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PIE COMMITTEE MEETING  
June 11, 2025

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**STACY M. BUTTERFIELD, CPA**  
 POLK COUNTY  
 EXECUTIVE COUNCIL CHAIR

**LAURA E. ROTH, ESQ**  
 VOLUSIA COUNTY  
 VICE CHAIR

**TARA GREEN**  
 CLAY COUNTY  
 SECRETARY/TREASURER

CRYSTAL K. KINZEL  
 COLLIER COUNTY  
 SENATE APPOINTEE

TODD NEWTON  
 GILCHRIST COUNTY

JODY PHILLIPS  
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NADIA DAUGHTREY  
 DESOTO COUNTY

JASON L. WELTY  
 EXECUTIVE DIRECTOR

BERTILA SOTO  
 11TH JUDICIAL CIRCUIT JUDGE  
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 ORANGE COUNTY

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

## PERFORMANCE IMPROVEMENT AND EFFICIENCIES COMMITTEE MEETING

June 011, 2025

Meeting: 9 AM – 10:30:00 AM, Eastern

Zoom Link: <https://us06web.zoom.us/j/86000133790?pwd=VkYDrEyp70UxwF8CmMCvCTeLwbitqmK.1>

Meeting ID: 860 0013 3790; Password: 221854

Conference Call: 1 305 224 1968; Access Code: 860 0013 3790

- 1) Call to Order and Approve Agenda ..... Hon. Laura Roth
- 2) Welcome to the new WG Members ..... Hon. Laura Roth
- 3) Approve Minutes from the 02/07/25 Meeting ..... Hon. Laura Roth
- 4) Cases and Subcases Update ..... Johnny Petit
- 5) PMAP Update ..... Johnny Petit
- 6) SMART Action Plans Update ..... Johnny Petit
- 7) Workgroup Updates
  - PAC Workgroup Update ..... Hon. Tara Green
  - Payment Plan Workgroup Update ..... Leonard Carper
  - Future Performance Workgroup Update ..... Jason Welty
  - Case Counting and Case Weight Workgroup Update ..... Jason Welty
  - Workgroup recruitment ..... Johnny Petit
- 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), Traci Perry (Citrus)



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## AGENDA ITEM 2

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**DATE:** June 11, 2025  
**SUBJECT:** Welcome New WG Members  
**COMMITTEE ACTION:** Informational

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**OVERVIEW:** The PIE Committee is delighted to welcome our newest workgroup members and to thank each of you for adding your talent, time, and fresh perspective to the PIE Committee's ongoing projects.

**Angela Gary-Austin** – PAC; Case Counting Business Rules; Future Performance Measures; Payment Plans

**Leonard Mattison** – Payment Plans

**Jennifer Kirby** – PAC; Future Performance Measures; Payment Plans; Case Weights; Case Counting Business Rules

**Shanice Mays** – PAC

**Maya Hendry** – PAC

**Very Reyna** – Future Performance Measures

**Michelle Hernandez** – Payment Plans

**Catalina Murphy** – PAC

**Emily Horan** – Future Performance Measures

**Karina Rodriguez-Matzen** – PAC

**Andrea Rocha** – PAC

**Rita Rodriguez** – PAC

**Eric Musgrove** – Future Performance Measures

Your willingness to serve strengthens every aspect of our performance measure, case-counting, case weights, and payment-plan workgroups. We look forward to your insights and appreciate your commitment to helping the PIE Committee advance consistent, data-driven improvements for Florida's Clerks of Court.



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*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.*

MEMO AGENDA ITEM 2 -WG Members

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## Minutes of February 07, 2025 Performance Improvement & Efficiencies (PIE) Committee Meeting

*These minutes summarize committee actions and key discussion points; they are not a verbatim transcript. All adopted motions appear in **bold**. All staff action items are noted in **bold red**.*

### Agenda item 1. Call to Order and Adoption of Agenda

The meeting convened via Zoom at 1:00 p.m. Chair **Laura E. Roth** (Volusia County) welcomed participants and asked Johnny Petit, CCOC Actuarial Performance Analyst, to conduct a roll call. Nine members were present: Clerks **Gary Cooney** (Lake), **Tara Green** (Clay), **Crystal Kinzel** (Collier), **Michelle Miller** (St. Lucie), **Matt Reynolds** (Putnam), **Victoria Rogers** (Hardee), **Clayton Rooks** (Jackson), **Doug Chorvat Jr.** (Hernando), and Chair **Laura E. Roth**. Clerks Stacy Butterfield (Polk), Brenda Forman (Broward), and incoming Citrus County Clerk Traci Perry were unable to attend.

**On motion of Clerk Green, seconded by Clerk Miller, the agenda was approved without objection.**

### Agenda Item 2. Welcome to Clerk Traci Perry (Citrus County) to the PIE Committee

Although unable to join this session, Clerk Perry was formally introduced. Chair Roth noted that she succeeds Clerk Angela Vick and brings twenty-three years of Citrus County court-system experience, most recently as Chief of Staff. Members look forward to her participation at the next meeting.

### Agenda Item 3. Approval of Prior Minutes

The draft minutes of November 4, 2024 were reviewed. Clerk Kinzel complimented staff on the level of detail. **On motion of Clerk Kinzel, seconded by Clerk Rooks, the minutes were adopted as presented.**

### Agenda Item 4. Case and Sub-Case Trends (Q1 CFY 2024-25)

Mr. Petit presented first-quarter case-filing data. While overall filings declined slightly year-over-year, they remain 0.79 percent above the CFY 2018-19 baseline. A striking 90 percent increase in auto-negligence filings was observed. Several counties failed to submit complete data, producing gaps that complicated analysis. Members expressed concern that large swings, particularly double-digit decreases in some mid-sized counties, might stem from data-entry errors rather than true workload changes.

Clerk Kinzel emphasized that reliable, timely submissions are essential, both for accurate statewide reporting and for any future budget methodology. Chair Roth added that substantial variances can appear suspicious to readers unfamiliar with local conditions and asked staff to improve explanatory notes.

**ACTION – Mr. Petit will (a) re-label every chart column by quarter to avoid confusion, (b) insert disclaimers whenever a variance exceeds roughly 40–50 percent, and (c) identify counties with missing or late data. He will work directly with those counties to secure corrected submissions.**

### **Agenda Item 5. Performance Measures & Action Plans (PMAP) – First Quarter Report**

Mr. Petit explained that twelve counties required no corrective action this quarter, a modest improvement. The detailed report, including county-level tables, will be posted to the CCOC website the week of February 10; committee members will receive the link by email.

Clerk Kinzel reiterated that late or incomplete PMAP data erodes the committee's ability to spot systemic issues. Mr. Petit described CCOC's reminder protocol and noted that many counties finalize their files only after receiving error notices. The report itself was accepted on motion of Clerk Kinzel, seconded by Clerk Chorvat, with the understanding that staff continue pressing for on-time compliance.

### **Agenda Item 6. Transition to SMART Action Plans**

To make action plans genuinely useful, Mr. Petit proposed adopting SMART criteria, Specific, Measurable, Achievable, Relevant, Time-bound, for both internal and external performance shortfalls. Two examples plans were shared: one illustrating precise staffing adjustments to improve docket timeliness, the other showing how a clerk's office might address an externally driven collections issue.

Members agreed that clerks should pilot the format before full rollout. **Clerk Green moved, seconded by Clerk Kinzel, that CCOC distribute guidance and templates to all committee members by Wednesday, February 12, and that each member recast at least one recent internal or external action plan using the SMART model and return it with feedback by March 7.** The motion carried unanimously.

**ACTION – Mr. Petit will email the guidance packet—including examples for external-factor plans, by February 12 and consolidate feedback for discussion at the May meeting.**

### **Agenda Item 7. Compliance Program Update**

Mr. Jason Welty, CCOC Deputy Executive Director, reported that CCOC did not renew its contract with Compliance Improvement Services (CIS) after the principals retired. Staff are drafting a new statewide compliance initiative. Details will be circulated to PIE members once options are fully developed.

### **Agenda Item 8. Work-Group Progress Reports**

#### **PAC Framework Workgroup**

Chair Tara Green summarized the Gainesville kickoff. The team is updating the Clerk's Court Services Framework to reflect statutory changes and technology advances and to support data-driven case-weight adjustments. A second in-person session is being scheduled to integrate new legislative duties into the matrix.

#### **Payment Plan Reporting Workgroup**

Mr. Leonard Carper noted that 53 of 67 clerks now submit monthly payment-plan counts. Confusion persists because earlier forms were labeled "pilot." Revised instructions, training videos, and a clearer business-rule set will be issued to all clerks. Some offices still lack CMS reporting capability; staff will document those obstacles and propose phased solutions.

#### **Future Performance Measures Workgroup**

Mr. Welty reported the re-launch of this group, which meets every five to six weeks. A full-day workshop on March 7 will begin vetting obsolete measures and developing replacements that better reflect current workloads and legislative interests. OPAGGA analysts have agreed to participate so that legislative expectations are understood upfront.

### **Case Counting & Business Rules**

Ms. Denise Bell (for Clerk Cooney) reviewed recent statewide audits. After years of iterative cleanup, residual dollar shifts caused by data corrections are now immaterial (< 0.05 % of budget). The workgroup recommends shifting from annual comprehensive audits to year-round exception monitoring. CCOC analysts will flag anomalies in real time; Ms. Bell's team will update Business Rules by October 1 to address recurring ambiguities.

### **Membership Recruitment**

Mr. Petit observed that Peer Groups 1–3 (small counties) are unrepresented on most workgroups. He will circulate a sign-up link inviting staff from those counties to participate, ensuring that forthcoming products are workable statewide.

**ACTION – Mr. Petit to email Chair Roth a roster of current work-group members and distribute the recruitment link.**

### **Agenda Item 9. Other Business**

Mr. Petit will schedule brief monthly check-ins with work-group chairs to keep deliverables on track for the summer budget cycle. Mr. Welty introduced Matt Guse, who joins CCOC to support PIE projects, policy development, and internal process improvement.

### **Agenda Item 10. Adjournment**

With no further business, Chair Roth adjourned the meeting at 3:01 p.m.



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## AGENDA ITEM 4

**DATE:** June 11, 2025  
**SUBJECT:** Cases/Subcases Update  
**COMMITTEE ACTION:** Information Only

### OVERVIEW:

#### CFY 2024-25 Cases and Subcases Summary

In Quarter 2 of CFY 2024-25, total case filings reached 1,289,643, marking a 9.59% decrease from the previous fiscal year (CFY 2023-24) and a 25.17% increase compared to CFY 2018-19. This trend suggests a return to pre-pandemic volume levels, albeit slightly below last year's peak.

Criminal cases continued their long-term decline, totaling 225,263, which represents a 1.92% decrease from CFY 2023-24 and a 7.66% decline from CFY 2018-19. This gradual reduction reflects ongoing shifts in filing patterns and possibly changes in enforcement or prosecution trends.

Civil cases remained relatively stable year-over-year with 359,775 filings, showing a negligible -0.08% change from the previous year. However, when compared to the peak volume in CFY 2022-23 (561,993 cases), this represents a significant 35.93% drop, although still 66.99% higher than levels reported in CFY 2018-19.

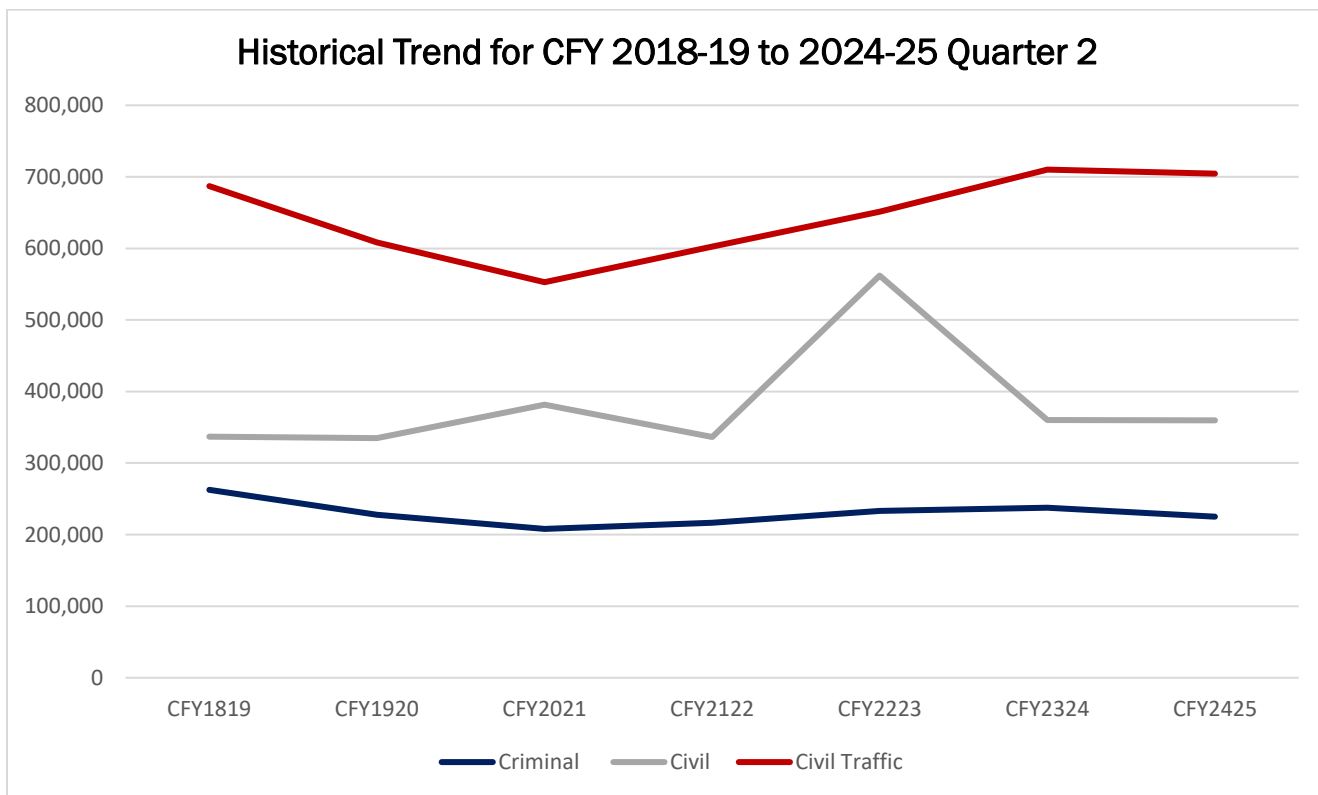
Civil Traffic cases were the most stable and consistent category, recording 704,605 filings in CFY 2024-25—just 0.78% lower than the previous year and 8.10% higher than CFY 2018-19. Notably, they posted a 9.03% increase over the prior year, signaling a modest rebound.

Overall, the data indicates stabilization in total filings after the pandemic disruptions, with Civil Traffic showing moderate growth, Civil filings leveling off after a temporary spike, and Criminal cases continuing to trend downward. These insights are crucial for planning, resource allocation, and assessing workload across the courts.

#### Historical Year-Over-Year for Quarter 2

CFY 2024-25 Quarter 2 Cases					
Case Type	CFY 2020-21	CFY 2021-22	CFY 2022-23	CFY 2023-24	CFY 2024-25
<b>Criminal</b>	207,986	216,607	233,196	237,668	225,263
<b>Civil</b>	381,697	336,541	561,993	360,051	359,775
<b>Civil Traffic</b>	552,795	602,550	651,356	710,156	704,605
<b>Grand Total</b>	<b>1,142,478</b>	<b>1,155,698</b>	<b>1,446,545</b>	<b>1,307,875</b>	<b>1,289,643</b>

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**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  
Total Cases

Attachment 4.1

Agenda Item 4

County	CFY1819	CFY1920	CFY2021	CFY2122	CFY2223	CFY2324	CFY2425	% change from Prior Year
Alachua	13,413	13,120	14,329	13,345	13,020	11,737	11,413	-2.76%
Baker	1,260	1,261	1,143	1,040	1,402	1,161	-	-100.00%
Bay	13,814	12,610	11,063	12,828	13,289	14,136	12,419	-12.15%
Bradford	3,082	2,816	2,598	2,790	3,345	2,681	2,081	-22.38%
Brevard	25,789	25,881	23,878	23,082	25,660	25,269	28,176	11.50%
Broward	124,668	111,226	103,008	93,099	125,624	96,400	98,545	2.23%
Calhoun	440	588	451	680	874	1,225	431	-64.82%
Charlotte	7,551	7,164	7,892	7,993	9,476	10,440	10,149	-2.79%
Citrus	5,840	5,696	6,545	6,519	8,736	8,147	7,647	-6.14%
Clay	10,837	12,055	11,744	9,036	11,968	11,572	10,802	-6.65%
Collier	15,608	16,486	16,394	16,448	18,372	15,893	17,697	11.35%
Columbia	4,118	3,993	4,217	4,025	3,852	3,270	2,125	-35.02%
DeSoto	1,621	1,625	1,684	1,755	1,904	1,886	2,102	11.45%
Dixie	782	609	857	695	926	884	719	-18.67%
Duval	65,304	59,007	70,611	64,728	68,243	63,930	62,676	-1.96%
Escambia	16,845	13,769	13,322	13,207	14,605	12,826	12,765	-0.48%
Flagler	4,290	4,500	3,968	3,824	4,738	4,631	4,958	7.06%
Franklin	542	636	532	618	721	839	1,161	38.38%
Gadsden	2,415	2,483	2,540	2,532	2,416	1,801	1,967	9.22%
Gilchrist	723	857	768	699	807	701	656	-6.42%
Glades	1,844	1,245	1,435	1,018	1,174	1,684	1,075	-36.16%
Gulf	526	542	393	450	597	730	601	-17.67%
Hamilton	1,516	909	1,155	938	1,011	944	1,134	20.13%
Hardee	1,619	1,381	1,612	1,330	1,673	2,035	1,862	-8.50%
Hendry	2,414	2,202	2,217	1,521	2,099	2,344	2,152	-8.19%
Hernando	9,199	8,145	7,944	7,546	9,216	9,070	8,507	-6.21%
Highlands	3,532	3,290	3,072	4,001	3,679	3,675	3,533	-3.86%
Hillsborough	77,249	76,190	76,322	76,982	125,858	84,089	67,841	-19.32%
Holmes	1,066	1,039	1,081	871	887	892	867	-2.80%
Indian River	6,987	6,116	6,125	5,812	6,739	6,483	8,035	23.94%
Jackson	2,614	2,561	2,753	2,198	2,358	1,799	1,984	10.28%
Jefferson	1,173	956	875	1,095	1,310	-	341	#DIV/0!
Lafayette	322	162	180	206	301	251	273	8.76%
Lake	15,069	15,018	13,916	14,623	16,624	14,356	16,875	17.55%
Lee	46,449	31,147	25,726	27,656	33,508	35,134	36,386	3.56%
Leon	13,805	11,734	10,698	13,180	13,803	11,995	13,064	8.91%
Levy	2,089	2,566	2,492	2,620	2,666	2,258	2,599	15.10%
Liberty	591	461	492	461	502	356	615	72.75%
Madison	3,304	2,783	2,153	2,352	2,279	2,976	3,299	10.85%
Manatee	14,545	15,405	14,850	16,642	17,265	16,475	22,142	34.40%
Marion	13,692	13,118	12,748	12,159	14,306	14,385	16,396	13.98%
Martin	9,160	8,573	7,246	7,707	9,244	8,321	12,285	47.64%
Miami-Dade	259,479	221,716	214,465	234,078	305,401	286,311	278,151	-2.85%
Monroe	8,631	7,869	9,935	10,086	11,027	10,582	9,999	-5.51%
Nassau	4,107	4,298	3,447	3,263	3,778	3,757	3,100	-17.49%

County	CFY1819	CFY1920	CFY2021	CFY2122	CFY2223	CFY2324	CFY2425	% change from Prior Year
Okaloosa	9,334	9,998	8,915	8,460	9,788	9,138	8,177	-10.52%
Okeechobee	2,316	1,964	1,665	1,937	2,240	2,713	2,423	-10.69%
Orange	105,072	94,519	102,855	93,560	134,699	128,457	115,348	-10.20%
Osceola	22,261	24,284	21,425	21,006	28,249	25,169	22,627	-10.10%
Palm Beach	83,523	77,943	75,351	76,613	87,561	82,243	91,857	11.69%
Pasco	23,135	19,887	18,489	18,815	21,691	19,044	20,288	6.53%
Pinellas	48,178	46,089	39,439	44,271	48,415	43,422	40,751	-6.15%
Polk	40,323	35,993	31,396	35,400	41,158	43,267	45,096	4.23%
Putnam	3,240	3,383	2,629	3,041	4,047	3,310	3,808	15.05%
Saint Johns	8,998	8,704	8,943	9,383	13,389	11,673	10,441	-10.55%
Saint Lucie	16,749	17,104	14,846	15,633	18,842	16,582	17,525	5.69%
Santa Rosa	8,826	9,266	7,893	7,941	10,330	8,128	7,286	-10.36%
Sarasota	21,814	19,454	19,726	23,309	25,275	23,587	23,927	1.44%
Seminole	27,527	24,024	24,873	24,524	27,301	26,991	27,387	1.47%
Sumter	5,418	5,309	4,613	5,072	5,938	7,239	5,803	-19.84%
Suwannee	2,139	2,238	2,576	1,788	2,422	1,926	1,912	-0.73%
Taylor	1,394	1,103	1,394	1,246	1,244	962	1,302	35.34%
Union	416	395	380	456	432	377	349	-7.43%
Volusia	30,620	28,353	28,513	29,383	38,043	36,775	35,956	-2.23%
Wakulla	1,565	1,483	1,542	1,577	1,809	1,277	1,369	7.20%
Walton	2,572	3,063	2,938	3,288	4,743	3,770	3,196	-15.23%
Washington	1,205	897	1,201	1,257	1,646	1,494	1,210	-19.01%
<b>TOTALS:</b>	<b>1,286,549</b>	<b>1,171,261</b>	<b>1,142,478</b>	<b>1,155,698</b>	<b>1,446,545</b>	<b>1,307,875</b>	<b>1,289,643</b>	<b>-1.39%</b>

Historical Quarter 2  
by Court Division

Agenda Item 4

Attachment 4.2

County	CFY1819			CFY1920			CFY2021			CFY2122			CFY2223			CFY2324			CFY2425		
	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	Civil Cases	Crim. Cases	Civ. Traffic
Alachua	3,235	2,923	7,255	2,883	2,940	7,297	2,857	2,567	8,905	2,977	2,493	7,875	4,546	2,334	6,140	3,579	2,593	5,565	3,472	2,175	5,766
Baker	359	358	543	374	400	487	262	411	470	267	358	415	347	431	624	289	392	480			
Bay	3,268	5,996	4,550	3,074	5,205	4,331	2,304	4,869	3,890	2,275	5,198	5,355	2,854	5,016	5,419	2,513	5,087	6,536	2,897	4,103	5,419
Bradford	395	641	2,046	326	556	1,934	307	545	1,746	315	488	1,987	375	475	2,495	319	418	1,944	363	365	1,353
Brevard	7,104	7,374	11,311	8,182	6,688	11,011	6,860	6,624	10,394	7,343	6,291	9,448	9,083	6,477	10,100	7,328	6,152	11,789	7,795	5,921	14,460
Broward	39,005	18,689	66,974	40,338	14,547	56,341	51,532	11,702	39,774	36,569	11,818	44,712	57,584	13,944	54,096	32,050	13,719	50,631	33,415	13,863	51,267
Calhoun	180	152	108	186	290	112	133	163	155	120	178	382	174	215	485	155	210	860	125	86	220
Charlotte	2,431	2,321	2,799	2,477	2,185	2,502	2,729	2,484	2,679	2,633	2,400	2,960	3,483	2,708	3,285	2,868	2,975	4,597	2,530	2,290	5,329
Citrus	2,038	1,248	2,554	1,946	1,330	2,420	2,052	1,327	3,166	1,996	1,365	3,158	2,520	1,307	4,909	2,116	1,458	4,573	2,432	1,166	4,049
Clay	2,564	1,932	6,341	2,616	2,125	7,314	2,552	1,749	7,443	2,318	1,581	5,137	3,240	1,723	7,005	2,585	1,715	7,272	3,060	1,473	6,269
Collier	4,852	2,917	7,839	4,613	2,329	9,544	4,534	2,667	9,193	3,910	2,847	9,691	5,400	3,115	9,857	4,408	2,683	8,802	4,667	2,283	10,747
Columbia	1,258	969	1,891	1,065	818	2,110	904	1,041	2,272	985	1,002	2,038	1,338	976	1,538	1,111	956	1,203	751	585	789
DeSoto	331	585	705	362	580	683	340	520	824	361	508	886	490	547	867	399	518	969	380	420	1,302
Dixie	188	204	390	198	189	222	210	246	401	184	202	309	202	257	467	204	258	422	191	178	350
Duval	17,425	18,031	29,848	18,283	14,155	26,569	22,424	13,165	35,022	18,263	13,757	32,708	27,731	13,430	27,082	18,898	13,729	31,303	19,092	13,187	30,397
Escambia	4,169	5,923	6,753	4,311	4,282	5,176	4,628	4,102	4,592	4,693	3,735	4,779	5,904	3,789	4,912	4,413	3,981	4,432	4,603	3,737	4,425
Flagler	1,226	1,046	2,018	1,758	968	1,774	1,276	1,106	1,586	1,251	1,092	1,481	1,690	1,156	1,892	1,389	1,227	2,015	1,571	1,163	2,224
Franklin	129	238	175	156	317	163	110	224	198	142	298	178	145	299	277	183	275	381	149	261	751
Gadsden	647	437	1,331	643	520	1,320	535	407	1,598	493	425	1,614	717	417	1,282	605	426	770	689	442	836
Gilchrist	172	166	385	155	223	479	154	220	394	171	178	350	194	218	395	207	220	274	209	168	279
Glades	117	226	1,501	83	151	1,011	119	190	1,126	101	170	747	128	178	868	116	538	1,030	125	179	771
Gulf	214	210	102	179	228	135	151	144	98	157	189	104	183	228	186	158	274	298	157	205	239
Hamilton	158	511	847	188	287	434	169	248	738	133	226	579	181	278	552	160	263	521	167	260	707
Hardee	250	532	837	258	409	714	239	475	898	246	355	729	326	425	922	257	476	1,302	237	448	1,177
Hendry	453	663	1,298	350	721	1,131	406	569	1,242	411	499	611	486	548	1,065	481	636	1,227	449	593	1,110
Hernando	3,105	1,976	4,118	3,013	1,714	3,418	2,905	1,570	3,469	2,856	1,387	3,303	3,669	1,769	3,778	3,017	1,668	4,385	3,328	1,676	3,503
Highlands	1,136	1,036	1,360	1,120	923	1,247	1,047	894	1,131	1,128	944	1,929	1,454	1,059	1,166	1,252	1,004	1,419	1,341	930	1,262
Hillsborough	30,033	16,131	31,085	33,049	14,628	28,513	42,763	13,488	20,071	32,852	14,207	29,923	81,710	15,073	29,075	28,299	16,661	39,129	24,331	16,576	26,934
Holmes	205	265	596	191	355	493	183	341	557	198	361	312	270	306	311	241	300	351	216	312	339
Indian River	1,756	1,726	3,505	1,680	1,515	2,921	1,678	1,290	3,157	1,671	1,335	2,806	2,091	1,612	3,036	1,702	1,379	3,402	1,945	1,267	4,823
Jackson	597	593	1,424	707	428	1,426	484	461	1,808	533	449	1,216	636	483	1,239	532	394	873	649	404	931
Jefferson	103	248	822	104	179	673	103	188	584	114	176	805	155	224	931	-	-	-	142	199	-
Lafayette	89	74	159	52	73	37	75	56	49	55	70	81	59	66	176	73	86	92	97	68	108
Lake	3,923	3,435	7,711	4,167	3,458	7,393	4,080	3,091	6,745	4,053	3,250	7,320	5,777	3,543	7,304	4,835	3,193	6,328	5,351	3,363	8,161
Lee	10,456	8,264	27,729	10,880	7,545	12,722	11,487	5,758	8,481	10,608	8,128	8,920	15,729	7,093	10,686	13,201	7,653	14,280	13,105	7,687	15,594
Leon	4,295	3,344	6,166	4,150	2,642	4,942	3,701	2,198	4,799	3,815	2,564	6,801	4,934	2,513	6,356	4,405	2,507	5,083	4,961	2,439	5,664
Levy	468	697	924	477	654	1,435	532	616	1,344	459	698	1,463	655	624	1,387	517	588	1,153	609	605	1,385
Liberty	79	143	369	76	132	253	81	104	307	78	99	284	76	119	307	62	66	228	87	93	435
Madison	237	240	2,827	248	254	2,281	204	228	1,721	194	194	1,964	259	274	1,746	195	239	2,542	189	242	2,868
Manatee	4,296	3,828	6,421	4,413	3,648	7,344	4,854	3,290	6,706	4,371	3,227	9,044	6,273	3,506	7,486	4,506	3,864	8,105	4,923	4,019	13,200
Marion	5,340	4,071	4,281	4,467	4,139	4,512	4,669	3,900	4,179	4,674	3,816	3,669	6,721	3,879	3,706	5,084	4,403	4,898	5,992	3,907	6,497
Martin	1,814	2,038	5,308	1,640	1,603	5,330	1,798	1,811	3,637	1,778	1,708	4,221	2,261	2,106	4,877	1,838	1,862	4,621	1,956	2,153	8,176
Miami-Dade	54,842	30,915	173,722	50,442	25,739	145,535	64,167	25,028	125,270	60,361	26,656	147,061	126,404	30,266	148,731	79,530	32,111	174,670	74,664	30,707	172,780
Monroe	1,088	2,479	5,064	840	1,865	5,164	919	2,476	6,540	961	2,767	6,358	1,196	2,747	7,084	833	2,269	7,480	908	2,108	6,983
Nassau	893	1,237	1,977	859	1,227	2,212	908	883	1,656	864	856	1,543	1,139	1,008	1,631	881	1,101	1,775	961	947	1,192
Okaloosa	2,513	3,355	3,466	2,492	3,092	4,414	2,218	3,266	3,431	2,255	3,105	3,100	2,824	3,111	3,853	2,322	3,123	3,693	2,476	2,744	2,957
Okeechobee	472	677	1,167	472	680	812	429	569	667	492	746	699	633	714	893	459	644	1,610	468	574	1,381
Orange	25,612	14,682	64,778	25,848	13,038	55,633	33,420	11,971	57,464	26,874	10,966	55,720	42,657	12,087	79,955	27,435	12,579	88,443	24,418	12,319	78,611
Osceola	4,934	3,901	13,426	5,317	3,346	15,621	5,549	2,943	12,933	5,500	2,640	12,866	7,958	3,637	16,654	6,051	3,611	15,507	6,691	3,343	12,593
Palm Beach	22,509	19,520	41,494	19,560	16,578	41,805	20,572	14,150	40,629	18,564	15,198	42,851	24,970	17,185	45,406	18,134	16,260	47,849	19,427	15,533	56,897
Pasco	7,473	7,411	8,251	7,528	5,971	6,388	7,304	4,822	6,363	7,205	4,419	7,191	9,879	4,750	7,062	7,954	4,832	6,258	8,866	4,917	6,505
Pinellas	13,468	14,358	20,352	13,720	12,205	20,164	13,449	10,454	15,536	12,235	12,287	19,749	18,061	12,375	17,979	12,318	12,267	18,837	12,791	11,608	16,352
Polk	10,111	9,695	20,517	10,315	9,489	16,189	9,353	7,945	14,098	9,840	8,349	17,211	13,351	9,162	18,645	11,517	9,856	21,894	12,483	9,063	23,550
Putnam	900	1,275	1,065	1,063	1,207	1,113	859	975	795	921	1,017	1,103	1,330	1,090	1,627	1,033	1,013	1,264	1,017	1,069	1,722
Saint Johns	2,224	2,395	4,379	2,246	2,283	4,175	2,555	2,251	4,137	2,288	2,727	4,368	4,979	2,764	5,646	3,253	2,901	5,519	3,307	2,713	4,421
Saint Lucie	4,295	3,205	9,249	4,112	3,127	9,865	4,339	3,002	7,505	4,221	3,024	8,388	5,280	3,271	10,291	4,498	3,468	8,616	5,269	3,313	8,943
Santa Rosa	1,760	2,129	4,937	1,819	1,862	5,585	2,075	1,554	4,264	1,722	1,765	4,454	2,031	2,257	6,042	1,711	1,947	4,470	1,965	1	



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POLK COUNTY  
EXECUTIVE COUNCIL CHAIR

**LAURA E. ROTH, ESQ**  
VOLUSIA COUNTY  
VICE CHAIR

**TARA GREEN**  
CLAY COUNTY  
SECRETARY/TREASURER

CRYSTAL K. KINZEL  
COLLIER COUNTY  
SENATE APPOINTEE

TODD NEWTON  
GILCHRIST COUNTY

JODY PHILLIPS  
DUVAL COUNTY

TOM BEXLEY  
FLAGLER COUNTY  
HOUSE APPOINTEE

NADIA DAUGHTREY  
DESOTO COUNTY

JASON L. WELTY  
EXECUTIVE DIRECTOR

BERTILA SOTO  
11TH JUDICIAL CIRCUIT JUDGE  
SUPREME COURT APPOINTEE

MICHELLE R. MILLER  
SAINT LUCIE COUNTY  
TIFFANY MOORE RUSSELL, ESQ  
ORANGE COUNTY

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

## AGENDA ITEM 5

**DATE:** June 11, 2025  
**SUBJECT:** CFY 2024-25 Quarter 2 PMAP Report  
**COMMITTEE ACTION:** Approve CFY 2024-25 Quarter 2 PMAP Report

### OVERVIEW:

The CCOC is finalizing the CFY 2024-25 Quarter 2 PMAP report which has been published on the CCOC website (<https://flccoc.org/ccoc-reports/#pr>) and submitted to the Legislature by May 15, 2025.

### 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	99
Filing – Timeliness	10	670	13
Docketing – Timeliness	9	670	11
Timely Juror Payments	7	67	7
Total	76	2037	130

- The total number of Action Plans, as well as the number of counties requiring them, continues to slightly decrease across all standards. Specifically, the total number of counties decreased from 83 to 76, and counties requiring Action Plans decreased from 146 to 130.
- Fourteen counties had no Action Plans: Bradford, Collier, DeSoto, Flagler, Hamilton, Indian River, Lafayette, Leon, Martin, Monroe, Saint Johns, Sumter, Suwannee, and Walton.
- Columbia did not submit any reports; Jefferson did not submit Collection and Jury reports; Baker did not submit Collection and Output reports; and Gilchrist did not submit a Jury report.

**COMMITTEE ACTION:** Approve CFY 2024-25 Quarter 2 PMAP Report  
**LEAD STAFF:** Johnny Petit, Performance Actuarial Analyst



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GENERAL COUNSEL

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## AGENDA ITEM 6

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**DATE:** June 11, 2025  
**SUBJECT:** SMART ACTION PLANS  
**COMMITTEE ACTION:** APPROVE THE SMART ACTION PLANS

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### OVERVIEW:

The SMART Action Plans were proposed in our last meeting to improve the quality and usability of the data collected. As a pilot, clerk offices from the PIE Committee were asked to re-submit their Quarter 1 action plans to assess the level of effort required. This report will include key takeaways and additional recommendations to guide the full implementation.

### Key Takeaways.

The first key takeaway is that most action plans are not reviewed before being submitted to the CCOC. This often results from upper-level managers being unaware of the specific issues, which partially explains why many submissions fail to present a clear plan for resolving the identified problems.

The second takeaway is that some counties struggle to correctly distinguish between internal and external issues. While determining the root cause can sometimes be ambiguous, a well-developed action plan typically reveals whether the issue stems from internal operations or external factors.

Lastly, the pilot revealed that additional training will be necessary to support counties in developing effective, actionable, and properly categorized plans.

### Proposed Plan.

The CCOC will offer a live training session, either in person or via Zoom, to help clerk staff learn how to develop SMART action plans. An additional session will be dedicated specifically to reviewing the SMART framework and ensuring that all submitted action plans include the required components. To support this effort, video tutorials and business rules will be posted on the CCOC website at least one month prior to the official launch and implementation.

### Why Are SMART Action Plans Important?

SMART Action Plans are essential because they bring structure, clarity, and accountability to performance improvement efforts. By being Specific, they provide a clear and focused roadmap that outlines exactly what needs to be done. This eliminates ambiguity and ensures that all stakeholders understand the intended actions. SMART plans also promote

Accountability, as they assign responsibility to specific individuals or teams, making it easier to follow up and ensure that progress is being made.

Furthermore, SMART Action Plans support effective Resource Allocation. When actions are clearly defined and measurable, it becomes easier to justify the need for additional resources such as staffing, training, or technological tools. This, in turn, strengthens Budget Justification, as any resource request is directly tied to a measurable outcome, making it more defensible during budget reviews or funding decisions.

Finally, SMART Action Plans are vital for Performance Monitoring. By including measurable and time-bound components, they allow offices to track progress over time, evaluate what's working, and quickly identify any barriers or challenges. This continuous feedback loop enables timely adjustments and ensures ongoing improvement. Overall, SMART Action Plans help transform goals into actionable steps, leading to more efficient, data-driven, and results-oriented operations.

**COMMITTEE ACTION:** APPROVE THE SMART ACTION PLANS

**LEAD STAFF:** Johnny Petit, Performance Actuarial Analyst

# Business Rule for SMART Action Plans

Counties must submit a reason code and an action plan when performance standards are not met. The objective is to drive improvements in efficiency, document resource shortages, and provide clear accountability for resolving issues within clerks' offices. By following the SMART framework, ensuring that each action is Specific, Measurable, Achievable, Relevant, and Time-bound, offices can track progress, justify resource needs, and align improvement strategies with organizational goals.

## Purpose of the SMART Action Plans

The primary purpose of SMART Action Plans is to create a structured, transparent, and measurable approach for addressing performance issues in county clerk offices. These plans are vital for several reasons:

**Efficiency Improvement:** By outlining precise actions and measurable targets, SMART action plans help clerk offices streamline workflows, reduce delays, and optimize resource allocation. This focus on efficiency directly addresses issues such as staffing shortages, outdated technology, or cumbersome processes.

**Accountability and Performance Monitoring:** When every action plan includes specific, quantifiable, and time-bound goals, it becomes much easier to monitor progress. Clear metrics allow supervisors to determine whether improvements are being achieved and if further intervention is needed. This accountability ensures that every step taken is aligned with the organization's performance standards.

**Resource Documentation:** Many performance issues stem from inadequate resources, such as understaffing or insufficient technology. SMART action plans force offices to document these resource gaps clearly. This documentation is essential not only for internal monitoring but also for justifying additional funding or resource allocation in budget discussions.

**Consistent Communication:** A standardized format (the SMART framework) ensures that all submitted action plans are consistent in detail and scope. This consistency is crucial for comparing performance across different offices and for understanding which strategies are most effective in overcoming common challenges.

# Requirements and Guidelines

## 1. Inclusion of Reason Code & Description:

- Every submitted plan must begin with an identified reason code (e.g., “Staffing – Internal,” “Systems/Conversions – Internal,” “External – Economic Factors”) that clearly explains the performance shortfall.

## 2. SMART Criteria:

- **Specific:** Clearly state the action, detailing which processes, technologies, or personnel will be involved.
- **Measurable:** Include quantifiable metrics (e.g., percentage improvements, error reductions) to track success.
- **Achievable:** Ensure the goals are realistic given current resources and constraints.
- **Relevant:** Tie the action plan directly to the identified performance issue and overall office objectives.
- **Time-bound:** Set clear deadlines and review points.

## 3. Documentation and Accountability:

- The plan should clearly document existing resource gaps (e.g., staffing shortages or technological constraints) and assign responsibility for implementation.
- Clear timelines and milestones must be established to facilitate ongoing performance monitoring.

## 4. Consistency and Clarity:

- Use the same structured format for every plan to allow easy comparison and effective monitoring across counties and offices.

## 5. Submission and Review:

- All plans will be evaluated against these criteria, with feedback provided for any omissions or vagueness. Plans that do not adhere to the SMART framework will be returned for revision.

# Evaluation of SMART Action Plans

## 1. Initial Review Process

### Submission Review:

All submitted action plans are first reviewed by a designated evaluation team at CCOC. The team verifies that each plan adheres to the SMART criteria, ensuring that actions are Specific, Measurable, Achievable, Relevant, and Time-bound.

### Checklist & Rubric:

The evaluation team uses a standardized checklist or rubric to assess key elements such as:

- Clarity of the action (Specific)
- Defined metrics or targets (Measurable)
- Realistic goals given existing resources (Achievable)
- Alignment with overall organizational objectives (Relevant)
- Clear deadlines and milestones (Time-bound)

## 2. Feedback and Revision Process

### Deficiency Identification:

If an action plan lacks details, such as vague descriptions, missing metrics, unrealistic deadlines, or unclear accountability, the evaluation team provides immediate feedback, highlighting the deficiencies and offering suggestions for improvement.

### Return for Revision:

Action plans that do not meet the SMART framework are returned to the originating Clerk Office for revision. The feedback includes specific recommendations (e.g., “Specify which procedures need review” or “Include a quantifiable target for performance improvement”) and a revised submission deadline.

## 3. Ongoing Monitoring and Performance Tracking

### Progress Reviews:

Once an action plan is approved, it enters an active monitoring phase. Progress is reviewed at regular intervals (e.g., monthly or quarterly) to assess whether the defined metrics are being met within the established timeline. This ongoing review includes:

- Checking that milestones are reached on schedule.
- Verifying improvements against the set performance targets.
- Documenting any deviations or emerging issues that may require adjustments to the plan.

### Data-Driven Assessment:

The evaluation team uses quantitative data (e.g., reduction in processing time, percentage of staff

trained successfully) to measure the effectiveness of the action plan. Periodic progress reports are generated to capture trends and compare performance against baseline data.

#### **4. Documentation and Accountability**

##### **Responsibility Assignment:**

Each action plan must clearly state who is responsible for implementation. The evaluation process verifies that accountability is assigned, ensuring that responsible parties are aware of their roles and the expected outcomes.

##### **Record Keeping:**

All action plans, including feedback, revisions, and progress reports, must be documented. This documentation serves as an auditable record of resource gaps, improvements made, and justification for any additional resource requests.

#### **5. Final Performance Review**

##### **Outcome Assessment:**

At the conclusion of the action plan's timeline, a final performance review is conducted. The evaluation team at CCOC will assess whether the plan's goals were met and whether there has been a measurable improvement in performance. This review also will examine the overall impact on efficiency and resource utilization within the clerk offices.

The final review informs future action plans. Lessons learned will be documented and shared across Clerk offices to promote best practices and enhance the effectiveness of subsequent SMART action plans.

# Internal Examples

## Internal Example 1: Overly Broad Process Review

### Inappropriate Action Plan:

"We will review our current processes and implement improvements."

### Why It's Not Effective:

- **Vague:** Does not specify which processes will be reviewed.
- **Not Measurable:** No defined metrics to assess improvements.
- **No Timeline:** Lacks a deadline for completion or implementation.

### Corrected SMART Action Plan:

- **Specific:** Conduct a detailed review of the case filing process to identify the top three bottlenecks.
- **Measurable:** Reduce the average case processing time by 20% and decrease filing errors by 15%.
- **Achievable:** Assign the Quality Assurance team to complete the review using staff interviews and existing documentation.
- **Relevant:** Addresses internal delays that are hindering efficiency.
- **Time-bound:** Complete the review within 45 days and begin implementing improvements within 60 days.

Conduct a detailed review of the case filing process to identify the top three bottlenecks, aiming to reduce the average processing time by 20% and filing errors by 15% within 45 days, and begin improvements within 60 days.

## Internal Example 2: Vague Resource Funding Request

### Inappropriate Action Plan:

"Increase funding to upgrade technology."

### Why It's Not Effective:

- **Non-Specific:** Does not indicate which technology or how funds will be allocated.
- **Not Measurable:** Lacks metrics such as expected improvements in system performance.
- **No Deadline:** No timeline provided for completing the upgrade.

### Corrected SMART Action Plan:

- **Specific:** Allocate funds to upgrade the case management software to version X, focusing on reducing system downtime.
- **Measurable:** Achieve a 50% reduction in downtime and a 25% improvement in processing speed based on IT performance metrics.

- **Achievable:** Collaborate with the IT department and vendor using the approved budget.
- **Relevant:** Directly addresses technology constraints affecting case processing.
- **Time-bound:** Complete the software upgrade within 90 days and review performance improvements at the end of the following quarter.

Allocate funds to upgrade the case management software to version X to reduce downtime by 50% and improve processing speed by 25%, complete the upgrade within 90 days and reviewing performance next quarter.

### Internal Example 3: Unassigned Training Initiative

#### Inappropriate Action Plan:

"Conduct staff training on new procedures."

#### Why It's Not Effective:

- **Lacks Detail:** Does not specify which procedures or the training content.
- **Not Measurable:** No criteria provided to assess the training's effectiveness.
- **No Accountability/Timeline:** Does not assign responsibility or set a deadline.

#### Corrected SMART Action Plan:

- **Specific:** Develop and deliver a training program on updated case management procedures for all clerical staff.
- **Measurable:** Ensure 100% of staff complete the training and score at least 85% on the post-training assessment.
- **Achievable:** Utilize in-house training resources and schedule sessions during low-peak periods.
- **Relevant:** Enhances staff competency and reduces errors in case processing.
- **Time-bound:** Launch the training within 30 days and complete assessments immediately after each session.

Develop and deliver a training program on updated case management procedures for all clerical staff, ensuring 100% completion with an 85% pass rate on post-training assessments, to be launched within 30 days.

### Internal Example 4: Overly Ambitious Target

#### Inappropriate Action Plan:

"Reduce case processing time by 90% within the next month."

#### Why It's Not Effective:

- **Unrealistic:** The target is overly ambitious and not achievable with current resources.
- **Not Measurable in Context:** Although a percentage is given, it's not based on a realistic baseline.

- **Inflexible Timeline:** The one-month deadline is impractical.

#### **Corrected SMART Action Plan:**

- **Specific:** Implement targeted process improvements and assign temporary support staff to address delays in case processing.
- **Measurable:** Aim for a 25% reduction in average processing time from the current baseline.
- **Achievable:** Set realistic expectations based on historical data and available resources.
- **Relevant:** Directly addresses internal delays impacting performance.
- **Time-bound:** Initiate changes within 30 days and achieve the 25% reduction by the end of the quarter (90 days).

Implement targeted process improvements and assign temporary support staff to achieve a realistic 25% reduction in processing time from the current baseline within 90 days, starting changes within 30 days.

### **Internal Example 5: Conflated Multiple Initiatives**

#### **Inappropriate Action Plan:**

"Improve training, reduce staff turnover, and upgrade the case management system all in one plan."

#### **Why It's Not Effective:**

- **Overly Broad:** Bundling multiple initiatives makes it unclear which specific action will drive results.
- **Not Measurable:** No separate metrics for each initiative.
- **Lacks Focus:** Without distinct timelines and responsibilities, tracking progress is difficult.

#### **Corrected SMART Action Plan:**

- **Specific:** Focus solely on reducing staff turnover by enhancing the onboarding process for new clerks.
- **Measurable:** Reduce staff turnover by 15% over the next six months, as recorded by HR metrics.
- **Achievable:** Implement a structured onboarding program with mentorship and scheduled check-ins.
- **Relevant:** Stabilizing staffing levels will lead to improved case processing and overall office efficiency.
- **Time-bound:** Develop and launch the onboarding program within 45 days and conduct quarterly reviews of turnover rates.

Focus on reducing staff turnover by enhancing the onboarding process for new clerks to achieve a 15% reduction over six months, launching the program within 45 days with quarterly reviews.

## External Examples

### External Example 6: Vague External Collections Efforts

#### Inappropriate Action Plan:

"We will continue working with our collections agency to improve external collections."

#### Why It's Not Effective:

- **Non-Specific:** Does not outline how the agency will be managed or what improvements are expected.
- **Not Measurable:** Lacks clear performance metrics or targets.
- **No Deadline:** There is no timeline for achieving improved collections.

#### Corrected SMART Action Plan:

- **Specific:** Negotiate a revised contract with the external collections agency that establishes a structured follow-up process for overdue payments.
- **Measurable:** Increase the collection rate by 15%, as measured by quarterly financial reports.
- **Achievable:** Utilize historical data to set realistic targets and define clear contract terms.
- **Relevant:** Enhances external collections, directly impacting revenue recovery.
- **Time-bound:** Finalize the revised contract within 60 days and monitor improvements over the following quarter.

Negotiate a revised contract with the collections agency to establish a structured follow-up process for overdue payments, targeting a 15% increase in collection rates within 60 days and monitoring improvements quarterly.

### External Example 7: Non-Specific External Outreach on Payment Reminders

#### Inappropriate Action Plan:

"We will remind defendants to pay their fines through multiple methods."

#### Why It's Not Effective:

- **Lacks Detail:** Does not specify which methods or how many reminders will be sent.
- **Not Measurable:** No defined target for improving payment compliance.
- **No Timeline:** There is no deadline for implementation.

#### Corrected SMART Action Plan:

- **Specific:** Implement an automated system to send text and email reminders to defendants with overdue fines.
- **Measurable:** Increase the rate of timely payments by 20% as tracked by the collections database.

- **Achievable:** Leverage current IT infrastructure and partner with a proven vendor.
- **Relevant:** Addresses external payment delays, thereby improving overall collection performance.
- **Time-bound:** Deploy the system within 45 days and assess its effectiveness at the end of the second quarter.

Implement an automated system to send text and email reminders to defendants with overdue fines, aiming to boost timely payments by 20% within 45 days and reviewing effectiveness at the end of Q2.

### **External Example 8: Unstructured External Economic Adjustment**

#### **Inappropriate Action Plan:**

"The local economy affects collections, and we will try to address it."

#### **Why It's Not Effective:**

- **Vague:** No clear action steps are provided.
- **Not Measurable:** Lacks specific targets to quantify improvement.
- **No Timeline:** Does not indicate when changes will be implemented or evaluated.

#### **Corrected SMART Action Plan:**

- **Specific:** Develop a financial hardship program for defendants, including extended payment plans and fee reductions where eligible.
- **Measurable:** Improve overall collection rates by 10% and reduce the number of delinquent accounts by 15%, as reported quarterly.
- **Achievable:** Pilot the program in one jurisdiction and expand based on successful outcomes.
- **Relevant:** Tailors the collections approach to meet the challenges posed by local economic conditions.
- **Time-bound:** Launch the pilot program within 60 days and review its impact after 3 months.

Develop a financial hardship program for defendants that offers extended payment plans and fee reductions, targeting a 10% improvement in collection rates and a 15% reduction in delinquent accounts within 60 days, with a review after 3 months.

### **External Example 9: Ambiguous External Policy Enforcement**

#### **Inappropriate Action Plan:**

"We will work on enforcing driver's license suspensions."

#### **Why It's Not Effective:**

- **Unclear:** Does not detail how enforcement will be carried out.

- **Not Measurable:** Lacks specific targets, such as the number of suspensions to be enforced.
- **No Timeline:** No clear deadlines for implementation or review.

#### **Corrected SMART Action Plan:**

- **Specific:** Implement a policy to suspend driver's licenses for defendants with delinquent fines exceeding \$500 by collaborating with the DMV and local law enforcement.
- **Measurable:** Increase enforcement actions by 30% over the next quarter, as documented in enforcement logs.
- **Achievable:** Utilize existing legal frameworks and establish clear inter-agency communication channels.
- **Relevant:** Enhances external policy enforcement to improve collection rates and accountability.
- **Time-bound:** Enact the policy within 30 days and conduct a performance review at the end of the quarter.

Implement a policy to suspend driver's licenses for defendants with fines over \$500 by collaborating with the DMV and local law enforcement, aiming for a 30% increase in enforcement actions within 30 days and a performance review at the end of the quarter.

#### **External Example 10: Overly Broad External Partnership Enhancement**

##### **Inappropriate Action Plan:**

"Enhance partnerships with external agencies to improve collections."

##### **Why It's Not Effective:**

- **Too Broad:** Lacks specificity regarding which agencies and how the partnerships will be enhanced.
- **Not Measurable:** No clear metrics to gauge the impact of these partnerships.
- **No Deadline:** Missing a timeline for finalizing and evaluating the agreements.

##### **Corrected SMART Action Plan:**

- **Specific:** Establish formal data-sharing agreements with three key external agencies (local law enforcement, DMV, and state collections office) to streamline case tracking and collection efforts.
- **Measurable:** Boost the collection rate by 12% over the next two quarters, as evidenced by integrated data reports.
- **Achievable:** Leverage existing legal frameworks and communication channels to facilitate these partnerships.
- **Relevant:** Improves external collaboration to directly address collections barriers.
- **Time-bound:** Finalize all agreements within 90 days and evaluate their impact on collections after 6 months.

Establish formal data-sharing agreements with three key external agencies (local law enforcement, DMV, and state collections office) to streamline case tracking and boost collection rates by 12% over two quarters, finalizing agreements within 90 days and evaluating impact after 6 months.



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## AGENDA ITEM 8.1

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**DATE:** June 11, 2024  
**SUBJECT:** PAC Framework Workgroup Update  
**COMMITTEE ACTION:** Informational

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**OVERVIEW:** The PAC Framework Workgroup has convened seven times, both in person and via Zoom, to evaluate and modernize the existing PAC (Planning, Accountability, and Court Services) framework. The primary goal of the workgroup is to redesign the Clerk court services framework to better support data-driven analysis and informed decision-making.

The PAC workgroup has made significant progress across several key deliverables:

- Finalization of the redesigned PAC Framework structure and layout. Currently 95% complete, this effort focuses on making the framework more intuitive and analytically useful.
- Consolidated framework update with tasks and statutory references, this task is 10% complete and will tie specific duties to their statutory requirements.
- Template for capturing the impact of local administrative orders, Now in the design stage, this tool will help standardize how local variations are documented.
- Strategy for maintaining the framework and integrating future duties. Under active discussion, this strategy aims to ensure the framework remains relevant and adaptable.
- Crosswalk documents showing PAC framework alignment with workgroups. This deliverable is also in the discussion stage and will map framework elements to specific workgroup responsibilities.
- Draft glossary of shared definitions. This task is being discussed to establish consistent terminology across counties and committees.
- Proposed data validation workflow. In the design stage, this will provide a method for verifying the accuracy and credibility of reported data.
- Future discussion: Time study plan, automation impact analysis, and a draft training and implementation roadmap. These are currently in the early discussion phase and will guide how the framework is operationalized and scaled across the state.

**COMMITTEE ACTION:** Informational

**Lead Staff:** Hon. Tara Green, Clay County Clerk of Court and Comptroller.

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## AGENDA ITEM 8.2

**DATE:** June 11, 2025  
**SUBJECT:** Payment Plan Workgroup  
**COMMITTEE ACTION:** Informational

### OVERVIEW: Overview

The Payment Plan Workgroup convened on April 25, 2025, at 10:51 a.m. The meeting was led by Leonard Carper, the new point of contact for the Florida Clerks of Court Operations Corporation (FLCOC). The group discussed ongoing progress, challenges, and next steps related to payment plan data collection and reporting. A major focus was placed on refining the reporting instructions and business rules to improve data accuracy and usability.

### Discussion Highlights

Key issues discussed included the need for clearer guidance on how to report multiple cases under a single payment plan and how to manage data purging practices. The workgroup emphasized the importance of standardizing the use of reporting categories to improve consistency across counties. Although the initial launch of the report submission process was slower than expected, there has been a steady upward trend in county participation. Monthly report submissions increased as follows:

October: 44 reports, November: 43 reports, December: 51 reports, January: 59 reports, February: 63 reports, March: 62 reports, April: 64 reports.

This growth indicates improved engagement and interest from the counties, despite early challenges.

### Follow-Up Actions

Several action items were identified to support the continued success of the initiative:

- Review the current reporting instructions and examples, and provide feedback on areas that require clarification or updates.
- Reach out to counties that frequently use the “Other” category to understand how it is being applied and explore the potential for a more precise definition.
- Prepare a summary presentation of the reported payment plan data to be shared with the PIE Committee for broader visibility and discussion.

**Purpose of the Workgroup**

The Payment Plan Workgroup is tasked with developing clearer and more consistent reporting instructions and business rules. It also aims to enhance training materials to better support county staff responsible for data entry. In the long term, the workgroup seeks to connect payment plan reporting to collection actions and financial monitoring efforts to improve transparency and accountability in court collections.

**COMMITTEE ACTION:** Informational  
**Lead Staff:** Leonard Carper, Data Integrity Officer



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## AGENDA ITEM 8.3

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**DATE:** June 11, 2025  
**SUBJECT:** Future Performance Workgroup  
**COMMITTEE ACTION:** Informational

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### OVERVIEW:

Since the relaunch of the New Performance Measure Workgroup, we have held a total of six meetings, including one in-person session. These meetings have focused on evaluating the current set of performance measures used across Florida's 67 clerk offices, identifying opportunities for improvement, and laying the groundwork for a more standardized, data-driven approach. The group began by reviewing the historical Article Five Performance and Accountability system, which originally included 330 tasks, 35 activities, 9 services, and 3 programs. From this, 31 key performance measures were retained, focusing on fiscal management, operational efficiency, and effective collections.

Throughout our sessions, we discussed challenges such as inconsistent definitions outdated metrics, and the need for a more unified reporting framework. The workgroup also considered incorporating new measures related to customer service, technology usage, and employee retention. To support this initiative, a statewide survey was distributed to all clerk offices. The survey was designed to gather information on:

- What each office currently measures for performance tracking.
- Which measures go beyond statutory requirements.
- Recommendations for new or revised performance metrics.
- Internal practices related to performance data collection and usage.
- Suggestions for improving the overall effectiveness of performance measures in clerk operations.

The survey results will help the workgroup identify common priorities and challenges across counties, and they will guide the development of improved reporting templates, definitions, and recommendations moving forward.

Thank you to all members of the workgroup who have participated in the meetings and survey process. Your input has been essential in shaping a more practical and meaningful performance measurement system for our clerks' offices.

**COMMITTEE ACTION:** Informational  
**Lead Staff:** Jason Welty, CCOC Executive Director

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## AGENDA ITEM 8.4

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**DATE:** June 11, 2025  
**SUBJECT:** Case Weight Workgroup  
**COMMITTEE ACTION:** Informational

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**OVERVIEW:** Case Counting and Case Weight Workgroup Update.

**COMMITTEE ACTION:** Informational

Jason Welty, CCOC Executive director, will provide an update on the Case Counting and Case Weight.



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## AGENDA ITEM 8.5

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**DATE:** June 11, 2025  
**SUBJECT:** Workgroup Recruitment  
**COMMITTEE ACTION:** Informational

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**OVERVIEW:** We would like to thank everyone who has joined the workgroups so far. However, we are still seeking additional members to join the PIE Committee Workgroup. We encourage participation from all peer groups to ensure broad representation and diverse perspectives. If you are interested in joining, please use the following link to sign up: <https://forms.office.com/r/ujQOAFKdfx>.

**COMMITTEE ACTION:** Informational  
**Lead Staff:** Johnny Petit