



**ILLINOIS JUDICIAL COLLEGE
JUDICIAL BRANCH STAFF EDUCATION COMMITTEE**

COMPREHENSIVE EDUCATION PLAN

August 1, 2018

COMPREHENSIVE EDUCATION PLAN FOR ILLINOIS JUDICIAL BRANCH STAFF

I. EDUCATION STANDARDS AND GUIDELINES

Charge:

Under the direction of the Illinois Judicial College Board of Trustees, the Committee on Judicial Branch Staff Education shall coordinate, direct and deliver continuing Education and training for all of the groups represented by the five subcommittees. *Although all judicial branch staff members will participate in education such as ethics, the JBSE committee recognizes the diversity of the members. Due to the diversity of the various justice partners included in judicial branch staff, the JBSE committee has outlined specific educational plans and goals for each group as indicated in the attachments (A-E).*

Projects and Priorities:

- 1 Design and implement a comprehensive education program for the target audiences based upon needs assessment and identification of core competencies required for the performance of their roles in the court in a manner that is consistent with the purpose of the curriculum and the core values of the Illinois Judicial College;
- 2 Design and implement a comprehensive education program, including curriculum development, program development and delivery, faculty selection and training, and the development of reference publications;
- 3 In the development of curricula, consult and comply with applicable Supreme Court Rules, policies and standards, and state and federal statutes;
- 4 Uphold and adhere to the Educational Standards and Guidelines promulgated by the Illinois Judicial College;
- 5 Review, evaluate, and recommend for approval by the Illinois Judicial College Board of Trustees potential education programs for inclusion in the curriculum, including non-Illinois educational programs and providers;
- 6 Establish methods for effective delivery of educational programs. Curriculum may be delivered using any appropriate educational mode, including but not limited to, in-person, distance learning, or a combination of educational opportunities;
- 7 Ensure program faculty is equipped, trained, prepared and able to effectively deliver education programs;
- 8 Maintain a three-year academic calendar;
- 9 Identify, collaborate and coordinate with appropriate Illinois Judicial Conference Committees and Supreme Court Committees and Commissions to identify educational needs and resources for the target audiences;
- 10 Provide information and make recommendations to the Illinois Judicial College Board of Trustees regarding curriculum and continuing education programs; and
- 11 Conduct periodic needs assessments.

Membership:

The membership of the JBSE Committee consists of Appellate Court Justices, Circuit Court Judges, reviewing court clerks, legal research directors, legal staff of the Supreme and Appellate Court, the Reporter of Decisions, and AOIC staff.

Leadership:

The JBSE Committee is chaired by Jack Flood, Clerk of the Fifth District Appellate Court, and by vice-chair, Hon. Susan Hutchinson, Appellate Justice, Second Appellate District. Hon. Christy Solverson, Associate Judge, First Judicial Circuit, is the Board of Trustee Liaison.

Organization:

Subcommittees include (a) Appellate and Supreme Court Law Clerks, Appellate and Supreme Research Clerks, Reporter of Decisions and staff, Law Librarian and staff, Circuit Court legal staff; (b) Reviewing Court Clerks; (c) Court reporters; (d) Interpreters; and (e) AOIC non-legal staff.

II. PURPOSE AND GOAL

Purpose: To ensure Judicial Branch Staff are competent, responsive and fair in carrying out their roles in the administration of justice.

Goal: The goal of this education plan is to instill the values of the Judicial Branch and to provide the skills to advance the administration of justice consistent with those Court values. It also seeks to provide opportunities for Professional Development in the area of public service.

III. COMPREHENSIVE CURRICULUM OVERVIEW

The curriculum will be a practical education plan that instructs the target audience on essential skills and how their performance impacts and improves the justice system. The curriculum will enhance professional competency by providing basic skills, updating skills to match the current best practices, maintaining a high level of skill consistently throughout the target audience through reinforcement of basic principles and inclusion of latest techniques, and providing the target audience with understanding of the impact their performance has on court users and the entire justice system while providing tools and techniques to ensure that impact is consistent with the core values of the court and the Illinois Judicial College.

Method of Delivery

For **Group A**, the target audience as a whole is spread across the State. Conversely, the majority of Circuit Court Legal Staff will be centered in Cook County. Because a significant portion of the target audience will be spread across the entire system without a large concentration of members in any one geographic region, on demand delivery methods such as video and digital instruction will be utilized. Resources are standard in all the five districts and the Supreme Court.

For **Group B**, it is anticipated that for non-managers, the delivery methods would be training videos, webcast presentations, and procedure manuals. For managers, it is anticipated that delivery methods would include training videos, webcasts, and in-person training.

For **Group C**, it is anticipated that the delivery method for non-managers would include training videos, webcast presentations, procedure manuals, and annual statewide training. For managers, delivery methods would include training videos, webcast presentations and in-person training.

For **Group D**, it is anticipated that the delivery methods would be trainings, both in person and over video, and webcast presentations.

For **Group E**, it is anticipated that the delivery methods would be written materials, training videos, and in-person training.

IV. TARGET AUDIENCES

- A. Appellate and Supreme Court Law Clerks, Appellate and Supreme Court Research Attorneys and Staff, Reporter of Decisions and Staff, Supreme Court Librarian and Staff, and Circuit Court Legal Staff.

There are 4 target audiences in this category—(1) Law Clerks (Appellate and Supreme Courts), Research Attorneys and Staff (Appellate and Supreme Courts), and their supervisors and managers, (2) Reporter of Decisions and Staff, (3) Supreme Court Librarian and Staff; (4) Circuit Court Legal Staff and their supervisors and managers. The target audience is crucial to the effective operation of the system. The target audience is vital to the timely creation of the system’s work product. The curriculum will educate the target audience on the impact their work can have on the court’s operations and on both the public’s perception of the system’s fairness and the public’s access to justice.

The tenure of members of the target audience varies greatly. Some circuit court, appellate court, and supreme court legal staff are hired for one or two-year terms, while others members of the target audience performing the same functions have years of experience. New staff members need initial training, especially in Illinois Court Systems (C-track), appellate process, and core values. Experienced staff needs “refresher” and updated skills training. The curriculum will accommodate this variance, in part, by utilizing experienced members of the target audience as instructors for novice members of the target audience who are in the same roles. This will serve to educate the novice members of the target audience as well as provide for reinforcement of core practices for experienced members of the target audience.

While many of the roles and responsibilities of the members of the target audience are similar, there are unique characteristics of the roles and responsibilities for different members of the target audience that the curriculum will take into consideration. For example, while multiple categories of members of the target audience produce written dispositions (*e.g.*, appellate court law clerks and circuit court law clerks) those dispositions may require completion on different timelines. Additionally, there are

unique members of the target audience who will require specialized training (*e.g.*, Reporter of Decisions Staff, Law Library Staff, and Circuit Court Hearing Officers).

Each office/function also has manager(s) who will have Human Resources and management training, in addition to the relevant competencies of the staff they supervise.

B. Clerks and Deputy Clerks of the Illinois reviewing courts (Supreme Court and Appellate Courts).

There are 3 target audiences in this category – managers (Clerks), new deputy clerks and experienced deputy clerks. Each court (6) has a manager (Clerk) who should have HR/management training. New deputy clerks need initial training/orientation and experienced staff need refresher courses. Clerks and deputy clerks interact with the public (*phone and in person*) and accordingly play a key role in shaping the public's perception of the court system. Geography is not a factor except that the case volume in the First District is much higher than the other four appellate districts. Resources are standard in all the five districts and the Supreme Court.

C. Court Reporter Supervisors (managers) and Official Court Reporters (non-managers) of the Circuit Court of Illinois.

There are 2 target audiences in this category – Court Reporter supervisors and court reporters. Depending on population, each county or circuit has at least one court reporter supervisor who should have HR/management training. New official court reporters need initial training/orientation and experienced staff need refresher courses, especially for freelance court reporters who transition to official court reporters with very little experience in working in the court system and the public. Geography is not a factor, except the volume of cases which vary between rural and urban settings though staffing levels should correspond with this disparity. Resources differ everywhere in the state. Official court reporters are responsible for purchasing their own equipment, software and computer aided transcription systems. Some official court reporters are required to purchase their own office supplies like paper, pens, etc. Internet access varies greatly from county to county which is needed for state mandated data backup on state servers.

D. Certified court interpreters, both for spoken and sign languages, that have completed the certification process through the Administrative Office of Illinois Courts.

There are 2 target audiences in this category – new interpreters and experienced interpreters. Since ineffective interpreting can directly affect the outcome of a case if witness testimony and evidence is improperly presented to the court, it is imperative for interpreters to receive continuing education.

The number of interpreters varies geographically with more availability and more diversity of skill in metropolitan areas compared to rural areas. New interpreters need more training in ethics and mock trials to understand how to use interpreting skills in the court context. Experienced interpreters need continuing education in complex ethical issues, skills building on the three modes of interpreting (Simultaneous, consecutive, and sight translation), and subject matter training depending on the court cases they typically interpret for (criminal procedure, gun/ballistics terminology, medical terminology,

domestic/sexual assault, etc). Resources differ everywhere in the state. Official court reporters are responsible for purchasing their own equipment, software and computer aided transcription systems. Some official court reporters are required to purchase their own office supplies like paper, pens, etc. Internet access varies greatly from county to county which is needed for state mandated data backup on state servers.

E. The non-legal staff of the Administrative Office of the Illinois Courts.

There are two target audiences in this category – the office personnel of the various departments and the managers of those various departments. These individuals are employed in the Chicago office and the Springfield office. While their contact with the general public is limited, when it does occur, these individuals often represent the frontline of the state courts. Furthermore, many of these individuals are regularly contacted by judges or judges’ administrative assistants concerning employee benefits, resources for courts and courtrooms and general information to assist the courts in the efficient administration of justice. The ability to carefully listen to all callers and to accurately answer their inquiries are paramount to the success and transparency of the entire system of the state courts.

V. PROFESSIONAL COMPETENCIES

There are several core competencies that apply to all subgroups within the Judicial Branch Staff Education Committee:

- a. Know and follow the Illinois Judicial Branch State-Paid Employee Code of Conduct or analogous local policy
- b. Perform job duties with integrity, professionalism and impartiality
- c. Be aware of the relevant rules of professional conduct or ethics related to each specific job category
- d. Maintain up-to-date technical skills to efficiently perform duties
- e. Be aware of the courts’ structure, operational policies, and guidelines (beginner and continuing levels)
- f. Listen and communicate attentively and professionally as part of serving the public
- g. Provide appropriate assistance for self-represented litigants and maintain appropriate boundaries against offering legal advice
- h. Demonstrate empathy, patience, civility, and respect for users of the court, the public, and coworkers
- i. Consciously avoid bias or partiality
- j. Develop understanding of cultures, embrace diversity, and show appropriate consideration for people with disabilities

*See Attachment A for additional competencies for **GROUP A: Appellate and Supreme Court Law Clerks, Appellate and Supreme Research Clerks, Reporter of Decisions and staff, Law Librarian and staff, Circuit Court legal staff.***

*See Attachment B for additional competencies for **GROUP B: Reviewing Court Clerks.***

*See Attachment C for additional competencies for **GROUP C: Court Reporters.***

*See Attachment D for additional competencies for **GROUP D: Interpreters.***

*See Attachment E for additional competencies for **GROUP E: AOIC Staff.***

VI. FACULTY

See Attachments A-E

VII. MINIMUM CONTINUING EDUCATION HOURS

See Attachments A-E

VIII. CONTINUING EDUCATION PROVIDERS

See Attachments A-E

Attachment A

Additional competencies for Appellate and Supreme Court Law Clerks, Appellate and Supreme Research Clerks, Reporter of Decisions and Staff, Law Librarian and Staff, Circuit Court Legal Staff include:

1. Effectively conduct legal research, including reading legislative history with an understanding of the legislative process, utilizing computer assisted research, and employing secondary sources.
 - a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ these competencies with an eye toward composing draft opinions and advising justices on the evaluation of cases. Their use of these skills will generally be to find the appropriate precedents and bring them to bear on observed facts within a given case.
 - b. The Reporter of Decisions and Staff will employ these competencies with an eye toward verification in drafts, with an additional focus on primary research skills where a source chosen by chambers either does not fit the occasion or is inaccurately cited.
 - c. The Supreme Court Librarian and Staff will employ these competencies to assist the other target audiences with their duties and to aid the public in locating desired legal materials.
 - d. Circuit Court Legal Staff will employ these competencies to draft orders and correctly dispose of cases before the court.
2. Analyze cases and effectively identify major legal issues, recognize and distinguish holdings from *dicta*, and determine whether precedent is controlling or persuasive.
 - a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ these competencies primarily in composing draft opinions.
 - b. The Reporter of Decisions and Staff will employ these competencies to verify that the authorities selected by Appellate and Supreme Court justices appropriately support the premises for which they have been marshaled.
 - c. Circuit Court Legal Staff will employ these competencies in applying controlling case law to facts developed before the circuit court.
3. Interpret statutes using appropriate canons of interpretation and construction.
 - a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ this competency to determine the appropriate decision on matters of fact developed before the circuit court.
 - b. Circuit Court Legal Staff will employ this competency in determining how to apply statutes to the facts developed before the circuit court.
4. Thoroughly review pleadings and the record to reach impartial conclusions.

- a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ this competency to ensure that all issues raised by litigants and supported by the record are appropriately and evenhandedly resolved.
 - b. Reporter of Decisions and Staff will employ this competency to the extent necessary to verify quotations and descriptions in reviewing Appellate and Supreme Court opinions and to advise Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys on issues of word choice.
 - c. Circuit Court Legal Staff will employ this competency to ensure that matters before the circuit court are appropriately and fairly resolved.
5. Draft clear, grammatically correct, well-supported opinions that employ impartial language, that avoid plagiarism via style-compliant citation, and that appropriately communicate the court's resolution of the issues before it.
 - a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ this competency to draft clean, well-supported opinions that effectively communicate the court's judgment.
 - b. Reporter of Decisions and Staff will employ this competency to verify all citations and quotations from published sources, to be vigilant as to issues of plagiarism, and to offer clarifying writing guidance where appropriate.
 - c. Circuit Court Legal Staff will employ this competency to clearly convey the judgment of the circuit court and the reasons therefor and to effectively signal the issues considered dispositive by the circuit court.
6. Effectively use technology in the performance of competencies outlined above.
 - a. Appellate and Supreme Court Law Clerks and Appellate and Supreme Court Research Attorneys and Staff will employ this competency to access the full range of research resources available, to conduct office business effectively, to efficiently draft opinions using the courts' approved software, and to use the court management system (C-Track) as both an information source and tool to manage the flow of the case.
 - b. The Reporter of Decisions and Staff will employ this competency to verify all citations where possible, to enhance the reader experience where appropriate, to conduct office business effectively, and to use the court management system (C-Track) as both an information source and tool to manage the flow of the case.
 - c. The Supreme Court Librarian and Staff will employ this competency to connect the other target audiences and the public with an enhanced range of research resources and to conduct office business effectively.
 - d. Circuit Court Legal Staff will employ this competency to manage the docket of the circuit court, to efficiently draft orders, and to conduct office business effectively.
7. Apply management skills and human resources policies to ensure the judicial branch is a healthy and rewarding work environment, in addition to being an effective one.
 - a. Managers from each of the target groups above will employ this competency to ensure employees contribute at their skill level, see their contributions recognized, feel invested in their work, and are treated fairly.

Because the abilities required of the target audience all build from a foundational set of skills, most courses in each course type will have a component that addresses basic-level skills to both assimilate new or recent hires and to reinforce those skills to experienced members of the target audience, and a component that builds upon and advances those skills, with certain fundamental courses or instruction provided for new or recent hires on self-contained topics such as the structure of the court system and administrative systems. Each course will integrate the subject of professionalism, including collegiality, accepting constructive criticism, impartiality, and ethics. Each course will also integrate the three core values of the Illinois Judicial College: Procedural Fairness, Access to Justice, and Diversity. This integration into the practical skills courses will serve to promote delivery of services by the target audience (*i.e.*, the administration of justice) that is both consistent with and promotes the court's values.

Essential Knowledge, Skills, Abilities, Information and Attitudes:

- Supreme Court Rules/Ethics (Privacy, Confidentiality), Policies and Guidelines (beginner and continuing), Court Structure (beginner), Court Process (general knowledge of the "life of a case" as it proceeds through the judicial system: *i.e.*, appellate procedure and the Supreme Court Rules that govern a case from docketing to closing).
- Listening/Communication, Patience/Civility, Problem Solving, Time Management, Legal, Research (beginner, intermediate, advanced), Legal Analysis (beginner, intermediate, advanced), Legal Writing (beginner, intermediate, advanced).
- Listening/Communication, Time Management/Organization, Problem Solving, Conflict Avoidance (legal advice vs. legal help).
- Technology training, Self-Represented Litigant filers, knowledge of other court services, public access (re: C-Track, SearchIL)
- Public Service, Civility, Fairness, Transparency, Consistency, Confidentiality, Accessibility, Diversity, Empathy, Respect, Humility, Cultural Competencies, Conscious Avoidance of Bias. We are public servants and certain underlying values (fairness, transparency, respect, awareness of diversity of groups) must be cultivated and/or learned. Understanding that you (target audience) are the public face of the judicial system, that you play a key role in shaping the public's perception of the court system, and that your actions, attitude and temperament can demonstrate that the courts operate in a fair and impartial manner and exist for everyone regardless of race/ethnicity, income, nationality or legal status. Attitudes included inclusiveness, empathy, civility, respect (for individuals and for the integrity of the process), and avoidance of bias and implicit bias.
- The majority of the target audience does not interact with court users directly, however, the target audience plays a role in ensuring court users are given, and perceive that they have been given, an opportunity to be heard. The curriculum will address that role through education on the performance of basic functions in a manner that acknowledges the court users' voice in the process. This will also improve court users' trust in the system.

VI. Faculty

I. Eligibility

1. Minimum Qualifications:
 - a. Possess J.D.
 - b. 10 years' continuous experience in any one or combination of the following fields:
 - i. Legal practice in state or federal appeals or legal practice involving extensive motion practice or requiring extensive legal writing.
 - ii. Law clerk at state appellate court level or higher or law clerk in federal district court.
 - iii. Law school faculty teaching courses in legal writing, legal research, ethics or professional responsibility, or a combination thereof in a skills-based course.
 - c. Prior experience teaching legal skills-based material to legal professionals (non-students) in organizational training or continuing education.
2. Exclusions:
 - a. Current members of the Target Audience.
 - b. Former members of the Target Audience who have not been members of the Target Audience for less than three years.
 - c. An exception may be provided for members of the Target Audience who satisfy one of the criteria in section II.1 below, however satisfaction of any criteria in section II.1 will not qualify a member of the Target Audience for CE credit through the Illinois Judicial College.

II. Development

1. Education providers who are full time or adjunct law school faculty, or who have attended an approved-provider Faculty Development Workshop, or received receive certified training in adult teaching methods or other pedagogical skills training will be preferred. Additional preference will be given to education providers who, professionally or otherwise, regularly attend such workshops or receive such training.
2. Participants will be asked to complete a survey asking for feedback on the effectiveness of the faculty. Faculty who receive 60% positive feedback as determined by the committee will be asked to return. Participants will be asked to identify specific attributes of the faculty and method of presentation that helped or hindered their understanding and development. This survey will focus on the teaching method and will specifically ask the participants to disassociate the material from the education provider in assessing the efficacy of the course.

III. Teaching Continuing Education (CE) Credit Hours

1. Education providers who are currently licensed to practice law by the State of Illinois, including education providers exempt from Illinois MCLE requirements pursuant to Illinois Supreme Court Rule 791 (eff. Jun. 5, 2012), shall receive CE credit for teaching a course or courses under this curriculum, calculated as follows:

Presentation Time (in minutes-calculated as course time divided by number of teachers)
+
Preparation Time (in minutes-calculated as six times Presentation Time) =
Total CE time; divided by 60 and rounded down to nearest quarter hour =
Total CE teaching credit.

2. The total number of CE hours earned by education providers shall be subject to Illinois Supreme Court Rules 795(d)(5)(i) and 795(d)(5)(iii) and 795(e) (eff. Jul. 1, 2017).

VII. Participant Minimum Continuing Education Hours

1. Minimum Continuing Education Hours for Target Audience
 - a. The source of CE hours under this part shall be limited to courses provided pursuant to this curriculum.
 - b. The mandatory minimum CE hours required under this part shall be in addition to any mandatory CE or CLE requirement that any member of the target audience is subject to, provided that a member of the target audience shall be permitted to use courses provided under this curriculum toward any other mandatory CE or CLE requirements if a course provided under this curriculum qualifies for such other mandatory CE or CLE requirement. Any such use shall be subject to the rules of the member's separate CE or CLE requirement.
 - c. The mandatory minimum CE requirement under this part shall be as follows:
 - i. Members of the target audience shall be required to complete $\frac{2}{3}$ (66%) of the total course hours, including introductory, optional, or developmental courses, provided in a curriculum cycle.
 - ii. A curriculum cycle is defined as that period of time required to complete only the developmental courses provided under this curriculum. For example, if there are five developmental courses under this curriculum that are offered over a three-year period, the curriculum cycle is three years, and the member will be required to complete $\frac{2}{3}$ (66%) of the total courses within that three-year period, which shall include introductory and optional courses.
 - iii. CE hours shall not carryover to the next curriculum cycle.
 - iv. Developmental courses distinguished. Developmental courses shall be any course offered under this curriculum not designated as an introductory or optional course.
 - v. Members of the target audience with less than two years of service as a member of the target audience in any capacity when this curriculum is adopted shall be required to complete all introductory courses in the first curriculum cycle after adoption of this curriculum.
 - vi. There shall be no exemptions from the mandatory minimum CE hour requirements under this part based on tenure.
2. Professional Responsibility
 - a. Professionalism and professional responsibility is a core competency that pervades every course that will be offered under this curriculum. Therefore, it is not necessary to provide separately for professional responsibility CE credit.

VIII. Continuing Education Providers

I. Co-Providers

1. National Center of State Courts
2. ABA Council of Appellate Staff Attorneys

II. Providers

1. <https://www.edx.org/course/justice> (recommended from target audience survey)
 - a. “Taught by lauded Harvard professor Michael Sandel, Justice explores critical analysis of classical and contemporary theories of justice, including discussion of present-day applications. Topics include affirmative action, income distribution, same-sex marriage, the role of markets, debates about rights (human rights and property rights), arguments for and against equality, dilemmas of loyalty in public and private life. The course invites learners to subject their own views on these controversies to critical examination.”

Attachment B

Additional professional Competencies for Reviewing Court Clerks include:

1. Understand the organization of the Illinois judicial system with an understanding of what the Appellate Court and the Supreme Court does (the appellate process). Recognize the specific role of the offices of the supreme and appellate court clerks within the judicial system. (Applies to all 3 target audiences.)
2. Know the Supreme Court policies for court employees on confidentiality, ethics, political activity, and use of social media. (Applies to all 3 target audiences.)
3. Demonstrate familiarity with the Supreme Court policy on assistance to self-represented litigants by clerks with an understanding of the difference between legal information and legal advice. (Applies to all 3 target audiences.)
4. Demonstrate familiarity with the standardized forms and related instructions that have been approved pursuant to Supreme Court Rule 10-101; forms included in the Illinois Supreme Court Rules; and the "Resources for Self-Represented Litigants" under the Access to Justice section of the Illinois Court home page. (Applies to all 3 target audiences.)
5. Interact with the public in a manner that is fair, impartial, respectful, and without bias or implicit bias, with an awareness that the offices of the supreme and appellate court clerks are the public face of the reviewing courts in Illinois and that these offices play a key role in shaping the public's perception of the court system. Awareness that the actions, attitude and temperament of court employees in these offices can demonstrate that the courts operate in a fair and impartial manner and exist for everyone regardless of race/ethnicity, income, nationality or legal status. (Applies to all 3 target audiences.)
6. Effectively manage staff and have knowledge and awareness of human resource problems and challenges (*e.g.: sexual harassment, discrimination, workplace bullying, substance abuse, performance, chronic tardiness, absenteeism, etc.*) and how to deal with them. (Applies only to managers.)

Essential Knowledge, Skills, Abilities and Attitudes for Deputy Clerks:

- Effective Verbal Communication/Effective Listening
- Structured Writing (emails)
- Problem Solving
- Team Building

Essential Knowledge, Skills, Abilities and Attitudes for Managers:

- Staff Management/HR Topics (for example, FMLA, issues related to sexual harassment and discrimination, workplace bullying, performance, chronic tardiness or absenteeism, lack of motivation, equitable allocation of resources, substance abuse, turnover and productivity)
- Making the Transition to Supervisor
- Communication
- Problem Solving (same course as offered to staff)
- Planning and Implementation/ Project Management
- Delegation

VI. FACULTY

VIII. CONTINUING EDUCATION PROVIDERS

For non-managers it is anticipated that the delivery methods will be training videos, webcast presentations, and procedure manuals. Therefore much of the training and education for the non-judicial court personnel could be coordinated and delivered through the Administrative Office of the Illinois Courts (AOIC). The AOIC recently released a web-based ethics training for all non-judicial court employees. This training was tailored toward the standards of ethical conduct outlined within the Illinois Judicial Branch Ethics Code. An alternative (or perhaps in conjunction with the AOIC) is Kantola Training Solutions (<https://www.kantola.com/>). Kantola produces professional quality, video-based and interactive eLearning workplace training courses covering topics such as harassment, diversity, ethics, customer service, social media at work, professional email etiquette, and others. They have an extensive library of "compliance and soft-skills training videos, interactive e-learning, and supplementary tools" that are used by businesses, non-profits, and government agencies. The training is available in different formats: Online Training (suggested to track completion and compliance), Instant Streaming (like Netflix for training - just log in and click play), Embedded Clips (allows creation of a custom training course), DVD's, Study Guides and Trainer's Manuals. There would be a cost in purchasing these training videos. Depending on the cost, the extensive Kantola library could provide much of the training for non-judicial court personnel and would complement material prepared by the AOIC tailored specifically to the judicial branch of Illinois.

For managers, it is anticipated that delivery methods would include training videos, webcasts, and in-person training. As with non-managers, some of the training and education for managers could be coordinated and delivered through the AOIC. The video-based workplace training courses produced by Kantola could also be used for managers as Kantola has a manager version of all their courses in addition to their employee version. Kantola also has several training videos geared specifically toward supervisors and managers. If the Kantola training is not an option, another possibility for managers could be the HFS Bureau of Training (hfs.bureauoftraining@illinois.gov) which conducts full day classes (9a.m.- 4p.m.), morning classes (9a.m.-12p.m.) and afternoon classes (1p.m.-4p.m.) in Springfield and Chicago. The classes are free although supervisory approval is needed to attend the training. HFS Bureau of Training conducts classes on Management (Leadership Skills, Discipline, Attendance, Preparing Employee Evaluations, etc.), Staff Development (Sexual Harassment, Diversity, Bullying, Communication, Advanced Customer Service, Writing, Punctuation, Grammar, E-mails, etc.) and Information Technology (Microsoft, Outlook, Word, Excel, PowerPoint, etc.).

VII. MINIMUM CONTINUING EDUCATION HOURS

Instead of setting minimum required education hours for non judicial staff, individual goals should be established for self directed learning. Training and education for non judicial staff should be in-house, rather than by attendance at off-site seminars or workshops. Live learning activities are costly and difficult to schedule. A series of job specific electronic training modules or courses should be created and each course would include a proficiency test. Learners would be required to pass each set of tests before moving on to another course. If they changed their minds about working on a selected training course, they could put it aside and come back to it at a later time. If they did not have enough time to complete an online course, they could stop and later resume where they left off without having to restart the course. In this way, individualized training would be self paced and staff would have control over their own learning, participating as time allows during their daily routine. Individuals learn at different rates and some training courses may cover concepts that are more difficult to learn. Staff availability to participate in training will be impacted by workload demands. Ideally, staff should be encouraged to block out set dates and times for a learning activity. Another possibility is to allow staff to use a training room to work on training activities in an uninterrupted environment. The manager can review who has completed their training, who has started but not completed, and who has not started yet. Reminder emails to those users who have not yet done their training could be sent by the manager. An employee can retake the courses multiple times to refresh their memories.

All new employees within four weeks of hiring should complete an orientation course consisting of a series of training videos covering the following topics: (1) *The Illinois Judicial System* (explaining the organization of the Illinois judicial system with an explanation of how cases move through the judicial system and the role of the offices of the supreme and

appellate clerks within the Illinois judicial system); (2) *Ethics for the Court Employee* (training to make the non-judicial staff aware of the standards of ethical conduct outlined within the Illinois Judicial Branch Ethics Code, and further increase their knowledge, comprehension and application of the ethical standards governing conduct in the Judicial Branch); and (3) *Legal Information or Legal Advice?* (introduction and explanation of the Supreme Court's Safe Harbor Policy which allows court personnel to provide legal information about court rules, court terminology, and court procedure, but prohibits court personnel from making specific legal recommendations and from giving legal analysis, strategy, research, or advice to court patrons).

Staff serving less than five years and not in a management position should be required to complete online training modules on harassment, diversity, customer service, social media at work, professional email etiquette, telephone communication, business writing and grammar, along with a refresher course on ethics. The manager can review who has completed their training, who has started but not completed, and who has not started yet. Reminder emails to those users who have not yet done their training could be sent by the manager. An employee can retake the courses multiple times to refresh their memories or as directed by the manager.

Staff serving more than five years and those in management positions (non-legal staff and legal staff alike) should also be required to complete online training modules on harassment, diversity, customer service, social media at work, professional email etiquette, telephone communication, along with a refresher course on ethics. The manager can review who has completed their training, who has started but not completed, and who has not started yet. Reminder emails to those users who have not yet done their training could be sent by the manager. An employee can retake the courses multiple times to refresh their memories or as directed by the manager.

Managers should be required to complete online training courses for Managers covering: Harassment Training, Diversity Training, Customer Service Training, Managing People (discipline, attendance, preparing employee evaluations, etc), Human Resources, Leadership Skills, Communication, Health and Safety. If the budget permits, all reviewing court clerks should become members (\$150 annually fee) of the National Conference of Appellate Court Clerks (NCACC) and should attend the annual meeting of the NCACC at least once every three years and be required to attend all offerings on the Education Schedule at the Conference. As new subjects or trends in human resource training and development emerge, it will be necessary to add new training videos for managers. New offerings may also be required for staff.

Attachment C

Additional competencies for Court Reporter Supervisors (managers) and Official Court Reporters (non-managers) of the Circuit Court of Illinois include:

- a. Understand the organization of the Illinois judicial system and how trial and appellate cases proceed through the system. Recognize the specific role of the Court Reporter within the judicial system.
- b. Understand appellate procedure and the Supreme Court Rules that govern a case from docketing to closing, especially rules governing how official court reporters process appeals.
- c. Have a working knowledge of legal ethic rules and how they apply to Court Reporters with regard to limitations on political activity and use of social media. Understand the applicable confidentiality rules and how they apply to Court Reporters.
- d. Have a working knowledge of relevant legal, medical, psychiatric, scientific and financial terms that are used in court proceedings
- e. Ability to perform general dictation for five minutes at 200 words per minute with 95% accuracy and two-person dictation for five minutes at 225 words per minute with 95% accuracy.
- f. Engage in skilled communication with the public, including exhibiting high levels of professionalism and patience.
- g. Understand and apply expert knowledge of punctuation and grammar to ensure an accurate record.
- h. Understand and effectively utilize computer aided transcription (CAT) technology, stenography machines, case management software programs, word processing and spreadsheet programs. to access electronic case documents to aid in transcript preparation.
- i. Understand the role of Court Reporters and Supervisors within the judicial system and adhering to the Core Values of the Judicial College (*Access to Justice, Procedural Fairness, and Diversity*) - thereby improving public trust in the judicial system. Listening (empathy/civility/ patience) and treating SRLs with respect.
- j. Possess the ability to prepare accurate, verbatim record of court proceedings.
- k. Understand how professionalism, integrity and temperament are important is working with court system participants.
- l. As a visible face of the court system that is more often seen than heard in the courtroom, it is important to instill and reinforce that official court reporters are part of the “team” of professionals in the court system. Just like other court professionals, the actions, demeanor, attitude and temperament of official court reporters can shape public perception of fairness and impartiality in the judicial system. Necessary attitudes include, but are not limited to, diversity, lack of implicit bias, inclusiveness, empathy, civility and respect.

Essential Knowledge, Skills, Abilities and Attitudes for Managers and non-managers include:

- Knowledge of the Illinois Judicial system (for new employees)
- Knowledge and skills related to Technology/ C-Track (includes an introduction to and periodic updates to CAT technology and software necessary for verbatim, accurate records of all proceedings, courts electronic case management system, Re:Search;IL, scanners, as well as Microsoft office suite, outlook, etc.)
- Ethics and Confidentiality (for example, confidentiality, including handling of in camera interviews, juvenile proceedings and transcript request/preparation and filing of transcripts in these proceedings; and use of proofreader/scopist on confidential transcripts, privacy, social media, gifts, outside employment and activities, political activity and issues related to diversity).
- Common terminology used in the court room including, legal, medical, psychological, and scientific.
- General knowledge on common topics encountered in the courtroom including, but not limited to, addiction and recovery, police techniques, DNA evidence, crime scene investigation, trauma, and second hand trauma, etc.
- General knowledge re workplace safety, active shooter situations, sexual harassment in the workplace etc.
- Electronic filing, especially as it pertains to official court reporter preparation and filing of transcripts.
- Transcript preparation ethics issues like notification to one party that another party has requested a transcript; requirements that all sides pay for transcripts and they should not be shared by counsel or the parties.
- Health and wellness issues unique to official court reporters, including, but not limited to, prevention and treatment of repetitive trauma injuries, neck, back, and other skeletal issues; chairs uniquely developed for the physical demands of the official court reporter.
- Editing and transcript preparation techniques and technology changes from software vendors.
- Punctuation and grammar rule updates.
- Real Time transcription training and technology.
- Effective Verbal Communication/Effective Listening (for example, ability to answer the public's questions on court rules and procedures without giving legal advice, handling challenging self-represented litigants (SLRs) and customer service situations).
- Team Building

Essential Knowledge, Skills, Abilities and Attitudes for Managers include:

- Staff Management/HR Topics (for example, handling difficult employee relations situations, FMLA, issues of sexual harassment, discrimination and bullying,

performance, absenteeism, lack of motivation, substance abuse, productivity and scheduling).

- Making the Transition to Supervisor
- Communication
- Problem Solving (same course as offered to staff)

Section VI – FACULTY ELIGIBILITY, FACULTY DEVELOPMENT AND TEACHING CREDIT HOURS

Faculty Eligibility:

1. All faculty must be demonstrably and objectively capable to instruct participants on the topic(s) relevant to the stated learning objectives.
2. No exclusions are recommended.

Faculty Development:

1. Where possible, faculty shall have previously attended at least one Illinois Judicial College or approved provider faculty development workshop and have a willingness to continue participating in faculty development events. The JSBE subcommittee on court reporters shall have discretion to approve faculty who do not meet the stated criteria herein.
2. Continuing education hours for faculty development participation may be awarded as allowed by the rules and regulations then in effect that govern continuing education for the particular discipline of the faculty member.

Faculty Teaching Credit Hours:

1. Lawyers, active and retired judges serving as faculty shall receive continuing education credit pursuant to Illinois Supreme Court Rule 795(d)(5).
2. Other faculty shall be entitled to credit in accordance with the rules and regulations then in effect that govern continuing education for the particular discipline of the faculty member.

Section VII – PARTICIPANT MINIMUM CONTINUING EDUCATION (CE) HOURS

1. 225 ILCS 415/27 requires all Illinois licensed court reporters to complete continuing education as prescribed by the Department of Financial and Professional Regulation. The Department promulgated rules requiring licensed court reporters to complete a minimum of 10 hours of CE every 24 months. However, 225 ILCS 415/27 exempts all official court reporters from this requirement. Unless and until the legislature changes this requirement, the committee cannot recommend minimum hours of completion for court reporters. Interestingly, 225 ILCS 415/27 is scheduled to be automatically repealed 1/1/2024. The statute does not, however, appear to exempt court reporter supervisors (managers) from any continuing education requirements.
2. If the legislature changes the law to require CE for court reporters, the committee recommends that all court reporters and managers comply with the CE requirements promulgated by the Department found at 68 Ill. Admin. Code 1200.75 (attached hereto).

Section VIII – CONTINUING EDUCATION PROVIDERS (IDENTIFICATION OF POTENTIAL COLLABORATIVE PARTNERS)

1. Co-Providers – attorneys, judges, Court Reporting Services, experts in the field of court reporting technique, grammar rules, professionalism, civility, ethics, diversity and inclusion, mental health and substance abuse.
2. Providers – National Court Reporting Association (NCRA); Illinois Court Reporters Association (ICRA); a city, county, state or federal judicial body responsible for coordination and presentation of CE courses or programs for its employees; a university or college course or adult education program that contributes directly to the court reporter’s knowledge, ability or competence to perform his/her duties; any other school, college or university, State agency, or any other person, firm or association that has been approved and authorized by the Department to coordinate and provide CE courses and programs

Attachment D

Additional competencies for Interpreters include: To interpret for all oral messages and utterances, as well as to orally translate written documents, court interpreters must have a broad range of knowledge and skills in the following areas: linguistic skills, speaking skills, listening comprehension skills, reading comprehension skills, interpreting skills, and behavioral skills. Both targeted audiences, new and experienced interpreters, need to possess these competencies. The skill level associated with each competency will vary depending on the interpreters' experience.

1. Linguistic skills
 - a. Native-like proficiency in all working languages;
 - b. Ability to think and react communicatively in all working languages;
 - c. Knowledge and use of a broad range of vocabulary, including legal terminology, subject-specific terminology, and slang; and
 - d. Knowledge and use of cultural nuances, regional variations, idiomatic expressions, and colloquialisms in all working languages.
2. Speaking skills
 - a. Ability to speak with proper pronunciation, diction, and intonation in all working languages;
 - b. Ability to speak with a neutralized accent in all working languages;
 - c. Ability to project and/or speak softly.
3. Listening skills
 - a. Ability to listen to and comprehend different rates of speech in all working languages.
 - b. Ability to listen to and comprehend various regional accents and/or dialectical differences in all working languages; and
 - c. Ability to ignore auditory distractions and focus on source speaker.
4. Reading comprehension skills
 - a. Ability to read and comprehend overall meaning and specific details of written text in all working languages;
 - b. Ability to read and recognize various written contexts, including formal and informal text, subject-specific vocabulary, idiomatic expressions, and colloquialisms; and
 - c. Ability to read quickly and with little preparation.
5. Interpreting skills
 - a. Ability to concentrate and focus;
 - b. Ability to process linguistic information quickly;
 - c. Ability to make quick linguistic decisions regarding word choice or terminology selection;
 - d. Ability to apply short-term memory skills in retaining small units of information;
 - e. Ability to think analytically;
 - f. Ability to utilize predictive thinking skills to anticipate incoming messages;
 - g. Ability to convey meaning;

- h. Ability to provide transference from one language to another;
 - i. Ability to preserve accuracy;
 - j. Ability to select appropriate equivalents for vocabulary or phrases;
 - k. Ability to accommodate for lack of equivalents in vocabulary or phrases;
 - l. Ability to conserve intent, tone, style, and utterances of all messages;
 - m. Ability to reflect register; and
 - n. Ability to self-monitor and self-correct.
6. Behavioral skills
- a. Ability to practice and follow ethical standards;
 - b. Ability to conduct business in a professional manner;
 - c. Knowledge and awareness of cultural aspects that affect language;
 - d. Ability to work in various settings, situations, or conditions;
 - e. Ability to project self-confidence and self-awareness when interpreting; and
 - f. Knowledge and continued learning of social, technological, and legal changes that affect language.

Just like other court professionals, the actions, demeanor, attitude and temperament of certified interpreters can shape public perception of fairness and impartiality in the judicial system. Necessary attitudes include, but are not limited to, diversity, lack of implicit bias, inclusiveness, empathy, civility and respect.

Essential Knowledge, Skills, Abilities and Attitudes for interpreters include:

- Interpreting skills training (linguistic, speaking, listening, reading comprehension, interpretation and behavioral skills)
- Illinois Judicial system (for example, an introduction to the Illinois judicial system: how the courts work, how the courts are organized, how the judiciary fits into state government; judicial branch terminology; and all other duties of official court reporters required by law).
- Technology/ C-Track (for example, court electronic case management system, Re:Search;IL, scanners, etc.).
- Ethics and Confidentiality (for example, confidentiality, social media, gifts and issues related to diversity).
- Common terminology used in the court room including, legal, medical, psychological, and scientific.
- General knowledge on common topics encountered in the courtroom including, but not limited to, addiction and recovery, police techniques, DNA evidence, crime scene investigation, trauma, and second-hand trauma, etc.
- General knowledge re workplace safety, active shooter situations, sexual harassment in the workplace etc.

Attachment E

Additional competencies for the non-legal staff of the Administrative Office of the Illinois Courts include:

1. Be familiar with the organization of the Illinois judicial system and how trial and appellate cases proceed through the system.
2. Recognize the specific role of the AOIC staff within the judicial system and the need for procedural fairness to accomplish ethical goals, diversity goals and confidentiality goals in the workplace.
3. Know the rules of conduct within the Administrative Office of the Illinois Courts.
4. Engage in skilled communication with colleagues and all members of the judicial system.
5. Communicate clearly in all verbal conversations and written documents after closely listening to the questions posed or information requested.
6. Develop customer service plans, team building incentives, time management strategies and efficient use of technology.
7. Identify implicit bias and develop strategies to deal with that bias.
8. Improve strategic planning strengths including collection of data, research techniques, delegation of duties, writing and presenting plans and grants and monitoring and measuring successes.

Additional competencies for the managers of departments within the Administrative Office of the Illinois Courts include:

1. Develop problem solving strategy protocols.
2. Develop project implementation protocols.
3. Identify future leaders and leadership skills in the rank and file personnel.
4. Encourage career employees with incentives and promotional opportunities.
5. Create training programs for those employees who are required to train and interact with judges and other court staff.

Essential knowledge, skills, abilities and attitudes include:

- The structure of the Illinois court system
- How your particular job contributes to the success of the system
- Supreme Court Rules and administrative procedures
- How is your particular job governed by the rules and procedures
- Ethical considerations in the workplace

- Diversity considerations in the workplace
- Confidentiality considerations in the workplace
- Why is procedural fairness important for the success of the system and how can all employees contribute
- Verbal communication
- Written communication
- Listening techniques
- Customer Service (public, judiciary)
- Team building incentives (managers, rank and file)
- Time Management Strategies
- Effective use of technology
- Problem solving in the workplace
- Project implementation in the workplace
- Strategic planning strengths
- Identifying implicit bias
- Developing strategies to deal with implicit bias
- Identifying the leaders and leadership skills
- Career employees (incentives for employment, promotion opportunities)

Faculty:

In searching for faculty, I would look first to the National Center for State Courts and the National Judicial College for instructors who are familiar with rank and file employees in a judicial system. I would also look to other state judicial colleges for individuals who teach in this particular area. This type of faculty would be especially important for the managers.

Illinois judges will also be recruited to teach these employees. They are best able to describe the workings of the Illinois judicial system and the progression of cases in the system. Judges also generally have good to excellent communication skills, and it could be important for morale in general if these important employees have an opportunity to get to know some of the judges that they have occasion to speak with.

Finally, I will recommend a 20 minute tape for all new employees (including new lawyers or employees with legal training) to serve as a welcome as well as instruction tool. This tape will be viewed by new employees within the first 14 days of employment. The presenters on this tape should be the Director of AOIC and the Chief Justice of the Illinois Supreme Court.

Minimum Continuing Education Hours

Employees serving less than five years and not in management position within AOIC should take seven hours of collaborative education every two years, with at least three of those hours focusing on ethics, diversity and other related issues. The non-ethics hours would be provided in house, while the ethics hours could be attended in a collaborative program with other target audiences.

Employees serving more than five year and those in management positions (non-legal staff and legal staff alike, newly-hired and senior members alike) should take nine to 11 hours every two years with at least three of those hours focusing on ethics, diversity and other related issues. Finally, managers who present the in-house programs to the other staff should get credit hours for preparing and presenting in-house programs. However, these managers shall have attended at least four hours of programs dealing with management responsibilities, diversity, team building and ethics.