



# National Client Protection Organization

[www.ncpo.org](http://www.ncpo.org)

## Workshop Assistance Program

The Workshop Assistance Program is an award program established by NCPO to assist members of NCPO in attending and participating in NCPO sponsored workshops or the annual National Forum on Client Protection. The workshop assistance award will be assessed based upon financial need. The maximum award to be granted is \$1,000 for each event. The award recipient will also receive a waiver of the registration fee to the NCPO workshop or the ABA National Forum on Client Protection.

The determination of the recipient of the workshop assistance award will be made by a committee comprised of three members. One member will be the President of NCPO who will also act as Chair of the committee. The two other committee members shall be appointed by the President, which individuals must be a member, officer or director of NCPO. All applications received by the President will be distributed to the committee members on a timely basis in order that the committee may make a determination and notify the award recipient no later than 60 days prior to the workshop. The determination of the award recipient will be made by a majority vote of the committee.

Factors to be considered by the committee in determining the award recipient should include but not be limited to:

- Assets and operating budget of the organization
- Inability to have the cost of attendance approved by the governing body
- Prior attendance at workshops (Preference will be given to an applicant or a Fund that has not attended, or is an infrequent attendee, to the workshops.)
- New NCPO member, new administrator, new trustee
- Circumstances forming the basis for the financial need
- **An individual or organizational membership with NCPO is a requirement**
- An award recipient shall not have received a prior workshop assistance award within the most recent 3 years, unless there are no other qualified applicants for the workshop assistance award.

Applications for a workshop assistance award must be received by the designated committee representative no later than 60 days prior to the start date of the workshop or forum. Applications that do not provide the Statement of Circumstances will not be considered. The committee will notify the award recipient no later than 30 days prior to the start date for the workshop or forum.

The award recipient must pay all expenses related to attendance at the event up front and seek reimbursement after the event. Reimbursement will be requested by submission of the approved reimbursement form, together with receipts for each item for which reimbursement is being requested. The award recipient will receive reimbursement for all event related expenses, such as travel, hotel and meals, with meal reimbursement not to exceed \$70 per day for each day of the workshop. The award recipient will receive the total allowable reimbursable expenses or \$1,000, whichever is less.



NATIONAL CLIENT PROTECTION ORGANIZATION  
Workshop Assistance Application

*I am applying for assistance in attending the following NCPO workshop or National Forum on Client Protection:*

Location: \_\_\_\_\_  
Dates: \_\_\_\_\_

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

Position/Title: \_\_\_\_\_

Organization: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Are you a member of NCPO:     Yes      Date joined \_\_\_\_\_  
    No

Is your organization                     Yes      Date joined \_\_\_\_\_  
a member of NCPO?                     No       Not applicable

Information about your organization:

Current annual operating budget: \_\_\_\_\_

Assets: \_\_\_\_\_ # of Staff \_\_\_\_\_

Have you or any member of your organization previously received a workshop assistance award?  
 Yes                     No

If yes, please provide the date(s) of the workshop(s) attended and the name(s) of the person(s) who attended and received the assistance award

\_\_\_\_\_  
\_\_\_\_\_

**STATEMENT OF CIRCUMSTANCES**

*Please attach a statement providing the circumstances regarding your organization's inability to fully fund your participation at the NCPO workshop or the National Forum on Client Protection and what benefits you hope to derive from attendance at either event.*

*I have read the criteria for the workshop assistance for which I am applying and I understand that the basis for an award is financial need. I hereby make application to NCPO for an award based on the inability of my organization to pay the full cost for me to attend the workshop.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

The basis for a Workshop Assistance Award is financial need. Factors to be considered by NCPO in awarding workshop assistance may include, but not be limited to:

- assets of the organization
- operating budget for the organization
- inability to obtain approval by the governing body for attendance at the workshop or similar conferences
- prior attendance at NCPO workshops
- length of time applicant has held the position indicated on the application
- individual's or organization's prior award of workshop assistance
- circumstances forming the basis of the organization's inability to fully pay for the applicant's attendance at the workshop

Workshop assistance applicants should submit applications no later than 60 days prior to the scheduled workshop. Awards are provided to help defray the cost of travel, attendance and participation at the NCPO workshop or ABA Client Protection Forum. The recipient is required to cover all expenses up front. After the event, the recipient will submit a reimbursement request form with receipts documenting costs of transportation, hotel, meals, and other travel related expenses. The total amount of reimbursement is limited to the award amount of \$1,000, which includes a maximum \$70 per diem for meals for the length of the workshop. The recipient of the workshop assistance award will also receive a waiver of the fee for the NCPO workshop or ABA Forum. The award recipient will be notified of the award no later than 30 days prior to the scheduled event.

Please contact NCPO at [info@ncpo.org](mailto:info@ncpo.org) with any questions.

Please submit the completed application and required Statement of Circumstances to:

Kathryn Peifer Morgan, President, NCPO,  
PO Box 62585, Harrisburg, PA 17106-2585 or  
[kmorgan@palawfund.com](mailto:kmorgan@palawfund.com)

# National Client Protection Organization

## Request for Reimbursement of Expenses

Purpose of Expenditure: \_\_\_\_\_

Date: \_\_\_\_\_

Dates of Meeting: \_\_\_\_\_

**Please mail to:**  
 Ruby Cochran  
 NCPO Treasurer  
 c/o NJ Lawyers' Fund  
 P.O. Box 961  
 Trenton, NJ 08625

Location of Meeting: \_\_\_\_\_

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

Other Explanation: \_\_\_\_\_

Meetings and Travel Expense		
Item and Description		Amount
Transportation	Air (Coach rate; attach receipt)	
	Rail (Attach receipt)	
	To and From terminals (taxi, limousine, etc.)	
	Automobile:            miles @            Parking \$            Tolls \$	
	Other (rental car, etc.) Explain and provide substantiation:	
Lodging and Meals (hotel or motel at single rates)		
Incidentals (gratuities and other miscellaneous items)		
<b>Total Meetings and Travel Expense</b>		-
Expenses not related to Meetings and Travel		
Statement attached (telephone, postage, office expense, etc.)		
<b>Total Reimbursement Requested</b>		-

**Make check payable to:**

**Total Reimbursement Requested**

Name: \_\_\_\_\_  
Individual Firm or Company

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

Address: \_\_\_\_\_  
Street Address or P.O. Box

\_\_\_\_\_  
City, State and Zip Code

\_\_\_\_\_  
Signature

For NCPO Use  
 Date Received: \_\_\_\_\_ BOD Auth: \_\_\_\_\_  
 Authorized by: \_\_\_\_\_  
 Amount Authorized: \$ \_\_\_\_\_  
 Check # Issued: \_\_\_\_\_ Date: \_\_\_\_\_