

CONTINUING EDUCATION AND TRAINING COMMITTEE JOB DESCRIPTION/RESPONSIBILITIES

The Chair of the Continuing Education and Training Committee (the “CE&T Committee”) is appointed by the President and serves for a one-year term, which is Annual Meeting to Annual Meeting.

These guidelines are taken from the By-Laws of the ABJA and Long-Range Goals. The main goal of the Continuing Education and Training Committee is to provide opportunities for the Judicial Assistants (“JAs”) to grow with the Association.

I. Responsibilities:

A. Planning the Annual Conference:

- Plan and prepare the agenda with the President (see Guidelines for Planning the Educational Agenda at B. below)
- Work with the Chair of the Conference Committee concerning speakers’ needs for the conference
- Prepare e-mails/letters to the speakers, making sure they get the proper information on the courses, bios, photos, special needs for the conference, such as flip charts, PowerPoint presentations and the equipment needed (screen). Also make sure the speakers get the necessary hotel information, etc., so that they can get the proper rate.
- It is important to stress to the speakers that our training cannot be legal in nature in order for the JAs to be reimbursed for their training and travel expenses
- Keep in mind that on the Advanced Bankruptcy Seminar day, we should offer courses that will benefit both the JAs and the paralegals from law firms
- Work with the AO to make sure that the courses offered fit within the Director’s guidelines for use of the chambers training funds
- Consult with the Chair of the CBA Program to make sure the educational training is comparable to give Certificates of Accomplishment for six (6) credit hours
- If there are handouts for the conference, make copies and ship to the conference location
- If the Chair chooses, she can prepare the Continuing Education and Training questionnaire for both educational seminars – Program Evaluation Form

B. Guidelines for Planning the Educational Agenda:

Develop a vision of the organizational effort for education, keeping in mind that the group is diverse as to Judicial Assistants, Clerk's Office staff, and secretaries, paralegals and/or legal assistants in law firms. The agenda must appeal to everyone.

The purpose of our training is higher learning. Focus on the whole of the group and assess it. Remember that we have offered practically every topic there is out there - legal and nonlegal. We also have to remember that we award Certificates of Completion; therefore, the instructor must be a judge, lawyer, certified teacher, and/or an instructor who has taught the same topic for many years and who has experience in that specific topic.

Here are some general rules of thumb to consider when picking topics:

- Strive for balance between work-specific topics and topics that provide skills that are helpful in our professional and personal lives.
- Do less and do it better - have only a few topics and speakers per day. Too many speakers can clutter the agenda and make it boring. An exception to this rule of thumb is if we have a panel of judges and attorneys, but keep it to a minimum of three people in a group.
- Keep the flow building up like a book. Keep it interesting and effective. Well-developed topics and interaction are always good.
- Create handouts that require participants to use.
- Legal Topics: Always keep in mind that legal topics will not be accepted when asking for AO funding. So we need to keep the training procedural. The speaker can always incorporate some legal issues/matters when teaching it, but the training must mainly be procedural. Always keep the legal topic titles procedural, as well as the description of the training. (Remember: JAs, Associate Members, and the CBAs want us to have legal topics, which is definitely part of our job.)
- Keep the speakers in tune to our needs: have the topics/courses tailored to our needs.

C. Duties at the Conference:

- Make sure all of the speakers are on board for the conference and last-minute alterations may have to be made. Must stay on top of this between August and the conference
- Arrange for CE&T Committee members to be on-call at the conference to give out any handouts
- Give out evaluation forms and collect at the end of the day of the conference (or get with Cindy for the new electronic version of the evaluation forms)
- Chair should introduce herself to the speakers and make sure they have everything they need – the President introduces them
- Make sure all PowerPoint presentations are working and compatible with the laptop
- Just make sure the President is aware of who is speaking and help her when she needs it
- Distribute the Certificates of Attendance to the attendees toward the end of Thursday's program.

D. Other:

- Prepare Articles for the newsletter – updating the progress of the work of the CE&T Committee. The final article should summarize what was done for the year.
- Prepare a final report, which will be based upon the final article. Email the final report to the President of the ABA and to the Long-Range Planning Chair. This is usually done sometime in August – the President usually e-mails the Chairs and lets them know when it is due
- The ABA can and will issue CLE/CEU Certificates of Attendance for the courses offered only if it meets the requirements of higher education – this is very important. (The Conference Registrar will prepare the certificates for the Chair's signature.)
- The Secretary updates and keeps both the **JA data lists** and the list of CBA associate members. They are updated and created from every conference.

The CLE/CEU Record is posted on the website so the JAs and CBAs and Associated Members can check to see when their CBA recertification is due. Updates are provided by the Secretary on a regular basis to the Website Chair for posting.

The JAs will be instructed to submit, at least every two years, updated information on any seminars or courses they have taken, along with the Certificate of Attendance they received or the ABJA Certificate of Attendance Form through the CBA Program.

The JAs are instructed to email or fax the forms to the CBA Program Chair and she will review them to verify the courses and instructor are accredited and acceptable for CLE/CEU credited hours/units

- Scan the evaluations when you get home and send them to the President
- Prepare an article for the Newsletter Editor on the evaluations—summarizing it
- Keep track of any suggested topics (from the evaluations)

E. Provide Opportunities for Educational Development and Growth.

- Promote the annual meeting for advanced courses. Let JAs know that the educational seminars offered each year at our annual meeting meet the 6-hour CLE/CEU requirement for recertification.
- Search for the highest level of educational courses (accredited instructors)
- Bring in FJC instructors for the JAs
- Bring in Administrative Office speakers to inform JAs of recent information regarding the judges and chambers

II. List of Educational Courses Given:

From 2000 - 2013

Advanced Bankruptcy
Hon. Alexander L. Paskay

Bankruptcy Principles
Hon. Lewis M. Killian, Jr.

Bankruptcy Procedure
William Norton III, Esq.

Financial Planning - How to Avoid Bankruptcy
Hon. R. Thomas Stinnett

West Publishing Update

Finding Your Way Around the J-Net (AO)

Bankruptcy Abuse Prevention and Consumer Protection Act of 2005

Hon. Peter W. Bowie and panel of attorneys

Changes in the Interim Bankruptcy Rules

Stephen Myers, Administrative Office

Do's and Don'ts in a Chapter 13 Plan: Key Terms, Definitions and Plan Calculations

Todd Trierweiler and Wayne Godare

Means Test and/or Who Can File under BAPCPA of 2005

Claude C. Lightfoot, Jr., Esq.

Ethics

Hon. Peter W. Bowie

U.S. Trustee's Perspective: Fraud and Abuse Prevention

Sara Kistler, U.S. Trustee, Pamela J. Griffith, and Celeste Miller, U. S. Trustee's Office

Panel Discussions with the judges and attorneys (Two or Three)

Procedures in the Clerk's Office-Nationwide... (3 on panel - Clerk and staff)

Credit Counseling - What is It? ... (*Judge, Attorney and Credit Counsel Rep.*)

Chambers Procedures, Local Rules and General Orders... (*2 Judges, attorney*)

Post-Storm Effects on LA and FL and emergency plan evacuation

(1 judge and two attorneys)

Bankruptcy Filings – Will They Ever Come Back Up? (AO and Judges)

(2 Judges and Dr. William Rule, AO)

Is it Legal Advice? (*Given by one of the judges*)

CM/ECF Training on new version, based on BAPCPA

Kevin Davis, Director of Court Services, FL-ND

Communications Courses

Conflict Management

National Seminar and Michael Siegel

Conflict Solutions (FJC)

Financial Planning, by Snow Cap Agency (CSRS and FERS)

Group/Round Table Discussions (3 times)

(Discussed: For CBAs, on committees--what they do and suggestions on how to improve them, and Officers and Chairs--discussed duties/responsibilities)

Managing Multiple Projects etc.

Essentials of Credibility, Composure, and Confidence

Training the Trainer

Skillpath's Administrative Assistant's Seminar

How to Handle Difficult People with Tact and Skill

Speedreading (Evelyn Wood by Fred Pryor Resources)

Business Writing (two different companies – Skillpath/National Seminars)

Stress Management (by EAP)

The Essentials of Communicating with Tact and Finesse

(by National Seminar Group)

Proper Role of Judicial and Legal Assistants/Secretaries (*panel of Judges*)

Navigating CM/ECF (*AO*)

Proofreading (*twice - Career Track and Claude Lightfoot*)

Advanced Writing

Rene Rosich, Esq. and professor

The Game of Life and How to Play It & Unleash Your Power

Dale Smith – local and national motivational speaker

Motivational speaker

Steve Morgan, New Orleans - has spoken to us 4 or 5 times

Managing an Office/Conflict with Employees
Dr. Michael Siegel, FJC

The Leadership Compass: Influencing People
Dr. Michael Siegel, FJC

Myers-Briggs Personality Test
Michael Birney, FJC - w/FJSA in Chicago

Travel Vouchers

Retirement Class - CSRS and FERS (have done twice)

Estate Planning and Elder Law Concerns
Sam Friedenber, Esq., Portland

Financial Advice and Planning (Portland, ME)

Introduction of the New Director, James C. Duff

Scope of Court Authority to Expend Funds for Training
Ken Allread, AO

Update on Court Compensation Study

San Antonio, TX - 2008

Ethics Class
Hon. Judge Brian K. Tester

Memory Skills to Enhance Productivity (FJC)
Angela Stewart, FJC
Stephan Harris, Clerk of Wyoming District Court

Personal & Organizational Effectiveness in the Courts
Dr. Michael Siegel, FJC

Automation Training and E-Mail Etiquette and Efficiencies
SDSD Training Center instructors

Teamwork Building - It's More than Rock 'n' Roll
George Prentice, Clerk of Bankruptcy Court, TX-W

Baltimore, MD - 2009

Procedural Impact of the Mortgage Crisis on Bankruptcy Courts

Hon. Nancy V. Alquist, Maryland

Mark Neal, Asst. U.S. Trustee, Maryland

Changes to Rules & Bankruptcy Procedure - Time Deadlines

James Wannamaker, Staff Attorney, Bankruptcy Judges Division

Administering Mega Cases

Hon. James F. Schneider, Maryland

Hon. Brendan Linehan Shannon, Delaware

Mark Sammons, Clerk of Court, Maryland

David Bird, Clerk of Court, Delaware

How to Process Motions: First Day & Every Day Thereafter

Hon. Brendan Linehan Shannon, Delaware

Scott Waterman, Esq., Media, PA

Mark Sammons, Clerk of Court, Maryland

David Bird, Clerk of Court, Delaware

Administration of Bankruptcy Cases & the Barriers to Entry and Exit

David Adams, U.S. Trustee

Scott Waterman, Esq., Media, PA

Judicial Assistants' Networking Sessions

Facilitators:

Dr. Michael Siegel, FJC

Richard Goodier, AO

Stress Management Vinyasa Yoga-Flow Yoga

Liz Conner, Registered Yoga Instructor

Judges' Travel Regulations

Steven M. Tevlowitz, Asst. General Counsel, AO

Security Class

Edward M. Templeman, Chief, Court Security Office, AO

New Orleans - 2010

Streamlining and Managing the Dismissal of Cases

Hon. Susan V. Kelley, Wisconsin Eastern

Marla Hamilton, Clerk of Court, Louisiana Eastern

Chambers' Administrative Support on Reaffirmation Agreements

Hon. Jerry A. Brown, Louisiana Eastern
Hon. Douglas D. Dodd, Louisiana Middle
Claude C. Lightfoot, Jr., New Orleans, LA

Managing Pro se Cases and Filers

Hon. Laurel M. Isicoff, Florida Southern
Hon. Catherine McEwen, Florida Middle

Streamlining the Administration of Large Cases

Hon. Mary F. Walrath, Delaware
Hon. Gregg W. Zive, Nevada

IT Update: Integrating the Use of Lotus Mail, Calendar, Sametime
Chat, Sametime Meeting, Quickr, and Connections

John L. Leonard, Training Branch Chief (SDSD)

Time Management

Lois McLeod, Director of Training & Special Projects, South Carolina

Financial Planning in Today's Economy

John Wahlers, Financial Advisor, Gallagher Benefit Services

Denver - 2011

Eve of Destruction: Why Bad Things Happen to Good Bands

George Prentice, Clerk of Court, Texas-Western

How Can I Help You? What the Circuit Librarian Can Do For You

*Madeline Cohen, J.D., M.L.S., Circuit Librarian, U.S. Court
of Appeals for the Tenth Circuit*

Healthful Communication in the Workplace

Dianne L. Blomberg, Ph.D.

Security - Office, Internet & Home

*Rodney Robinson, Judicial Security Inspector, Office
of the U.S. Marshal, District of Colorado*

Coping with Change

*Lois McLeod, Director of Training & Special Projects, U.S. District
Court, District of South Carolina*

Bankruptcy Operations Forum (OPS)

Milwaukee - 2012

The Art of Judging

Hon. James E. Shapiro, Wisconsin-Eastern

Hon. Thomas S. Utschig, Wisconsin-Western

Dealing with Creditors: Practices and Procedures

James W. McNeilly, Jr., Esq.

Michael L. Ralph, Esq.

Mortgage Modification Mediation: Practices and Procedures

Nathan E. DeLadurantey, Esq.

Debra Tuttle, Mediator

Bankruptcies of the Rich and Famous

Leonard G. Levenson, Esq.

Memory Skills to Enhance Productivity

Dr. Richard Marshall

An Introduction to Structured Writing

Esther DeVries, Ed.D.

Healthy Eating Made Easy: Planning, Moderation and Variety

Heather Klug, M.Ed., RD, CD

Leadership

Marcia Anderson, Clerk of Court, Wisconsin-Western

Atlanta – 2013

Claims Filing and Noticing from a Claims Agent's Perspective

Jennifer Meyerowitz, Epiq Systems

11th Circuit Court of Appeals Tour

James P. Gerstenlauer, 11th Circuit Executive

Alternate Structures for Bankruptcy Appeals

Prof. Rafael Pardo, Emory University School of Law

The Four Phases of Attitude

Steve Morgan, Motivational Speaker

Saving Your Job/National Bankruptcy Archives
Hon. Joyce A. Bihary, Georgia-Northern (retired)

Chapter 11 Procedures
Hon. Catherine J. Furay, Wisconsin-Northern
Hon. Karen K. Specie, Florida-Northern

Dealing with Difficult People and Saving Your Sanity
Hon. Margaret Dee McGarity, Wisconsin-Eastern

Proofreading and Blue Book
Nancy Adams and Michael Davis, 11th Circuit Librarians

Dischargeability (CBA breakout session)
Beth Anne Harrill, Esq., Law Clerk to Hon. Paul W. Bonapfel

Workplace Harassment
Woody Parks, Training Specialist, USBC, Minneapolis, Minnesota

(Revised 8/25/14)