

## **PUBLIC DEFENDER REQUESTS FOR SPECIAL TRAINING**

### A. Introduction

The purpose of this policy is to set out the rules and requirements for defenders employed by the Office of Indigent Defense Services (IDS) to request permission to attend a continuing legal education (CLE) program that is sponsored by a group other than IDS or the UNC School of Government (SOG).

Although IDS and SOG make every effort to offer relevant training opportunities that qualify and prepare attorneys for various practice areas within indigent defense and satisfy CLE requirements imposed by the North Carolina State Bar, it is recognized that attorneys may need to seek training in certain topics or highly specialized areas of practice outside of the existing training framework.

### B. General Policy

If an IDS-employed defender wants to attend a CLE program that is sponsored by some group other than IDS or SOG, they must obtain prior approval from the IDS Defender Policy & Planning Attorney, as delegated by the IDS Executive Director.

Defenders should make every effort to procure relevant training and CLE credits via programs sponsored by IDS or SOG. In the event such training is not reasonably available, every effort should be made to procure the relevant training in North Carolina or via a virtual/remote option to avoid incurring unnecessary travel expenses. Special training programs requiring travel outside of North Carolina will be approved only if such training is not available locally.

### C. Approval Procedures

To request prior approval, the attorney should complete form [AOC-A-182](#) (Request for Special Travel and Training) and submit that form along with supporting documentation to Becky Whitaker, IDS Defender Policy & Planning Attorney, at [PD\\_Administration@nccourts.org](mailto:PD_Administration@nccourts.org), with the subject line "Training Request." (Do not submit the form to AOC as stated in the form's instructions). Requests should be submitted at least 30 days in advance of the anticipated training. If the requested training is approved, the Defender Policy & Planning Attorney will sign form A-182 and a copy of the fully executed form will be returned via e-mail to the attorney making the request.

Requests for training that exceed \$1500 in total expenses or involve travel outside of North Carolina are subject to elevated approval by the IDS Executive Director.

Once permission has been granted, the attorney may register, pay the registration fee, and seek reimbursement for the costs of registration and any associated travel costs after the program has concluded. If prepayment and reimbursement would result in an undue hardship, the attorney may ask IDS to prepay the registration fee directly if the request is submitted at least 30 days prior to the event.

#### D. Reimbursement Procedures

To seek reimbursement of travel expenses, including mileage and necessary lodging, after the program is complete, the attorney should complete form [IDS-A-25](#) (Reimbursement of Travel and Other Expenses), and submit that form, the signed form A-182, a copy of the agenda for the program, and all required receipts to IDS Financial Services in a single email at [IDS.Employee.Reimbursements@nccourts.org](mailto:IDS.Employee.Reimbursements@nccourts.org), including your first and last name and “travel” in the subject line. If the attorney has prepaid registration and is seeking reimbursement for registration fees, the attorney should claim that expense in the “Other Expenses” section of form A-25 and attach the registration receipt.

All questions about prior approval for training should be directed to Becky Whitaker. Questions about payment for registration fees should be directed to Aaron Gallagher, IDS Chief Financial Officer.

Policy effective December 2004; updated February 2007, May 2007, October 2010, November 2011, June 2017, and February 2024.