



# New Trustee Orientation

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Trustees play important roles in each and every client security fund. Providing new Trustees with a good orientation will help prepare them to fully participate in discussions and decision making, and help them to assume their duties and responsibilities as a Trustee a lot faster.

What follows is a recommended content listing for an Orientation Handbook as well as a suggested guide for a new Trustee's orientation session. Please feel free to tailor it to fit your particular needs.

## **Handbook:**

A handbook of helpful reference information will help ease new Trustees into their roles. We suggest the following content be provided to new Trustees:

### Basic Fund Concept:

- Fund Philosophy & History
- Elements of a Claim
- Criteria for Success

### Fund Rules:

- Formal (Rules of the Court, Bar Association, etc.)
- Administrative (internal, operating)

### ABA Model Rules

### NCPO Standards

### Compilation of Decisions:

- Precedent Setting Decisions
- Novel and Difficult Claims and Issues
- Decisions made in the "Interest of Justice"

### Contact Information:

- Staff
- Trustees
- Other key people



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## Fund Literature

- Annual Report
- Brochures
- Flyers
- Newsletters
- Recent press releases
- Website information

## Minutes for the most recent Trustees' Meetings

### Financial:

- Current Year's Budget (operating & award claims)
- Current Fund interim financial statements
- Last fiscal year's financial statement

### Forms:

- Claim Application
- Subrogation Agreement
- Other

Meeting Schedule for current year; locations, refreshment plans, parking arrangements, other logistical information.

Fund's policy regarding reimbursable expenses along with any required forms, etc.

Fund's policy regarding ongoing Trustee training.

### Listing of other available resources for Trustees:

- ABA Client Protection Forum
- ABA Center for Professional Responsibility Website:  
[www.abanet.org/cpr/clientpro/home.html](http://www.abanet.org/cpr/clientpro/home.html)
- NCPO Workshops
- NCPO Website: [www.ncpo.org](http://www.ncpo.org)
- Other



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## **Orientation Session:**

An Orientation Session should be held with new Trustees prior to their attendance at their first official meeting. Ideally, it should involve the Fund Administrator and the Chair, along with the new Trustee(s). A sample agenda might look like this:

- Introduction to the office staff, and tour of the office
- Review of the Orientation Handbook
- Review a recent claim to familiarize the new Trustee with forms used and the process that a claim goes through.
- Mention the difficult types of claims that they may see; unearned fees, investment or loan claims, etc.
- Emphasize the impact that the Fund can have on victims' lives.

And lastly, please welcome the new Trustee to what should be important and gratifying work and thank them for their service to the profession.