



# Education Committee Meeting

May 12, 2026



## EDUCATION COMMITTEE MEETING

May 12, 2026

Meeting: 12:30 – 1:30 PM, Eastern

Location: Virtual through Zoom

[Zoom Link](#)

- 1) Call to Order and Introduction .....Hon. James M. Swisher
- 2) Roll Call .....Hon. James M. Swisher
- 3) Public Comment .....Hon. James M. Swisher
- 4) Approve Minutes from March 24, 2026 .....Hon. James M. Swisher
- 5) 2026 Summer Conference Plan.....Linzee Buck
- 6) Education Survey Review .....Linzee Buck
- 7) Proposed Three Phase Training Model .....Jason Welty
- 8) Proposed Topics for 2026 Trainings .....Linzee Buck
- 9) Open Discussion and Member Input .....Hon. James M. Swisher
- 10) Next Meeting .....Hon. James M. Swisher
- 11) Other Business .....Hon. James M. Swisher



## Education Committee Meeting Attendance May 12, 2026

	Committee Member	Present (On Call)	Absent
1	Honorable James M. Swisher Chair	X	
2	Honorable Sam Bailey	X	
3	Honorable Jody Phillips	X	
4	Honorable Robin "Cissy" Barfield	X	
5	Honorable Roger Eaton		X
6	Honorable Crystal Sconiers	X	
7	Honorable Todd Newton		X



**MINUTES OF THE EDUCATION COMMITTEE MEETING  
FLORIDA CLERKS OF COURT OPERATIONS CORPORATION (CCOC)**

**DATE:** March 24, 2026

**TIME:** 10:00 AM – 11:00 AM

**LOCATION:** Virtual

**1. CALL TO ORDER**

Chair James M. Swisher at 10:02 AM

**ROLL CALL**

Present:

Chair James M. Swisher

Clerk Todd Newton

Clerk Jody Phillips

Clerk Roger Eaton

Clerk Crystal Sconiers

Clerk Robin “Cissy” Barfield

A quorum was established.

**2. Approval of Agenda**

- Motion to approve: Clerk Todd Newton
- Second: Clerk Roger Eaton
- **Vote:** Agenda approved unanimously

**3. Introduction to the Education Committee**

Chair Swisher welcomed members and introduced the purpose of the newly established committee.

Education Committee:

- Identify gaps in education and resources
- Support clerks statewide, with emphasis on small counties
- Improve access to training and professional development

Jason Welty emphasized:

- Education is a statutory responsibility of CCOC
- This is the first formal activation of the committee
- Focus will include both technical training and leadership development

#### 4. Committee Focus Area

Presented by Linzee Buck:

- Identify gaps in training and education
- Improve onboarding processes
- Share best practices across offices
- Develop accessible resources (e.g., recorded trainings, tools for smaller counties)

Discussion confirmed the need to:

- Avoid duplicating existing efforts
- Focus on filling gaps, especially due to fewer conferences

#### 5. Initial Action Plan and Deliverables

Jason Welty outlined:

- Transition to a credit-hour-based contract model with FCCC
- Increased flexibility in training delivery
- Potential for:
  - Grants (e.g., Certified Public Manager program)
  - Expanded training opportunities

Agreed strategy:

- Develop and distribute a statewide survey
- Supplement with:
  - Staff feedback from individual offices
  - Committee discussions

Action:

- Linzee Buck to draft survey and circulate for review
- Survey timeline: ~2 weeks with follow-up reminder

#### 6. Open Discussion and Member Input

- Committee will contribute to conference topic development
- Immediate input requested for upcoming summer conference
- Long-term goal:
  - Develop a 3-year education plan
  - Move away from reactive planning

Key discussion points:

- Need for short, accessible training formats
- Increased use of:
  - Virtual learning
  - Recorded sessions
- Leverage CertiClerk Learning Management System for statewide access

## 7. Meeting Schedule

- Standard cadence: Quarterly meetings
- Additional meetings as needed during startup phase
- Next meeting:
  - Target: May (prior to next conference)
  - Format: In-person (Tallahassee)
  - Date TBD via scheduling poll

## 8. Other Business

With no further business, the meeting was adjourned at 10:31 AM.



## AGENDA ITEM 5

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**SUBJECT:** 2026 Summer Conference Plan  
**COMMITTEE ACTION:** Information Only

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### OVERVIEW:

The purpose of this memorandum is to provide an update on the development of the Summer 2026 conference session focused on indigency procedures and Title IV-D RMS sampling.

### SESSION TITLE:

Indigency Procedure Updates & Implementation Readiness with Title IV-D RMS Sampling

### SESSION DESCRIPTION:

This session will provide an overview of indigency determination procedures and upcoming form updates pending Supreme Court approval. Participants will review expectations for consistent application, documentation, and reporting. The session will also include a walkthrough of Title IV-D RMS sampling, highlighting its role in workload measurement and accountability. Attendees will gain practical guidance to support accurate tracking, consistency, and readiness for statewide implementation.

Development work to date has focused on creating a practical, implementation-centered session. Efforts include:

- Draft PowerPoint presentation (in progress)
- Quick Reference Guide for clerks
- Proposed updates to policies and procedures
- Review of current reporting templates and existing business rules

The approach emphasizes clarity, consistency, and the development of tools to support clerks in applying procedures accurately and effectively.

This session is designed to provide both foundational knowledge and practical resources to support statewide consistency and successful implementation. Supporting materials are attached for informational purposes.

**LEAD STAFF:** Linzee Buck, Education Coordinator



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## AGENDA ITEM 6

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**SUBJECT:** CCOC Education Survey Review  
**COMMITTEE ACTION:** Information Only

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### OVERVIEW:

The purpose of this memorandum is to provide a high-level summary of key themes identified in the Education & Training Needs Assessment Survey. Detailed results and analysis are attached for further review.

### SUMMARY OF KEY FINDINGS:

Survey responses identified consistent needs across:

- Customer service and de-escalation
- Finance, budget, and accounting
- HR, leadership, and onboarding
- Court operations and legal knowledge
- Process standardization and best practices
- Systems, technology, and emerging topics

These are not isolated gaps; they indicate the need for a coordinated training framework.

### A SHIFT TO A TRAINING PLATFORM:

The findings support development of a comprehensive training platform that includes tiered learning paths (beginner to advanced), a standardized onboarding program, an on-demand training library, short practical training sessions, a leadership development track, and a centralized resource toolkit.

### CORE DESIGN PRINCIPLES:

Training should be practical, role-based, consistent across counties, easily accessible, and designed for long-term sustainability.

### SUMMARY:

The survey results reinforce the need for a more structured, practical, and progressive approach to training. The attached document provides a more detailed breakdown of responses and recommended strategies to support these needs.

**LEAD STAFF:** Linzee Buck, Education Coordinator

### ATTACHMENTS:

1. CCOC Education Survey Summary

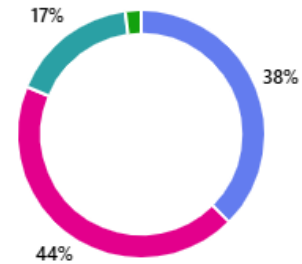


## CCOC Education Survey Summary

### Overview

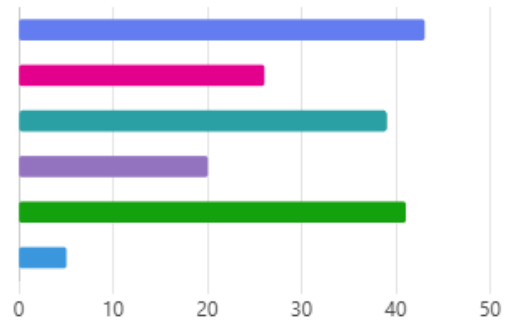
#### Size of your office:

● Population Group I: Counties with less than 100,000 residents	18
● Population Group II: Counties with 100,000 but fewer than 500,000 residents	21
● Population Group III: Counties with 500,000 but fewer than 1 million residents	8
● Population Group IV: Counties with 1 million or more residents	0
● Other	1



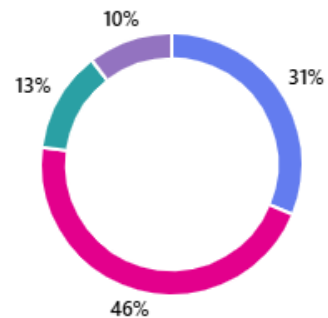
#### How do staff in your office receive training?

● Conferences (FCCC, CCOC, etc.)	43
● In-person local trainings	26
● Webinars	39
● CertiClerk (Learning Management System)	20
● Internal/on-the-job training	41
● Other	5



#### How accessible are training opportunities for your staff:

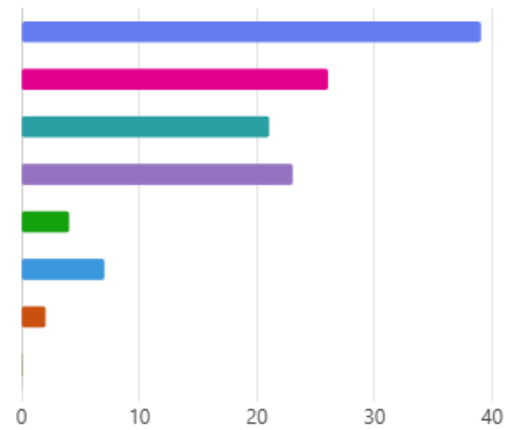
● Very accessible	15
● Somewhat accessible	22
● Limited access	6
● Very limited access	5



## EDUCATION SURVEY SUMMARY

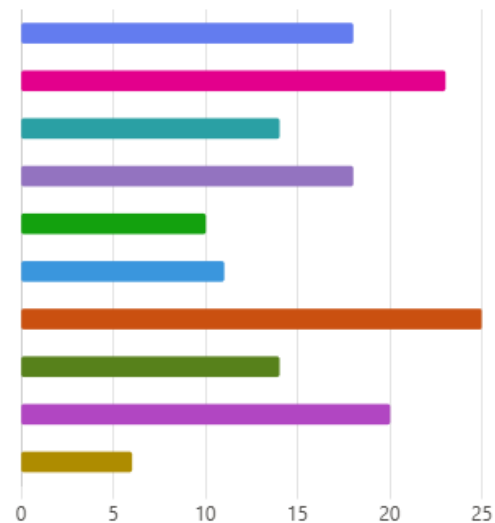
### What are the biggest barriers to training?

● Staffing limitations	39
● Budget constraints	26
● Travel requirements	21
● Time constraints	23
● Lack of relevant topics	4
● Lack of awareness of opportunities	7
● Technology limitations	2
● Other	0



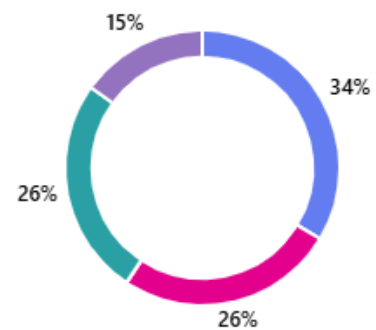
### Where do you see the biggest gaps in training?

● Court operations	18
● Financial / budget processes	23
● Case management systems	14
● Leadership / management development	18
● Customer service	10
● HR / personnel management	11
● Compliance / statutory requirements	25
● Technology / systems training	14
● Onboarding new employees	20
● Other	6



### Which staff levels need the most support?

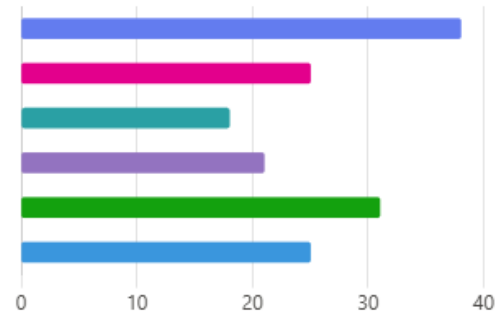
● New hires	38
● Frontline staff	29
● Supervisors	29
● Leadership / Executives	17



## EDUCATION SURVEY SUMMARY

### Preferred training formats:

● Short virtual sessions (1–2 hours)	38
● Half-day trainings	25
● Full-day trainings	18
● Multi-day conferences	21
● On-demand/recorded training	31
● Self-paced online courses (CertiClerk)	25



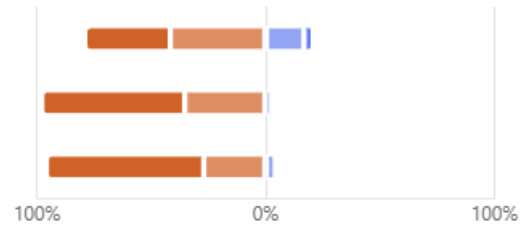
### How likely are your staff to participate in the following?

● Very likely ● Somewhat likely ● Somewhat unlikely ● Very unlikely

In-person training

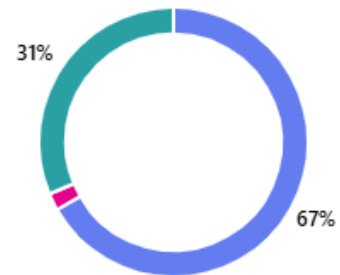
Virtual live training

Recorded/on-demand training



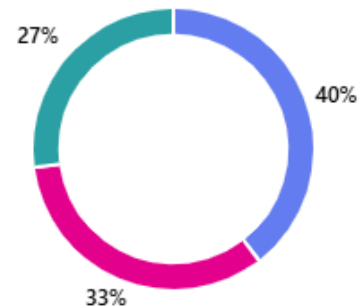
### Would your office benefit from more recorded/on-demand training?

● Yes	32
● No	1
● Maybe	15



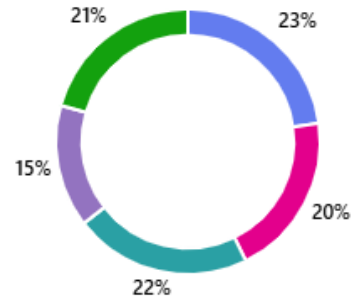
### Does your office have a structured onboarding program?

● Yes	19
● No	16
● In Process	13



What onboarding resources would be helpful?

● Standardized training modules	41
● Checklists/toolkits	36
● Recorded training videos	39
● Mentorship guidance	27
● Best practice guides	37



**Top Training Topics**

1. Customer Service & Public Interaction (VERY frequent)

What people said:

- “Customer service” (multiple responses)
- De-escalation
- “Chick-fil-A level service”
- Handling different transaction types

What this REALLY means:

- Staff struggle with difficult interactions
- There’s a desire to improve public perception
- Offices want consistent service standards

2. Finance, Budget & Accounting (VERY frequent)

What people said:

- Budgeting, accounting, audits
- Chart of Accounts
- Revenue/expenditure authority
- GASB updates

What this REALLY means:

- Confusion around how money flows + rules
- Need for beginner AND advanced tracks
- Desire for practical, clerk-specific examples

### 3. HR, Leadership & Onboarding

What people said:

- Onboarding
- HR compliance
- Supervisor training
- Leadership / succession planning

What this REALLY means:

- New supervisors feel underprepared
- Offices lack structured onboarding
- Need for people-management skills (not just technical)

### 4. Court Operations & Legal Knowledge

What people said:

- Court operations basics
- Statutes & Supreme Court rules
- Article V
- Case-type specific topics (IV-D, guardianship, appeals)

What this REALLY means:

- Staff don't fully understand the "why" behind their work
- Need for foundational + role-based legal training
- Desire for clarity across counties

### 5. Process Standardization & Best Practices

What people said:

- "Every office does things differently"
- Cross-training
- Streamlining processes
- Best practices

What this REALLY means:

- Frustration with inconsistency across counties
- Need for clear models + examples
- Interest in peer learning

### 6. Systems, Technology & Emerging Topics

What people said:

- CLERICUS training
  - Digital accessibility / ADA
-

- AI
- Learning systems

What this REALLY means:

- Staff need hands-on system training
- Interest in modern tools
- Confusion about new compliance areas (ADA, digital)

### **Themes from Open-Ended Responses**

Across comments, several consistent themes emerged:

1. Need for Standardization
  - Variation between offices creates confusion
  - Desire for consistent practices, especially in compliance and reporting
2. Practical Tools Over Theory
  - Checklists, templates, and real examples are highly valued
  - “How-to” > conceptual training
3. Onboarding is a Pain Point
  - Limited time to train new hires properly
  - Need structured programs to build confidence faster
4. Cross-Office Collaboration
  - Interest in sharing best practices between counties
  - Some already doing informal partnerships

### **Highest Impact Opportunities**

1. Standardized onboarding program
    - Modules + videos + checklists
  2. Short, virtual training series
    - Focused on compliance, finance, and court operations
  3. On-demand training library
    - Centralized and easy to access
  4. Supervisor/leadership development track
  5. Practical resource toolkit
    - Templates, guides, and real-world examples
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### Key Insight

1. Different Levels of Training

- Beginner (new staff)
- Intermediate
- Advanced

2. Hands-On, Practical Learning

Not lectures.

They want:

- Real scenarios
- Walkthroughs
- “How do I actually do this?”

3. Consistency Across Counties

There’s a strong underlying theme of: “We all do this differently and need alignment.”

4. Role-Based Training

Different needs for:

- Frontline staff
  - Supervisors
  - Finance staff
  - Leadership
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## AGENDA ITEM 7

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**SUBJECT:** Three Phase Training Model  
**COMMITTEE ACTION:** Information Only

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### OVERVIEW:

This memo outlines a standardized structure for conference training sessions to better support topics requiring in-depth explanation, practical application, and long-term retention.

### PROPOSED STRUCTURE:

Complex topics should be delivered using a three-phase approach:

1. Introduction Phase
  - Overview of topic and relevance
  - Key terminology, forms, and high-level processes
  - Common challenges
2. Deep Dive Phase
  - Detailed workflows and business rules
  - Real-world scenarios
  - Discussion of variations and best practices
3. Application Phase
  - Hands-on or scenario-based exercises
  - Troubleshooting and common issues
  - Key takeaways and transition to future topics

### SUMMARY:

This structure provides a consistent and effective method for delivering training across conferences, ensuring participants not only understand concepts but can consistently apply them in practice.

**LEAD STAFF:** Linzee Buck, Education Coordinator

### ATTACHMENTS:

1. Training Framework Rationale & Design



## Training Framework Rationale & Design

### Overview

Conference training topics often involve complex processes that cannot be fully understood or effectively implemented through a single presentation. Topics such as indigency, jury management, and traffic workflows require time, repetition, and practical exposure to ensure success.

This framework is designed to move beyond basic instruction and support meaningful learning through progression, engagement, and application.

### Instructional Approach

The proposed three-phase model is intentionally structured to mirror how individuals learn and apply new processes:

#### 1. Introduction Phase – Building Awareness

The initial phase focuses on establishing a clear foundation. Participants are introduced to the purpose of the topic, key terminology, and the overall process.

This phase is critical for:

- Creating a shared baseline of understanding
- Reducing confusion in later sessions
- Identifying early knowledge gaps

#### 2. Deep Dive Phase – Building Understanding

The second phase expands into detailed instruction and operational context. Participants explore how processes function step-by-step and how they vary in real-world application.

This phase emphasizes:

- Breaking down complex workflows
- Understanding business rules and decision points
- Learning from real examples and peer experiences

Incorporating panel discussions or subject matter experts enhances this phase by providing practical insight beyond theory.

#### 3. Application Phase – Building Confidence

The final phase focuses on applying knowledge in realistic scenarios. Participants engage in hands-on or scenario-based exercises designed to simulate actual work environments.

This phase supports:

- Reinforcement of learning through practice
- Identification and correction of common errors
- Development of confidence in applying processes independently

### Key Design Considerations

To maximize effectiveness, each phase should include:

- Practical Application: Opportunities to practice real tasks
- Engagement: Interactive elements to maintain participation
- Continuity: Clear connections between sessions over time
- Takeaways: Materials that can be used post-training (guides, checklists, workflows)

### Benefits of This Approach

- Improves retention by spacing learning over time
- Allow participants to build knowledge progressively
- Encourages consistency in training delivery
- Provides practical tools for real-world implementation

This structured approach ensures that training moves beyond awareness and into application. By aligning sessions with how participants learn best, conferences can deliver more impactful, practical, and lasting outcomes.

### At-a-Glance Timeline

Conference	Topic	Phase
Summer 2026	Indigency Forms + Title IV-D	Standalone + Application
Winter 2027	Jury Management	Introduction
Summer 2027	Jury Management	Deep Dive
Summer 2028	Jury Management + Traffic Tickets	Application + Introduction
Fall 2028	Traffic Tickets	Deep Dive



## AGENDA ITEM 8

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**SUBJECT:** 2026 Proposed Training Topics  
**COMMITTEE ACTION:** Information Only

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### OVERVIEW:

The purpose of this memorandum is to provide a summary of key training priorities identified through the recent Education & Training Needs Assessment Survey and to recommend targeted topics for training.

Survey responses reflected a strong need for practical, role-relevant training that supports day-to-day responsibilities, improves consistency across counties, and provides foundational knowledge in complex subject areas.

### Recommended Topics

To address these needs, the following five topics are recommended as 1-hour webinar sessions:

1. Customer Service & De-Escalation for Clerks  
Focus on handling difficult interactions, maintaining professionalism, and creating consistent service standards.
2. Onboarding & Training New Staff Effectively  
Provide tools and strategies to support structured onboarding, reduce errors, and improve long-term staff success.
3. Court Operations 101: Understanding the “Why”  
Offer a high-level overview of court workflows, roles, and the importance of accuracy in case processing.
4. Best Practices Across Counties  
Highlight successful approaches, common challenges, and opportunities for greater consistency and efficiency.
5. Budgeting & Finance Basics (Finance 101)  
Provide a foundational understanding of financial processes, terminology, and the clerk’s role in budgeting and reporting.

These recommended topics are designed to address the most frequently identified needs while providing practical, accessible training opportunities. Implementing a webinar series focused on these areas will support staff development, improve operational consistency, and enhance overall service delivery.

**LEAD STAFF:** Linzee Buck, Education Coordinator