn leaders often post this same document on their local Inn website enabling them to direct potential members to the site to learn more about the Inn and to apply for membership.

Resources:

[Sample Membership Application](#)

[Sample Membership Renewal Form](#)



At the end of the Inn year, members who are eligible and wish to continue their membership into the next year should be asked to complete a membership renewal form. A sample renewal form can be found on the website. A firm renewal deadline allows the Membership Committee to determine how many and what categories of openings are available for the coming year.

New Lawyers: Handle with Care

A critical membership category for any Inn is the Associate member. These early careerists are navigating a number of competing pressures and can sometimes be difficult to recruit into the Inn because they simply can't see how they could possibly add another obligation to their already full plate. Inn leaders can and should be creative when it comes to meeting the needs of this membership category. In addition to gaining the critical skills needed to be a successful attorney and demonstrate value to the law firm, new lawyers may have important and active social lives, may be newly married or may be raising a young family, all of which creates demands on personal time. Some Inns have met this need head on using the following methods:

- First, remember that not all new lawyers are the same. Some may be younger and fresh from law school, while others are career changers who are facing different pressures at work and at home. Be sure to treat each member's unique needs with appropriate strategies.
- Lighten the attendance requirement. While the face-to-face monthly dinner meetings are the "meat and potatoes" of the Inn experience, it may be a barrier for Associate level members. Can Associates have more fluid attendance requirement and still have a vital link to their Inn and the legal community?
- Consider lunch meetings. Even if it's not a full Inn of Court meeting, creating opportunities during lunch hour timeslots may be just what an Associate needs as it lightens the demand for their evening time with their families.
- Meet them halfway: Can the Inn provide for spouses and family during some of the Inn's events? Either social or community outreach programs can be made family-friendly, allowing for the new lawyer to balance work and home while encouraging family support of work related activities. A strong support system is a critical element to any challenge, and the Inn can foster this through its meetings and events.





- Make additional efforts to incorporate new lawyers into structured mentoring efforts. Going above and beyond to make sure that newer members of the bar are integrated into the Inn makes their decision to join and renew a bit easier.
- Ask them! Have an open conversation with individuals or a group of new lawyers and ask how they can be best served or what they would like to experience as part of belonging to the Inn. Some Inns have an Associate position on the Executive Committee specifically for this purpose. Not only will you get new ideas to create a vibrant Inn, you'll have built a stronger relationship with a very important part of your Inn- its future Masters of The Bench.

Judicial Recruitment and Membership

Another critical part of the American Inns of Court membership experience is the involvement of judicial members. Inns provide lawyers and judges with the opportunity to connect face-to-face in a casual environment and interact in a collegial way. This engagement between the bench and the bar is a compelling value for all members as they develop professional skills and civility in the courtroom.

Over the years, Inns have found it challenging to get the judiciary more involved with their programming and membership. It is commonly believed that Inns with strong judicial engagement have more successful programming, member participation, and operations in general.

A Judicial Engagement Benefits document was developed by the Judicial Task Force to help Inns enhance and improve the Inn experience for judiciary members. Developed by judges nationwide, it speaks to common hesitations judges may have about becoming involved in the American Inns of Court, and provides insights to address those concerns.

Resources:

[Benefits of Judicial Engagement flier](#)

[Instructions for Engagement flier](#)

Member Recruitment and Community Engagement

Once membership openings have been determined, the next step in the process is to recruit new members. The Membership Committee should explore a number of options to identify and contact potential new members:



- Encourage Inn members to help recruit. The first and best source for member prospects is the Inn’s existing members. Specific membership openings should be communicated to the Inn’s members, who can either nominate or encourage their colleagues to apply. Existing members should understand the specific membership levels being sought. Inn leaders should also clearly convey what is expected of new members, such as the membership duration, attendance and participation policies, and adherence to the American Inns of Court Professional Creed.
- Announce membership opportunities through the local bar associations, either at meetings or through publications.
- Use the press. If there is a local legal press outlet, or if the local newspaper has a legal section, consider placing an ad.
- Invite prospective members as guests. Keep in mind that one of the best recruiting tools you have is your monthly meeting. Use it! Based on responses from an Inn membership survey, many current members joined after attending an Inn meeting as a guest. Send out a general invitation to the local bar association, and encourage Inn members to personally invite a guest or two.
- Make a presentation to a legal organization. State and local bar associations are frequently searching for good CLE programs for their meetings. Arrange to present one of your best programs for them, and don’t forget to bring along a supply of membership applications with your Inn’s contact information included.

Your members are distributed throughout the legal community and have wide networks. Including your members in the recruitment process encourages them to talk to others about the Inn of Court and its benefits, which will increase your members’ sense of ownership of the Inn. The American Inns of Court is a respected organization with more than 35 years of history. As part of that history, your Inn and its members are known and respected in the community. They are a tremendous recruiting tool, and represent the professionalism and standards of the organization. Engage them in your efforts.

Member Orientation

Each year, Inns across the country welcome thousands of new members, ranging from law students to senior judges. Many Inns go to great efforts to recruit each new member but do not know what to do with them once they sign up. One of the simplest solutions for this problem is to conduct a formal orientation for new members, at which they are introduced to the Inn’s leadership, given an overview and history of the Inns of Court, and are engaged in discussion regarding what they can expect and what will be expected of them. Establishing participation and attendance expectations early can be the key to successfully onboarding new, active members. Here are a few considerations when onboarding new members:



- Was the member made to feel welcome?
- Does the new member understand what is involved and what participation level is required?
- Does the new member know who they can go to with questions?

This same orientation meeting allows Inn Leaders an opportunity to understand where new members are in their careers and why each person has joined the Inn.

Orientation Agenda

Orientation meetings may follow different formats, but here are a few key elements to consider when building your orientation agenda:

- Welcome new (and returning, if applicable) members
- Introduction of Inn leadership and description of duties
- Discuss participation expectations of members
 - Attendance Policy
 - Active participation in pupillage teams, mentoring activities and outreach opportunities
- An overview of the National organization, history and our mission
- A brief history of the Inn & namesake if applicable
- Discuss Inn policies and procedures
- Discuss operation details and logistics
 - Meeting locations
 - Day of meetings, start and ending times
 - How to RSVP to meeting invitations
 - Parking instructions
 - Security instructions if using a secure building like a courthouse
- Protocol followed at the Inn
 - How to address each other, especially judges. Is your Inn on a first name basis?
 - Inns value both civility and open discussion. The Inn is a safe place to ask questions.
- Outline the Inn's program structure
 - Role of pupillage teams and how they are assigned
 - Requirements of pupillage teams: additional meetings outside of Inn meetings, sitting together at meals, etc.
 - Importance of participation, both on pupillage teams and Q&A during programs
- Welcoming constructive feedback from its members.
 - Membership satisfaction surveys
 - Program surveys

Resources:

[History of AIC](#)

[Orientation Samples](#)



- Any informal outlets that are welcome and when
- Emphasis that all honest, constructive criticism is welcome.

Marketing Your Inn

For better or for worse, because of our grassroots founding and member selection process, many practitioners are unfamiliar with the American Inns of Court. Others may have the wrong idea of who we are, what we do, and what we stand for. Increasing your Inn's visibility is a great way to boost interest in membership and to promote the mission of the American Inns of Court as an open and collegial mentoring organization. A few ideas to get the word out include:

- Write an article for local and state bar publications. Your Inn's programs can provide the basis and much of the body of a good article. The *Bench* is also a good source for great articles, with reprint permission easily granted through the national office. These articles, along with information about your Inn, are great ways of promoting the Inns of Court as a resource for the community.
- Encourage Inn members to serve on panels and programs for local law schools and legal organizations. Be sure to arm them with the latest membership or guest opportunities available at your Inn.
- Honor a local hero, incoming or retiring judge, bar president or founder of a firm with a special reception before the regular meeting. Invite members of the community to attend.
- When your Inn has a special program or speaker, invite the newspaper's legal reporter to cover it. Or send a press release to the local newspapers and bar journals. Provide information about the Inn, the organization and the event. Be sure to include a contact name, number or your Inn's website address.
- Many Inns engage in an annual community outreach effort to get members engaged in the community and to demonstrate the good works of The American Inns of Court. Consider which community engagement ideas could have the greatest impact, both on existing members and on the Inn's ability to recruit future members.
- Leverage your community outreach effort for additional publicity about the Inn by submitting press releases and articles to local bar journals with photos and leader contact details for more information about the Inn.

Available Resources

Your Director of Chapter Relations can provide additional resources to assist with your recruiting efforts, including back issues of *The Bench* magazine and reprints of interesting articles, copies of the AIC



Professional Creed, and Sample Membership Applications or Renewal forms, as well as general information about the American Inns of Court organization.

Your Inn is provided with a free website from the national organization, designed to allow you to post information about your Inn and the value it brings to members. Keep the website updated with membership information, highlights and photos of past education events, and relevant news about the Inn and its members, and refer potential members to the site. Make sure information about how to join your Inn is easily accessible on the site the membership chair's contact information is kept up to date.

Membership Satisfaction

Have you ever wondered if the topics that the Inn selects for the program year are relevant and meaningful for the Inn's members? Are members satisfied with their Inn experience? Do they wish they could have more meetings per year, or if they'd prefer that the meetings always end before 8 pm?

Membership satisfaction surveys can help your leadership team make data-driven decisions based on member feedback. Using data to support your actions puts the quality of the Inn member experience at the top of the list, making the deliberations of a new executive committee easier. You can even provide the feedback from the satisfaction survey to the membership so they know your team is listening and aware of the needs of the membership.

Your Director of Chapter Relations has sample surveys that you can use in a few different formats. From paper to electronic surveys that you can customize, you can send an annual survey to your members. Inns that are focused on the HQME may find it helpful to benchmark their member satisfaction year over year, or compare it to a similar Inn in another part of the nation.

Survey Monkey® (www.surveymonkey.com) is a free online surveying tool. Inns can choose to create an account and set up their own survey (limited to 10 questions) or can work with their Director of Chapter Relations to build a custom survey using the American Inns of Court's business account.

Another resource is the leadership team as a whole, and their ability to reach out personally to members. While a survey instrument provides specific actionable data, consider a personal approach to data gathering. Some high performing Inns make it an annual mission for their leadership team to make personal phone calls

Resources:

[Sample Membership Satisfaction Survey](#)

[Sample Survey Results](#)



to each member. While time intensive, it goes a long way to informing the leadership team about their members and their goals for belonging to the Inn, it also helps the member to know that their leadership team is making an effort to get to know them as an individual and as a vital part of the Inn's on-going success. Real opinions sometime get sanitized via surveys, so personal phone calls can be very revealing and are often highly actionable by the leadership team.



Mentoring

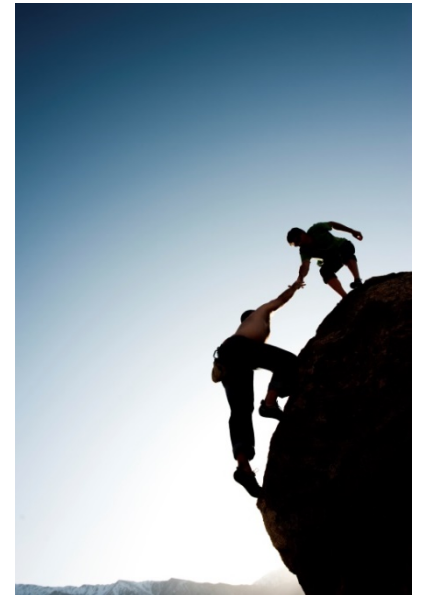


MENTORING

Everyone Needs Mentoring

Mentoring is a time honored legal tradition and a cornerstone of the American Inns of Court. The purpose of mentoring is to cultivate excellence in professionalism, ethics, civility, and legal skills. Mentoring assists members in developing high standards of professionalism based upon internalized principles of appropriate behavior consistent with the legal profession's core values.

According to our research, mentoring is one of the primary attributes of a High Quality Member Experience (HQME) at the American Inns of Court. By offering mentoring programs and opportunities, new lawyers will not only gain the knowledge, skills and abilities to recognize and exhibit professionalism. This will not only help them thrive in the legal community, but they will continue to see value their American Inns of Court membership, and are more likely to maintain it over the course of their careers. To this end, mentoring programs are an investment in the future health of your Inn.



Goals of Mentoring Programs

To further the American Inns of Court goal of fostering excellence in professionalism, ethics, civility, and legal skills, the goals of Inn mentoring efforts should be:

Values & Standards: To develop an understanding of generally accepted professional values and standards of behavior and the importance of professionalism in the practice of law.

Ethical Awareness: To build awareness of ethical obligations and of proper practices for avoiding mishandling of other's assets, conflicts of interest, neglect of matters, and civil liability problems.

Skill-Building: To improve professional skills necessary for the effective practice of law at a high level of competence.

Involvement: To develop an appreciation of the importance of supporting and improving the justice system, improving access to justice and the importance of active involvement in the profession and the community.



Benefits of Mentoring Programs

While an established multi-faceted mentoring program is something to strive for, form is less important than outcome. Regardless of how it is done, mentoring can:

- Foster development of practical skills.
- Increase knowledge of legal customs.
- Contribute to a sense of integrity in the legal profession.
- Promote collegial relationships among legal professionals and involvement in the organized bar.
- Improve judgment.
- Encourage the highest ideals in legal practice.

Mentoring is both an investment in your Inn and in the legal profession.

Formal or Informal Mentoring Programs

In order to fully achieve those goals, we encourage all Inns to be strategic in their mentoring activities, to ensure Inn members are engaged and developing professionally from the experience. Ideally, all Inns should have a formal or informal mentoring program as part of their annual planning.

Formal Mentoring Programs

To support this ideal, the American Inns of Court has developed four mentoring models that Inns can adapt to their own needs and personalities.

- [Traditional Pairs](#)
- [Small Groups](#)
- [Activity-Focused](#)
- [Affiliated Programs](#)

Each model provides a step-by-step approach for Inns to establish an effective and easily administered mentoring program. It describes the principles and goals for Inn mentoring and suggests a straightforward format of administration, operation, and scheduling that can be adapted to meet the needs of individual Inns. Elevating mentoring in your Inn takes thoughtful consideration and planning. The two main elements that determine whether or not your Inn is engaged in one-off mentoring activities or has a “formal” mentoring program are:

- **Frequency:** How often does the mentoring activity occur? Does it happen “whenever” or at particular intervals determined by the Inn?



- **Intent:** Is it a planned mentoring-focused event or a by-product of another Inn activity (like a pupillage team developing educational content or Inn meeting dinner)? Is there Inn-wide evaluation of the activity?

Informal Mentoring Programs

In instances where an Inn cannot support a formal mentoring program, informal mentoring is encouraged, and can be integrated into the Inn's pupillage team structure. Inns should plan specific, mentoring activities throughout the year that encourage interaction between members. During meetings, lawyers who are new to the practice of law are given the opportunity to have an intimate and appropriate way to get to know esteemed members of the local legal community. This familiarity removes barriers to asking questions, seeking career advice and receiving guidance when handling ethical dilemmas.

Additionally, some Inns include a standing "mentor moment" presentation where Masters of the Bench recall their standout memories as a mentees learning the profession, or share anonymous but real moments when they mentored a colleague about a specific issue in the practice of law. Storytelling is a powerful teaching tool.

Your Inn should also consider the idea of "reverse" mentoring, where more seasoned practitioners learn from newer lawyers, especially in the areas of technology and communication. The practice is constantly changing, and everyone needs help catching up.

Mentoring Matters

The most important aspect of your mentoring efforts should be the level of satisfaction members are receiving from the mentoring experiences.

The amount of engagement is less important than the quality of engagement, and quality correlates to frequency, access and personalization. Doing one thing once a year is not likely to garner you high marks for satisfaction, but innovation and customization will definitely move you in the right direction.

Mentoring Resources

[Informal vs. Formal Mentoring](#)

[Ground Rules for Success](#)

[Networking vs. Mentoring](#)

[Roles & Responsibilities](#)

[Suggested Experiences and Activities](#)

[Suggested Discussion Topics](#)

[Mentoring FAQs](#)

[Mentoring Models](#)



Outreach



Outreach, Joint Meetings and Special Projects

Community Outreach

Inns are making a positive impact and giving back to their local communities through community outreach programs. Community 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 beyond their membership. Inn outreach efforts can take a number of forms, including:



- Presentations at local bar meetings, co-sponsored events with other professional organizations, or presentations at law schools. This type of outreach can also serve as a great tool for membership recruitment.
- Putting on special programs for the general public; doing presentations for elementary/middle/high school students
- Providing legal aid, pro bono work, or other support to the community
- Peer Leader mentoring the Organizing Committee of a new Inn
- Providing Inn to Inn support for new or troubled Inns
- Providing donations to local charities during the holidays (Toys 4 Tots, Food Banks, etc.)
- Sponsoring a local youth sports team.
- Arranging for mock interviews for pupil members at local law firms.

Community outreach can be a great way to engage Emeritus and Alumni members of the Inn. Some Inns have specifically dedicated Outreach Committees or an Outreach-based pupillage team that coordinate activities for the Inn.

Joint Meetings

Joint meetings enable members to engage with others outside of their own Inn membership, to learn from each other, and establish community ties. Inns may host or attend a meeting with another American Inn of



Court or may plan a meeting with another legal or community group. Joint meetings are a great way to share speaker costs and extend the network of your Inn members beyond the Inn’s membership.

Special Project Award

Special Projects are defined as Inn activities outside of the Inn’s regular meetings that:

- Promote or incorporate elements of the American Inns of Court mission
- Reach out to the legal community
- Present interesting or challenging subjects
- Contain complete research to support the project

Special projects may be submitted for consideration in the Special Projects award category as part of the National Program Awards competition. All projects must be submitted by June 30th. More information is available on the [Inns of Court website](https://www.innsforcourt.org).

Special Project Examples

[Attorney ad Litem Training: Making a Difference One Child at a Time/Protecting Children in Legal System](#)

The mission is simple: engage local attorneys on the subject of abused, abandoned, and neglected children; convince them to represent a child and their expressed interests on a pro bono basis; address the attorneys’ concerns with this type of representation; and educate them to be able to do it well. Winner of Best Special Project 2018

[Howard Middle School Law Awareness Mock Trial](#)

This special project built on an established relationship between the Inn and a local middle school. After several years of coaching and using scripted mock trials, the Inn developed this project to feature an original mock trial based on a real case. To give students a better appreciation of how the law might affect them, the scenario involved a minor who committed a series of burglaries. Students acted as jurors, trial clerks, bailiffs, judges and attorneys. The audio/visual class at the school filmed the mock trial and is creating a documentary based on the experience.



[Mentoring Series- Vol. I](#)

This project promoted the principles of the American Inns of Court movement by showcasing local attorneys who exemplify those values. Inn members formulated the interview topics and conducted the interviews with the senior attorneys. Some of the topics discussed in the interviews included the traits of an ideal lawyer, balancing career and family, ethical issues, young lawyers today and how the practice of law has changed over the years.

[Justice Games](#)

Based on the hit movie series “The Hunger Games,” this special project brought together six American Inns of Court to compete in a legal trivia match. Prior to the program, an “All for Justice” social hour featured information and representatives from organizations that offer pro bono opportunities. The program began with an introduction video which presented each Inn in a dramatic fashion. A pair of representatives, or “tributes,” then answered trivia questions from law-related books, songs, and movies. The Inn with the most points was declared the champion.



Programs



PROGRAMS

MEETINGS AND EVENT PLANNING

Planning Effective Meetings

Planning effective meetings is crucial to the overall success of your Inn, and should incorporate as many of the elements of a High Quality Member Experience (HQME) as possible. Consciously planning for a collegial environment, mentoring opportunities and educational content in innovative formats is essential to the success of each meeting. Consider the desired outcome for each part of the meeting – from the opening reception or cocktail hour, to the dinner, the program presentation and the resulting discussion. Attending to the details will enhance the impact of the meeting.

Meetings should create an experience that has an impact for the participant. During this short period, they are your audience. Will it be a good or bad experience that they will remember? You have the control and the responsibility for the experience.

Inns are required by the Organizational Charter to have a minimum of six regularly held, programmatic meetings per Inn year. On average, Inns conduct an average of seven annual program meetings, not including banquets and special meetings. Most Inns meet from September through May or June, but any meeting schedule may be followed as long as there are at least six meetings. Meetings should be scheduled on an easy-to-remember basis. For example, meetings could be held on the second Tuesday of each month.

Type of Meeting

In addition to monthly educational programs, Inns may hold additional meetings throughout the year:

Social Meetings Many Inns also have social meetings, such as holiday parties or end of the year banquets. Social meetings allow time for networking and create the opportunity for members to get to know each other on an informal basis.

Orientation Meetings New member orientation meetings are held prior to the beginning of the Inn year and outline the Inn's policies and guidelines. Orientation meetings also give continuing members the opportunity to get together and look forward to the year ahead.



Joint Meetings Joint meetings with another Inn or organization enable Inn members to engage with others outside of their own membership, to learn about other practice areas, and to build connections within the community.

Other types of meetings include: Meetings of the Masters, Executive committee meetings, business meetings, and Committee meetings.

Meeting Venues

Selecting an appropriate meeting location is often as important to the success of your meeting as the content. Many Inns hold meetings in the local courthouse where there is space adequate for serving dinner. Other Inns hold meetings in educational facilities, law firm offices, or restaurants. Some Inns base the meeting location on the theme of the program. A few creative meeting locations have included: a local theater, a baseball game, an art museum, and a women’s shelter.

Wherever the Inn meets, the venue selected should be conducive to intent of the meeting. A restaurant that does not have a private room for the meeting may not be the best option for a meeting with a speaker or panel discussion. Similarly, holding an event focused on mentoring, networking and connection may not work as well in a formal auditorium setting.

The venue selection must also take into account the Inn’s meal function. The dinner and meeting should be held in the same or contiguous space so that the Inn doesn’t “lose” members between the dinner and the program or vice-versa.

Things to consider when selecting a meeting venue:

- Parking availability
- ADA accessibility
- Acoustics and audio/visual needs

Insurance

The American Inns of Court carries a national general and umbrella liability policy covering all active Inns for its legal obligations for damages due to bodily injury and property damage. Because each Inn is an unincorporated association, liability may extend to the individual members and volunteers with respect to operations of the Inn. The liability policy includes liquor liability, which some venues may require. Please contact your [Director of Chapter Relations](#) if you need an Insurance certificate.



- Room set-up for the program
- Staging areas for the presentation
- In-house catering availability and fees vs. external caterers

Meal Planning and Costs

A meal function of some type should be part of each Inn meeting. Sitting down to “break bread together” is a tradition derived from the English Inns of Court, and is carried on by the American Inns of Court. It provides an essential experience of Inn membership and contributes greatly to building collegiality and connection within the legal profession, and provides informal mentoring opportunities.

The type of meal may vary, depending on what the members are willing to pay. Some Inns hold elaborate, catered meals, which in turn drive local dues higher. Many Inns also hold a cocktail hour at the beginning of the evening to provide members with time to unwind and enjoy conversation before dinner or the program. Alcohol may be served at dinner, but adds to the overall meal costs. A cash bar, as opposed to an open bar, helps to keep members’ dues low.

Determining an acceptable expense for the meal function should be decided upon by the Inn’s executive committee as part of the overall budgeting process. The program chair should work with the Inn treasurer during the budgeting process to ensure anticipated costs are in line with the Inn’s expected revenue, and provides the number of meetings to be held, where they will be held, and any special needs the programs may have, such as paid speakers or audio-visual expenses.

The cost of meals should be factored into and collected as part of the member dues at the beginning of the Inn year. Using a “pay as you go” method of collecting money for meals may result in members feeling no commitment to attend Inn meetings and dinners, while the Inn will have payment obligations to the venue and/or caterer.

Several Inns have had success in securing sponsorships to fill in budgetary gaps. Law firm or other legal organizations can contribute a sponsorship for a special event, a social event, or a happy hour. It is important to have an understanding between the Inn and sponsor of the benefits/services to be received before accepting any sponsorship monies. Any sponsorship revenue should be recorded on the Inn’s income statement, and may have an impact on the Inn’s Federal tax filing for the year. Consult with your Director of Chapter Relations if you are unsure.



Attendance Policies and Team Participation

Consistent attendance and participation at meetings by all members is important to the success of the Inn meeting. To ensure member awareness and attendance at meetings, the Inn Administrator or Secretary should send out invitations in a timely manner and track responses. Ideally, invitations should be sent no later than two weeks prior to the meeting, and should include any preparatory material (pre-readings, links to case law, articles, etc.) Communications should include the date, time, meeting location and how to RSVP, as well as relevant CLE information. Inns that use the [Inn Management System](#) (IMS) can send meeting invitations by email, with each member receiving a unique RSVP link. The IMS system captures each member's responses, and can generate attendance, meal count and other reports for Inn leadership.

An established and enforced attendance policy encourages members to take the commitment of membership seriously, and leads to well-attended and engaging meetings. To make sure everyone is aware of the policy and to ensure impartiality, the attendance policy should be publicized on an ongoing basis through announcements at meetings, publication in the Inn handbook and on the Inn website.

When creating an attendance policy, consider the following:

- How many unexcused absences will be allowed in a year
- What is the difference between excused and unexcused absences
- What action is required of the member in the event of an absence
- What are the financial implications for the Inn (Example: Inns with a "pay-as-you-go" policy may lose money when members cancel for a dinner meeting)
- Will the Inn allow guests or substitutes
- Who will enforce the policy and how the policy will be enforced

Inns often use some method of planned seating during meals. The advantage of planned seating is that all categories of members can be interspersed to foster connection and networking. Random or spontaneous seating may not accomplish the goals of the Inn; people tend to sit with their friends and a good mix of members is rarely achieved.

A variation on assigned seating is for pupillage teams to be seated together. This format encourages team discussion of the topic being presented, and creates a natural environment for informal mentoring. When using this format, develop discussion topics to be considered during dinner, and then have each team report to the larger group after dinner.



Timing

Once a location has been determined, the next step is to determine the amount of time that each meeting should take. It is important to communicate the duration of the meeting to all members, and to start and finish the meeting on time. Attendance will improve when members can rely on the duration and timing of the meeting.

Meetings generally run about an hour and a half, exclusive of the meal function. Plan to have the dinner before the program to prevent the program content from being cut short, or the dinner from being delayed.

The schedule for a typical Inn meeting:

- ✓ Meal Function: 30-60 min.
- ✓ Opening Remarks by the President and Inn Business: 5 min.
- ✓ Pupillage Team Program & Discussion: 60-90 min.
- ✓ Adjournment: 5 min.

TOTAL TIME: around 2-3 hrs.

Program Content Development

Adult Learning Principles

One of the primary benefits of Inn membership is the opportunity to learn from and with other professionals in the legal community. However, the Program Committee must make sure that programs are created and delivered in a manner that acknowledges the learner. The following are basic Adult Learning Principles that should be incorporated into Inn programs to ensure the program has a greater success of addressing the needs of the members:

- Does the learner understand the reason he or she is learning about the issue?
- Can the learner use his or her experience as the basis for the learning?
- Is the learner responsible for decision making about the experience?
- Is the content or issue relevant to the learner?
- Is the content or issue problem-centered?
- Is the learner internally motivated to learn?



The Program Committee should examine how these principles have been incorporated into the program development process, and how they can be used by the pupillage teams to make the Inn’s programs relevant to members.

Program Development Model

This section outlines a model for developing Inn programs. There are several variations on this model, and your Inn will ultimately have to decide which model is most appropriate. However, the model presented here provides a gauge to measure the effectiveness of your Inn’s program development process, and offers some possible solutions for any challenges.

Survey the Membership

The Program Committee should poll the members about the issues and concerns that are most important to them. The Inn should make sure programs address the challenges and questions members face.

In the survey, ask members what program formats they prefer (speakers, panel discussions, skits, game show, blended formats, etc.). Be aware of the different ways adults like to learn and incorporate

different learning styles into the program presentations. The Program Committee should survey the members throughout the year for new topic ideas, and include questions about the programs in the annual member satisfaction survey. The committee should review the survey results prior to beginning plans for the next year.



Select Theme and Topics

The Program Committee should choose the theme and topics for the full Inn year of programs during the summer before the Inn year begins. Doing this not only ensures an organized, comprehensive approach to the Inn’s programs, but also prevents topics or issues from being duplicated during the year.

The Program Committee should ensure that all topics are relevant and supportive of the Inn’s mission and align with the theme. While the committee may occasionally opt for a purely entertaining, non-substantive



program for a banquet or special meeting, most Inn programs deal with topics that support the mission and address the issues of importance to the members. Topics can be drawn from a range of sources: Questions before the Supreme Court; ABA Trends Reports; Newly enacted state laws and regulations; Topics in the national discourse (e.g., Sexual Harassment; Cyber Bullying; Opioid Abuse); and the [Inns of Court National Program Library](#).

When developing topics, the topic and title should not only deal with a specific legal practice, skill or issue, but should also explicitly include the AIC principle that is to be addressed. Don't just choose a topic like "Withdrawing as an Attorney." Instead, focus the program on the ethical implications of the subject, such as "Withdrawing as an Attorney: Ethically Jumping Ship."

Pupillage Team Assignments

Successful Pupillage teams do not happen by accident, and building a team should not be approached haphazardly. Pupillage teams are typically responsible for presenting one of the monthly programs during the Inn year, and provide the foundation for mentoring experiences in the Inn.

There are certain things that should be considered to help ensure that teams will be effective. The team assignments should be made before the Inn year begins. This should be done in coordination with the Membership Committee. Teams should have a fair distribution of members from each category, and when possible, include at least one judge. Inn members from the same firm or court should be assigned to different teams.

✓ **Choose team leaders**

Selecting the team leader is probably the most important factor in determining a team's success. Team leaders are chosen by the Program Committee. The person chosen should not only be committed to the role of the

Key Issues for Team Leaders

- Team leaders do not have to "do it all"-delegate key responsibilities to members of the pupillage team.
- Lawyers and judges have many talents aside from their legal abilities. Research the unique abilities of your pupillage team and utilize the resources of your team members.
- Seek out Inn members for future leadership roles within pupillage teams and within the Inn.
- Teams work best together when Inn leaders foster interaction among team members with regular interaction outside of monthly meetings.
- Chatter and other distracting behavior are common during presentations. Team leaders may have to re-direct that energy to appropriate discussion times.

*Recommended by the
American Inn of Court of
Acadiana



Pupillage Team concept and to the Inn, but should also be able to inspire members of the team. The team leader is responsible for calling team meetings, early enough and frequently enough to accomplish all of the tasks necessary to make a quality presentation. Team leaders may also serve on the Inn's Program Committee.

The team leader will not necessarily be the person who does the most work on the team. He or she should be a senior lawyer or judge, and will be responsible for calling team meetings frequently enough to achieve stated objectives. The team leader may not have to actually assign tasks, since team members may volunteer for certain roles. However, the leader must ensure that there is a fair distribution of work among team members, and must be prepared to hold team members accountable for their assignments. The first meeting of the team should include a discussion of the assigned topic. The team should decide on the core issues that will be presented, and brainstorm for ideas about how to effectively present the topic. The team leader should keep a record of participation by team members.

✓ **Assign topics**

Once the teams have been assembled, the Program Committee should assign one of the topics developed to each team. When assigning topics and scheduling presentations, the Program Committee should consider the perceived strengths of each team, and the relative complexity of each topic. More complex topics may require significant work, and therefore should not be assigned to the first or second meeting of the year.

✓ **Format Selection**

After the team has received its topic assignment and presentation date, it will need to decide on a format or multiple formats that work for the issues to be presented

Program Formats

Case Reenactment

Full length skit

Game Show

Guest Speaker

Interview

Judicial Deliberation

Jury Deliberation

Man-on-the-Street Interviews

Mediation

Multiple vignettes

Musical

News Show

Panel Discussion

Talk Show

Trial of historical/fictional character

Video Clips



With the team clear on the topic and the presentation format(s), the team leader ensures that each team member is assigned to a task related to the program’s development. For example, two to three members might work on writing the script for the skit, two members might prepare handouts, and two members might develop the discussion questions. Every member of the team should have a role both in the development and presentation of the program.

Program Presentation

All of the hard work of the Program Committee and the pupillage team pays off when the program is presented at the Inn meeting. The Inn’s members expect a good program, and the team wants to present a good program. But good intentions are not always enough.

To build anticipation for the presentation, the team might consider sending out e-mail teasers or advance questions to the members. The team might poll the members as part of the research when developing the program, or begin discussion of the topic during the meal prior to the program.

During the presentation, at least one member of the team should serve as the discussion facilitator. Although the team may have an interesting topic and the presentation may be engaging, teams shouldn’t assume that discussion will be automatic.

Often, an audience requires a little prodding before a good discussion happens. An effective facilitator, armed with provocative questions, can be a useful way to encourage a healthy discussion.

Every member of the team should have a role in the presentation of the program. The program should not be an opportunity for the biggest personalities to take center stage. Providing every member with a visible role helps to build collegiality among the members and encourage a high quality membership experience for all Inn members.

Program Evaluation

After the presentation, it is important to solicit feedback about the quality and effectiveness of the program. One should not assume that a program was effective just by the sense that it went well. A sample program evaluation form is available on the AIC website. This or something similar should be used to evaluate each program, and it is important to use a standard evaluation form for the entire year, so that the quality of programs can be measured consistently.



The program evaluations should be read by the pupillage team that presented the program, and by the Program Committee. The evaluations should not be thought of as votes for the most popular program, or in any way as a competition. The evaluations, taken together, should paint a picture of the Inn’s educational effectiveness, and should be used as a tool to help improve the programs for the next year.

The results of program evaluations should also be a factor in the Inn’s annual self-evaluation. Program effectiveness is an important indicator in the overall health and success of an Inn.

Submitting Programs: Achieving Excellence and Program Awards

Inns that choose to participate in the Achieving Excellence Program must submit their program topics, dates and locations by October 1st to complete one of the essential Bronze level requirements. Inns using the Inn Management System (IMS) can simply enter their program information in the IMS. Inns that do not use the IMS must submit their information by email, mail or fax.

Inns should also submit programs to the national Program Library, as a way to archive programs and share the Inn’s creativity with other Inns across the country. All Inn program submissions must include a completed Program Submission form, and include all necessary materials to replicate the program (such as outlines, agendas, handouts, scripts, transcripts, videos, PowerPoint presentations, etc.).

Inns participating in the Achieving Excellence program are required to submit 2 programs to complete the Gold level and 4 programs to complete the Platinum level. Submissions are encouraged throughout the year, but are due no later than June 30th.

Program Awards

The National Program Awards process recognizes exceptional programs presented at the local level. Any program presented within the year is eligible to be submitted for award consideration. However, the program must be submitted for consideration within 60 days of its presentation date. The criteria for a program to receive award recognition include:

- Promotes or incorporates elements of the American Inns of Court mission
- Presents information in an entertaining or captivating way
- Poses interesting questions or challenging subjects

Resources:

[Program Submission Form](#)

[Program Submission Guidelines](#)



- Presents legal issues in a new or creative way
- Raises ethical questions
- Addresses current legal issues
- Contains complete research to support the program
- Can be replicated by other Inns and contains a complete set of materials

All programs can be submitted by emailing a copy of the Program Submission Form and a complete set of materials to ProgramLibrary@innsofcourt.org.

