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Good administration and management of your Inn is vital to the existence and success of your Inn.

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Inn Administration & Management

- Recording, reporting and communicating
- Responsibility
- Easy to use tools

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This module will focus on the basic building blocks of effective administration:

- Recording, reporting and communicating;
- Who's responsible; and
- How to make it easier.

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Record Keeping

- Member, Officer & Committee information
- Pupillage Teams
- Meetings: details and attendance
- Financial
 - Dues
 - Accounts payable
 - Minutes

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The very basics of Administration implies record keeping.

First, member contact information needs to be recorded and kept current. Also, a list of your Officers and Committees should be kept. In addition, you will want to track pupillage team assignments.

You will also need to keep a schedule of your meetings and activities, along with the logistical details and who has responsibilities for those events. After the meetings, attendance should be tracked, as participation is the key to the Inn membership experience. If your Inn provides CLE credit for programs, attendance is essential to gain this credit. You need to be able to accurately keep such information.

Financially, you need to have accurate records for dues billing and payments, as well as any accounts payable. Of course, you will also need to have good records of any business meetings or minutes and any additions or changes to the Inns policies and procedures. Your inn may also have additional records it traditionally keeps. You have also inherited these record keeping responsibilities.

To make sure that you have a good handle on all of the records and record keeping procedures of your inn, take the lists we discuss here and talk with your Inn administrator and past inn leaders to learn how your inn handles record keeping.

If you find that your inn doesn't have any procedures, this may be a great time to develop the missing pieces.

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Reports - Local Inn

- Inn Roster
- Attendance reports
- Financial: income/expense report
- Inn Calendar
- Officers, Committees and Teams

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As you collect information and keep these accurate records, you need to be able to pull the information together into coherent reports. Reports are needed both for local administration and for the National Foundation. Reports organize your data in a specific way and for a specific purpose: such as your inn roster, attendance reports or an income-expense report. Other information such as your inn calendar, officers, committee lists and pupillage team assignments directly provide the information which keeps your inn organized and running. Once you have created these important organizing reports and documents, it is important to effectively communicate the information to your members.

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Reports - AICF

- Membership Roster
- Inn Annual Report Part 1:
Demographics and Leadership
- Inn Annual Report Part 2:
Inn Self-evaluation
- Inn Annual Report Part 3:
Model of Excellence

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It is also crucial for your Inn to communicate information in these reports to the national office. Inns are encouraged to finalize and provide their membership roster by the second meeting of the year, usually October. The updated member roster is necessary so that your members will receive The Bencher and have access to the members section of our website. It is also important in order to accurately bill your Inn for the national dues.

For those Inns not using the online Chapter Management System administration tool, the National Office sends out the Inn Annual Report in the Spring and asks that it be returned by July 15th. Part 1 asks for your officers for the coming year and any changes to your vital information. This information is important so that we can track of changes with your inn, keep in contact with your inn leaders and publicize the correct information.

Part 2 is a copy of your Inn Self-evaluation. This evaluation tool will help you better understand how your inn is doing, clarify your inn's successes and strengths and identify your inn's challenges and areas to focus on in the coming year. Sharing the information about your inn and knowledge of the strengths and challenges of Inns helps the National Foundation understand the structure of your Inn of Court-which helps us shape and provide relevant support, advice, and training to you at the local inn level.

Part 3 is the Model of Excellence Verification Form. This form is to report your inns activities that relate to Model of Excellence points. Later in the module, we will discuss the Model of Excellence Program.

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Communication

- Know your audience
 - membership
 - other Inns
 - local community
 - prospective members
 - AICF
- Your message
 - policies/procedures
 - officers & members
 - Inn calendar
 - pupillage teams
 - mentoring
 - leadership opportunities

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Once the information has been recorded and prepared into reports, the next step is to communicate the information. You need to first know your audience. In most cases, your audience is your active members, but you need to also be able to communicate with four other groups: prospective members, other inns, the National Office, and, finally, your local community.

When communicating with your members, you need to communicate effectively:

- Your Inn's Policies and Procedures;
- Your Inn's leadership as well as the full membership of the Inn for the year;
- The Inn Calendar and the details of each event;
- The Pupillage Team and Mentoring Structures and the individual assignments and responsibilities; and
- Opportunities for involvement and leadership in the Inn as well as the election procedures. You need to be always looking for way to find and groom future inn leaders.

Now that you have an idea of what you need to say, the trick is to find the right way to communicate it. Let's look at the tools available to help you accomplish this critical task.

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Communication Tools

- Inn Handbook
 - directory
 - calendar
 - Inn policies
 - history: local and national
 - story of Inn namesake
- Web site
[www.innsforcourt.org/inns/\(your Inn's site\)](http://www.innsforcourt.org/inns/(your Inn's site))
- Email and/or listserv

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We have many ways in this e-Society to communicate. Some people prefer e-mail, some like listservs, and others like to go to a website to find the information at their leisure. However, we can not discount the traditional methods of communication. Some people still prefer a phone call, and some information is best communicated only in a letter. Let's take a brief look at a few options that can help you communicate with your members at various levels of comfort with technology.

First, let's look at a handbook. A handbook is an excellent way to enhance the understanding of the Inn, as well as communicate among Inn members. It is something that can be distributed in hard copy as well as stored digitally on your Inn's website for your members to access or download as they need. The greatest asset included in an Inn handbook is the membership directory. This directory gives your members all the information they may need in order to contact each other outside of the Inn's monthly meeting.

Another resource for communicating is your Inn's web site. If your Inn currently uses your American Inn of Court hosted site you will notice that your officers and membership directory are already listed there. On the site you can easily add as much information about your inn as you would like. Some ideas for web pages can come from the list here of possible handbook items like history of your Inn and the Inn calendar. You can also add pages with downloadable materials for your inn programs, or information on how to become a member of your Inn of Court. There is a step by step guide to managing your Inn's Web site listed as a resource.

You know how important the ability to communicate by e-mail has become. As important is to make sure that the National Office has the correct and up-to-date e-mail addresses of your members. A member's e-mail address is their key to the members-only content on the American Inns of Court Web site and your local Inn's Web site. Also, if you would like the National Office to set-up a listserv for your inn, members without a correct e-mail address will be excluded from your listserv communication, which makes e-communication less effective. A listserv is another way to facilitate communication and discussion among Inn members by sending out a message to the entire group at the same time. An Inn may have as many separate lists as it needs. The listserv application is listed under related resources for this module.

Now that we have examined the components that create the structure for the administration of the Inn-record keeping, reports and communication-let's look at who is responsible for the administrative functions and how they can accomplish these functions.

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Effective Administration

- Secretary
- Treasurer
- Administrator

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Management planning and oversight must be done by the Inn's leadership. Your inn may simply look to your elected Secretary or Treasurer to handle the administrative tasks we have discussed, or your Inn may have an Inn Administrator.

An Inn Administrator is usually not part of the volunteer officer rotation, but instead is a paid or unpaid volunteer that manages the ongoing day-to-day administrative tasks of the Inn over a span of years-providing the continuity of management during the rotation of leadership.

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Effective Administration

- Chapter Management System (CMS)
 - Features:
 - accessible 24/7 with internet connection
 - dynamic link to your Inn's membership records at the national office, active and alumni
 - automatic updates to your Inn's Web site
 - Benefits:
 - information at your fingertips
 - time and energy saved
 - communication made easy

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Historically, the tools used by those responsible for the Inn's administration have ranged from Excel spreadsheets, Access databases, Word documents, and money management software--and these resources varied even more when leadership transitions occurred. Some Inns have reported that only hardcopy files were exchanged between incoming and outgoing leaders responsible for the administration.

With this in mind, the American Inns of Court Foundation created a custom-built Inn administration tool, the Chapter Management System. This tool was created to handle all aspects of inn administration quicker and easier. It is a web-based system of record keeping which allows you to:

- update member information,
- manage officers and committees,
- facilitate dues billing and collections, and
- maintain your meeting calendar.

With features designed to be user friendly and time sensitive, the benefits that Inn administrators will experience are numerous. Here are just a few of those:

- Information available when and where you need it
- Time and energy saved by no longer needing to re-create your membership records every year or reporting those updates to the national office
- Communication to your members and potential members can be done with the touch of a button

More information on the Chapter Management System as well as an enrollment form are found in the related resources for this module.

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Model of Excellence Award



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Again, we realize that good inn administration doesn't happen without effort. The national office created the Model of Excellence Award to recognize those efforts. This award is given to the Inn that has accumulated the most points for the Inn year. In addition, Inns that meet the threshold for the Model of Excellence program but aren't the top Inn are distinguished by being named to the Circle of Excellence.

More information on the Model of Excellence award details can be found in the related resources for this module.