

## Clerk's Practice and Procedure Guide Revision – Project Plan Outline

### **I. Target Audience**

- A. Bankruptcy practitioners and their support staff
- B. *Pro se* persons
- C. Court staff

### **II. Purpose/Objectives**

- A. Form a group of clerk's office employees and volunteers from the Bankruptcy Law Section of the State Bar of New Mexico (the CPPG Working Group) to work together to revise the 1996 Edition of the Clerk's Practice and Procedure Guide (CPPG) to include updated and additional information relating to bankruptcy practice in New Mexico.
- B. To publish an updated on-line edition of the CPPG to renew the purpose of the original CPPG: "Provide an accurate source of information to practitioners, their support staff, *pro se* persons, and the bankruptcy court staff regarding the clerk's preferred practices and procedures, to ensure efficient processing of cases and avoid delays."
- C. To provide a resource that can be printed, downloaded, and maintained constantly up-to-date.
- D. To encourage parties to seek direction and instruction from the CPPG to eliminate the bulk of practice inquiry calls to the clerk's office.
- E. To instill confidence in the accuracy and timeliness of the CPPG resource available to practitioners and their support staff.
- F. To have the CPPG complement the federal and local rules.

### **III. Principles**

- A. It is the clerk's duty to provide timely information about procedures.
- B. In this process, we seek to honor the court's values of quality, accessibility, and effective communication.
- C. To ensure consistency and the highest level of quality, the Clerk retains editorial control, and will provide guidelines to the working group.
- D. Volunteers' time is valuable and should be used efficiently and effectively.
- E. The efforts of the members of the working group are critically important; due acknowledgment will be made.

### **IV. Vision/Outcome**

The fall 2003 revision of the 1996 edition of the CPPG will provide an updated, online tool for use by bankruptcy practitioners, their support staff, *pro se* persons, and the

court's staff. It will serve as an excellent resource guide which provides updated, clear, and precise instructions for practicing in the bankruptcy court and as a training tool for new hires in the law office and the court.

**V. Brainstorming**

- A. Get everyone's ideas out of their heads and turn them into objectives.
- B. Conduct internal committee meetings to determine needs as outlined in section VI.
- C. Meet with attorney Thomas Walker to determine working group needs and effective approaches.

**VI. Organizing/Approach**

- A. Organize and implement internal, external and combined groups
- B. Collect, assess, and develop information
- C. Select and implement technical approach
- D. Design and implement effective continuous updating procedures
- E. Compile and publish guide

**VII. Next Actions:**

- A Organize and implement internal, external and combined groups**
  - 1. Set meeting with Mr. Walker to discuss:
    - a. Final draft project plan
    - b. Draft notice to practitioners
    - c. Need, if any, to recruit additional members
    - d. Determine the needs of the working group
    - e. Determine frequency of working group meetings
  - 2. Extend invitation to working group to attend an organizational meeting to be conducted by the clerk, asking participants to come with suggestions for approach/process; format; how to resolve disputes; and estimation of time they can allot to the project
  - 3. Develop guidelines, to include citations and cross-references
  - 4. Orient groups
  - 5. Work with combined group to achieve consensus on process (e.g., draft, group review, clerk editing, etc.)
  - 6. Establish meeting schedule
  - 7. Make assignments, assign deadlines

**B Collect, assess, and develop information**

1. Send notice to practitioners
2. Gather and track data and materials from sources inside the court; follow up with staff as needed
3. Identify needed changes and additions
4. Research federal courts and other government sources, with an eye towards providing helpful links
5. Gather and track data and materials from sources outside the court
6. Review collected data and sort into sections by topical areas/issues (e.g., motion type)
7. Determine writing needs
8. Perform writing
9. Follow draft/comments/redraft progression to final draft
10. Editing
11. Proofing
12. Obtain approvals on an incremental basis: group, clerk, judges
13. Finalize section upon approval
14. Prepare table of contents
15. Prepare index

**C Select and implement technical approach**

1. Conduct on-line research of other sites for format
2. Determine need for rearrangement of current format and numbering scheme to ensure guide will be user-friendly, both on paper and on-line
3. Determine on-line format needs/screen perspective (e.g., practice tips in boxes)
4. Determine how CPPG will be accessed on-line by internal and external users
5. Determine how CPPG can be downloaded and saved, to include number of bytes
6. Determine specifications for printing, to include page numbering
7. Prepare proposal
8. Present proposal
9. Obtain approvals: group, clerk, judges
10. Implement approach

**D Compile and publish guide**

1. Test on-line usage
2. Test printing
3. Announce availability

- E Design and implement continuous updating procedures**
1. Determine approach for reviewing and identifying updates
  2. Determine frequency of on-line updates
  3. Implement suggestion/recommendation mechanism

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