

Achieving Excellence www.innsocourt.org/achievingexcellence

The Achieving Excellence program 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](#).

All information and documentation of your Inn's eligible activities for the 2016-2017 Achieving Excellence program should be e-mailed to AExcellence@innsocourt.org by June 30, 2017. Please CC your [Director of Chapter Relations](#) on your submission.

Administration

Administration is the key to a successful Inn and with a strong foundation in administrative procedures an Inn is well on its way to success.

- [Review the Administration Competency Outline](#)
- [Submit the Inn's Annual Operating Budget](#)
- [Inn Management System \(IMS\)](#)
- [Administrative requirements for IMS Inns](#)
- [Administrative requirements for non-IMS Inns](#)
- [National Dues Paid in Full](#)

Communications

Communication on all levels is another key to running a successful Inn.

- [Review the Communications Competency Outline](#)
- [Maintain an Inn website](#) or Maintain and publish a print or digital Inn Handbook
- [Hold a New Member Orientation](#)
- [Distribute a Membership Satisfaction Survey](#)
- [Engage Alumni, Emeritus, and Honorary Members](#)
- [Promote the American Inns of Court Diversity Policy](#)
- [Submit a current Inn news item](#)

Program Development

Monthly programs are the foundation of each Inn. Programs provide the unique opportunity for all levels of the profession to come together and learn from each other by focusing on practical legal skills with an emphasis on ethics, civility, and professionalism in the practice of law.

- [Review the Programs Competency Outline](#)
- [Determine and implement structure for monthly Program Development](#)
- [Submit programs to the national Program Library](#)

Mentoring

Mentoring, on a formal or informal basis, can be one of the most effective tools for providing information and counsel to new lawyers. Having a great mentor is one of the greatest gifts and advantages an Inn can offer its members.

- [Review the Mentoring Competency Outline](#)
- [Model Mentoring Program](#)

Outreach Activities

Outreach involves hosting, mentoring or providing activities that promote the Inn movement in the legal community and public in general.

- [Review the Outreach Activities Competency Outline](#)
- [Inn Outreach Samples](#)
- [Host or attend a Joint Inn meeting](#)

Questions?

If you have additional questions about the Achieving Excellence program, the core competencies, achievement levels or could not find an answer to your question online, please [contact your Director of Chapter Relations](#).

Inn Name:

Inn No.:

List of Requirements for Inn Year of July 1, 2016–June 30, 2017	Due Date	Designations				Your Inn	
		Bronze	Silver	Gold	Platinum	Assigned to and/or notes	Completed
File with AICF (one time)							
Become a chartered Inn and remain a chartered Inn in good standing	ASAP	X	X	X	X		
Obtain an EIN (federal tax ID) and file with the national office	ASAP	X	X	X	X		
File a Group Tax Exemption Option form with the national office (<i>opt in or out</i>)	ASAP	X	X	X	X		
E-file copy of the Inn's approved bylaws with the national office	ASAP	X	X	X	X		
Record any law school affiliation(s) with the national office	ASAP	X	X	X	X		
Develop and implement an Inn leadership succession plan ‡	Jun 30			X	X		
Core Competency 1. Administration							
Comply with IRS tax filing for FY2015:	Nov 15	X	X	X	X		
<ul style="list-style-type: none"> Option 1: Inn has gross annual (July 1–June 30) income under \$50,000 and has instructed the national office to file the 990N on its behalf 							
<ul style="list-style-type: none"> Option 2: Inn has gross annual (July 1–June 30) income under \$50,000, chooses to self file the 990N with IRS, and send copy to the national office 							
<ul style="list-style-type: none"> Option 3: Inn has gross annual (July 1–June 30) income over \$50,000, file 990-EZ and Schedule A with IRS, and send copy to the national office 							
Submit Annual Operating Budget	Nov 30			X	X		
National dues paid in full	Jan 31		X	X	X		
Requirements of IMS or Non-IMS Inns		X	X	X	X		
<ul style="list-style-type: none"> Inns using the Inn Management System (IMS) <ul style="list-style-type: none"> Post meeting dates, locations and program topics (<i>minimum of six required</i>) 	Oct 1						
<ul style="list-style-type: none"> Maintain current membership roster * 	Ongoing						
<ul style="list-style-type: none"> Update Inn leadership information 	Jun 30						
<ul style="list-style-type: none"> Inns not using Inn Management System (IMS) (<i>submit to national office</i>) <ul style="list-style-type: none"> Inn meeting dates, locations and program topics (<i>minimum of six required</i>) 	Oct 1						
<ul style="list-style-type: none"> Inn membership roster 	Nov 30						
<ul style="list-style-type: none"> Inn leadership information for the next Inn year 	Jun 30						
Core Competency 2. Communications							
New Member Orientation—held prior to first meeting of the Inn year	Nov 30		X	X	X		
Membership Satisfaction Survey	Jun 30				X		
Maintain one of the following items (choose one)			X	X	X		
<ul style="list-style-type: none"> Inn Handbook—in printed or electronic format 	Jun 30						
<ul style="list-style-type: none"> Inn Web site—hosted by national office or other 	Ongoing						
Describe how your Inn engages Alumni, Emeritus, and Honorary members ‡	Jun 30			X	X		
Describe how your Inn promotes the American Inns of Court Diversity Policy	Jun 30			X	X		
Submit current Inn news to the national office	Ongoing				X		
Core Competency 3. Programs							
Document monthly program development process ‡	Jun 30		X	X	X		
Submit programs to the national program library	Jun 30			2	4		
Core Competency 4. Mentoring							
Submit an outline of the Inn's formal or informal mentoring efforts to the national office ‡	Jun 30			X*	X		
Submit a description of mentoring evaluation process to the national office ‡	Jun 30			X*	X		
Core Competency 5. Outreach Activities							
Submit a description of the Inn's community outreach program to the national office	Jun 30			X*	X		
Document participation in and/or hosting of a joint meeting	Jun 30				X		

Notes: * Dues are assessed on number of active members as of June 30.

‡ Items need only to be submitted once, unless information has changed.

* The Inn has a choice of doing the Mentoring or Outreach requirement for Gold Level.

Detailed explanations of each requirement are available in Achieving Excellence Overview.

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

1. Administration: (www.innsofcourt.org/administration)

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

2. Communications: (www.innsofcourt.org/communications)

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

3. Programs: (www.innsofcourt.org/localinnprogramming)

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

4. Mentoring: (www.innsofcourt.org/mentoring)

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

5. Outreach Activities: (www.innsofcourt.org/outreach)

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

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

BRONZE LEVEL RECOGNITION

- Recognized in *The Bench*er and on the website
- Listed in Celebration of Excellence event program
- Certificate of achievement
- A bronze Achieving Excellence web badge to display on Inn website

SILVER LEVEL RECOGNITION

- Recognized in *The Bench*er and on the website
- Listed in Celebration of Excellence event program
- Certificate of achievement
- A silver Achieving Excellence web badge to display on Inn website

GOLD LEVEL RECOGNITION

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

PLATINUM LEVEL RECOGNITION

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

BRONZE LEVEL REQUIREMENTS

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

SILVER LEVEL REQUIREMENTS

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

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

 - Inn Handbook—in printed or electronic format, which may include:
 - Local Inn history/biography of namesake
 - AICF national movement information
 - Inn bylaws
 - Inn policies
 - Inn calendar
 - List of officers
 - Member directory (with pictures, if available)—encourage members to complete/update individual profiles with practice specialty areas
 - Inn website—hosted by national office or other, which may include:
 - Local Inn history/biography of namesake
 - Link to www.innsocourt.org website (*if using external website host*)
 - Inn bylaws (*may be for members only*)
 - Inn policies (*may be for members only*)
 - Current calendar of meetings (*may be for members only*)
 - Current Inn leadership listing with contact information (*may be for members only*)
 - Membership information
 - How to join/application
 - » Who to contact
 - » Meeting guest attendee information
- New Member Orientation—held prior to first Inn meeting of the Inn year, submitted by November 30
- **Core Competency: 3. Programs**
 - Document monthly program development process by October 1*

GOLD LEVEL REQUIREMENTS

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

PLATINUM LEVEL REQUIREMENTS

- Maintain Bronze, Silver and Gold Level requirements
- Display competency in all five core areas, including:
 1. Administration
 2. Communication: Actively seek member feedback utilizing a Membership Satisfaction Survey (printed or online). A copy of the survey should be submitted to the national office by June 30. *(NOTE: Summary highlights of the results or changes as a result of the feedback may also be submitted to the national office.)*
 - Submit current Inn news to the national office. News items should be articles, summaries, and/or photos of Inn activities suitable for publishing in *The Bench* or posting on the American Inns of Court website. *(NOTE: If Inn news has been published in your local or state media, please provide links or printed copies to the national office.)*
 3. Increase program submissions to the national program library from two to four programs
 4. Mentoring
 5. Outreach Activities
 - Document participation in and/or hosting of a joint meeting by June 30

** These items may have previously been submitted to the national office and do not need to be submitted in their entirety again.*