



Minutes of June 11, 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 **bold**. All staff action items are noted in **bold red**.*

Agenda item 1. Call to Order and Adoption of Agenda

The meeting was held via Zoom at 9:00 a.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 **Doug Chorvat Jr.** (Hernando), **Gary Cooney** (Lake), **Brenda Forman** (Broward), **Tara Green** (Clay), **Crystal Kinzel** (Collier), **Michelle Miller** (St. Lucie), **Traci Perry** (Citrus), **Matt Reynolds** (Putnam), **Victoria Rogers** (Hardee), **Clayton Rooks** (Jackson), and Chair Lauras Roth. Clerks Stacy Butterfield (Polk) and Clayton Rooks (Jackson) were unable to attend.

A motion to approve the agenda with the proposed edits was made by Chair Roth and seconded by Clerk Kinzel. The motion was approved with no objection.

Agenda Item 2. Welcome to the new WG Members

Chair Roth expressed how excited the committee was to welcome new talent to the PIE committee workgroups. She extended a welcome to the new members of the workgroup on behalf of the committee and thanked them for their willingness to serve.

Agenda Item 3. Approval of Prior Minutes

The draft minutes of February 7, 2025, were reviewed.

A motion to approve the minutes with no proposed edits was made by Clerk Perry and seconded by Clerk Kinzel. The motion was approved with no objection.

Agenda Item 4. Case and Sub-Cases Update

Mr. Petit opened the update by stating there was a decline of 9.95 from the previous year due to the high volume of Civil County Cases. However, when compared to the previous 5 years, this was the highest they had been in the quarter, if they removed last year. The bulk of the increase was coming from Civil and Civil Traffic with a decline in Criminal since last year. Mr. Petit believed they were getting back from the pandemic upon reviewing the numbers they were currently seeing.

Clerk Kinzel asked if a cumulative summary would be possible, combining the quarters as they went through the year, because it would save time for her county and may be helpful for other counties. Chair Roth agreed it would be a good idea. Mr. Petit stated he would include this in the next report. Clerk Green questioned what the individual data was used for. Mr. Petit clarified that he used the data to look at flux trends and find reasons for any deviation from the norm in it. Looking only at the cumulative data made it harder to see when things happen in specific quarters or months.

Clerk Roth used the example of PIP coming into Volusia County. She mentioned that a doubling in caseload overnight could cause some performance issues and that keeping track of the counties who are dealing with the most intense workload could be relevant. Mr. Welty responded that he looked at the

revenue projection and why things would be increasing using small claims “blowing up” as an example. He reviewed the quarterlies and assessed what counties were being hit the hardest and reached out to those counties to get an insight on any early signs of trouble, however it did not happen uniformly across the state with cases that may blow up first before happening elsewhere. This quarterly assessment helped to provide them with what was happening in any given county and allowed them to ask why that was.

Clerk Kinzel asked if there was a way for other counties to help those who were not reporting, she felt it was important for every clerk to be supported and have the data for the years and quarters as required. Clerk Green asked which case mixes were presented in that report. Mr. Petit replied it was all the cases grouped into two categories in the second table, those being all civil together, all criminal together, and all traffic together, with the top table combining all three. Clerk Green asked if there was a statewide downward trend and if it's a particular case type or not. Mr. Petit said the decrease was all over the map but when looking at total cases and comparing them to last year, the decrease was due to an increase in cases last year across all counties.

ACTION – Mr. Petit will create a cumulative summary combining the quarters as they go through the year, to include in the next report.

Agenda Item 5. Performance Measures & Action Plans (PMAP) Update

Mr. Petit mentioned that fourteen counties did not have action plans in any categories. For the handful of counties who did not submit they were being communicated and worked with to correct any errors and provided with support. Clerk Kinzel gave the idea of changing the language from “no action plan” to “did not require action plan” to help clarify the language. Chair Roth agreed. Clerk Green pointed out an error in the header of the case count report saying civil traffic twice, which needed to be corrected to say civil traffic and criminal traffic. Mr. Petit assured her that the numbers were correct, but the header needed to be adjusted.

A motion to approve the quarter two PMAP report was made by Clerk Kinzel and seconded by Clerk Miller. The motion was approved with no objection.

Agenda Item 6. SMART Action Plans Update

Chair Roth summarized the background leading to the SMART Action Plan update and the prior steps that had been taken within the committee. Mr. Petit mentioned that following the previous meeting, the CCOC team reviewed the submissions from multiple counties in the committee and sent back feedback. His takeaways were that in multiple counties, the report was not reviewed at a higher level, so the feedback they received was from the staff, some of whom didn't have authority to make certain decisions. Next was that some counties could not distinguish between internal and external issues, so they did not provide a good action to improve as a result. Lastly, more training and education in this report was needed.

Mr. Petit's plan was to have an interactive zoom session for quarter 3 where people could bring in their current action plans and receive live help to make the action plans “SMART”, which was important to ensure the action plans were specific, measurable, and time bound. The consequent plan was to do more training after that, focusing on what SMART action plans were and looking at how to see if a submission met the requirements. Once those trainings had been completed, his last plan was to create videos and upload them to the CCOC website. Following the training, the team at CCOC would still be available to answer questions and help provide any feedback. He reiterated that the idea was to identify the issue, have a plan to fix it, and have a timeline in mind so that the issue could be tracked from quarter to quarter.

Mr. Welty stated that SMART action plans were a good tool that they could utilize, and if they could train and educate folks to clear up confusion on what SMART actions meant, then that would be great; ultimately, he left it up to the committee to decide what they did moving forward. Chair Roth added that they should encourage clerks to attend the live training sessions.

Clerk Miller thought they needed to look at what they were responsible for reporting, because if she was required to submit a SMART action plan every time they had staff turnover, a case threw off the numbers, etc. she was not going to do it due to time concerns. Her concern was that they were over reporting on many things when the legislature was not looking at it and her staff was already overworked, so they did not have time to do something as in depth as this. Chair Roth wondered if maybe they were ahead of themselves with the SMART action plans since they had an active workgroup that they would be hearing from shortly that would look at changing, abandoning, or adding other performance measures. Clerk Kinzel mentioned they should look at the parameters that almost always caused collection issues. She thought maybe excluding things like that in the rules would minimize the response requirements, because why report something that was not controllable by them.

Mr. Petit explained that they were trying to collect more information to make sure they understood what the issues were, and so they could have a better understanding of how effectively they were using their resources. He also replied to Clerk Kinzel's point saying that if the issue was the same every time, then the next time the issue came up, they did not have to redo it. In that case, CCOC would work with them and look at what could be done. That is what the training sessions would be for, to look at what could be done when the issues were stagnant. He reiterated that no matter what they were measuring, if they did not get the correct information from clerk's offices, they could not access what was wrong and they could not help.

Clerk Perri explained that she did not disagree with SMART action plans or goals, but she believed that it should be postponed until the future performance measures were completed. She also said that the training was a great idea. Concern of SMART goals being created with budget matters were brought up. Clerk Kinzel added that before implementing SMART action plans, they should go back and look at the historical data to create a plan for legislative action.

A motion to postpone SMART action plans until further performance workgroup progress was made by Clerk Kinzel and seconded by Clerk Rooks. The motion was approved with no objection.

Agenda Item 7. Workgroup Updates

Clerk Green mentioned that the workgroup had met seven times where they were working to update the existing PAC framework to account for all work relating to court cases. The aim was for it to be a multifaceted tool that would serve as a model of the information to cultivate more data-driven information and decision making. The workgroup started with the redesign of the actual framework and were approximately 90%-95% complete. Clerk Green explained that part of the workgroup was working on that, and the others were verifying that the statutes were correct and properly noted, while also identifying rules and orders. The group broke down laws by statute and why those laws were tied to specific tasks as well as added a tab for counties to add any local orders that impact their workload based on the Supreme Court orders. She added that the framework would be very useful from a legislative perspective and would help determine why one county may need more resources than another, while driving better data-

driven decision making. She explained that the workgroup was also drafting a glossary to create shared definitions for consistency across the counties, making data more consistent and creating a better understanding of what needed to be reported. Additionally, the workgroup was looking at a proposed data validation workflow so the data could be verified to be relevant and accurate, checked annually.

Jessica Padilla was introduced, and she explained that the workgroup broke down things that were previously in one cell, such as Florida Statutes and Supreme Court orders and rules, into multiple cells, and the table was much wider and richer in data.

Chair Roth asked if the document could be shared with committee, while in draft. Clerk Green responded, saying that the workgroup hoped to present to the committee for feedback when the document was closer to being all-inclusive, adding that she thought the group was close to that point. Ms. Padilla added that there would be a session at the summer conference about data visualization and data quality to ensure that data was in the proper context and consistent. Chair Roth complimented the workgroup for their impressive work.

Clerk Cooney explained that his office laid out individual tasks by statutory reference in a spreadsheet and broke it down so they could go search for a specific citation if they needed to. He offered to share this document with the workgroup. Clerk Green accepted the offer and thanked Clerk Cooney for his contribution.

Chair Roth introduced Leonard Carper to present the payment plan workgroup update. Mr. Carper said he'd begun working on changes to the form for next year to present to the committee in July. He mentioned that around 60+ reports were being submitted regularly and consistently, meaning they'd be able to start doing analysis of the information soon. Mr. Carper met with Doug Isabel to get a lot of background information and create a new viewpoint on how to look at the data. Clerk Kinzel asked Mr. Carper if there was any summary/measure of whether the reports are failing or if they were successful. Mr. Carper replied saying that he wrote the macro in a way that there should be a summary tab. Clerk Kinzel requested that the summary be sent to her whenever possible.

Chair Roth then introduced Jason Welty to present the future performance workgroup update. Mr. Welty mentioned the workgroup had met six times and looked at where performance measures came from and discussed where they stood or needed to be. The workgroup was trying to generate feedback on what performance measures should look like and Mr. Petit sent out a survey that Mr. Welty encouraged everyone to participate in. There was also recent feedback from the judiciary in relation to timeliness of docketing that would be shared with the workgroup soon.

Chair Roth asked when the PIE Committee would be involved in that process. Mr. Welty explained that the committee would receive all the work and recommendations that the workgroup came up with, including new proposed measures, elimination of measures, timeframe changes, changing of measures, etc. He also explained that he was not opposed to changing how they measured, for example a standard

for measure vs measuring against yourself. The performance measures could help the counties understand what was going on.

Chair Roth moved the discussion to the case counting and case weights workgroup. Mr. Welty mentioned that at the summer conference, CCOC would be holding an interactive session with a bit of case weight history and what had been done with them since their inception, as well as their use in the budget committee. The CCOC planned to get feedback from session participants on if case weights should be modified, if they should start over, or should they do something else. They hoped to generate enough content and interest for a December workshop to continue looking at case weights and have them thoroughly reviewed and updated. Chair Roth encouraged committee members to attend the session, especially if they had issues with the case weights. She requested that Mr. Welty send the document that had the categories and their case weights as they stand currently to the committee members. He complied and she thanked him again for his and the workgroup's efforts and idea to run the workshop.

Mr. Petit thanked new members and let everyone know that the link for workgroup recruitment was embedded and it could be sent to anyone who may want to join. He also said he would send out an email on what each workgroup did.

Agenda Item 8. Adjournment

With no further business, Chair Roth adjourned the meeting at 10:37 a.m.