

**CONTINUING LEGAL EDUCATION
AND CERTIFICATION FOR BANKRUPTCY ASSISTANT'S
COMMITTEE DUTIES/GUIDELINES**

The following are duties/guidelines for the CLE/CBA Committee, whose goal is to provide opportunities for the new JAs and CBAs to grow with the Association.

I. Responsibilities

A. Annual Conference

Chairs plan and work on agenda for the annual conference with the President of the ABJA

- Prepares agenda with President
- Works with the chair of conference committee concerning speakers' needs for the conference
- Prepares emails/letters to 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 any equipment needed (screen)

B. Plans for CBA Seminar for each year

1. CBA agenda remains the same every year with two standard instructors (Tamara and Claude)
 - Judge Dodd has taught, drafted and restructured Ethics)
 - Judge Tester updated and condensed the Code and Rules in 2008. His PowerPoint presentation is very good.
2. STUDY GUIDE: Updates Study Guide with Tamara, the Judges for Code and Rules and Ethics, and Claude for Legal Writing
 - 2009 will use the same study guide (70 copies left from last year) and will revise and update for 2010 - constantly updating the Code and Rules
 - Extra materials are gathered from the speakers. (The materials have been printed by Kinkos and they make a special binder for it.)
 - Revised and Updated CBA Rules and Regulations (2009)
 - Revised and Updated the Application for Certification (2009)

- Note: Judge Dodd and Claude are supposed to revise Ethics and Writing

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II. Objective: Provide Opportunities for Educational Development and Growth

- A. Promote the annual meeting for our advanced courses. Let JAs and CBAs know that the educational seminars offered each year at our annual meeting meet the 6-hour CLE/CEU requirement for re-certification.
 - Search for the highest level of educational courses (accredited instructors)
 - Bring in FJC instructors for JAs
 - Bring in Administrative Office speakers to inform JAs of recent information regarding the judges and chambers (trying to get raises for judges and JAs)
 - The ABA can and will issue CLE/CEU Certificates of Attendance for the courses offered.
- B. Promoting and recruiting possible new CBAs in their areas – telling the new recruits when and where the next seminar is being held and any other information we can offer.
- C. Research the local areas where CBAs reside so that they can pursue educational courses for CLE/CEUs
 1. Keep and maintain their CLE/CEUs up-to-date. Of course, it is the CBAs responsibility to keep up with their own credits. The Committee sends an email to everyone reminding them. It is also put in the newsletter and on the website.
 2. Check any and all on-site training. (Check the website, local seminars, college courses, etc., National Seminars, attorney seminars (if they can attend), secretarial groups, etc.)
 3. When the CBAs find out what is offered and want to take a course(s), they are instructed to check with Ann to see if the course(s) or seminar is acceptable.
- D. The Committee will ask CBAs how the CBA program benefits them, their attorneys, jobs, and any other areas.
 - We request that the CBAs submit their report to Ann or Martie so that they can include that information in her article for the newsletter.

- E. Sally keeps the CBA data lists and the list of CBA associate members. They are updated and created from every conference.
- F. Sally and Ann keep the Certified Bankruptcy Assistants' CLE/CEU records. These include the CBAs (associate members and non-members) and JAs who have taken the exam.
- The CLE/CEU record is posted on the website so that the CBAs can check to see when their CBA re-certification is due. Updates are provided by Sally on a regular basis to the Website Chair for posting.
 - The CBAs are 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 ABA Certificate of Attendance Form.
 - The CBAs are instructed to email or fax the forms to Ann and she will review them to verify the courses and instructors are accredited and acceptable for CLE/CEU units.
 - Sally emails all CBAs to remind them to keep up with their CLE/CEUs, especially those who are delinquent.
- G. Each of the CBA forms is reviewed every year to make sure it they meet the standards for certification.
1. List of forms:
 - Application for CBA
 - Letters to CBA
 - Rules and Regulations
 - Certificate of Attendance
 - CBA Guidelines for Credited Courses
 - Study Guide (see H. below)
 - Certificate of Attendance Bankruptcy Assistant
 - Certification Certificate for CBA on Bankruptcy Law
 - The CBA forms are posted on the website. Updates are provided by Ann to the Website Chair for posting whenever changes are made to the forms.
 2. Exam on Code and Rules, Ethics, Grammar/Legal Writing, and Legal Research are drafted by the instructors - updated and revised each year. (See H. below)

- Approximately 50 questions on each exam
- H. The Study Guide is reviewed by the instructors and any updates are given to Ann to revise.
- West was printing the book every year, but it depends year-to-year where or who will print the book.
 - Additional information on the courses is drafted by each individual instructor according to how they teach it. Ann makes the copies or will have it printed.
 - The exam is reviewed by the instructors – any changes to the exam are made by Ann. She makes the copies, places the exam in a sealed envelope, and the envelope is not to be opened until the day of the exam.
 - If there are any errors in the Study Guide or exam, they will be corrected for the following year.
 - The CBA instructors have created and helped Ann edit the Study Guide with the new law. If one of them is not available, an instructor will be chosen in the area that the conference is held.
- I. Any emails from the CBAs that Ann cannot handle are usually discussed with Sally, Karen Krouch (who helped start the CBA), the President of the Association, and Mary Morrison.
- J. Sally types the Certificate for Certification for Bankruptcy Assistants in Bankruptcy Law for those who have passed the exam and Certificates of Attendance for those who attend the advanced courses at the annual conference.
- K. Prepare articles for the newsletter – updating the progress of the Committee, informing JAs and CBAs where to find CLEs, if possible, and the progress of the annual conference and CBA educational seminar.
- L. Prepares CLE/CBA questionnaire for both educational seminars - Program Evaluation Form
- M. Search for new sites to have the CBA seminar, in hopes that it can be done twice a year

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III. LIST OF EDUCATIONAL COURSES GIVEN:

From 2000 - 2007

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

(Revised 2/22/10)