



PIE COMMITTEE MEETING
June 14, 2024



Stacy M. Butterfield, CPA
POLK COUNTY
EXECUTIVE COUNCIL CHAIR

Tiffany Moore Russell, ESQ.
ORANGE COUNTY
VICE-CHAIR

Laura E. Roth, ESQ.
VOLUSIA COUNTY
SECRETARY/TREASURER

CRYSTAL K. KINZEL
COLLIER COUNTY
SENATE APPOINTEE

TODD NEWTON
GILCHRIST COUNTY

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FLAGLER COUNTY
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JOHN A. CRAWFORD
NASSAU COUNTY

JOHN DEW
EXECUTIVE DIRECTOR

BERTILA SOTO
11TH JUDICIAL CIRCUIT JUDGE
SUPREME COURT APPOINTEE

MICHELLE R. MILLER
SAINT LUCIE COUNTY

ROB BRADLEY
BRADLEY, GARRISON & KOMANDO, P.A.
GENERAL COUNSEL

2560-102 BARRINGTON CIRCLE | TALLAHASSEE, FLORIDA 32308 | PHONE 850.386.2223 | WWW.FLCCOC.ORG

PERFORMANCE IMPROVEMENT AND EFFICIENCIES COMMITTEE MEETING

June 14, 2024

Meeting: 10:00 AM – 12:00 PM, Eastern

Webex Link: <https://flclerks.webex.com/flclerks/j.php?MTID=m9f8f7e2ee2aa7cde3da0bf632b1916b8>

Meeting Number: 2315 646 7652; Password: CCOC

Conference Call: 1-866-469-3239; Access Code: 2315 646 7652

- 1) Call to Order and Approve Agenda Hon. Laura Roth
- 2) Approve Minutes from 03/15/24 Meeting..... Johnny Petit
- 3) CFY 2023-24 Quarter 2 PMAP Report..... Johnny Petit
- 4) Cases/Subcases Update..... Johnny Petit
- 5) Payment Plan Workgroup Update..... Nike Campbell
- 6) PAC framework/Case Weights Work Group.....Hon. Laura Roth
- 7) Compliance CPR Training..... Don Murphy
- 8) Other Business Hon. Laura Roth

Committee Members: Laura E. Roth, Esq. (Volusia), Chair, Stacy Butterfield, CPA (Polk), Doug Chorvat, Jr. (Hernando), Gary J. Cooney, Esq. (Lake), Brenda D. Forman (Broward), Tara S. Green (Clay), Crystal K. Kinzel (Collier), Michelle R. Miller (St. Lucie), Matt Reynolds (Putnam), Victoria L. Rogers (Hardee), Clayton O. Rooks (Jackson), Angela Vick (Citrus)

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Minutes of March 15, 2024 PIE Committee Meeting

Committee Action: Review and approve with amendments, as necessary.

The Performance Improvement and Efficiencies Committee of the Clerk of Courts Operation Corporation (CCOC) held a meeting via WebEx on 3/15/24. An agenda and materials were distributed and posted on the CCOC website before the meeting. Provided below is a summary of staff notes from the meeting. These staff notes are designed to document committee action, not to be a complete record of committee discussions. All motions adopted by the committee are in **bold** text. All action items based on committee direction are in **red** and **bold** text.

1. Agenda Item 1 – Call to Order and Approve Agenda

The meeting was called to order by Chair Laura Roth. John Dew, CCOC Executive Director, called the roll.

Present for meeting [WebEx]: Chair Roth, Clerk Butterfield, Clerk Gary J. Cooney, Clerk Tara S. Green, Clerk Crystal K. Kinzel, Clerk Michelle Miller, Clerk Rooks, III, Clerk Reynolds and Clerk Chorvat.

Absent from the meeting: Clerk Forman, Clerk Rogers, and Clerk Angela Vick.

A motion to approve the agenda as presented was made by Clerk Butterfield and seconded by Clerk Green. The motion was adopted by consent.

2. Agenda Item 2 – Approve Minutes from 12/01/23 Meeting

The minutes from the 12/01/23 PIE Committee meeting was presented. Clerk Kinzel asked that in the minutes, under agenda item #4, it be clarified as to the timeframe of the reporting period for the case analysis being presented. She also noted that on the next page of the minutes the spelling of her last name should be corrected.

A motion to approve the minutes with the edits suggested was made by Clerk Kinzel and seconded by Clerk Green. The motion was approved.

3. Agenda Item 3 – CFY 2023-24 Quarter 1 PMAP Report

Mr. Dew presented the CFY 2023-24 Quarter 1 Performance Measures and Actions Plans report to the Committee. He noted that 9 counties did not require action plans, which was a decrease from the prior quarter so that is an improvement. He said that the report has already been posted and the Legislature was notified in order for us to meet the statutory deadline. However, we still wanted to bring it to the Committee for their review/approval and see if there were any questions.

A motion to approve the PMAP Report was made by Clerk Kinzel and seconded by Clerk Miller. The motion was approved.

Clerk Green asked for an update on where we are in reevaluating our performance measures and redefining what we want to report/track that is a true reflection of where our resources are spent. Mr. Dew responded that we should be doing this often and we were planning this year to do a dead dive into reviewing performance measures. Jason Welty in our office was taking the lead on that project. However, with Mr. Welty being appointed as the Jefferson County Clerk, and the reality that our office currently is not sufficiently staffed, Mr. Dew said he asked Clerk Roth to allow us to hold off on such an evaluation until a later date. He also mentioned that we are in the process of asking Clerks what the CCOC should be doing better and how we can improve. Once we get this information back and are better staffed we will be better prepared to evaluate the current measures and/or the need to add different measures. Clerk Green suggested that it would be beneficial if we could create a workgroup to start defining goals related to reevaluating our performance measures so once the CCOC is better staffed we could hit the road running. Chair Roth mentioned that we did have a workgroup established by Jason Welty but we are holding off for now.

4. Agenda Item 4 – Peer Group Discussion

Chair Roth noted that the committee has four options for approving the revised Peer Groups used in the budgeting process. The options are to make no changes to the currently approved Peer Groups; select new Peer Groups based on population; select new Peer Groups based on weighted cases; or select Peer Groups based on some other metric. She said the last time we revised the Peer Groups was based on weighted cases. She asked Clerk Cooney to provide an overview of the work he has done on this issue.

Clerk Cooney noted that the statute requires to develop groups of similarly situated counties based on population and cases. He provided an historical prospective on how the CCOC in the past developed these groups which we now call Peer Groups. He said he personally liked using weighted cases, but it did not matter to him which methodology was chosen.

Clerk Kinzel said that she did not understand why we develop these Peer Groups when from her perspective we don't use this in the budget process. We don't look at the performance of the peer groups. We should look at efficiencies within the peer groups or across all peer groups.

Chair Roth asked John Dew to respond. Mr. Dew noted that based on a statutory change in 2009, the CCOC was required first the first time for budgeting purposes to compare by peer group using similar population and similar number of cases. He stated that the Council actually used this information to decrease some Clerk's budgets when compared to Clerks in their grouping. However, the data on cases needed more work since it was unfair to compare workload for a traffic ticket case versus a felony case. The data today is much better, and the Council has an opportunity to use the peer groups and weighted cases in the budget process if they choose to do so.

Clerk Cooney said that we have been doing this process for many years. He said that as we use weighed cases more for comparison, and then use additional variables such as number of court houses and cost of living for example, we would all be very similar and therefore he was not sure we need to continue to check the box that we are comparing within groups. He was not sure that had much relevance anymore. In the long term we could compare all of us, and not just within peer groups as we will all be similar, except for those additional variables.

Clerk Butterfield noted that we did indeed use peer groups in the past for making budget decisions. We are much closer in having great information on weighted cases and it is a major indicator of workload. We should continue to work on weighted cases and determine how it can be used in the budget process.

Clerk Green motioned to vote on using the Peer Groups recommended based on weighted cases which is option two. Clerk Cooney seconded the motion. The motion passed unanimously.

5. Agenda Item 5 – Cases/Subcases Update

Johnny Petit, CCOC Actuarial Performance Analyst, presented the following highlights related to trends in cases handled by Clerks' offices.

- There was a slight overall increase (3.29%) in total cases for the September-December quarter for 2023 compared to the same quarter in 2022.
- Civil traffic cases increased by 4.63% between the same two periods.
- Although civil cases have declined year over year, they remain 14% higher than the baseline.
- At the subcases level, there were no significant changes, except for a 31.6% decrease in small claims up to \$5000 recorded in December.

In conclusion, there is a general upward trend in case numbers. Despite the decrease in civil cases, the overall trend remains positive.

Chair Roth thanked Johnny for calling in since he was in providing the report from his trip in Germany. There were no questions concerning the update.

6. Agenda Item 6 – Payment Plan Update

Chair Roth asked Mr. Dew to provide the results of the Payment Plan Pilot Project to date. Mr. Dew first recognized the eight Clerk Offices that participated in the project and thanked them individually. They were the Clerk offices from Broward, Citrus, Clay, Duval, Nassau, Orange, Palm Beach, and Seminole. He said that based on the study it was suggested that the PIE Committee might want to consider recommending that all Clerks starting next county fiscal year should start reporting on the number of payment plans they create monthly. He then asked if Kathy Davis from Citrus County could provide information on the recommendations of the workgroup.

Ms. Davis said that the information on number of payment plans developed would be useful for legislation and analyzing what are workload is. She said that it would be beneficial now to make a decision for Clerks to start collecting this data effective October so they can prepare for the process. Collecting information on payment plans now would be the first step and it should not be too burdensome to gather. We don't want to burden the Clerks with collecting more information than that, since we all have so much on our plate now.

Clerk Green made a motion to approve having Clerks start reporting information on number of payment plans effective October 1, 2024. Clerk Chorvat seconded the motion.

Chair Roth asked if there were questions or discussion. Clerk Kinzel said she was not in favor of creating any additional required reports. Clerk Green responded that collecting this data would be beneficial to help us determine if our focus on payment plans is being successful in our effort related to compliance. It would show if it is successful where and how. If it is not, we need to show that we are spending our time developing payment plans that are creating a revolving door that is creating work for us. We need to look at a risk versus return on our effort. If we don't have the data, we can't go to the Legislature and report on the effectiveness of establishing payment plans that they have required of us.

The motion was approved with nay votes from Clerk Kinzel and Clerk Miller.

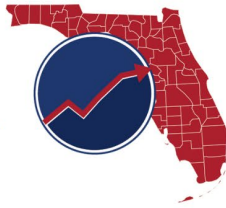
Agenda Item 7 – Update on CPR Training

Chair Roth asked Mr. Dew to provide an update on the compliance training efforts done by our vendor CIS, Inc. Mr. Dew said that Compliance Improvement Services is going to provide a number of training sessions in 2024. He asked CIS Director Don Murphy to provide information on upcoming training. Mr. Murphy noted that there would be upcoming in-person regional training sessions in March and April in Jackson, Leon, Duval, Seminole, Palm Beach, Charlotte, and Pinellas counties. There will be virtual trainings sessions in May on the 14th and 21st. Then on July 18th, in Seminole County, there will be an in-person and virtual CPR summary and certification ceremony. Mr. Murphy pointed out that the training was composed of four modules: communications; process improvement; reporting analytics; and summary/certificate ceremony.

Clerk Kinzel asked if Mr. Murphy would be tracking the results of the training to see if collections improved for those counties attending. He replied that they do help staff in the Clerk's offices to set up an internal process to measure their effectiveness. Mr. Dew responded by saying that we do track to see if there are improvements in collections by Clerks and staff that attend these training sessions. It does take several months to see results. He said we could provide such information.

Clerk Roth asked is there was any questions, comments, or further business that needed to be addressed. Hearing none, Clerk Roth adjourned the meeting at 11:00 AM.

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AGENDA ITEM 3

DATE: June 14, 2024
SUBJECT: CFY 2023-24 Quarter 2 PMAP Report
COMMITTEE ACTION: Approve CFY 2023-24 Quarter 2 PMAP Report

OVERVIEW:

The CCOC has completed the CFY 2023-24 Quarter 2 Performance Measures and Action Plans (PMAP) report, posted it to the CCOC website (<https://flccoc.org/ccoc-reports/#pr>), and submitted it to the Legislature on 5/15/24.

Report Highlights

The Performance Measures and Action Plans report identifies the counties not meeting workload performance standards for specific measures.

Performance Standards	Counties Requiring an Action Plan	Potential Action Plans	Total Action Plans
Collections	50	603	111
Filing – Timeliness	16	670	26
Docketing – Timeliness	8	670	10
Timely Juror Payments	6	67	6

- Total number of Action Plans and the number of counties requiring Action Plans continues to slowly decrease for each standard.
- Ten counties did not have any Action Plans: DeSoto, Flagler, Hamilton, Liberty, Marion, Martin, Okeechobee, Sumter, Suwannee, Walton

COMMITTEE ACTION: Approve CFY 2023-24 Quarter 2 PMAP Report

LEAD STAFF: Johnny Petit, Performance Actuarial Analyst

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AGENDA ITEM 4

DATE: June 14, 2024
SUBJECT: Cases/Subcases Update
COMMITTEE ACTION: Information Only

OVERVIEW:

CFY 2023-24 Quarter 2 Cases and Subcases Summary

- **The total cases reported were 1,293,771.**
 - Cases decreased by 9.99 percent from CFY 2022-23 Quarter 2.
 - Cases increased by 2.14 percent from CFY 2018-19 Quarter 2.
- **Civil Traffic continues to increase.**
 - Civil Traffic cases increased by 8.34 percent from CFY 2022-23 Quarter 2
 - Civil Traffic cases increased by 2.68 percent from CFY 2018-19 Quarter 2.
- **Civil decreases in Quarter 2.**
 - A 36.15 percent decrease from CFY 2022-23 Quarter 2; however, civil cases increased 8.25 percent from CFY 2018-19 Quarter 2.
- **Criminal trends upward year-over-year but still down from historical levels.**
 - Criminal cases increased by 2.37 percent from CFY 2022-23 Quarter 2.
 - Criminal cases decreased by 7.51 percent from CFY 2018-19 Quarter 2.

The 9.99% decline in total case numbers is mostly due to a significant 36.15% drop in civil cases, which was widely expected following the Tort reform introduced in March 2023. This reform had a significant impact on circuit and county civil cases, as indicated by substantial decreases in different subcases. Small claims under \$5,000, declined by 49 percent, are largely responsible for the year over year decrease in county civil cases. Furthermore, auto negligence cases dropped by 88.11%, while negligence fell by 83.73% explain the decline in circuit civil. Despite the 8.34 percent rise in civil traffic and a 2.37 percent increase in criminal cases, these increments were insufficient to counterbalance the effects of tort reform. Nonetheless, it's worth noting that the total number of cases remains elevated, surpassing every quarter 2 case counts since CFY2018-19, with the exception of CFY2022-23.

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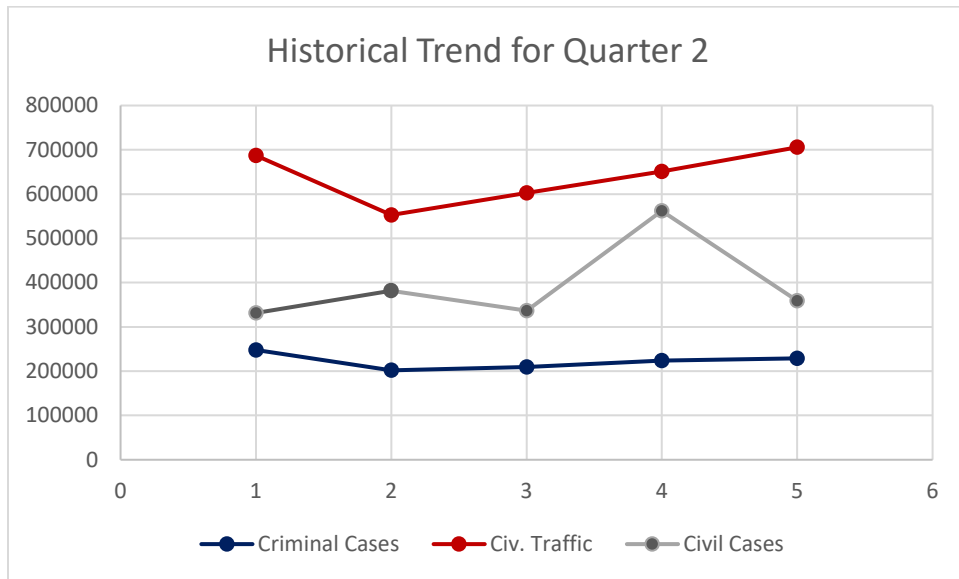
AGENDA ITEM 4 - CASES/SUBCASES UPDATE

CFY 2023-24 Quarter 1 and CFY 2023-24 Quarter 2 Comparison

- Cases increased by 11.26 percent from CFY 2023-24 Quarter 1.
- Civil, criminal, and civil traffic cases increased by 2.97 percent, 5.21 percent, and 18.30 percent respectively from CFY2023-24 Q1.

Historical Year-Over-Year for Quarter 2

CFY 2023-24 Quarter 2 Cases					
Case Type	CFY 2018-19	CFY 2020-21	CFY 2021-22	CFY 2022-23	CFY 2023-24
Criminal	247,947	201,905	209,477	223,939	229,252
Civil	331,493	381,697	336,541	561,993	358,848
Civil Traffic	591,139	502,474	539,431	572,462	705,651
Grand Total	1,266,721	1,136,397	1,148,568	1,437,288	1,293,771



COMMITTEE ACTION: Information Only

LEAD STAFF: Johnny Petit, CCOC Actuarial Performance Analyst

ATTACHMENTS:

1. Historical Q2 Total Cases by County
2. Historical Q2 Total Court Division by County

Historical Quarter 2

Agenda item 4

Total Cases

Attachment 1

County	CFY 2018-19	CFY 2019-20	CFY2020-21	CFY2021-22	CFY 2022-23	CFY2023-24	% change from Prior Year
Alachua	13,460	13,188	14,253	13,343	13,048	11,628	-10.88%
Baker	1,332	1,241	1,137	1,026	1,414	1,147	-18.88%
Bay	13,385	12,533	10,817	12,695	12,958	13,897	7.25%
Bradford	3,032	2,822	2,607	2,761	3,302	2,717	-17.72%
Brevard	25,336	25,802	23,759	22,937	25,357	25,124	-0.92%
Broward	122,062	111,389	102,343	92,551	124,766	96,157	-22.93%
Calhoun	571	594	441	683	866	1,232	42.26%
Charlotte	7,546	7,154	7,851	7,926	9,255	10,296	11.25%
Citrus	5,889	5,632	6,473	6,521	8,724	8,136	-6.74%
Clay	10,867	12,013	11,511	9,061	11,943	11,592	-2.94%
Collier	15,282	16,605	16,423	16,520	18,353	15,950	-13.09%
Columbia	3,978	4,018	4,137	3,971	3,825	143	-96.26%
DeSoto	1,616	1,635	1,702	1,752	1,860	1,868	0.43%
Dixie	782	611	849	686	961	913	-4.99%
Duval	63,645	58,683	70,563	64,479	67,982	63,558	-6.51%
Escambia	16,502	14,002	13,222	13,145	14,576	12,719	-12.74%
Flagler	4,240	4,480	3,959	3,816	4,836	4,609	-4.69%
Franklin	554	602	538	600	721	847	17.48%
Gadsden	2,413	2,507	2,591	2,542	2,385	1,818	-23.77%
Gilchrist	728	845	745	695	804	699	-13.06%
Glades	1,791	1,282	1,407	1,030	1,170	1,671	42.82%
Gulf	492	547	405	464	582	684	17.53%
Hamilton	1,407	932	1,127	929	984	926	-5.89%
Hardee	1,533	1,394	1,604	1,338	1,659	2,085	25.68%
Hendry	2,414	2,222	2,241	1,549	2,076	2,319	11.71%
Hernando	9,092	8,212	7,910	7,556	9,277	9,032	-2.64%
Highlands	3,391	3,251	3,071	4,040	3,701	3,686	-0.41%
Hillsborough	75,880	76,514	76,022	76,207	125,321	83,237	-33.58%
Holmes	1,110	1,002	1,052	867	902	878	-2.66%
Indian River	6,918	6,057	6,187	5,797	6,726	6,433	-4.36%
Jackson	2,522	2,540	2,727	2,196	2,375	1,808	-23.87%
Jefferson	1,168	954	853	1,056	1,290	-	-100.00%
Lafayette	313	154	177	205	299	241	-19.40%
Lake	14,945	14,887	13,794	14,730	16,541	14,304	-13.52%
Lee	45,911	31,331	25,603	27,423	33,058	35,008	5.90%
Leon	13,431	11,788	10,634	13,103	13,671	11,931	-12.73%
Levy	2,065	2,613	2,512	2,614	2,720	2,237	-17.76%
Liberty	549	471	476	458	492	358	-27.24%
Madison	3,289	2,777	2,142	2,378	2,277	2,966	30.26%
Manatee	14,223	15,456	14,777	16,602	17,155	16,266	-5.18%
Marion	13,665	13,054	12,772	12,062	14,322	14,432	0.77%
Martin	9,129	8,662	7,228	7,614	9,062	8,361	-7.74%
Miami-Dade	255,841	221,197	212,433	231,307	303,109	283,427	-6.49%
Monroe	8,508	7,911	9,881	10,051	10,921	10,546	-3.43%
Nassau	4,020	4,237	3,448	3,277	3,754	3,715	-1.04%
Okaloosa	9,217	9,957	8,891	8,407	9,748	9,073	-6.92%

Historical Quarter 2

Agenda item 4

Total Cases

Attachment 1

County	CFY 2018-19	CFY 2019-20	CFY2020-21	CFY2021-22	CFY 2022-23	CFY2023-24	% change from Prior Year
Okeechobee	2,310	2,004	1,674	1,928	2,232	2,767	23.97%
Orange	103,567	94,427	102,455	93,491	134,210	128,123	-4.54%
Osceola	21,921	24,307	21,414	21,031	27,976	25,194	-9.94%
Palm Beach	82,956	78,381	74,571	75,913	86,466	78,317	-9.42%
Pasco	22,674	19,957	18,519	18,775	21,620	18,991	-12.16%
Pinellas	47,194	46,378	39,306	43,931	48,352	43,162	-10.73%
Polk	39,680	35,672	31,385	35,324	40,905	43,070	5.29%
Putnam	3,154	3,354	2,582	2,993	3,994	3,402	-14.82%
Saint Johns	8,929	8,689	8,917	9,305	13,370	11,609	-13.17%
Saint Lucie	16,703	17,055	14,889	15,631	18,757	16,480	-12.14%
Santa Rosa	8,775	9,246	7,929	7,997	10,338	8,074	-21.90%
Sarasota	21,383	19,575	19,655	23,254	25,285	23,671	-6.38%
Seminole	27,123	24,099	24,888	24,411	27,139	26,878	-0.96%
Sumter	5,428	5,350	4,648	5,040	5,799	7,131	22.97%
Suwannee	2,080	2,256	2,532	1,776	2,398	1,939	-19.14%
Taylor	1,339	1,097	1,398	1,238	1,252	962	-23.16%
Union	409	400	366	450	428	368	-14.02%
Volusia	29,871	28,070	28,307	28,957	37,517	36,465	-2.80%
Wakulla	1,471	1,487	1,526	1,580	1,787	1,268	-29.04%
Walton	2,630	3,093	2,923	3,319	4,705	3,712	-21.11%
Washington	1,102	916	1,218	1,254	1,630	1,514	-7.12%
TOTALS:	1,266,721	1,171,571	1,136,397	1,148,568	1,437,288	1,293,771	-9.99%



Historical Quarter 2
By Court Division

Agenda Item 4

Attachment 2

County	CFY1819			CFY1920			CFY2021			CFY2122			CFY2223			CFY2324		
	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic
Alachua	3,235	2,970	7,255	2,883	3,008	7,297	2,857	2,491	8,905	2,977	2,491	7,875	4,546	2,362	6,140	3,579	2,484	5,565
Baker	374	415	543	374	380	487	262	405	470	267	344	415	347	443	624	289	378	480
Bay	3,206	5,629	4,550	3,074	5,128	4,331	2,304	4,623	3,890	2,275	5,065	5,355	2,854	4,685	5,419	2,513	4,848	6,536
Bradford	373	613	2,046	326	562	1,934	307	554	1,746	315	459	1,987	375	432	2,495	319	454	1,944
Brevard	7,193	6,832	11,311	8,182	6,609	11,011	6,860	6,505	10,394	7,343	6,146	9,448	9,083	6,174	10,100	7,328	6,007	11,789
Broward	38,249	16,839	66,974	40,338	14,710	56,341	51,532	11,037	39,774	36,569	11,270	44,712	57,584	13,086	54,096	32,050	13,476	50,631
Calhoun	193	270	108	186	296	112	133	153	155	120	181	382	174	207	485	155	217	860
Charlotte	2,400	2,347	2,799	2,477	2,175	2,502	2,729	2,443	2,679	2,633	2,333	2,960	3,483	2,487	3,285	2,868	2,831	4,597
Citrus	2,008	1,327	2,554	1,946	1,266	2,420	2,052	1,255	3,166	1,996	1,367	3,158	2,520	1,295	4,909	2,116	1,447	4,573
Clay	2,534	1,992	6,341	2,616	2,083	7,314	2,552	1,516	7,443	2,318	1,606	5,137	3,240	1,698	7,005	2,585	1,737	7,270
Collier	4,788	2,655	7,839	4,613	2,448	9,544	4,534	2,696	9,193	3,910	2,919	9,691	5,400	3,096	9,857	4,402	2,753	8,795
Columbia	1,255	832	1,891	1,065	843	2,110	904	961	2,272	985	948	2,038	1,338	949	1,538	-	143	-
DeSoto	347	564	705	362	590	683	340	538	824	361	505	886	490	503	867	399	500	969
Dixie	197	195	390	198	191	222	210	238	401	184	193	309	202	292	467	204	287	422
Duval	17,323	16,474	29,848	18,283	13,831	26,569	22,424	13,117	35,022	18,263	13,508	32,708	27,731	13,169	27,082	18,898	13,357	31,303
Escambia	4,160	5,589	6,753	4,311	4,515	5,176	4,628	4,002	4,592	4,693	3,673	4,779	5,904	3,760	4,912	4,413	3,874	4,432
Flagler	1,214	1,008	2,018	1,758	948	1,774	1,276	1,097	1,586	1,251	1,084	1,481	1,690	1,254	1,892	1,389	1,205	2,015
Franklin	138	241	175	156	283	163	110	230	198	142	280	178	145	299	277	183	283	381
Gadsden	658	424	1,331	643	544	1,320	535	458	1,598	493	435	1,614	717	386	1,282	605	443	770
Gilchrist	164	179	385	155	211	479	154	197	394	171	174	350	194	215	395	207	218	274
Glades	97	193	1,501	83	188	1,011	119	162	1,126	101	182	747	128	174	868	116	525	1,030
Gulf	209	181	102	179	233	135	151	156	98	157	203	104	183	213	186	158	228	298
Hamilton	180	380	847	188	310	434	169	220	738	133	217	579	181	251	552	160	245	521
Hardee	264	432	837	258	422	714	239	467	898	246	363	729	326	411	922	257	526	1,302
Hendry	418	698	1,298	350	741	1,131	406	593	1,242	411	527	611	486	525	1,065	481	611	1,227
Hernando	3,064	1,910	4,118	3,013	1,781	3,418	2,905	1,536	3,469	2,856	1,397	3,303	3,669	1,830	3,778	2,965	1,690	4,377
Highlands	1,117	914	1,360	1,120	884	1,247	1,047	893	1,131	1,128	983	1,929	1,454	1,081	1,166	1,252	1,015	1,419
Hillsborough	29,417	15,378	31,085	33,049	14,952	28,513	42,763	13,188	20,071	32,852	13,432	29,923	81,710	14,536	29,075	28,299	15,809	39,129
Holmes	216	298	596	191	318	493	183	312	557	198	357	312	270	321	311	239	287	352
Indian River	1,703	1,710	3,505	1,680	1,456	2,921	1,678	1,352	3,157	1,671	1,320	2,806	2,091	1,599	3,036	1,702	1,329	3,402
Jackson	594	504	1,424	707	407	1,426	484	435	1,808	533	447	1,216	636	500	1,239	532	403	873
Jefferson	127	219	822	104	177	673	103	166	584	114	137	805	155	204	931	-	-	-
Lafayette	79	75	159	52	65	37	75	53	49	55	69	81	59	64	176	73	76	92
Lake	3,949	3,285	7,711	4,167	3,327	7,393	4,080	2,969	6,745	4,053	3,357	7,320	5,777	3,460	7,304	4,835	3,141	6,328
Lee	10,590	7,592	27,729	10,880	7,729	12,722	11,487	5,635	8,481	10,608	7,895	8,920	15,729	6,643	10,686	13,205	7,523	14,280
Leon	4,266	2,999	6,166	4,150	2,696	4,942	3,701	2,134	4,799	3,815	2,487	6,801	4,934	2,381	6,356	4,405	2,443	5,083
Levy	492	649	924	477	701	1,435	532	636	1,344	459	692	1,463	655	678	1,387	517	567	1,153
Liberty	65	115	369	76	142	253	81	88	307	78	96	284	76	109	307	62	68	228
Madison	233	229	2,827	248	248	2,281	204	217	1,721	194	220	1,964	259	272	1,746	195	229	2,542
Manatee	4,193	3,609	6,421	4,413	3,699	7,344	4,854	3,217	6,706	4,371	3,187	9,044	6,273	3,396	7,486	4,506	3,655	8,105
Marion	5,316	4,068	4,281	4,467	4,075	4,512	4,669	3,924	4,179	4,674	3,719	3,669	6,721	3,895	3,706	5,079	4,455	4,898
Martin	1,785	2,036	5,308	1,640	1,692	5,330	1,798	1,793	3,637	1,778	1,615	4,221	2,261	1,924	4,877	1,838	1,902	4,621
Miami-Dade	53,440	28,679	173,722	50,442	25,220	145,535	64,167	22,996	125,270	60,361	23,885	147,061	126,404	27,974	148,731	79,515	29,242	174,670
Monroe	1,043	2,401	5,064	840	1,907	5,164	919	2,422	6,540	961	2,732	6,358	1,196	2,641	7,084	833	2,233	7,480
Nassau	890	1,153	1,977	859	1,166	2,212	908	884	1,656	864	870	1,543	1,139	984	1,631	881	1,059	1,775
Okaloosa	2,485	3,266	3,466	2,492	3,051	4,414	2,218	3,242	3,431	2,255	3,052	3,100	2,824	3,071	3,853	2,325	3,055	3,693
Okeechobee	470	673	1,167	472	720	812	429	578	667	492	737	699	633	706	893	459	698	1,610
Orange	24,528	14,261	64,778	25,848	12,946	55,633	33,420	11,571	57,464	26,874	10,897	55,720	42,657	11,598	79,955	27,435	12,245	88,443
Osceola	4,816	3,679	13,426	5,317	3,369	15,621	5,549	2,932	12,933	5,500	2,665	12,866	7,958	3,364	16,654	6,051	3,636	15,507
Palm Beach	22,496	18,966	41,494	19,560	17,016	41,805	20,572	13,370	40,629	18,564	14,498	42,851	24,970	16,090	45,406	18,115	15,619	44,583
Pasco	7,390	7,033	8,251	7,528	6,041	6,388	7,304	4,852	6,363	7,205	4,379	7,191	9,879	4,679	7,062	7,954	4,779	6,258
Pinellas	13,366	13,476	20,352	13,720	12,494	20,164	13,449	10,321	15,536	12,235	11,947	19,749	18,061	12,312	17,979	12,318	12,007	18,837
Polk	9,877	9,286	20,517	10,315	9,168	16,189	9,353	7,934	14,098	9,840	8,273	17,211	13,351	8,909	18,645	11,517	9,659	21,894
Putnam	963	1,126	1,065	1,063	1,178	1,113	859	928	795	921	969	1,103	1,330	1,037	1,627	1,033	1,105	1,264
Saint Johns	2,192	2,358	4,379	2,246	2,268	4,175	2,555	2,225	4,137	2,288	2,649	4,368	4,979	2,745	5,646	3,253	2,837	5,519
Saint Lucie	4,338	3,116	9,249	4,112	3,078	9,865	4,339	3,045	7,505	4,221	3,022	8,388	5,280	3,186	10,291	4,498	3,366	8,616
Santa Rosa	1,799	2,039	4,937	1,819	1,842	5,585	2,075	1,590	4,264	1,722	1,821	4,454	2,031	2,265	6,042	1,711	1,893	4,470
Sarasota	5,507	4,373	11,503	5,522	4,074	9,979	5,976	3,660	10,019	5,562	4,526	13,166	8,311	5,031	11,943	5,995	5,202	12,474
Seminole	5,203	4,555	17,365	5,546	3,512	15,041	6,228	3,480	15,180	5,128	3,833	15,450	7,774	4,038	15,327	5,934	4,158	16,786
Sumter	869	1,217	3,342	896	1,268	3,186	1,028	1,154	2,466	1,117	1,110	2,813	1,522	1,228	3,049	1,111	1,315	4,705

Historical Quarter 2
By Court Division

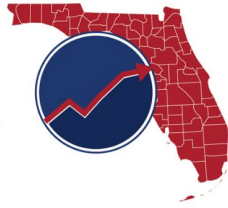
Agenda Item 4

Attachment 2

County	CFY1819			CFY1920			CFY2021			CFY2122			CFY2223			CFY2324		
	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic	Civil Cases	Criminal Cases	Civil Traffic
Suwannee	565	594	921	521	585	1,150	484	675	1,373	458	467	851	553	625	1,220	492	524	923
Taylor	271	289	779	217	287	593	244	347	807	233	319	686	336	316	600	286	356	320
Union	140	116	153	147	102	151	139	88	139	158	116	176	157	80	191	131	115	122
Volusia	8,906	8,846	12,119	8,332	8,353	11,385	9,522	7,364	11,421	10,310	6,895	11,752	16,207	7,294	14,016	10,012	8,297	18,156
Wakulla	391	324	756	364	309	814	330	311	885	303	381	896	889	374	524	343	435	490
Walton	948	919	763	978	1,117	998	919	997	1,007	859	1,283	1,177	1,131	1,867	1,707	901	1,425	1,386
Washington	311	261	530	276	253	387	280	277	661	359	268	627	371	266	993	367	323	824
TOTALS:	331,493	247,947	687,281	334,870	228,188	608,513	381,697	201,905	552,795	336,541	209,477	602,550	561,993	223,939	651,356	358,848	229,252	705,671



Stacy M. Butterfield, CPA
POLK COUNTY
EXECUTIVE COUNCIL CHAIR



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GILCHRIST COUNTY

BERTILA SOTO
11TH JUDICIAL CIRCUIT JUDGE
SUPREME COURT APPOINTEE

Tiffany Moore Russell, ESQ.
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TOM BEXLEY
FLAGLER COUNTY
HOUSE APPOINTEE

Laura E. Roth, ESQ.
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AGENDA ITEM 5

DATE: June 14, 2024
SUBJECT: Payment Workgroup Update
COMMITTEE ACTION: Information Only

APPROVAL OF PAYMENT PLAN FORM

The payment plan form was approved by the PIE committee on March 15, 2024. The Executive Council held off on voting at the March 18, 2024 meeting to allow the Council and Clerks time to review and understand the form. The follow-up request to the Executive Council is to approve that the Clerks start filling out the form in October.

REVIEW OF BUSINESS RULES

At the last meeting the workgroup discussed the current business rules and their consistency with best practices.

Don Murphy updated the group that the FCCC Compliance business rules for collection have been completed. It will be going forward to the PIE committee and executive council for approval.

ROLL-OUT AND PUBLICITY

Once the Executive Council approves the payment plan form, training will be scheduled for all clerks' offices prior to roll out. Don Murphy and some members of the workgroup will be included to train the clerks' offices.

- Publicity of Payment Plan training should begin in June
- Online training in Summer TBD
- Data reporting begins in October 2024

Our Mission: As a governmental organization created by the Legislature, we evaluate Clerks' court-related budgetary needs, and recommend the fair and equitable allocation of resources needed to sustain court operations.

NEXT STEPS: ASSESSING EFFECTIVENESS OF THE PAYMENT PLAN

The workgroup's plan after the rollout of the form is to assess the effectiveness of the business plan.

- How do we determine the effectiveness of the payment plan?
- Do we need to collect other data on effectiveness – cost, time, and other resources?

COMMITTEE ACTION: Information only

LEAD STAFF: Nike Campbell, Budget Manager

County:

Contact:

E-Mail Address:

Report Month:

Version #:

CASES ON A PAYMENT PLAN													COMMENTS	
	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	YTD Total	
A1 Circuit Criminal														
Cases Placed on a Payment Plan													0	Circuit Criminal
A2 County Criminal														
Cases Placed on a Payment Plan													0	County Criminal
A3 Juvenile Delinquency														
Cases Placed on a Payment Plan													0	Juvenile Delinquency
A4 Criminal Traffic - UTCs														
Cases Placed on a Payment Plan													0	Criminal Traffic - UTCs
A5 Circuit Civil														
Cases Placed on a Payment Plan													0	Circuit Civil
A6 County Civil														
Cases Placed on a Payment Plan													0	County Civil
A7 Probate														
Cases Placed on a Payment Plan													0	Probate
A8 Family														
Cases Placed on a Payment Plan													0	Family
A9 Juvenile Dependency														
Cases Placed on a Payment Plan													0	Juvenile Dependency
A10 Civil Traffic - UTCs														
Cases Placed on a Payment Plan													0	Civil Traffic - UTCs
A11 Multiple Case Types														
Cases Placed on a Payment Plan													0	Multiple Case Types
Total Cases on a Payment Plan =	0	0	0	0	0	0	0	0	0	0	0	0	0	

Number of Active Payment Plans ¹ on 9/30/22	PAYMENT PLANS												YTD Total	COMMENTS	
Number of Payment Plans ²														0	
Number of Removed Payment Plans - Satisfied ³														0	
Number of Removed Payment Plans - Defaulted ⁴														0	
Number of Removed Payment Plans - Other ⁵														0	
Total Active Payment Plans =	0	0	0	0	0	0	0	0	0	0	0	0	0		

NOTES

- "Number of Active Payment Plans" in cell D45 includes all active payment plans as of September 30th.
- "Number of Payment Plans" on Line 46 includes all new payment plans added for the month.
- "Number of Removed Payment Plans - Satisfied" on Line 47 includes active payment plans paid in full and no longer tracked.
- "Number of Removed Payment Plans - Defaulted" on Line 48 includes active payment plans that defaulted on payment and no longer tracked.
- "Number of Removed Payment Plans - Other" on Line 49 includes active payment plans that are otherwise no longer tracked. Please include explanation in the Comments section in Column R.
- Submit reports in Excel format to reports@flccoc.org.



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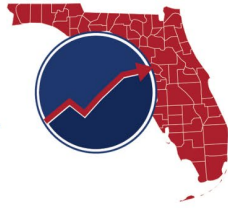
PAYMENT PLAN COUNTING BUSINESS RULES
Monthly Payment Plan Report - PILOT
Effective October 1, 2022

The goal of these rules is to ensure the consistent and accurate counting of cases on a payment plan. These business rules are in draft form for the work of a pilot group of counties.

Reporting Guidelines

1. In sections A1 through A11, count the number of cases placed on a payment plan per month by court type.
 - a. Do not count the total number of payment plans.
2. If multiple cases are placed on a single payment plan, count by court division, if possible. If you cannot break out the court divisions of the cases placed on a payment plan, report the total number of cases on Line 41, section A11, Multiple Case Types.
3. In cell D45, enter the total number of payment plans tracked by your office, as of September 30, 2022.
4. The total number of new payment plans should be entered on Line 46.
 - a. For counties that create a new payment plan per case, this number will equal the totals on Line 43.
 - b. For counties that combine multiple cases into a single payment plan, this number will be less than the total on Line 43.
5. On Line 47, enter the total number of payment plans that have been removed; satisfied/paid in full, defaulted, or otherwise removed and are no longer being tracked.
6. If a case is added to an existing payment plan the case should be counted under the appropriate court division but no changes made to payment plan amount because that plan should already be captured in the total.
7. If a previously defaulted case is placed on a payment plan again, the case and payment plan should be added again.

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AEGENDA ITEM 6

DATE: June 14, 2024
SUBJECT: PAC Framework
COMMITTEE ACTION: Pending further discussion

OVERVIEW:

The PAC Framework/Case Weights has not been updated since 2017-18 and requires revision to facilitate the budget process.

1. Please review the most recent PAC framework: [PAC 2017-18 framework](#).
2. Establish a workgroup to commence the process of updating the PAC 2017-18 framework.
3. Further discussion, as necessary.

COMMITTEE ACTION: Pending further discussion

Our Mission: As a governmental organization created by the Legislature, we evaluate Clerks' court-related budgetary needs, and recommend the fair and equitable allocation of resources needed to sustain court operations.

Compliance CPR Training Update

**Compliance
CPR Training**

COMMUNICATIONS

CIS COMPLIANCE
IMPROVEMENT
SERVICES

CCOC
FLORIDA OFFICE OF
OPERATIONS COMPLIANCE

Promotes excellence in efficiency through compliance best practice instruction

BEST PRACTICE!



The need for qualified compliance specialists has grown. Compliance CPR is the focused training that will keep teams aligned with best practices in communication, process improvement, and reporting.

Communications Module 1 training conducted at 7 sites: Jackson, Leon, Duval, Seminole, Palm Beach, Charlotte, & Pinellas

Out of the 7 events held during the past 6 weeks we worked with 30 different counties and 84 attendees. Over 60% of surveys were completed with a 5.0 rating on program instruction.

CPR Communication Training Feedback

"It was our absolute pleasure to be a host site and participate in the Compliance CPR training. I was very pleased with the material, presentation, group interaction, and overall training component. Great job, Don, and stage producer Doug! I hope that all goes well with the remainder of your training sessions."

Rose Devoe, Director to the Clerk of Court, Duval County Clerk of the Court

"Thanks for a great session! I already started sharing information with the staff. "

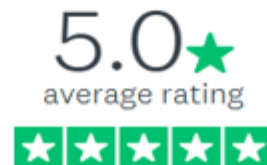
Mary Heather Verzaal, Manager, Court Operations -Customer Service, Palm Beach Clerk of the Circuit Court

"Thank you so much for scheduling this additional training in Pinellas and for providing my staff with some real-life tools they can use in their day-to-day interactions with customers. My staff and I spoke after the training to discuss how important this is to all of our front-facing customer service team members."

**Katherine Carpenter, J.D., Director, Court and Operational Services
Office of Ken Burke, Clerk of the Circuit Court and Comptroller**

How well did the instructor present the material (1 being the lowest and 5 being the highest)?

Answered: 50 Skipped: 1





Virtual CPR Completed

CPR Module 2a- Process Improvement Webinar training held **May 14th**. We had 68 attendees representing 28 counties. In meeting polls were well received and we had an active Q & A session. Over 40 surveys scored 4.8 out 5.0 on course and instructor.

CPR Module 3a –Reporting Analytics training, **May 21st**. We had 73 attending, representing 32 counties. There were 50 surveys received with an average score on training and instructor of 4.8. Our next training, the second part of process improvement is set for June 13th followed by part b of reporting training.



CPR Training June 2024

Module 2b June 13th- 9:30 am – 11:30 am- Process Improvement- via Zoom. To register click the [Module 2b link](#).

Module 3b June 27th- 9:30 am – 11:30 am- Reporting Analytics- via Zoom. To register click the [Module 3b link](#).

Module 4, July 18th CPR Summary & Certificate Ceremony Seminole Clerk's Office with Zoom option. All in attendance will be presented certificates for completing all CPR modules.



Palm Beach Communications training held May 25th.

Homework & Webinar Recordings

After each training session, attendees are assigned homework to reenforce compliance learning. The material is posted on the CIS website at [CPR Training 24 - Compliance Improvement Services](#). Included are handouts and a recording of each virtual session.

The screenshot shows a Zoom webinar interface. The main content area displays a slide with the following text: "Compliance CPR Training" in a blue box, "Module 2a" in white, and "process improvement" in white handwritten-style font. A hand is visible on the right side of the slide, holding a blue marker and drawing a white arrow that points from the bottom left towards the top right. The Zoom interface includes a top bar with a smiley face icon, the title "Compliance CPR - Module 2a", and the name "Don Murphy". On the right side, there is a list of participants: "Don Murphy" (with a profile picture), "Douglas Isabelle", and "Melissa Holland" (listed twice). The bottom of the screen shows a video player with a play button, a timestamp of "1:31:43", and various control icons including volume, closed captions, chat, settings, and the Vimeo logo.