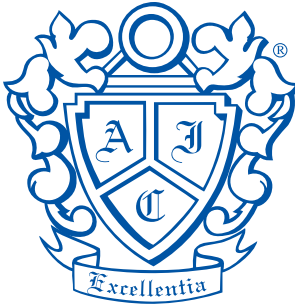




# Creating an American Inn of Court



AMERICAN  
INNS of COURT®



## Creating an American Inn of Court

### THANK YOU FOR YOUR INTEREST IN THE AMERICAN INNS OF COURT

The American Inns of Court is dedicated to building and preserving a bench and bar that is worthy of respect for the essential role each plays in fostering the rule of law and preserving trust in the American justice system. There are two components to maintaining this trust: A strong and independent judiciary, following the rule of law no matter the political pressures, and a strong and independent bar comprised of practitioners dedicated to professionalism, ethics, civility, and excellence.

This guide provides a brief overview of how to start an American Inn of Court. The American Inns of Court, with its focus on mentoring and professionalism, has expanded from a single Inn in 1980 to more than 375 Inns across the nation, including Guam and Tokyo. Every local chapter of an American Inn of Court is referred to as an “Inn” or an “Inn of Court.” Each member of an Inn is also a member of the American Inns of Court national organization and receives benefits and training nationally as well as locally.

The American Inns of Court is pleased to provide you with advice and hands-on assistance as you take steps toward creating a new American Inn of Court. You will be assigned a regional Chapter Relations Director (CRD) who will serve as your consultant on all Inn management and leadership topics. Your CRD will provide sample documents, face-to-face leadership training, facilitate your initial meeting of the Masters of the Bench, and provide you with resources including an Inn website, Inn management tools, tax-exempt guidance, and insurance—plus excellent governance and policy consulting designed to establish and grow a successful American Inn of Court.





# What is an American Inn of Court?

The concept of the American Inns of Court is based upon the four English Inns of Court in London and their centuries old tradition of senior lawyers and judges educating successive generations of advocates, with a focus on civility and professionalism.

The American Inns of Court is an association of lawyers, judges, law professors, and law students from all levels and backgrounds who share a passion for professional excellence. Through regular meetings, members build and strengthen professional relationships, discuss fundamental concerns about professionalism and pressing legal issues of the day, share experiences and advice, mentor, and educate.

More than 31,000 federal and state judges, attorneys, legal scholars, and law students are involved in more than 375 Inns. Each Inn has an average of 80 members in the following categories:

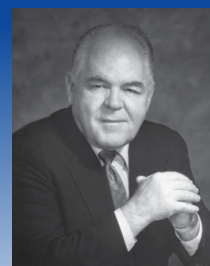
- **Masters of the Bench**—judges, experienced lawyers, and law professors
- **Barristers**—lawyers established in practice
- **Associates**—lawyers within their first few years of practice
- **Pupils**—law students

Inn members are divided into pupillage teams. Each team includes Masters of the Bench, Barristers, Associates, and Pupils, and is tasked with presenting at least one educational program during the Inn year. Pupillage teams meet informally outside of the monthly Inn meetings to plan and rehearse their assigned programs. Pupils and less-experienced lawyers learn from more-experienced lawyers and judges in an environment that fosters collegiality, mentoring, professionalism, and informal discussion about the practice of law.

Most Inns concentrate on legal issues associated with civil and criminal litigation practice and include members from a number of specialties. Additionally, there are a significant number of Inns that specialize in appellate practice, bankruptcy, criminal practice, family law, intellectual property, tax, or worker's compensation, among other areas.



"I do believe the day will come in the United States when no lawyer would think of accepting a commission from a client to try a case in a courtroom or to negotiate a contract, who was not a member of the American Inns of Court. Not by law, not by rule, not by regulation, not by force, but solely by choice. Solely because all lawyers will recognize the value and the absolute necessity of having acquired what the American Inns of Court can give."



—JUDGE HOWARD T. MARKEY

# Our Vision, Mission, and Commitment to Diversity

## VISION STATEMENT

A legal profession and judiciary dedicated to professionalism, ethics, civility, and excellence.

## MISSION STATEMENT

The American Inns of Court inspire the legal community to advance the rule of law by achieving the highest level of professionalism through example, education, and mentoring.

## COMMITMENT TO DIVERSITY

### Ideals of the Movement

- Upholding the standards of the legal profession
- Practicing law with dignity and respect
- Encouraging respect for our system of justice
- Achieving a higher level of legal excellence
- Developing a deeper sense of professionalism

### Ideals of Diversity

- The American Inns of Court firmly believes that personal diversity in all its aspects is essential to our ability to accomplish our mission.
- Diversity embodies all those differences that make us unique individuals.
- We value the differences in views and perspectives and the varied experiences that are part of a diverse membership.
- Diversity enriches and broadens our membership, which in turn leads to more creative and meaningful programs.

### Professional Diversity

- Legal professionals and law school faculty, administrators, and students
- All practice types, from both the public and private sectors
- From the least experienced to the most seasoned are vital to maximizing the Inn experience

Only by drawing and retaining a diverse membership will we guarantee 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 our organization, but in our profession as well.



# Getting Organized

Forming an Inn requires the coordination of a local organizing committee with the national staff of the American Inns of Court. The process is not difficult, but will require thought and planning. The Chapter Relations Director (CRD) for your area is your dedicated staff resource, and will happily work with your organizing committee to minimize effort and maximize the benefit of starting your Inn.

## FORM AN ORGANIZING COMMITTEE

The organizing committee should be comprised of two to five leading members of the bar, including at least one federal or state judge. Having a well-respected federal or state judge, who has leadership skills and a strong belief in the American Inns of Court movement, has proven to be very beneficial for organizing efforts. A judge can serve as an initiator and member of the organizing committee and potentially as the first president or counselor of the Inn.

## HOLD AN ORGANIZING COMMITTEE MEETING

During its first meeting, the organizing committee should determine if there is sufficient interest within the local legal community to proceed with creating a new Inn. There should be sufficient interest from both judges and lawyers. The committee may wish to do an informal survey of the legal community, consult with other Inns in the area, and consult with their assigned CRD.

An early consideration should be whether or not the Inn will specialize in a certain area of the law. The committee must consider whether the local area can support a specialty Inn with adequate numbers of members.

Next, the committee should determine if the Inn will be affiliated with a law school, bar association, or similar organization. Affiliating with these organizations is not mandatory, but can be beneficial in several ways, such as providing a meeting venue, administrative support, and/or working with the Inn to select students to participate as Pupil members. If the committee elects to affiliate with a law school, a faculty member should be invited to participate on the organizing committee.

## APPLY FOR CHARTER

Once a decision has been made to form a new Inn, the organizing committee should complete and submit an application for charter to the national office. Each local Inn is required to be chartered through the American Inns of Court in order to use the trademarked name. When the application for charter is approved, usually within two weeks of receipt of the application, the CRD will provide helpful materials, publications, and online tools to aid in the process. The CRD will work closely with the committee to assist in the development of the Inn and serve as an on-going resource to future leaders.

### Benefits of affiliating with a law school, local bar association, or similar organization:

- **Organizing expenses:** Organizing expenses are minimal but may include refreshments, which may be served at the meeting of the Masters of the Bench. These expenses may be financed by members of the organizing committee, law school, or bar association. Once organized, an Inn is self-sustaining.
- **Facilities and/or staff:** Inn meetings are often held in courtrooms, law firms, law schools, or restaurants. A law school or bar association may provide a room for some or all meetings. A person on the staff of a law school or bar association may perform administrative duties for the Inn.
- **Pupils:** When an Inn is affiliated with a law school, that school often aids in the recruitment of students to participate as Pupil members of the Inn. If there is not a law school in the immediate area, the Inn may restrict its membership to judges and lawyers and designate newly licensed lawyers as Associate members.

# Meeting of the Masters of the Bench

**A**fter the application for charter has been approved, determine a time and place for your first Meeting of the Masters of the Bench. A sample agenda is available from the national office and should be used to establish the leadership and to plan for the administration of the Inn.

Planning should include compiling a list of potential Benchers who will be invited to participate in this new Inn. Take care to invite only the number of candidates that will equal approximately one third of the total membership. This is because the number of active members must be evenly spread among the three major categories of membership. On the other hand, not all who are extended invitations will be able to join. Therefore, some thought must be paid to the number of potential Masters of the Bench initially invited. More Masters of the Bench can be invited to fill any available positions at a later date.

Send written or email invitations to potential Masters of the Bench. A sample letter of invitation is available that can be customized to the Inn. Informational publications, supplied on request from the national office, may also be included with the invitation.

## ELECTION OF INN OFFICERS

Masters of the Bench, by majority vote, elect the officers and other members of the executive committee to supervise operations of the Inn. Each Inn is required, at minimum, to have the following officers:

- **President**
- **Counselor or Vice President**
- **Secretary/Treasurer**

Other officers on the executive committee can include program chair, membership chair, president-elect, mentoring chair, web administrator, reporter, or social chair. Detailed leadership position descriptions are available from your CRD after the application for charter has been approved.

## PLAN THE INN MEETING STRUCTURE

Determine the number of meetings the Inn will hold during the year. The Inn is required by its charter to hold at least six—preferably seven or eight—meetings during the Inn year, which begins July 1 and ends June 30. Inn meetings should include both substantive programs and meal or reception functions. “Breaking Bread” together is an essential experience of Inn membership; therefore, the program and meal or reception should be held in the same or contiguous space to facilitate attendance for the entire meeting. Determine whether to have a meal or reception before or after the program, and if you will be seeking CLE credit approval from your local CLE authorized provider for your Inn programs.

## DETERMINE MEMBERSHIP SELECTION

The official Diversity Policy of the American Inns of Court governs each chartered American Inn of Court. That national diversity policy, found earlier in this guide, requires that each Inn provide equal membership opportunities to any qualified member of the legal community. Inn members should be drawn from as many segments of the legal community as possible: federal, state, and local judges, lawyers, law professors, law students, plaintiff’s bar, defense counsel, solo practitioners, prosecutors, corporate counsel, large law firm practitioners, and public defenders are all an important part of each Inn’s experience. The diversity policy encompasses both personal and professional diversity and inclusiveness.

Many Inns have found it is useful to form a membership committee to gather applications or nominations and screen potential members for recommendation to the Benchers. The selection of Barristers and Associates is ultimately approved by the Benchers. When an Inn is affiliated with a law school, Pupils are most often chosen on the basis of a recommendation by the school or a member of the faculty.



## DETERMINE A DUES STRUCTURE

Inns are self-supported from membership dues. A large portion of dues cover social costs, which vary widely according to the type of meal function or reception planned for each meeting.

Most Inns choose a tiered structure for dues. A typical structure is as follows:

<b>Masters of the Bench</b>	\$300–\$600
<b>Barristers and Associates</b>	\$275–\$400
<b>Pupil members</b>	\$75–\$95

The exact amount of your Inn's dues for each category should be established after a comprehensive budget has been developed and approved. More information on dues and budgeting will be available after your Inn's charter application is approved. National dues are assessed for each active member, with the exception of Pupils. The national dues amount should be included in the local Inn dues paid by each member. Your CRD will provide you with information about the exact amount, as set by the American Inns of Court Board of Trustees.

## CHOOSE A NAME FOR THE INN

Consider a name for the Inn early on in the organizing process. In advance of the meeting of the Masters of the Bench, potential names can be suggested or selected for discussion and approval. However, if the Inn's name is not chosen at this meeting, a temporary designation will be assigned by the American Inns of Court until a name is selected. Please let your CRD know of any potential names under consideration and it will be checked against

“Having an Inn of Court named after me is truly humbling. The Inn was formed on the initiative of Olivia Luk, who was my mentee at The Giles S. Rich American Inn of Court. Her experience at the Inn was so meaningful to her that when she moved to Chicago she established a Chicago Inn focused on intellectual property.”

—JUDGE RICHARD LINN  
Chair of The Linn Inn Alliance

the list of current Inn names, so that the organizing committee can move forward with full knowledge of any similarities with other existing Inns in the nation.

Many Inns of Court choose to be named for a distinguished judge or lawyer, often from the area where the Inn is located. The name chosen must not have been already adopted by any other Inn.

Naming an American Inn of Court for a living person should be done judiciously as it can sometimes lead to dissension unless the namesake is universally acclaimed. Once a name is selected, it should be ratified by the Masters of the Bench and/or general membership and submitted to the national office for final approval.



# National Support and Additional Organizing Resources

The American Inns of Court staff is here to be a resource and a support for the creation and growth of your Inn. Your assigned CRD is available to provide guidance and resources tailored to your Inn's specific needs. If you have any questions about the organizing process or Inn administration in general, please do not hesitate to be in contact with your CRD.

## The following resources are available from your CRD to aid in your organizing efforts:

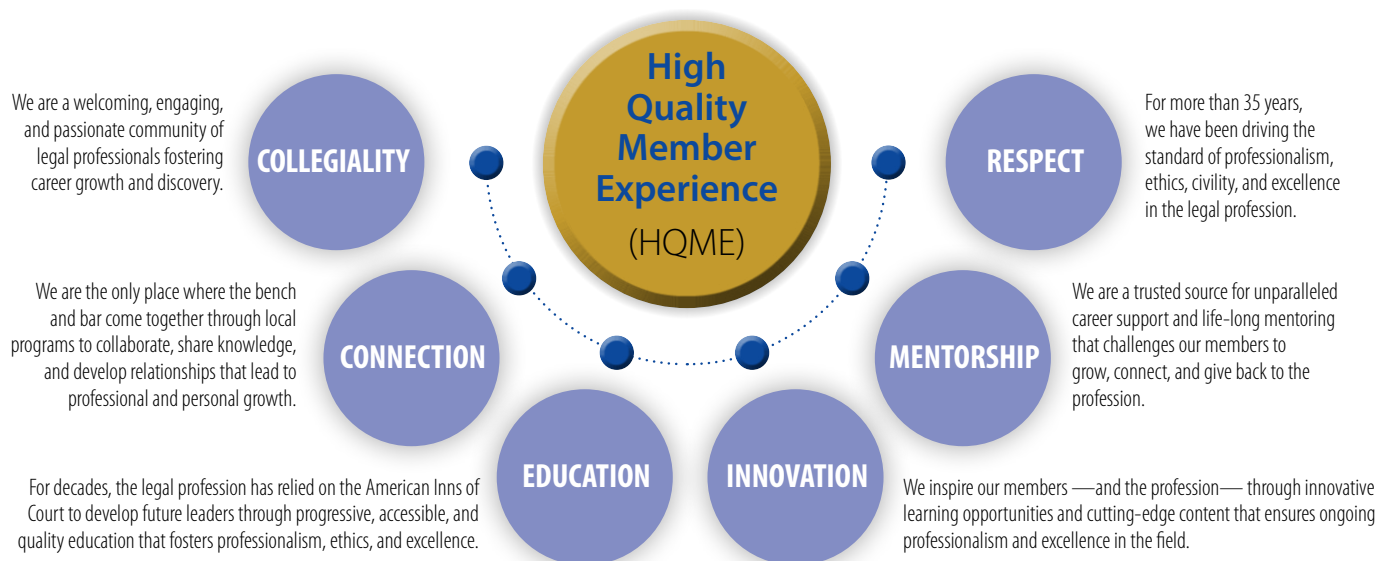
- History of the American Inns of Court
- Checklist and agenda for getting organized
- Sample Letter of Invitation for the Meeting of the Masters of the Bench
- Orientation and informational videos for membership recruitment and retention:
- Sample agenda for the Meeting of the Masters of the Bench
- Sample Organizational Charter
- Application for Charter
- Sample volunteer job descriptions
- Sample Inn bylaws and policies

- Tax exemption filing and insurance guidance
- Access to the online Inn Management System (IMS)
- Inn website development and training
- A Tradition of Excellence brochure
- Membership application and renewal forms
- Online Program Library
- Leadership training opportunities
- Research and consulting on creating a High Quality Member Experience (HQME)
- Sample copies of *The Bench* magazine
- American Inns of Court Board of Trustees and staff contact list and more

We believe these resources and the consulting you will receive from your CRD will make the process easy and efficient. Once your Inn is up and running, you will find that the experience is exceptionally worthwhile and fun for your members. Moreover, the difference you will make in your legal community will be immeasurable.

**Thank you for considering how the American Inns of Court can achieve the highest level of professionalism through example, education and mentoring, nationally and in your community.**

## Attributes of a High Quality Member Experience





# Application for Charter



This Inn shall be known as the \_\_\_\_\_

*(Please note: If a name has yet to be determined, then the Inn will be assigned a Roman numeral until such time as a name is selected and ratified by the Inn's membership).*

American Inn of Court

American Inn of Transactional Counsel

1. Will host its meetings primarily in (city, state and zip): \_\_\_\_\_

2. Will this Inn specialize in any particular area of law:      No      Yes, if so what?

\_\_\_\_\_

3. Will the Inn be affiliated with any Law Schools?      No      Yes, if so which ones?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please, briefly describe the nature of the affiliation(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Will the Inn be affiliated with any other legal organizations, such as local/state bar associations, legal societies or other organizations?      No      Yes, if so which ones?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please, briefly describe the nature of the affiliation(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. What are the approximate geographic boundaries of the proposed American Inn of Court?

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6. Has the organizing committee been in communication with leaders from other Inns?      No      Yes      Please note the Inn name(s).

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7. What is the size of the bar association(s) that are in this geographic area? If there is a specialty section of the local bar that applies to the formation of this Inn, please describe. Is membership in the local bar association voluntary or required?

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8. How many members does the Inn anticipate having in its first year? \_\_\_\_\_. Has the membership been equally distributed between each category of Master, Barrister, Associate?      No      Yes

9. What is the current level of support and involvement of members of the judiciary in this American Inn of Court?

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10. The American Inns of Court Charter requires each Inn to hold at least six meetings per fiscal year. How many meetings will this Inn hold per year, including social and programmatic meetings?

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**Please, list the members of Inn's Organizing Committee below.** If officers have been selected, indicate each person's position in the space provided followed by their contact information. If officers have not been selected, please designate the "Key Contact" with whom the Foundation should communicate. Additional pages may be attached if necessary.

**President or Key Contact Person:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Additional Member:**

Name: \_\_\_\_\_

Officer Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Additional Member:**

Name: \_\_\_\_\_

Officer Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Additional Member:**

Name: \_\_\_\_\_

Officer Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

We, the undersigned have reviewed a sample copy of the Organizational Charter of an American Inn of Court/Transactional Counsel and do now hereby make application to the American Inns of Court Foundation for a Charter to organize, establish and carry on activities as a participating Inn of the American Inns of Court.

On behalf of ourselves and our successors, we hereby agree to conduct our activities in a manner consistent with the requirements of such Charter, the Articles of Incorporation, Bylaws and policies of the American Inns of Court Foundation as they now exist or may hereafter be interpreted, modified or amended by the Board of Trustees of said Foundation.

We request that our Inn be granted use of the American Inns of Court Foundation name, service mark, seal and copyrighted materials. We understand that our American Inn of Court/Transactional Counsel is to become fully organized and operational within one year of the issuance of its Charter in order to retain its status as a Chartered American Inn of Court/Transactional Counsel.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_.

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Print Name: \_\_\_\_\_





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