



## NACTT 2012 Staff Symposia Series - Dates and Locations

Please check the symposium location you will be attending. Contact the hotels directly to make your hotel reservations. Advise the hotel that you are part of the NACTT Staff Symposium.

- Orlando, Florida**  
**March 8 and 9, 2012**  
**Classes: Thursday and Friday**  
**Reception: Wednesday, March 7, 2012**  
**Registration Deadline: February 15, 2012**

**Orlando World Center Resort**  
World Center Drive  
Orlando, FL 32821  
(800) 380-7931 or (407) 239-4200  
Room Rate: \$170 per night  
**Reservations Deadline: February 15, 2012**
  
- Las Vegas, Nevada**  
**April 11 and 12, 2012**  
**Classes: Wednesday and Thursday**  
**Reception: Tuesday, April 10, 2012**  
**Registration Deadline: March 9, 2012**

**The Mirage Hotel**  
3400 S. Las Vegas Blvd.  
Las Vegas, NV 89109  
(800) 499-6311 or (702) 791-7444  
Room Rate: \$138 per night (plus \$10 resort fee)  
**Reservations Deadline: March 9, 2012**
  
- Chicago, Illinois**  
**May 30 and 31, 2012**  
**Classes: Wednesday and Thursday**  
**Reception: Tuesday, May 29, 2012**  
**Registration Deadline: April 27, 2012**

**Intercontinental Chicago Magnificent Mile**  
505 North Michigan Avenue  
Chicago, IL 60611  
Room Rate: \$189 per night  
(800) 628-2112 or (312) 944-4100  
**Reservations Deadline: April 27, 2012**

### Registration Fees

- \$350 (advance registration) to attend both days of the Symposium. Includes breakfast on both days and lunch on the first day. Fee is based on registration prior to the deadlines listed above.

Please check mark the box to the right if you have pre-paid with FY'11 funds:

- \$400 (late registration) to attend both days of the Symposium. This will include breakfast on both days and lunch on the first day. This price is based on registration after the deadlines listed above.

### Method of Payment

- Check (preferred\*)       MasterCard       Visa       American Express

(\*Please pay by check if possible - the NACTT has to pay a fee to use MasterCard, Visa, and American Express)

Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_

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

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

Please complete all pages of the registration form and submit one registration per attendee by:  
Email: [courtney@jee.com](mailto:courtney@jee.com) or Fax: 1-803-765-0860 or Mail: NACTT, 1 Windsor Cove, Suite 305, Columbia, SC 29223

**ATTENDEES SHOULD KEEP A COPY OF THIS FORM TO BRING WITH THEM TO THE SYMPOSIUM.**  
**Advance registration is required for all attendees. There are no provisions for parties traveling with attendees.**

## NACTT 2012 Staff Symposia Series

### GAME PLAN FOR A CHAMPIONSHIP OFFICE

(Please complete a separate form for each attendee.)

Attendee's Name: \_\_\_\_\_  
(Please print name to appear on name tag.)

Office Position: \_\_\_\_\_

Trustee's Name: \_\_\_\_\_

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

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

Participant's Email Address: \_\_\_\_\_

Office Contact Name, Telephone, Email Address: \_\_\_\_\_

Emergency Contact and Telephone: \_\_\_\_\_

*In the following sections, please check your session choices. Choose only one per section.*

**Evening Prior to Symposium:** Registration and Opening Reception: 5:30 p.m. to 7:30 p.m.

**Day 1:** Registration and Breakfast: 7:30 a.m. to 8:45 a.m.

Lunch (Provided): 12:00 noon to 1:30 p.m.

Breaks: 15 minutes each between Sessions 1 and 2 and Sessions 3 and 4.

#### **Session 1 (8:45 - 10:15):**

Foundation: **The Architecture - Bankruptcy Basics**

Leadership: **Getting to Know YOU**  
**NOTE: Covers Two Sessions -Sessions 1 and 2. Requires advance participation. Prior to arriving at the Symposium, each participant must complete the DISC assessment on-line. If the assessment is not completed, the participant will not be able to attend this session. Link to assessment will be provided by email.**

Value-Added Employee: **What is a Value-Added Employee and Can I Become One?**

Office Managers/Controllers: **What Kind of Manager Are You?**

#### **Session 2 (10:30 - 12:00):**

Foundation: **The Build-Out - Life of a Bankruptcy Case (Part I)**

Value-Added Employee: **Enhance Personal Productivity and Accuracy**

Office Managers/Controllers: **Disaster Recovery – Are You Ready for the Unthinkable?**

## NACTT 2012 Staff Symposia Series - Registration (continued)

### Session 3 (1:30 - 3:00):

- Foundation: **The Build-Out - Life of a Bankruptcy Case (Part II)**
- Leadership: **Everyone Communicates, Few Connect (Part I)**
- Value-Added Employee: **Discover, Investigate, and Resolve Anomalies and Errors**
- Office Managers/Controllers: **Reports, Reports, Reports – How to Use Them to Monitor Employees**

### Session 4 (3:15 - 4:45):

- Foundation: **A Successful Project - What Makes a Chapter 13 Case Successful?**
- Leadership: **Everyone Communicates, Few Connect (Part II)**
- Value-Added Employee: **Develop Procedures and Checklists**
- Office Managers/Controllers: **Controllers “Controlling” the Auditors and the Audit Process**

### Sessions 4 and 5 (3:15 - 4:45; 8:30 - 10:00):

**CHICAGO ONLY - OFFICE MANAGERS AND CONTROLLERS ONLY - WITH TRUSTEE PERMISSION**

Trustee Initials: \_\_\_  Office Managers/Controllers: **Legal Developments - Employment Law Update**

Day 2: Breakfast: 7:30 a.m. to 8:30 a.m.  
Break: 15 minutes between Sessions 1 and 2.

### Session 5 (8:30 - 10:00):

- Foundation: **Partial Payments or Payments Or Payments in Full - Satisfying Claims**
- Leadership: **Inspiring Employees to Take Ownership on a Daily Basis... and What Champion Leaders Do When There is Nothing Left to Do**
- Value-Added Employee: **Become a Training Resource**
- Office Managers/Controllers: **Social Networking in the Workplace – Does it Have a Place?**

### Session 6 (10:15 - 11:45):

- Foundation: **Building Successful Relationships- Dealing With the Chapter 13 World**
- Leadership: **Creating Championship Teams - How To Reach Every Goal, and How to Eliminate Unnecessary Gossip and Chatter Within Each Team**
- Value-Added Employee: **Model Ethical Behavior in a Technological World**
- Office Managers/Controllers: **ePay Systems The Next Generation for Debtor Payments**

Adjournment: 11:45 a.m.

## NACTT 2012 Staff Symposia Series

### **FOUNDATION FOR BECOMING A CHAMPION TRUSTEE EMPLOYEE**

Designed for Employees with Limited Experience

Facilitated by Pamela Peterson (Office of Glenn Stearns – Lisle, IL), Brett Meyer (Office of Herb Beskin – Charlottesville, VA), and Carrie Vasquez (Office of Mary Viegelahn, San Antonio, TX)

#### Session 1 – The Architecture – Bankruptcy Basics

This session is designed primarily for employees new to a Chapter 13 Trustee's office. Learn a general overview of the types of bankruptcy, the role of the Trustee's office, the Trustee Pledge of Excellence, and basic bankruptcy laws.

#### Session 2 – The Build-Out – Life of a Bankruptcy Case – Part I

Learn how a case starts, including how the debtor gets through the attorney consultation, credit counseling and document preparation to arrive at a filed case. Watch how a case travels through the Bankruptcy Court system and a Trustee's office to reach confirmation. Review the information the Trustee's office considers when preparing for and conducting Section 341(a) meetings. Consider the confirmation requirements for Chapter 13 cases and the Trustee's role in the process.

#### Session 3 – The Build-Out – Life of a Bankruptcy Case – Part II

Learn what happens to a case post-confirmation. Find out how a Trustee's office administers cases to completion and closing. Discuss obstacles that may occur during cases such as motions to dismiss, motions for relief from stay, and plan modifications. Review requirements for debtors to complete a case, including discharge requirements and debtor education.

#### Session 4 – A Successful Project – What Makes a Chapter 13 Case Successful and How Can You Be Part of the Success?

Success in a Chapter 13 case may depend on a number of factors. Discuss the perspectives of success from the views of the debtor, the attorney, the creditors and the Trustee's office. Consider how you as an employee can contribute to the success of a case, including office procedures and dealings with the different types of parties in a case.

#### Session 5 – Partial Payments or Payments in Full – Satisfying Claims

Claims come in varying forms and types – secured, priority, unsecured – and require administration. Discuss how claims are filed, processed, allowed, objected to, and administered in a roundtable discussion format.

#### Session 6 – Trustee Roundtable

A panel of Chapter 13 Trustees will answer questions collected during the Staff Symposium.

## NACTT 2012 Staff Symposia Series

### **HOW TO BECOME A CHAMPION VALUE-ADDED EMPLOYEE**

Designed for Employees with Moderate Experience

Facilitated by Nancy Cole (Office of Joyce Babin - Little Rock, AR), Carol Day (Office of Beverly Burden – Lexington, KY), and Kathy Tylka (Office of Russell C. Simon, Swansea, IL)

#### Session 1 – What is a Value-Added Employee and Can I become One?

Facilitators and attendees, with Trustees' and managers' points of view from across the country included, will work together to define the characteristics, traits, behaviors, and actions of a value added employee, with the intent to give fresh perspectives and ultimately bring greater job satisfaction.

#### Session 2 – Enhance Personal Productivity and Accuracy

This session will describe tools to help you grow productivity through development of behavior patterns, use of technology and software reports, goal setting, and other tips. The group will discuss and share ideas to increase accuracy.

#### Session 3 – Discover, Investigate, and Resolve Anomalies and Errors

Facilitators will provide actual case studies containing multiple errors which occurred across departments that escaped discovery by many eyes. Cases will be reviewed, facts investigated, and solutions provided by participants. This session will provide ideas to find and address anomalies and reduce errors within the office.

#### Session 4 – Develop Procedures and Checklists

Office procedures are sometimes unwritten, or are constantly changing, and, at best, are difficult to keep up with. Learn how to develop, standardize, streamline, and organize procedures into an efficient, structured system. Come create one of the most effective tools available for preventing errors, omissions, and misdisbursements – A CHECKLIST.

#### Session 5 – Become a Training Resource

Given the complexity of tasks that a Trustee's office performs and the detailed work the office does, the ability to train is a valued asset. Attend this session to learn training techniques and participate in some fun, but skill-building, training activities.

#### Session 6 – Model Ethical Behavior in a Technological World

Texting, surfing, social networking...technology continues to evolve while providing ongoing challenges to ethics in the workplace. Join us in discussing these "tech topics" that affect workflow, relationships, and office security. Develop your own "office policies".

**Please note that while attendance at all 6 sessions is not required, these sessions tend to "build" on one another.**

## NACTT 2012 Staff Symposia Series

### HOW TO BE A CHAMPIONSHIP LEADER IN THE TRUSTEE'S OFFICE

Designed for Employees with All Levels of Experience

Facilitated by Ronnie LeFevers (Office of Nancy J. Whaley – Atlanta, GA), Mattie Gordon (Office of Hank Hildebrand – Nashville, TN), and Kristyn Sinn (Office of Mary Grossman – Milwaukee, WI).

#### Sessions 1 and 2 – **BACK BY POPULAR DEMAND!!!!** - A Strong Foundation – Getting to Know YOU

People are different. We have different filters that influence the way each of us behaves. We're not locked in a box by these preferences but, until we understand them, we have little chance of either accepting or altering their unique characteristics. In order to understand our relationships with other people, we must first understand ourselves. In your home or at your job, would you like to know how to: Resolve conflict? Build better teams? Improve performance? Understand differences? Enhance communication? Influence others' responses? All of this, and more, is available to you once you get to know YOURself. You start by understanding DISC!

**Note:** These sessions, facilitated by Ronnie LeFevers, will cover 3 hours (2 sessions) and requires pre-registration and advance participation. Prior to arriving at the Symposium, each participant will go on-line and complete the DISC assessment prior to attending the symposium. You will need to pre-register and complete the assessment in order to attend these 2 sessions.

#### Session 3 - Everyone Communicates, Few Connect—What the Most Effective People Do Differently- Part I

Some people are much more effective at communicating with others—but WHY? How do you know if you really are “connecting” when you communicate with others? Learn five important PRINCIPLES behind connecting with others.

#### Session 4 – Everyone Communicates, Few Connect - What the Most Effective People Do Differently – Part II

Being a strong leader involves not only communicating, but CONNECTING. Learn five important PRACTICES for really connecting with others. These practices are very helpful in becoming the best leader you can be. Learn how to connect in all settings, whether one-on-one, in a group, or with an audience.

Sessions 3 and 4 are based on the informative book by John C. Maxwell, “Everyone Communicates, Few Connect”.

#### Session 5 – Inspiring Employees to Take Ownership on a Daily Basis...And What Champion Leaders Do When There is Nothing Left to Do

Every Trustee wants leaders who inspire others to be the best employees possible. Being a great employee involves taking ownership of one's job and job duties on a daily basis. Learn some valuable techniques for inspiring employees and keeping them motivated, regardless of how mundane the job tasks might be.

#### Session 6 – Creating Championship Teams---How to Teach Teams to Reach Every Goal, and How to Eliminate Unnecessary Gossip and Chatter Within Each Team

Great employees are part of great TEAMS. Learn how to create teams that work well together. Also, gossip is a poison in an office environment. Get tips on how to “curb the gossip enthusiasm” within and outside each team.

## NACTT 2012 Staff Symposia Series

### **BECOMING CHAMPION OFFICE MANAGERS AND CONTROLLERS**

Designed for Office Managers and Controllers

Facilitated by Michele Timko (Office of Jan P. Johnson, Sacramento, CA), Patricia Dickerson (Office of Tammy L. Terry, Detroit, MI), and Kathy Davis (Office of Robert B. Wilson, Lubbock, TX)

#### Session 1 – What Kind of Manager Are You?

Discussion of the different management styles, along with what does and does not work within each management style. A very interactive session, with the participants encouraged to discuss their personal management styles and what they think is the best approach to managing employees in a Trustee's office.

#### Session 2 –Disaster Recovery—Are You Ready for the Unthinkable?

Thorough review of the newly developed Emergency Action Plan developed by several Trustee employees nationally. The panelists will take participants through the Plan step by step and will provide templates each office can work from to develop their own individual emergency action plans.

#### Session 3 – Reports, Reports, Reports – How to Use Them to Monitor Employees

Discussion will focus on how to best utilize reports to effectively and efficiently monitor your employees' productivity. Participants will receive examples of various management reports and will learn how the reports can produce better employees.

#### Session 4 – Controllers “Controlling” the Auditors and the Audit Process

Overview of several aspects of the audit process. Facilitators will discuss the Statement of Work in detail, including recent changes. There will also be a group discussion regarding various audit firms and particular idiosyncrasies of individual audit firms. Participants will receive tips regarding strategies to better prepare for the annual audit. In addition, participants will learn better ways to utilize internal controls on a daily basis and in the context of the audit process.

#### Sessions 4 and 5 in Chicago—Employment Law Update

**With Trustee approval, attend a 3 hour employment law session provided by Andria Ryan, a partner with Fisher & Phillips, LLC. Andria is a renowned employment law attorney who tells it like it is and provides a wealth of information, with lots of “take away” advice for office managers, regardless of geographic location.**

#### Session 5 – Social Networking in the Workplace – Does it Have a Place?

In-depth discussion of the role of social networking within Trustees' offices. As an Office Manager, how do you monitor all of the various forms of social networking during office hours? Is your office policy manual specific enough regarding the ramifications of abuse of various social networking avenues? Should you monitor your employees' social networking sources “after-hours” as well?

#### Session 6 – ePay Systems – The Next Generation for Debtor Payments

Participants will learn all about how ePay systems work in Trustee offices. Valuable information to be provided regarding how to get started in setting up an ePay system and the policies and procedures related to these systems.