

Attachment B-1: New Trustee Orientation and Training Program

FIRST TRAINING MODULE – The State Bar

- () Organizational Chart
- () History of the State Bar
- () Understanding the roles and responsibilities of Stakeholders (Chief Justice, Legislature, Governor, Labor, Media, etc.)
- () Sub-entities and Volunteers
- () State Bar Initiatives & Strategic Planning
- () Procedures for Complaints against the State Bar/Staff
- () Facilities Tour

SECOND TRAINING MODULE – The Board of Trustees

- () The Role of the Board, its Trustees & Officers
- () Board Committee Structure
- () Board Adopted Protocols: Interacting with Media, Legislature, Bar Staff and Others
- () The “Board Book”
- () Financial Review: The Budget, Sources of Funding and Comprehensive Annual Financial Report (Annual Financial Audit)

THIRD TRAINING MODULE- Legal Training from the Office of General Counsel

- () Legislative Oversight/Separation of Powers
- () Antitrust, including Antitrust Policy
- () Bagley Keene Open Meeting Act
- () California Public Records Act
- () Fiduciary Duties (Bus. & Prof. Code, §§ 6001.1 & 6030)
- () State Bar Rules Applicable to Trustees and Officers (e.g., State Bar Rules 6.20 & 6.40)
- () Conflict of Interest (Gov. Code, §1090 & Bus. & Prof. Code, § 6036 / Form 700)

- () Travel and Reimbursement Rules: Travel Reimbursement & Stipend Request Forms
- () Labor Relations – What is a “Bargaining Unit?” What is the Role of the “Exclusive Representative?”

OTHER

- () Discipline Day – The Discipline System
- () Admissions Day – The Admissions System – Application, Licensing, Certification, Moral Character, Examinations, Special Admissions