

California Escrow Association  
Directors Meeting  
May 18 through May 21, 2007  
Sacramento, CA

**CEA News**

Issue #2 for 2007 had just come out prior to the May meeting and the committee was very proud of our efforts together with CEA Headquarters in coming up with a great magazine.

Committee reviewed each individual article in the Material Review Packet which was sent previous to the meeting and each were categorized as either a “main article” or a “filler” and whether it would be entered into issue #3 (July/Aug/Sept) or beyond. With minor changes to be made to some of the articles, issue #3 was completed, and work has started on issue #4. Individual members were given assignments and homework.

We are slowly building up a portfolio of articles for which we can draw upon for future issues, and that means that we are accomplishing one of our goals for the year.

One of the items on the Strategic Plan as put out by the Governance Committee, is to make the CEA News “100% paperless” by 2008. A motion was put forth and approved to submit to the Governance committee an amendment to that specific item to allow for distribution of either a hard copy news edition or an electronic edition, whichever is desired by the individual member.

**Lender’s Relation**

Committee chair Dave Shean put together a tentative “Problem Resolution Spreadsheet” for publication on the CEA website, which has the following:

- Document Name
- Description of Problem,
- Recommended Action of Settlement Agent
- Name of Lenders using this form

The committee reviewed the format and agreed that it was a good format, and the following additional suggestions were made:

- Look into having a “Search” button link for the documents
- Put documents in alphabetical order
- Possibly attach a copy of the specific document
- Move the Legend to the top of the site (presently on the bottom)
- List the recommended actions in bullet form
- Provide a feedback section for viewers which, when accessed and feedback given, will send the e-mail to the designated “reviewer”

There was inconclusive discussion on what the process will be like so that questionable documents will be reviewed in a timely manner by specified members once this project is established.

Finally, the committee finished giving additional solutions to the stack of documents given after the March meeting.

**PROFESSIONAL DESIGNATION**

At the Friday afternoon session the members who came were able to finish the task of reviewing the existing CSEO test in its entirety. This test is now ready to be incorporated in the next PD test session.

The Bulk Sale test was also done and will be submitted at the next test session.

It was determined that the proposed guideline for application by outside sources for classes that will be able to give PD credits and/or certificates for Escrow I, II, III is to be approved by the Education Committee and will not be a function of the PD committee.

Various committee members were still working on updating and reviewing the on-line sample tests and study materials.

A form has been created by headquarters for members to submit in the event there are disputes on the submission of electronic PD credits.

Headquarters is also working on a Power Point presentation for the Proctor Training Program to be used by regionals which will be hosting tests.

The committee requested that headquarters, in lieu of regular mail of test notification to candidates, e-mail the notification instead to save time. Then the candidates would receive notification days earlier.

The committee will be scheduling PD prep sessions at conference for all PD exams.

PD exam review and its \$50.00 fee was the final subject which generated a lot of heated discussion. The final determination was that headquarters will not longer be sending out the Request for Exam Review Form with the notification letters of no-pass. The exam review may be eliminated in 2008 altogether, but a compromise would be researched on whether a simple guideline of areas that require further study be included in the notification letters. Headquarters will research if the software program can do something like that.

### **GENERAL SESSION**

The Manual of Policies and Procedures was submitted to the Executive Board and it was approved.

President Fran Butler visited the possibilities of reducing the number of physical meetings for the directors, with the committees using e-mail, teleconferencing, and webinar capabilities instead. Each committee was asked to provide their comments to this, as it relates to how work is done in their committee through the year. The answers varied from committee to committee, and Fran took down all the comments.

Mike Belote finished up general session with his statement that there were a great number of bills that were submitted to the legislature this year which will directly impact Escrow Officers at their desk. He will keep us posted. With regards to the "Garamendi issue", it looks like the new Commissioner of the Department of Insurance (Poisner) will be correcting the technicalities that affected the passing of the escrow fee cap proposal through the Office of Administrative Law last time. Once the corrections are made it will surely pass OAL and once that happens (possibly in a month or so), CLTA will then sue the DOI. Mike will keep us posted on that issue, too.

The undersigned director did not attend Legislative Day on May 21<sup>st</sup>.

Submitted by,

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CEA Director