Education Committee Meeting

November 5, 2026

EDUCATION COMMITTEE MEETING

November 5, 2026
Meeting: 1:00 - 2:00 PM, Eastern
Location: Virtual through Zoom
Zoom Link

1) Call to Order and Introduction .....Hon. James M. Swisher
2) Roll Call .....Linzee Buck
3) Public Comment .....Hon. James M. Swisher
4) Approve Minutes from September 23, 2026 .....Hon. James M. Swisher
5) Approve 2027 Meeting Dates.....Linzee Buck
6) DFS Toolkit Development .....Linzee Buck
7) Summer Conference Topic .....Linzee Buck
8) Clerk Expertise Directory .....Hon. James M. Swisher
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
November 5, 2026

	Committee Member	Present (On Call)	Absent
1	Honorable James M. Swisher Chair		
2	Honorable Sam Bailey		
3	Honorable Jody Phillips		
4	Honorable Robin “Cissy” Barfield		
5	Honorable Roger Eaton		
6	Honorable Crystal Sconiers		
7	Honorable Todd Newton		
8	Honorable Michelle Miller		
9	Honorable Steve Land		
10	Honorable Barbie Higginbotham		
11	Honorable Kellie Rhoades		

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

DATE: September 23, 2026
TIME: 1:30 – 2:00 PM ET
LOCATION: Virtual

1. CALL TO ORDER

Chair James M. Swisher called the meeting to order at 1:31 PM.

2. ROLL CALL

Present:

Chair James M. Swisher
Clerk Sam Bailey
Clerk Jody Phillips
Clerk Crystal Sconiers
Clerk Robin "Cissy" Barfield
Clerk Todd Newton

A quorum was established.

3. Public Comment

Chair Swisher opened the floor for public comment.

No public comments were received.

4. Approval of Previous Meeting Minutes

The committee reviewed the July 17, 2026 meeting minutes.

- **Vote:** Approved unanimously

5. Approval of Updated Conference Topic for Winter 2027

Presented by Linzee Buck:

The Committee reviewed the proposed adjustment to the previously approved Winter 2027 conference education topic. Staff explained that the proposed session, "What Are Your Needs? Budgeting for the 21st Century – A CCOC Financial Education & Listening Session," would focus on the financial and operational challenges currently facing Clerks while also creating a foundation for future education related to automation.

The proposed session would be designed as an interactive listening session rather than a traditional budgeting presentation. It would utilize live polling, real-world scenarios, and group discussion to identify challenges facing Clerks and determine the tools, data, resources, and training needed from CCOC.

Committee Action

The committee agreed to move forward with the proposed updated Winter 2027 conference topic, incorporating the financial education and listening-session components with the previously approved automation focus.

- **Vote:** Approved unanimously

6. Open Discussion

Committee members discussed:

- **Identifying areas of expertise:** Jason Welty asked Clerks to think about areas within their offices that they do particularly well, as well as areas where they know other offices or Clerks have developed strong practices. The goal is to identify potential subject-matter experts who could assist other offices when questions or needs arise.
- **Developing a more specific survey:** Clerk Green suggested creating a survey that breaks down areas of responsibility into more specific categories to better identify areas of expertise. For example, rather than having a general category for Jury, the survey could include specific sections or functions related to different aspects of jury operations.

7. Next Steps and Meeting Schedule

Action Items

- Committee Members will think about areas in which their offices excel, as well as other offices or Clerks who have expertise in specific areas, to help identify potential subject-matter experts and resources.
- Committee Members are encouraged to share procedures, checklists, examples, or other tools that could be included in the CCOC Education Toolkit.
- Committee Members will also consider areas where additional training, videos, examples, or resources would have been helpful, particularly for newer Clerks and staff.

The next Education Committee meeting is scheduled for: Thursday, November 5, 2026, at 1:00 PM ET.

8. Other Business

With no further business, Chair Swisher adjourned the meeting at 1:42 PM.

AGENDA ITEM 5

SUBJECT: 2027 CCOC Education Committee Meeting Dates
COMMITTEE ACTION: Approve 2027 Meeting Dates

OVERVIEW:
The CCOC Education Committee will continue meeting quarterly in 2027 to support the development of education and training opportunities for Clerks and their staff throughout Florida. The following meeting dates and times have been established for 2027. All meeting times are Eastern Time (ET).

MEETING SCHEDULE

- January 21, 2027, at 11:00 a.m.
- April 20, 2027, at 11:00 a.m.
- July 27, 2027, at 10:00 a.m.
- October 26, 2027, at 10:30 a.m.

NEXT STEPS
Please save these dates to your calendar. Meeting invitations and additional information will be provided as each meeting approaches.

LEAD STAFF: Linzee Buck, Education Coordinator

AGENDA ITEM 6

SUBJECT: DFS Toolkit
COMMITTEE ACTION: Information Only

OVERVIEW:
The CCOC Education Committee is working to develop a DFS Toolkit on the CCOC Education page to provide Clerks and their staff with practical resources to support audit preparation, compliance, and financial reporting. The goal is to make useful tools and examples readily available to offices statewide.

PROPOSED RESOURCES:
The committee will discuss existing resources that Clerk offices may be willing to share and identify which materials would be most beneficial to develop first. Potential resources include:

- Audit preparation checklists
- Sample procedures and policies
- Worksheets and templates
- Examples of supporting documentation
- Reference materials and step-by-step guidance

NEXT STEPS:
Committee members will be asked to identify resources currently used in their offices and volunteer to contribute materials that may benefit other Clerks. These submissions will help establish the initial DFS Toolkit and identify gaps where additional resources or training may be needed.

LEAD STAFF: Linzee Buck, Education Coordinator

AGENDA ITEM 7

SUBJECT: June Conference Topic
COMMITTEE ACTION: Approval of June Conference Topic

OVERVIEW:
Session Title: Beyond the Budget: Connecting Financial Data to Operational Decisions

Description: Building on the financial challenges, priorities, and resource needs identified during the March Conference listening session, this training will help Clerk's Office staff apply financial and operational data to real-world decisions. Participants will learn a repeatable process for interpreting available data, identifying meaningful trends or gaps, evaluating options, and using evidence to support current and future operational decisions.

Proposed Approach
The March Conference listening session and Education Survey responses will help guide the development of the June Conference training content. Practical examples and exercises will be selected based on the needs identified, allowing the training to address relevant challenges while providing a distinct learning experience from the June Conference discussion.

Final training content and practical examples can be refined after the March Conference listening session and review of the feedback received.

LEAD STAFF: Linzee Buck, Education Coordinator

AGENDA ITEM 8

SUBJECT: Clerk Expertise Directory Development
COMMITTEE ACTION: Information Only

OVERVIEW:
The CCOC Education Committee is working to develop a Clerk Expertise Directory to identify knowledgeable Clerks and Clerk staff who can share their expertise, effective practices, and resources with other offices. This initiative will help CCOC connect offices with the right resources, support peer-to-peer learning, and proactively identify areas where additional training may be needed.

AREAS OF EXPERTISE:
The directory will focus on key CCOC-related areas, including:

- Budget Development and Revenue-Limited Budget
- DFS Audits and Compliance
- CCOC Reporting Requirements and Data Submission
- Weighted Workload Measures (WWM)
- Case Counting and Workload Reporting
- Performance Measures and Workload Data
- Court-Related Expenditures and Cost Allocation
- Jury Management and Jury Cost Reimbursement
- Budget Issue Requests and Budget Factors
- CCIS and Workload Reporting Automation

SURVEY AND NEXT STEPS:
A survey will be distributed to collect recommendations for Clerks and Clerk staff who have expertise in these areas. Responses will be used to build a database of subject-matter experts who can assist offices as questions arise, contribute to future webinars and workshops, and share resources and best practices.

This directory will also help CCOC anticipate the needs of Clerk offices and proactively develop targeted training and resources to support Clerks and their staff statewide.

LEAD STAFF: Linzee Buck, Education Coordinator