



**National Association for Court Management
International Association for Court Administration
Court Association Formation Template**



<p>I. Group Formation</p> <p>A. Purpose and Goal. Determine the purpose of the organization and group name. Establish the vision, mission, consider membership, and membership structure.</p> <p>B. Legal Authority. Create/establish formal, documented, and legal authority for the group to operate. This may include formal mission statement, articles of incorporation, by-laws, non-governmental organization (NGO) status, and descriptions of leadership roles and positions, formal governance documents, legal filings with local government authorities.</p> <p>C. Parliamentary Procedures. Identify how events and meetings will be conducted.</p> <p>D. Code of Ethics. Determine and establish a possible code of conduct/ethics that represents the organization.</p>	<p>III. Group Operations and Financial Practices</p> <p>A. Clerical Support. Determine and establish clerical and administrative support and identify for which functions (paperwork, financial/dues, conference operations, publications, etc.)</p> <p>B. Membership Dues/Fees. Consider and establish dues and membership fees. Set categories and areas for complimentary or waived fees.</p> <p>C. Organization Financial Management. Bank account, authorized signatories, insurance and financial controls.</p> <p>D. Establish Mailing Address/Location.</p> <p>E. Establish Web presence and/or online access.</p>
<p>II. Group Structure</p> <p>A. Group Leadership. Consider leadership positions of the organization. This may include officers (e.g., president, president elect, vice president, secretary, treasurer) and non-officer board members (e.g., regional or job-based positions). Consider criteria, requirements, and terms for positions. Consider election timeframes and cycles.</p> <p>B. Group Membership. Determine desired membership and structure, categories of membership (if applicable), and application for membership processes. Identify membership voting criteria, and categories.</p> <p>C. Committees. Identify committees and workgroups, terms, timelines, and committee charge and structure. Identify if they are standing (ongoing) or as needed and with special appointment. Examples include: executive, finance, education, communications, publications, ethics, and special-purpose.</p>	<p>IV. Group and Organizational Activities</p> <p>A. Group Products. Determine the products to be used, disseminated, and published by the organization. These may include meetings, educational conferences, publications (journals, newsletters, topic-focus documents, webinars, blogs, podcasts, social media), or other materials of interest to the membership. Determine titles (e.g., journal, newsletter or social media titles) dissemination schedules or target timelines, and distribution channels for sharing with membership, and those outside the organization.</p> <p>B. Outreach/Marketing. Determine how to do any outreach and marketing or advertising of the group.</p> <p>C. Access Channels. Determine and establish access methods: website, mobile, email blasts.</p> <p>D. Website/Technology Support. Determine support and technical providers (support for any web, media, and social media functions), and update cycles.</p> <p>E. Meetings. Determine and establish dates, times and locations of organizational leadership (board and officers) and group membership. Identify costs and fees to apply to attendance.</p> <p>F. Educational Programming. Identify when and where educational presentations and speakers are used at group meetings, and how speaker costs are covered.</p> <p>G. Organizational Maintenance. Determine a regular or periodic schedule for managing and maintaining the organization and assigned responsibilities.</p> <p>H. Organizational Expansion. Establish a target and organization expansion regarding membership, outreach, or products.</p>

Glossary (Preliminary or Representative Sample)

Hyperlink to NACM/IACA

- Mission, vision – (definition)
- Articles of incorporation, by-laws – (definition)
- Parliamentary procedures – (definition)