

Inn Name:

Inn No.:

List of Requirements for Inn Year of May 1, 2023–April 30, 2024 <i>Opt in to the 2023–2024 Achieving Excellence Program by May 30, 2023</i>	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 ‡	Apr 30			X	X		
Core Competency 1. Administration							
Comply with IRS tax filing for year ending June 30, 2023:	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 for the current Inn year 	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 current 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 for the prior Inn year	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 	Apr 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 ‡	Apr 30			X	X		
Describe how your Inn promotes the American Inns of Court Diversity Policy	Apr 30			X	X		
Submit current Inn news to the national office within 60 days of event	Ongoing				X		
Core Competency 3. Programs							
Document monthly program development process ‡	Apr 30		X	X	X		
Submit programs to the national program library within 60 days of presentation	Ongoing			2	4		
Core Competency 4. Mentoring							
Submit an outline of the Inn's formal or informal mentoring efforts to the national office ‡	Apr 30			X*	X		
Submit a mentoring evaluation for the prior Inn year	Jun 30			X*	X		
Core Competency 5. Outreach Activities							
Submit a description of the Inn's community outreach program to the national office	Apr 30			X*	X		
Document participation in and/or hosting of a joint meeting	Apr 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. Request a Recurring Items Form from your Chapter Relations Director.

* 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.