

SALMON P. CHASE CHAPTER OF THE AMERICAN INNS OF COURT
MEMBERSHIP HANDBOOK

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AMERICAN INNS OF COURT

Professional Creed

Whereas, the Rule of Law is essential to preserving and protecting the rights and liberties of a free people; and

Whereas, throughout history, lawyers and judges have preserved, protected and defended the Rule of Law in order to ensure justice for all; and

Whereas, preservation and promulgation of the highest standards of excellence in professionalism, ethics, civility, and legal skills are essential to achieving justice under the Rule of Law;

Now therefore, as a member of an American Inn of Court, I hereby adopt this professional creed with a pledge to honor its principles and practices:

- ✧ I will treat the practice of law as a learned profession and will uphold the standards of the profession with dignity, civility and courtesy.
- ✧ I will value my integrity above all. My word is my bond.
- ✧ I will develop my practice with dignity and will be mindful in my communications with the public that what is constitutionally permissible may not be professionally appropriate.
- ✧ I will serve as an officer of the court, encouraging respect for the law in all that I do and avoiding abuse or misuse of the law, its procedures, its participants and its processes.
- ✧ I will represent the interests of my client with vigor and will seek the most expeditious and least costly solutions to problems, resolving disputes through negotiation whenever possible.
- ✧ I will work continuously to attain the highest level of knowledge and skill in the areas of the law in which I practice.
- ✧ I will contribute time and resources to public service, charitable activities and pro bono work.
- ✧ I will work to make the legal system more accessible, responsive and effective.
- ✧ I will honor the requirements, the spirit and the intent of the applicable rules or codes of professional conduct for my jurisdiction, and will encourage others to do the same.



The American Inns of Court

General Information

American Inns of Court (AIC) are designed to improve the skills, professionalism and ethics of the bench and bar. An American Inn of Court is an amalgam of judges, lawyers, law professors and law students.

Looking for a new way to help lawyers and judges rise to higher levels of excellence, professionalism, and ethical awareness, the American Inns of Court adopted the traditional English model of legal apprenticeship and modified it to fit the particular needs of the American legal system. American Inns of Court help lawyers to become more effective advocates and counselors with a keener ethical awareness. Members learn side-by-side with the most experienced judges and attorneys in their community.

American Inns of Court actively involve more than 25,000 state, federal and administrative law judges, attorneys, legal scholars and law students. Membership is composed of the following categories: Masters of the Bench—judges, experienced lawyers, and law professors; Barristers—lawyers with some experience who do not meet the minimum requirements for Masters; Associates—lawyers who do not meet the minimum requirement for Barristers; and Pupils—law students.

History

The American Inns of Court concept was the product of a discussion in the late 1970's among the United States' members of the Anglo-American exchange of lawyers and judges, including Chief Justice Warren E. Burger and Chief Judge of the Ninth Circuit J. Clifford Wallace. Chief Justice Burger subsequently invited Rex E. Lee (then Dean of the J. Reuben Clark School of Law at Brigham Young University and later United States Solicitor General) and Dallin Oaks (then president of Brigham Young University and later Justice of the Utah Supreme Court) to test the idea.

At the suggestion of Rex Lee, a pilot program was entrusted to Senior United States District Court Judge A. Sherman Christensen, who honed the idea into a feasible concept. The first American Inn of Court was founded in 1980 in the Provo/Salt Lake City area of Utah, and included law students from Brigham Young University. Within the next three years, additional American Inns formed in Utah, Mississippi, Hawaii, New York, and Washington, D.C.

In 1983, Chief Justice Burger created a committee of the Judicial Conference of the United States to explore whether the American Inn concept was of value to the administration of justice and, if so, whether there should be a national organization to promote, establish and assist American Inns, and promote the goals of legal excellence, civility, professionalism and ethics on a national level. The committee reported to the Judicial Conference affirmatively on the two questions and proposed the creation of the American Inns of Court Foundation. The Judicial Conference approved the reports and, thus, endorsed the American Inn concept and the formation of a national structure. In 1985, the American Inns of Court Foundation was formally organized.

Salmon P. Chase

Salmon P. Chase was born on January 13, 1808 in Cornish, New Hampshire. He was the eighth of eleven children. When Chase was nine years old, his father died, leaving Chase in the care of his uncle who was the Protestant Episcopal bishop of Ohio. Chase studied at Cincinnati College where his uncle was the president. He later transferred to Dartmouth College and graduated Phi Beta Kappa in 1826. He moved to Washington, D.C., where he taught school and studied law under William Wirt, the U.S. Attorney General. Chase passed the bar in 1829.



In 1830, Chase moved to Cincinnati, Ohio, where he practiced law, entered into antislavery and other reform activities, and engaged in writing and lecturing. He worked initially with the American Sunday School Union and began defending fugitive slaves in local as well as federal courts. Chase was labeled the "Attorney General of Fugitive Slaves."

In 1849, Chase was elected to the U.S. Senate from Ohio. In 1855 he was elected governor of Ohio. Chase was the first Republican governor of Ohio, serving from 1856 to 1860, where he supported women's rights, public education, and prison reform. His long antislavery record and party activism lead Chase to be prominently mentioned as a Republican presidential candidate in both 1856 and 1860. He returned to the U.S. Senate in 1860 but resigned after three days to serve under President Lincoln as Secretary to the Treasury.

Chase served as Secretary of the Treasury in President Lincoln's cabinet from 1861-1864. During the Civil War, he faced the daunting task of financing the Union war effort and maintaining the nation's solvency. He created a national banking system and established an Internal Revenue Division. The first U.S. federal currency, the greenback demand note, was printed during Chase's tenure as Secretary of the Treasury. To honor Chase for introducing the modern system of banknotes, he was depicted on the \$10,000 bill printed from 1928-1946. Chase was instrumental in placing the phrase, "In God We Trust" on United States coins. In 1864, Chase resigned as Secretary of the Treasury.

In December of 1864, President Lincoln appointed Chase as the new Chief Justice of the Supreme Court. In one of his first acts as Chief Justice, Chase appointed John Rock as the first African American attorney to argue cases before the Supreme Court. In March 1868, Chase presided over the removal trial of the impeached President Johnson in the U.S. Senate. The Chief Justice brought to the trial a much needed air of dignity and impartiality.

Chase died in New York City in 1873. The Chase National Bank, Chase Hall, the main barracks and dormitory at the United States Coast Guard Academy, Chase Hall at Harvard Business School, and Salmon P. Chase College of Law in Highland Heights, Kentucky, were all named in Salmon P. Chase's honor.

SALMON P. CHASE CHAPTER
THE AMERICAN INNS OF COURT

Salmon P. Chase College of Law was founded in 1893. In celebration of the hundredth anniversary of the law school, several prominent lawyers initiated the development of a chapter of the American Inns of Court. The Honorable William Bertelsman, Professor M. Bratton, E. Andre Busald, Esquire, William T. Robinson, Esquire, and The Honorable Donald E. Wintersheimer applied for a Charter. The American Inns of Court Foundation presented Official Charter Number 186 to the Salmon P. Chase American Inn of Court on June 11, 1993.

In 2004 the Honorable William O. Bertelsman was awarded the American Inn of Court, Professionalism Award for the Sixth Circuit.

The past presidents of the Salmon P. Chase American Inn of Court are as follows:

1993-1994	William T. Robinson III
1994-1995	E. Andre Busald
1995-1997	Richard Lawrence
1997-1999	Robert Sanders
1999-2001	Kevin Murphy
2001-2003	Margo Grubbs
2003-2005	Hon. Greg Bartlett
2005-2008	Hon. J. Gregory Wehrman
2008-2010	Hon. Joy Kramer
2010-2012	Hon. Anthony W. Frohlich
2012-2013	Hon. Michelle Keller
2013-2014	Mark G. Arnzen
2014-2016	Hon. Candace J. Smith

Some of our recent past outstanding speakers have been:

- *Insights Into the United States Supreme Court*
William Suter, the 19th and current Clerk of the United States Supreme Court, Former Judge Advocate General, Former Chief Judge of U.S. Army Court of Military Review
- *The Death of American Virtue: Clinton v. Starr*
Ken Gormley, bestselling Author
- *Twelve Angry Twitters*
Bill Haltom, Esq., Author and former President of the Tennessee Bar Association
- *The Oklahoma City Bombing*
Geoffrey Mearns, President, Northern Kentucky University

American Inns of Court Foundation
Official Charter Number 186

Presented to

The Salmon P. Chase American Inn of Court
In Highland Heights, Kentucky

This eleventh day of June, 1993,
at the Ninth Annual Meeting of the
American Inns of Court in
Chicago, Illinois.

American Inns of Court Foundation
Charter Number 186 of

~~THE SALMON P. CHASE AMERICAN INN OF COURT~~

IN Highland Heights, Kentucky

Inasmuch as The Honorable William Bertelsman, Professor Robert M. Bratton, E. Andre Busald, Esquire, William T. Robinson, III, Esquire, and The Honorable Donald C. Wintersheimer have made due and proper application to the American Inns of Court Foundation for a charter to organize, establish and carry on activities as a participating American Inn of the American Inns of Court Foundation, and,

Whereas, the aforesaid applicants have agreed to abide by and conduct their activities consistent with the requirements of this Charter, and the Articles of Incorporation, Bylaws and Policies of the American Inns of Court Foundation, as they now exist or may be hereafter interpreted, modified or amended by the Board of Trustees of said Foundation, and,

Whereas, applicants have requested that their member American Inn be granted use of the American Inns of Court name, service mark, seal and copyrighted materials and be designated as The Salmon P. Chase American Inn of Court.

NOW THEREFORE, subject to the conditions hereinafter set forth, the American Inns of Court Foundation, by and through its Board of Trustees, does hereby grant American Inns of Court Foundation Charter Number 186 to the above-named applicants, their successors and to such others as are or shall be joined with them as members of the within described American Inn to be known as The Salmon P. Chase American Inn of Court in Highland Heights, Kentucky.

FURTHERMORE, subject to the conditions set forth hereinafter, the American Inns of Court Foundation, by and through its Board of Trustees, does hereby grant to The Salmon P. Chase American Inn of Court the right to use the Foundation name, service mark, seal and copyrighted materials as long as the American Inn is in good standing and the use is in compliance with conditions established from time to time by the Foundation.

ARTICLE I OBJECTIVES

The objectives of this American Inn are:

1. To be a membership of judges, lawyers, legal educators, and others as may be consistent with this Charter, to promote excellence in legal advocacy at the trial and appellate court levels.

2. To foster greater understanding of, and appreciation for the adversary system of dispute resolution in American law, with particular emphasis on ethics and professional standards of excellence.
3. To provide significant educational experiences that will improve and enhance the skills of lawyers as counselors and advocates and of judges as adjudicators and judicial administrators.
4. To promote interaction among members of all categories in order to minimize misapprehensions, misconceptions and failures of communication that obstruct the effective practice of law.
5. To facilitate the development of law students, and recent law school graduates and less experienced lawyers as skilled participants in the American court system.
6. To build upon the genius and strengths of the common law and the English Inns of Court and to renew and inspire joy and zest in legal advocacy as a service worthy of constant effort and learning.
7. To promote collegiality among professionals and to transmit ethical values from one professional generation to another.

ARTICLE II ORGANIZATION

1. Nature of Association.

This American Inn shall be and remain chartered and affiliated with the American Inns of Court Foundation as a member American Inn and shall be an unincorporated association composed of judges, practicing lawyers, law school educators, recent law school graduates, and law students who accept an invitation to membership as hereinafter described.

2. Governing Body and Officers.

The officers of this American Inn shall be a President, a Counselor, a Secretary/Treasurer and such other officers as the Benchers, by majority vote of those present at a meeting duly called for that purpose, may deem necessary. The President and Counselor must be selected from among the Benchers and shall be elected by vote of a majority of the Benchers present at a meeting called for that purpose. All other officers, including the Secretary/Treasurer, may be selected from any class of membership and shall be elected by vote of a majority of all members present at a meeting called for that purpose. Unless otherwise authorized by the Board of Trustees of the Foundation, either the President or the Counselor shall be a judge. The officers, along with such other members as the Benchers, by majority vote of those present at a meeting duly called for that purpose, shall select, shall constitute an Executive Committee.

Pursuant to Article II, Section I of the Foundation Bylaws, it is suggested that the Executive Committee select either the President or the Counselor to serve as a member of the American Inn of Court Foundation during his or her term of office. (See Article II, Section 2d of this Charter.)

A. Term of Office.

The term of each office shall be one year. Officers may succeed themselves. The Executive Committee shall designate the dates for the commencement and termination of the operative year. The final meeting of each operative year typically shall be designated as the meeting for elections, but exceptions may be established by the Executive Committee.

B. Duties of President and Counselor.

In addition to other duties which may be imposed by the Benchers and by the Trustees of the American Inns of Court Foundation, the President and the Counselor shall have the following duties, which, in the absence of agreement between them as to division, shall be allocated by vote of the Executive Committee of the American Inn:

1. Schedule and preside at all meetings of the American Inn;
2. Ensure that an annual curriculum and agenda for American Inn meetings and activities are developed and furnished to members;
3. Notify members of their appointment to serve on American Inn of Court committees;
4. Call and conduct meetings of officers and committees as required to plan and conduct activities of the American Inn;
5. Conduct all American Inn activities in accordance with the Articles, Bylaws and Policies of the American Inns of Court Foundation and this Charter;
6. Supervise and monitor pupillage group activities in order to encourage the proper functioning of this important aspect of American Inn organization;

7. Encourage attendance at all American Inn meetings;

8. Serve as liaison with other American Inns of Court as they may be established;

9. Extend invitations for membership in the American Inn of Court as authorized by the Executive Committee.

C. Duties of Secretary/Treasurer.

The Secretary/Treasurer shall:

1. Prepare, maintain and forward to the American Inns of Court Foundation Secretary, at least annually, a complete roster of all present and past members of the American Inn specifying name, last known address, telephone number, membership category, beginning date of membership and ending date of membership;

2. Prepare and maintain minutes of each meeting of the American Inn and forward a copy thereof to the American Inns of Court Foundation Secretary within one month of each meeting;

3. Receive and disburse monies and other property paid to the American Inn of Court in accordance with directives and policies of the American Inns of Court Foundation;

4. Prepare and maintain accurate financial records for the American Inn in accordance with directives and policies of the American Inns of Court Foundation;

5. Furnish application forms to persons interested in becoming members of the American Inn and see that the Executive Committee receives such completed applications;

6. Perform such other duties as may be assigned by the President.

D. Duties and Authority of the Executive Committee.

The Executive Committee, acting by majority vote of its members, shall:

1. Select a Member of the American Inns of Court Foundation pursuant to Article II, Section I of the Bylaws of the said Foundation. Usually this will be the President or Counselor.

2. Establish such committees as may be necessary to carry out or assist the officers in carrying out the responsibilities imposed by this Charter or by the Articles of Incorporation, Bylaws, Policies or Directives of the American Inns of Court Foundation.

3. Confer and terminate memberships in the American Inn.

4. Perform such other duties as may be assigned by the President or the Counselor.

3. Relationships with Courts.

This American Inn shall be and remain outside the jurisdiction of the courts but shall endeavor to work in close cooperation with the trial and appellate courts. Federal, state and local trial and appellate judges will participate in the organization in the tradition of the common law.

ARTICLE III MEMBERSHIP

1. Invitations to Membership.

Memberships shall be conferred upon those accepting invitations extended by the Executive Committee. The Executive Committee's discretion in extending invitations to membership is absolute and non-reviewable. Such invitations may be extended on the basis of recommendations made to the Executive Committee by any member of the American Inn or in response to written application filed with the Secretary/Treasurer of the American Inn. Membership shall not be denied to any person on account of race, creed, religion, sex, age, disability or national origin.

2. Designation of Categories of Membership*.

Members shall be selected in the following five categories and shall be given suitable certificates of membership in this American Inn of Court:

A. Masters of the Bench (Benchers)—Active.

Membership as Active Masters of the Bench or "Active Benchers" may be held by judges, lawyers and law teachers who have demonstrated superior character, ability and competence as trial or appellate advocates. Retention of status as an Active Bencher is contingent upon reasonable American Inn activity to be periodically reviewed by the Executive Committee. There is no required tenure of membership in this category but it is suggested that Active

Benchers serve continuously for at least five (5) years before being eligible for election to Emeritus status. Any person who has been granted Emeritus status as a Bencher may be reinvited to serve again in an active capacity. At least twelve (12) Active Benchers shall be practicing lawyers. The remainder shall be judges or law teachers as determined by the Executive Committee.

B. Masters of the Bench (Benchers)—Emeritus.

Membership as Emeritus Masters of the Bench or "Emeritus Benchers" may be conferred upon Active Benchers by a two-thirds affirmative vote of the Active Benchers of the American Inn in attendance at a meeting called for that purpose. The vote shall be by secret ballot. Such membership status may be granted on the basis of long and distinguished service to the American Inn. Emeritus Benchers shall be under no obligation to pay dues, attend meetings or participate in other programs of the American Inn but will enjoy all privileges of Active membership except the right to vote. Emeritus Benchers will retain such membership status for life if they so desire.

C. Barristers.

Active membership as Barristers may be held by attorneys who have been in active practice for at least two (2) years prior to selection as a Barrister and must have demonstrated good character and a desire to improve and refine their skills as trial and appellate advocates. Barristers shall be eligible to remain as active members for up to three (3) years in the discretion of the Executive Committee. After such time Barristers may remain as members of the American Inn invited to participate in such activities as the Executive Committee may deem appropriate.

* The actual number of members in each category should be consistent with the original application for charter. American Inn may propose a different number so long as the spirit and concept of the American Inn of Court movement is not violated and the maximum number of active members of the American Inn of all categories not exceed sixty-five (65).

D. Pupils.

Membership as Pupils shall be held by persons who are either students at an accredited law school or are recent law school graduates admitted to the practice of law for not more than two (2) years. Tenure of membership for Pupils shall be not more than on (1) year. Membership may be terminated in the sole discretion of the Executive Committee.

E. Honorary Members.

Honorary members may be elected from time to time upon nomination by the Executive Committee and upon a two-thirds affirmative vote of the Benchers in attendance at a meeting ~~called for that purpose. Election shall be by secret ballot.~~ Consideration for selection is on the basis of distinguished service to the bench or bar, furtherance of American Inn of Court objectives or other noteworthy achievements. Honorary members shall be under no obligation to pay dues, attend meetings or participate in other programs of the American Inn but will have all privileges of membership except the right to vote.

ARTICLE IV FINANCES

1. Financial matters within this American Inn shall be managed and controlled in accordance with policies and directives established by the American Inns of Court Foundation and this Charter.
2. This American Inn shall remit annually to the American Inns of Court Foundation a reasonable amount to be levied by the Board of Trustees of said Foundation for the purpose of paying its proportionate share of operating expenses of the said Foundation.
3. The Executive Committee is empowered to levy and collect assessments in the form of dues in amounts which it may deem appropriate in order to meet its obligations to the American Inns of Court Foundation as well as the American Inn's operating needs. Failure to pay assessments and dues within a reasonable time and after reasonable notice may be considered by the Executive Committee as a ground to terminate membership of the person in default.
4. The Fiscal Year of the American Inn for financial reporting purposes shall be the same as the operative year set by the Executive Committee.

ARTICLE V MEETINGS AND ACTIVITIES

1. Schedule for Meetings.

Regular meetings of the membership of the American Inn shall be called by the Executive Committee at least six times per year at such intervals as it may determine. The operative year of the American inn of Court shall be as determined by the Executive Committee.

2. Content of Meetings.

The main themes and subject matter of regular meetings shall be practical legal advocacy with emphasis on legal ethics and excellence in lawyering. Programs should present, demonstrate, teach and explain the principles, skills, techniques and relationships involved in the courtroom and in activities preliminary to courtroom appearances and should involve critique and questions from the membership of the American

Inn, all designed to assist members in better discharging their duties to clients and society. Programs should ordinarily be presented by previously assigned pupillage groups.

ARTICLE VI PUPILLAGE GROUPS

As an American adaptation of the pupillage system which is basic to the English Inns of Court, each Pupil and Barrister will be assigned to work with a Benchers ~~(who is a practicing attorney)~~ during meetings and at other times throughout the year. At least one (1) Active Benchers who is a practicing attorney, one (1) Barrister, and one (1) Pupil, appropriate to the numbers in the American Inn, shall comprise the Pupillage Group. Each Pupillage Group shall be assigned to a Benchers who is a Judge who shall exercise general supervision over the group assigned to him or her and shall monitor the group's attendance at meetings, encourage its meaningful participation at meetings, and at scheduled pupillage events, and oversee presentation of assigned meeting topics. All Active Benchers should strive to make contact with Pupils and Barristers between the scheduled American Inn meetings. On such occasions Pupils and Barristers should be advised about pertinent points of trial or appellate advocacy as is appropriate.

ARTICLE VII OTHER AMERICAN INNS OF COURT

This American Inn shall promote or cooperate in the establishment of similar American Inns in the same different localities of the state or elsewhere, to meet existing or developing needs in order to more widely achieve the objectives of the American Inns of Court Foundation.

ARTICLE VIII AMENDMENTS TO CHARTER

This Charter may be amended only with the approval of the Board of Trustees of the American Inns of Court Foundation following a two-thirds vote of the non-Pupil American Inn members present at a meeting called and reasonably noticed for such purpose, or upon written consent of at least two-thirds of such membership.

ARTICLE IX REVOCATION OF CHARTER

This Charter may be revoked by the Board of Trustees of the American Inns of Court Foundation upon the occurrence of any one or more of the following events: (1) The American Inn of Court hereby chartered does not become organized and operational within one year of the issuance hereof; (2) Violation by the American Inn of Court hereby chartered of the laws under which the American Inns of Court Foundation was organized or violation by the American Inn of the Articles of Incorporation, Bylaws or Policies of the American Inns of Court Foundation.

IN WITNESS WHEREOF this Charter is hereby granted by the American Inns of Court Foundation by and through its Board of Trustees this Eleventh day of June, 1993.

Howard J. Marking
Chairman of the Board of Trustees
American Inns of Court Foundation

SALMON P. CHASE INN OF COURT

MEMBERSHIP POLICY

I. General Policy on Membership.

Membership in the Chase Inn of Court should be structured to effectively further the Inn's mission of raising the skills, professionalism and ethics of the community's bench and bar to the highest levels of excellence.

Membership in the Inn should reflect a balance of judges, practicing lawyers, law professors, and students.

Members should bring to the Inn experience from the private sector and the public sector, from the for-profit practice and the not-for-profit practice, from the solo practitioner's office to the large firm, from the state bench to the federal bench, the trial court and the appellate court, from traditional litigation and trial practice to alternative dispute resolution and administrative law, and all that lies in between.

II. Membership Committee.

Membership in the Chase Inn of Court shall be determined by the Executive Committee upon recommendation of the Membership Committee, which shall have been appointed by the Executive Committee. In making recommendations for membership to the Executive Committee, the Membership Committee shall apply the membership criteria. Selection to membership in the Inn shall be subject to the sound discretion of the Executive Committee.

III. Membership Criteria.

A. All non-student members of the Inn and all applicants for non-student membership shall be licensed attorneys in good standing with the bars to which they are admitted, shall be of good character and fitness, and shall not be under suspension by any court.

B. For practicing lawyers, membership in the Inn shall be limited to those whose practice is at least 50% committed to litigation, trial practice or other forms of dispute resolution.

C. Membership in the Inn is composed of the following categories, to which members will be assigned by the Membership Committee:

Masters of the Bench - Generally, Masters of the Bench include members of the judiciary, as well as lawyers and law professors with 15 or more years of experience, as measured from their first year of admission to the bar.

Barristers - Generally, Barristers include lawyers and law professors with 4 to 14 years of experience, as measured from their first year of admission to the bar.

Associates - Generally, Associates include lawyers with 0 to 3 years of experience, as measured from their first year of admission to the bar.

Students - Generally, Students are current students at the Salmon P. Chase School of Law, who are selected by the Dean of the law school to participate in the Inn. Upon graduation from law school, Students do not continue their membership in the Inn and do not become Associate members in the Inn. Rather, they may seek admission upon regular application.

D. The Membership Committee will seek to achieve a target membership, excluding Honorary Members, consisting of 50 Masters of the Bench, 40 Barristers, 20 Associates, and 12 Students.

E. All applicants for membership in the Inn must be sponsored by either a Master of the Bench or a Barrister.

F. Members of the judiciary and their staff members will be considered Honorary Members of the Inn, with the appropriate category of participation to be determined by the Membership Committee.

MENTORING PROGRAM

Purpose

The Salmon P. Chase Inn of Court Mentoring Program was developed as a way to put into practice the American Inns of Court Professional Creed's goal of upholding "the highest standards of excellence in professionalism, ethics, civility and legal skills" and attaining "the highest level of knowledge and skills" in every practice area. It will assist members in developing and maintaining high standards of success based upon internalized principles of appropriate behavior consistent with the core values of the legal profession.

Goals

- Develop an understanding of generally accepted professional values and standards of behavior and the importance of professionalism in the practice of law.
- Build awareness of ethical obligations and of proper practices for avoiding mishandling of other's assets, conflict of interest, neglect of matters, and civil liability problems.
- Improve professional skills necessary for the effective practice of law at a high level of competence.
- 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.

Administration and Operation

Each year the Executive Committee shall divide the Inn Membership into eight pupillage groups. Each pupillage group shall contain similar numbers of Judges, Masters, Barristers, Associates and law students. The Executive Committee shall designate one of the Masters as the Pupilage Group Mentor. Associates, however, may choose to seek mentors from another team.

Each member of the Inn shall complete a profile information form. The mentor for each pupillage group shall be given a copy of the profile forms to assist in formulating their mentoring plans. Barristers are permitted to utilize this program, but are not required to attend a mentoring session.

The Executive Committee shall designate a member of the Inn as the Mentoring Director. At the beginning of each Inn Year the Mentors and their Associates will be introduced at a group orientation. The Mentoring Director will lead an informal discussion on the goals of the mentoring program. This will allow the Mentors and Associates to become acquainted with each other's respective experience, background and aspirations.

A mentor shall meet and conduct at least one individual mentoring session with each associate in the pupillage group during the Inn fiscal year. The Mentor should discuss the mentoring plan with the Associate as well as answer questions regarding the practice of law. This will include ethical as well as substantive issues.

Mentors and Associates will evaluate their mentoring experience. This evaluation should include positive experiences as well suggestions regarding ways to improve the program. Evaluations shall be given to the Mentoring Director no later than the May meeting.

A Mentor of the Year Award will be given at the September Meeting. This award will be based upon the performance of Mentors during the past fiscal year. The Executive Committee, assisted by the Mentoring Director, will choose the recipient.

Duties of Mentoring Director

- Appoint a committee of 3-4 persons to assist
- Oversee the Inn's Mentoring Program
- Communication with Inn members about the existence and organization of the mentoring program
- Recruitment of mentors
- Establish mentoring timeline
- Generate and maintain a nonexclusive, illustrative list of mentoring topics
- Promote necessary forms which establish mutual expectations between mentors and protégés
- Establish appropriate mechanisms for accountability to ensure a successful program
- Periodic evaluation to improve the program
- Troubleshooting if required
- Assist Executive Committee in choosing an annual Mentor of the Year Award recipient.

MASTER EMERITUS

A Master with a record of distinguished service to the Inn may choose, after fifteen active years of membership as a Master, to take inactive service. Upon timely completion and submission of the Master Emeritus Application, the Master may be designated Master Emeritus by a vote of the Executive Committee. Founding or initial members of the Inn may also qualify for Master Emeritus status even if they do not have fifteen years of consecutive membership as a Master as this policy was not in existence at the time they were members.

Master Emeritus members do not have to participate in pupilage groups and committees, but are welcome to do so. They do receive notices of meetings and are welcome to enjoy the fellowship of the dinner and the program that follows. The dues paid by a Master Emeritus shall only be a sum sufficient to cover the costs of their meals as set by the Executive Committee. Master Emeritus members are encouraged to become a member of the American Inns of Court Alumni Association.

**SALMON P. CHASE CHAPTER OF AMERICAN INN OF COURT
APPLICATION FOR MASTER EMERITUS STATUS**

Mail or Fax no later than May 31st to the President

Master Emeritus: A Master with a record of distinguished service to the Inn may choose, after fifteen years of membership as a Master, to take inactive service. Upon timely completion and submission of the Master Emeritus Application, the Master may be designated Master Emeritus by a vote of the Executive Committee. Master Emeritus members do not have to participate in pupilage groups and committees, but are welcome to do so. They do receive notices of meetings and are welcome to enjoy the fellowship of the dinner and the program that follows. The dues paid by a Master Emeritus shall only be a sum sufficient to cover the costs of their meals as set by the Executive Committee. Master Emeritus members are encouraged to become a member of the American Inns of Court Alumni Association.

Name: _____ **Date:** _____

Year you joined Inn: _____

Mailing address, city & zip: _____

Office phone: _____ **FAX:** _____ **Home Phone:** _____

Primary Vocation:

- ☐ Judge
- ☐ Legal Educator
- ☐ Attorney
- ☐ Other: _____

Law School and year of graduation: _____

State the reason(s) you wish to take Emeritus status: _____

List each committee on which you have served: _____

List the committees that you have you served as chair or co-chair: _____

How many times have you served as a pupilage team leader? _____

Which Inn offices have you held? _____

AMERICAN INNS OF COURT WEBSITE

One of the benefits of being a Salmon P. Chase Inn of Court member is access to the American Inns of Court website. This website allows you to network with members from the different chapters of the American Inns of Court. As a new member you will receive an email directly from the website with your username and password. It will also contain a link to the login page for the website. Once you have logged into the website you will have the opportunity to fill out your profile and download a picture.

You should log into the website and activate your account as soon as possible for several reasons. Aside from being able to access the contact information for attorneys around the nation, those attorneys will be able to view your information. This is a wonderful way to receive referrals and other business that would not otherwise be available. You will also receive all of the information regarding the monthly Inns of Court meetings through your Inn of Court account. Prior to the monthly meeting, you will receive an email that will describe the presentation for the upcoming meeting, the time and place of the meeting and the deadline to RSVP for the meetings. At the bottom of the email there will be a link for you to RSVP for the meeting. It is very important that you use this link to submit your RSVP for the meeting prior to the deadline. If you do not RSVP, you will be unable to attend. If, for some reason, you have difficulty with the RSVP link, please respond to the email that was sent so the issue may be rectified.

CLE CREDIT AND EVALUATIONS

You are entitled to receive one hour of general credit toward your Kentucky CLE and one hour of general credit toward your Ohio CLE for each Salmon P. Chase Inn of Court meeting attended. At each table there will be a set of Kentucky CLE forms, Ohio CLE forms and evaluation forms. In order to receive your credit you must fill out the appropriate CLE sheet along with an evaluation form. These forms should be returned to the welcome table where you picked up your nametag. If you are unable to find the appropriate forms at your table, please come to the Welcome table for assistance.

The American Inns of Court National Awards Program

Mentoring has always been fundamental in the minds and activities of American Inns of Court chapters and members, and the most compelling case a person can make is by example. American Inns of Court celebrates those professionals whose lives, as well as their words and standards, reflect the civility, ethics, and professionalism that the community upholds. By formally recognizing a select number of individuals with national awards, American Inns of Court provides role models for other lawyers and strengthens the image of the legal profession before the public and other business communities.

Awards

- The **Lewis F. Powell, Jr., Award for Professionalism and Ethics** is given to recognize exemplary service to the legal profession in the areas of professionalism, civility, and ethics. It may be awarded to judges and lawyers that have not been directly involved with the American Inns of Court.
- The **A. Sherman Christensen Award** honors an American Inn of Court member who has provided distinguished, exceptional and significant leadership to the American Inns of Court.
- The **Sandra Day O'Connor Award for Professional Service** recognizes an Inn member in practice ten or fewer years for excellence in public interest or pro bono activities.
- The **Best Special Project Award** recognizes different activities outside the Inn's monthly meeting, which allows Inns to promote the mission of the American Inns of Court.

The Achieving Excellence program is designed to encourage effective practices in the five core competencies of Inn management. 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 these core competencies.

Five Core Competencies of Successful Inns

Inns that are continuously successful, have mastered the five core competencies of Inn management. These are Administration, Communications, Programs, Mentoring and Outreach activities. Each is outlined below and provides a brief description of just what is possible in each competency.

1. Administration:

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

2. Communications:

Communication on all levels is another key to running a successful Inn. Developing ways to connect with your members, the legal community, and the national office, helps to build a great Inn.

3. Programs:

Monthly programs are the foundation of each Inn. Without programs the Inn would become just like any other organization. Programs provide the unique opportunity for all levels of the profession to come together and learn from each other.

Monthly programs generally focus on practical legal skills with an emphasis on ethics, civility, and professionalism in the practice of law. They may also involve demonstrations, presentations of principles, techniques, as well as relationships involved in practice of law. Great programs also allow time for discussion by all Inn members.

4. 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.

5. Outreach Activities:

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

BRONZE LEVEL RECOGNITION

- Recognized in *The Bench*er and on the Web site
- Listed in Celebration of Excellence event program

SILVER LEVEL RECOGNITION

- Recognized in *The Bench*er and on the Web site
- Listed in Celebration of Excellence event program
- Certificate of achievement

GOLD LEVEL RECOGNITION

- Recognized in *The Bench*er and on the Web site
- 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

PLATINUM LEVEL RECOGNITION

- Recognized in *The Bench*er and on the Web site
- 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
- Press release of achievement
- Early registration available for Inn representatives to attend Celebration of Excellence awards dinner

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**
 - Submit IRS Tax Filing verification form to the national office by June 30
 - Comply with IRS tax filing by November 15:
 - Option 1: Inn has gross annual (July 1–June 30) income under \$25,000 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 \$25,000, 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 \$25,000, file 990-EZ and Schedule A with IRS, and send copy to the national office
 - **Requirements of CMS or Non-CMS Inns**
 - Inns using the Chapter Management System (CMS)
 - » Update executive committee by June 30
 - » Post meeting dates, locations and program topics by October 1
 - » Maintain current membership roster (*Note: Dues are assessed on number of active members as of June 30.*)
 - Inns not using the Chapter Management System (CMS)
 - » Submit Inn meeting dates, locations and program topics to the national office by October 1
 - » Submit Inn membership roster to the national office by November 30
 - » Submit Inn Annual Report 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 Web site—hosted by national office or other, which may include:
 - Local Inn history/biography of namesake
 - Link to www.innsofcourt.org Web site (if using external Web site 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 executive committee 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
- Core Competency: 3. Programs
 - Determine and implement structure for monthly program development and document by October 1*

GOLD LEVEL REQUIREMENTS

- Maintain Bronze and Silver Level requirements
- Inn must display competency in two of the following three core areas:
 - 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 the Inn movement to the legal community and general public. Submit a description of the Inn's community outreach program to the national office.

Additional Requirements:

- Describe how your Inn engages Emeritus and Honorary members (*Alumni Association, meetings, etc.*)*
- Promote Alumni Association, which may include:
 - Distribute Alumni Association brochure/flyer to outgoing members
 - Present Alumni Association benefits to Emeritus and retired members
- Develop and implement an Inn leadership succession plan*

PLATINUM LEVEL REQUIREMENTS

- Maintain Bronze, Silver and Gold Level requirements
- Display competency in all five core areas, including:
 1. Administration
 2. Communication
 3. Increase program submissions to the national program library from two to four programs
(Submissions may be done on a quarterly basis)
 4. Mentoring
 5. Outreach Activities

Additional Requirements:

- Document participation in and/or hosting of joint Inn meeting by June 30
- Submit current Inn news to the national office
- Submit a draft of the Inn annual operating budget by November 30

** These items may have previously been submitted to the national office. Resubmit only if the information has changed.*

LEADERSHIP SUCCESSION PLAN

Officers and members of the Executive Committee are elected at the May meeting. The Executive Committee shall present a slate of candidates to be considered for election. Members at Large may also nominate members for election.

In accordance with Article II of the Charter, terms of office shall be one year. Officers may succeed themselves. Terms shall commence on June 1st and terminate on May 31st of the succeeding year.

In addition to the officers set forth in the Charter the membership shall elect a person designated as President Elect who shall work closely with the President to prepare for a smooth succession in that office. The immediate past President shall serve on the Executive Committee.

ARCHIVE POLICY

The Library of the Salmon P. Chase College of Law is designated as the Archive Depository for the Salmon P. Chase Inn of Court. Programs shall be videotaped. The programs and supporting educational materials shall then be archived.

Judges are encouraged to archive video tapes of trials or portions thereof, which the Judge believes a member of the Inn of Court has performed so well as to constitute a teaching tool.

As part of the outreach activities of the Inn, all archive materials shall be available to members of the public in accordance with the regulations of the Salmon P. Chase Law Library.

The President shall appoint an Archivist to serve in such position for a one year term (June 1st – May 31st). The Archivist shall have the discretion to preserve or destroy Inn materials as he or she deems proper.

**SALMON P. CHASE INN OF COURT
2016-2017 OFFICERS**

President:	Hon. James R. Schrand
Treasurer/Secretary:	J.B. Lind
Counselor:	Debra S. Pleatman
Imm. Past President:	Hon. Candace J. Smith

Executive Committee

Hon. Anthony W. Frohlich	Jeffrey Fichner
Hon. Michelle M. Keller	Penny U. Hendy
Hon. Joy A. Kramer	Lindsay Lawrence
Hon. James R. Schrand	J.B. Lind
Hon. Candace J. Smith	Dean David MacKnight
Hon. J. Gregory Wehrman	Theresa Mohan
Mark G. Arnzen	Kevin L. Murphy
Ethan Busald	Debra S. Pleatman

Committee Chairs

Archivist:	Michael Whiteman
Program:	
Membership:	Debra Pleatman/Theresa Mohan
Community Outreach:	Penny U. Hendy
Communications:	Ethan Busald/Jeffrey Fichner
Student Membership:	Lindsay Lawrence
Student Liaison:	Emily Cooney
Mentoring Director:	Hon. Candace J. Smith/Hon. Anthony Frohlich (ret.)