



Proposal to Provide Education for the Florida Clerks of Court Operations Corporation

December 23, 2009

Submitted by:

**Florida Association
of Court Clerks
and Comptrollers**

3544 Maclay Boulevard
Tallahassee, FL 32312

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**Florida
Association of
Court Clerks
&
Comptroller**

Jim Fuller
Duval County
President

Tim Smith
Putnam County
First Vice President

Ken Burke
Pinellas County
Second Vice President

Rebecca Norris
Gulf County
Secretary

James B Jett
Clay
Treasurer

Kenneth A. Kent
Executive Director

Fred W. Baggett
General Counsel

3544 Maclay Boulevard
Tallahassee, Florida 32312
(850) 921-0808
Fax: (850) 921-4119
Suncom: 291-0808
Suncom Fax: 291-4119
www.flclerks.com

December 23, 2009

John Dew
Executive Director
Florida Clerks of Court Operations Corporation
2804 Remington Green Circle, Suite 3
Tallahassee, FL 32308

Dear Mr. Dew:

Thank you for providing the Florida Association of Court Clerks and Comptrollers (FACC) this opportunity to provide a response to the Florida Clerks of Court Operations Corporation (CCOC) Request for Proposal for Clerk Training and Education. FACC is a proven success story in planning, developing, and implementing a professional education program for Florida's Court Clerks and Comptrollers. FACC provides this service with more than thirty years of experience and anticipates continuing this service. FACC is committed to ensuring the success of this program, as well as achieving each of CCOC's proposed objectives and requirements. FACC utilizes a team that combines more than 400 years of experience in fields related to this Program.

Included in this proposal are the Executive Summary, FACC staff information, a proposed cost structure, and the 2010 Education Plan Outlined Proposal. An electronic version of the proposal and attachments are also included on a USB storage device.

Thank you again for this opportunity to provide a proposal for education services. We can implement the enclosed program immediately upon your notification and look forward to your response.

Sincerely,

Ken Burke, Chair
Education Committee
FACC

Kenneth A. Kent
Executive Director
FACC

Executive Summary

1.0 Intent

FACC has a proven record in planning, developing, implementing, and following through with a professional education program for Florida's Court Clerks and Comptrollers. With its unique relationship to the courts and government, FACC's position brings special talents to the table, as it has for more than thirty years. FACC is committed to ensuring the success of all training activities, as well as achieving each of CCOC's objectives and requirements. FACC utilizes a team that combines more than 400 years of experience in fields related to this program.

FACC was incorporated in 1969. Due to the organization's depth of experience, FACC is valuable in improving the ability of the Clerks and Comptrollers to effectively and efficiently serve the citizens of the state through the education of the Clerks and their staff, legislative action, and public awareness of the role and the function of the office.

Knowledge of the Clerks' duties, responsibilities, and the issues they face on a day-to-day basis gives FACC a perspective of both present and future educational needs and requirements. FACC cultivates relationships with local, state, and national presenters, helping provide Clerks with quality instructors.

FACC's infrastructure and related skill sets are in place to successfully implement the Clerk Training and Education program. FACC is committed to providing high quality results, as is exemplified in its long track record of successful programs. In its long track record of over 30 years of successful training programs contracted with the CCOC, FACC stands apart in knowledge, skill, and ability.

2.1 Planning and Development of an Annual Training Program

TRAINING CURRICULUM

Consistent with s. 145.051, F.S., Clerk of Circuit Court and County Comptroller training needs are determined as part of the overall education requirements for the benefit of the Clerk and local staff. While the 1996 Florida Supreme Court order requires only 36 hours for ongoing certification requirements, the Clerks' certification program requires a variety of educational opportunities on current topics as well as traditional responsibilities.

The Florida Supreme Court order requires that program curriculum planning delineate requirements in the areas of:

- General Administration/Office Transition
- Administration and Office Management
- Court Services Operations
- Records Maintenance and Management
- Financial Administration and Management
- Office Technology and Resources
- State and County Government Organization, Structure and Relationships
- Personal Skills Development

Within these functional areas, requirements are structured into program series that address specific curriculum needs and provide a comprehensive program structure. In the ensuing years, FACC will address this curriculum plan through the utilization of workshops, specialty roundtables, classes, webinars, and FACC's two on site programs. While these classes are indicative of the type of information necessary to fulfill the required curriculum, FACC reserves the right to change the specific classes for each program to ensure the latest information is provided.

The New Clerk Training Program will again commence in December 2012, when a new class of Clerks is elected to office. New Clerk Training is provided every four (4) years, coinciding with the election cycle. These requirements are specified in the Supreme Court order.

Note: The complete curriculum is filed with the State Board of Accountancy for CPE credit. Credits are also given by The Florida Bar and the Society for Human Resource Professionals, as specified by FACC.

2.1.1 General Administration/Office Transition

This program area includes requirements dealing with the administrative and support functions of the office and respective personnel, as well as transition issues facing Clerk's offices.

Workplace Environment Series:

Objective: To ensure understanding of the laws and regulations governing the public workplace, as well as factors influencing the work environment.

- Ethics 101
- Labor Laws and Regulations
 - Workplace Safety Issues
 - OSHA
 - Workman's Compensation
- Employment Process and the Law
- Employment Practices Liability Risk
- Privacy and Record Retention
 - Access to employee records
 - Maintaining personnel, medical, and I-9 records

Personnel Development Series:

Objective: To improve the performance of Clerk personnel by improving their customer service skills.

- Maintaining Customer Service Excellence
- Creating a Culture of Improvement
- Compensation – Performance Appraisals/Salary Adjustments
- Recruiting and Retaining Employees
- Dealing with a Multi-Generational Workforce
- Recognition and Reward Programs - Solutions that Work
- Effective Communication Skills
- Health & Wellness
 - Environmental Protection Act
 - Managing Your Stress on the Job

2.1.2 Administration and Office Management

Administrative Management Series:

Objective: To improve the knowledge and skills of Clerks and senior management staff in functional organizational development and management.

- Security Issues
- Utilizing Technology to Enhance Financial Operations
- New Technology Initiatives

- The Technical Side of Tele-working
 - Call Centers
 - Telecommuting
- Networks and Infrastructures in Clerks' offices

Supervisor Development Series:

Objective: To improve the skills of supervisory personnel, thus improving the performance of the organization.

- Managerial Development
- Managerial Pitfalls - How to Avoid
- Using Team Leader Training to Improve Supervisor Performance
- Coaching – A Skill for Management
- Supervisor's Boot Camp
- New Hire Orientation

2.1.3 Court Services Operations

Civil Court Processes Series:

Objective: To improve understanding of the laws, rules, and procedures governing civil court procedures.

- Sealing and Expunging Records
- Probate/Guardianship
 - Indigent Guardianships
 - Termination of Estate Cases
 - Trust and Spousal Inheritance Life Estate
- Mortgage Foreclosures and Surplus Funds Procedures
- Traffic Fines/Fees – Civil Infraction Distribution
- Juvenile Civil Dependency
- Civil Inmate Processes

Criminal Court Process Series:

Objective: To improve understanding of the laws, rules, and procedures governing criminal court procedures.

- SRS Reporting Rules
- OBTS/FDLE – The Reporting Process
- Evidence, Securing, Destruction, and Chain of Custody
- Surety Bonds – Forfeitures, Judgments, Surrenders, Releasing
- Indigence Determination with Prisoners
- Juvenile Criminal Delinquency

Court Technology Series:

Objective: To improve understanding of technical programs and procedures in court areas.

- TCATS
 - "A to Z"

- Error Reports and Central Site
- In-Court Processing
- Emergency Preparedness
- The Paperless Court
- E-Government - Use of IT to Open Government Information to the Public
- CCIS - Comprehensive Case Information System and statewide information

General Judicial Series:

Objective: To promote uniformity and assist counties in dealing with all aspects of the judiciary.

- Article V Reporting/Forms
- Assessment/Collection Reports
- Appeals Processing of Pro Se; Fees
- Looking Beneath the Numbers - Reasons that costs per case vary from county to county

Family Law/CSE/Domestic Violence Series:

Objective: To improve understanding of the legal processes and underlying factors associated with domestic violence.

- Domestic Violence Injunctions
CLERC System Training
- Child Support
 - Customer Service Operations
 - CAMS Phase II
 - Private Income Deduction Orders
 - Lost Payments and Other Payment Processing Issues
 - Random Moment Sampling
 - Varied payment processing options
 - Child support research

2.1.4 Records Maintenance and Management

This program area addresses all phases of record keeping, encompassing the responsibilities and management skills necessary for keeping official and public records.

Official Records:

Objective: To develop and expand skills relating to the management of official records and increase knowledge of areas involved with their safekeeping.

- Tax Deed Overbids
- Tax Deed Sale Processes
- Documentary Stamp Taxes/Exempt from Payment
- Redaction Requirements for Records
- ACH/Escrow Accounts
- E-Recording Court Documents

- Plats and Condos
- Transfer and Release of Lien to Surety
- Document Types
- Indexing Rules
- Mortgage Lender Panel

BCC Records and Value Adjustment Board:

Objective: To develop and expand the skills necessary for management in the area of Clerk to the Board records and seek ways to improve record keeping through new technologies.

- Value Adjustment Board Statewide Practices
- Board of County Commissioners Meetings

Records Management:

Objective: To provide an overview and improve the skills relating to maintenance of all records of the courts and counties through increasing expertise in management of these records, imaging, disaster recovery, and new technologies.

- State Retention Schedule
- Outsourcing Records
- Will Your Records Be There When You Need Them? - Digital Records and Media Stability
- The 7 Step Roadmap to Better E-Discovery Management
- Court Records Life Cycle Management
- Indexing Codes and Guidelines
- Preserving Our Past to Protect Our Future
- Disaster Planning and Recovery
- Records Management in a Digital World
 - Electronic Advances in Records Management
 - Locating Misfiled Documents
 - Products Available
- Information Technology Infrastructure Library (ITIL)
- Frauds and Other Email Risks
- E-Filing Efforts and Initiatives
- Redaction Efforts (Clerk Systems)

2.1.5 Financial Administration and Management

This program area addresses needs related to the financial management of both the court and board responsibilities including accounting, control, audit, and reporting.

Accounting and Operations Series:

Objective: To provide an overview of new accounting requirements for investments and changes in the rules and statutes affecting financial services.

- Issuance of Bonds for General Obligation Debt
- GASB Updates Implementing Changes

- Document Imaging in Accounting Systems
- Purchase Cards and Credit Cards 101
- Grant Accounting/Yellow Book Standards and Changes
- Grant Compliance with A87 and A133
- Federal Funds Management
- Fraud Prevention
- Uniform Accounting System (UAS)
- Emergency Management/Disaster Preparation
- Department of Financial Services Policies
- Meet the Auditor - Preparing for the External Audit
- Best Business Practices for Annual Accounting

Treasury Management Series:

Objective: To establish a forum for reviewing county investment banking and cash management services, achieved by sharing information and experiences.

- Economic Update
- Measuring Risks in Local Government
- Investing in the Current Economy
- Investments 101 and Beyond
- Portfolio Management
- Arbitrage
- Lessons Learned in Investment Practices

Internal Audit Series:

Objective – To develop and expand the skills and understanding related to the internal audit function and staff performance.

- Audits – Peer Review
- Internal Controls for Beginning Auditors
- Internal Controls for Auditors (Refresher)
- SAS 70 – Application to Counties/Clerks Management
- Developing an Effective Audit Function
- Audit Standards and the Clerk's Office - Do We or Don't We
- Winning Friends while Effecting Change
- Strategies to Improve Audit Productivity and Timeliness
- Approaches to IT Audit Coverage
- Fraud Found
- Risks and Threats Approach to Auditing
- Automated Auditing Tools
- Meet the Auditor - Preparing for the External Audit

2.1.6 Office Technology and Resources

Technology Series:

Objective: To provide current information to Clerks' offices on the latest technology for court and Clerk operations.

- Rapid ID Devices within a Courtroom
- Upcoming Changes in the law and government operations

- Security changes to online payment processing
- E-Recording Solutions
- E-Filing Solutions
- On-line Remittance - Changes in DFS technology
- Data Vaulting - Solutions right for you

2.1.7 State and County Government Organization, Structure, and Relationships

Intergovernmental Series:

Objective: To provide Clerks' offices with training on current developments within agencies, changes in operations, and required interactions.

- Changes in the Secretary of State's Office
- New DOR processes
- Interacting with FDLE systems
- The DHSMV Story
- DOC and Clerk data sharing requirements
- OSCA and Administrative Orders
- Ethics Commission - How complaints are filed
- DFS and the Finance Reporting

Legislative Development/Implementation Series:

Objective: To provide a better understanding of the legislative process and to establish an improved approach to the effective implementation of legislation.

- The Legislative Process – How It Works
- The Legislative Process – From Bills to Law
- Legislative Implementation – Bills Effective on or Before July 1
- Legislative Implementation – Bills Effective After July 1
- Legislative Initiatives - Session 2010 District Teleconferences
- 2010 Legislative Session Overview

Statutory, Judicial and Constitutional Responsibilities:

Objective: To provide understanding of laws enacted by the Legislature, Rules of Court, the Florida Constitution, and how they affect the office of the Clerk and Comptroller.

- Rules of Judicial Administration, Review of Changes, Rules 2.051 and 2.075
- Rules of Criminal Procedure, Rule 3.692
- Reporting Juvenile Dispositions to FDLE
- Delinquent Taxes; Legality of Overbid; Manipulation of Tax Sale
- Supreme Court Order on Release of Public Records
- Ministerial Assistance versus Legal Advice
- Report from the Clerk of Court Operations Corporation (CCOC)

2.1.8 Personal Skills Development

Leadership Series:

Objective: To provide Clerks' offices with current training on developments in the area of leadership, managerial changes, and evolving issues.

- Changes in Leadership Strategy
- Listening - Management Styles Examined
- Strategic Planning
- Organizational Development
- Negotiating Skills
- Managing in a Tough Economy
- Change Management
- New Florida Initiatives unique to Florida's Government Environment

Best Practices/Performance Standards

This program area deals with the ramifications of the passage of Article V, Revision 7, and subsequent legislation contained in the passage of CS/CS/HB 1935 (2005). Subjects are listed under various education tracks as topics submitted by Clerks and their staff. Training on these topics will be conducted on a statewide, regional, and Clerk-specific basis throughout the year. Also, the curriculum shall include training elements for the effective management and performance of the functions and duties of the Clerk of Court related to Article V, Revision 7, and budget provisions. These elements include quarterly performance standards training and best business practice training as provided in a Professional Services Agreement between the Clerk of Court Operations Corporation (CCOC) and the Florida Association of Court Clerks (FACC).

Topics submitted by Clerks and their staff are used for training sessions in the various education tracks at the statewide, regional and Clerk-specific training sessions throughout the year. Also the curriculum includes training elements for the effective management and performance of the functions and duties of the Clerk of Court. The Clerk of Court Best Practices Committee recommends development of best business practices for Clerk operating procedures each year to improve efficiency, timeliness and uniformity. As each best practice process is being developed, sessions will be held at seminars to gather input and assistance from the Clerks and staff. When the development process is complete, training sessions for Clerks and staff are held at quarterly seminars or regional workshops. The new best practices that are scheduled for development this year are: Mental Health Case Processing; assisting in the filing and processing of Petitions for Injunctions (Domestic Violence, Dating Violence, Repeat Violence, and Sexual Violence) ;and processing Foreign Judgment cases.

In addition, all of the recommended Best Practices that have already been developed are scheduled for review and revision if needed. Upon completion of this review, training sessions will be held at quarterly seminars when warranted. Access to the developed best practices is available on the FACC website.

2.2 Planning and Acquiring Facilities to Conduct Training Programs

FACC developed and currently maintains relationships with facility vendors across the state to assure the Clerks have a quality educational experience while incorporating the importance of value. FACC currently has contracts set with vendors for the June 2010 conference, November 2010 seminar, and June 2011 conference.

2.3 Planning and Development of Clerk of Court Seminars

FACC proposes to provide one on-site seminar in November of the program year. Curriculum is designed based on identified training and information requirements associated with the administration and operation of Clerk of Court/Comptroller offices and their respective constitutional and statutory duties in the areas of Records Management, Civil and Criminal Court Operations, Finance, Technology, and Administration. Legislative issues continue to raise questions with regard to budget operations and best practices. The on-site seminar will focus on court finance, records and retention, and technology and administrative topics. In addition, FACC plans to offer three online seminars for each year. The online seminars will provide opportunities for additional education and training in a convenient venue. The proposed topics and dates are in the chart below.

March 2010	Records and Technology	Process Implementation Training and Best Practices
August 2010	Administration	Management and HR Training
October 2010	Finance	Legislative Implementation and Impact on the Federal Fiscal Year

2.4 Planning and Development of Clerk of Court Conference

FACC proposes to provide one conference in June of the program year. Curriculum is designed based on identified training and information requirements associated with the administration and operation of Clerk of Court/Comptroller offices and their respective constitutional and statutory duties in the areas of Civil and Criminal Court Operations, Finance, Technology, and Administration. Legislative issues continue to raise questions with regard to budget operations and best practices. These issues will be discussed at all training sessions in 2010. The conference will focus on child support issues, court-related functions, technology and administrative topics. Certain topics will be recorded and available in the online training venue for those unable to attend.

2.5 Planning and Development of a Training Program for New Clerks

Every four years, the Association conducts special training for the newly elected Clerks of the Circuit Court/Comptroller. The training was authorized by Chapter 80-377, Laws of Florida, which amended section 145.051, Florida Statutes. This law directed the Supreme Court to create and implement a certification program for Circuit Court Clerks and elected County Comptrollers. The New Clerk Training Program will again commence in December 2012, when a new class of Clerks is elected to office.

Initial certification for newly elected Clerks/Comptrollers is based on a system of credits, and provides for a minimum of 240 hours of approved training within 24 months of assuming office. This training is broken down into eight (8) training modules with four (4) modules in 2010 and a new calendar of training starting for the newly elected Clerks in 2012.

New Clerks who assume office in the middle of a term will also be offered interim training by FACC. This training will not be a substitute for New Clerk Training; instead, it will provide a service to a new Clerk who may need assistance in specific areas of the Clerk's operations. The majority of this training can be performed by conducting on-site training or by providing training at FACC's office in Tallahassee.

2.6 Planning and Development for Special Workshops

Workshops are designed to offer training opportunities in multiple geographic locations and to address specific operational and program subjects. Periodic workshop announcements will provide locations, dates, and times of each offering. The following list is intended to provide a general outline of suggested

workshops that shall be scheduled throughout the year. Additional offerings may be included based on requirements and needs assessment.

- Legislative Updates and Changes, including Rule Changes
- CSE Training on New Regulatory Changes
- Changes in Technology Requirements
- Changes in Foreclosures/Liens
- UIFSA/URESA – Registration Orders
- Security Updates
- Interagency Agreements, Interlocal Agreements, and Updates

SPECIALTY ROUNDTABLES

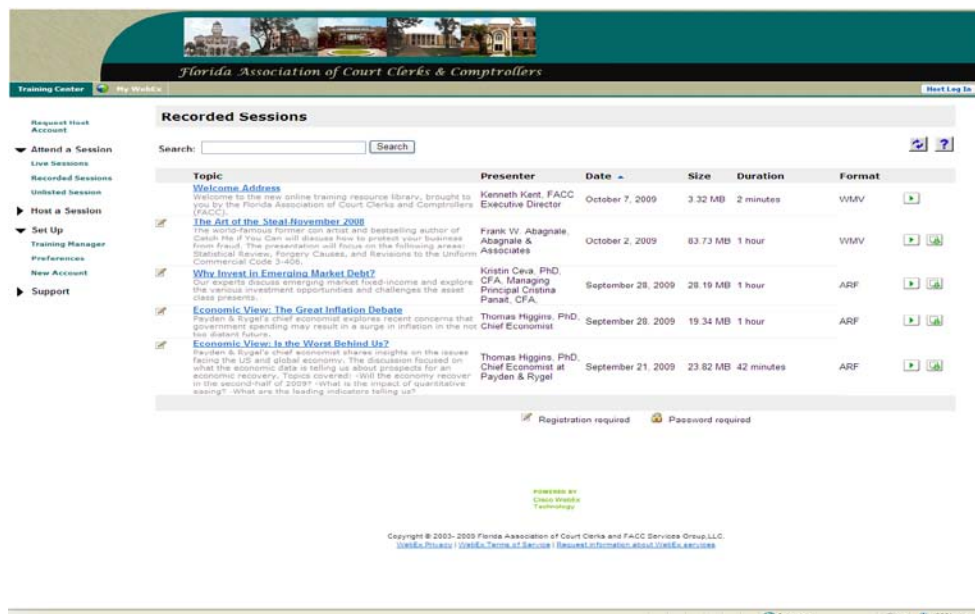
Specialty Roundtables offer training opportunities throughout the year to management staff and are a form of interactive workshop. This learning format is unique in that it aims to improve understanding of process and operations via peer networking. Curriculums for the Roundtables are based on the skill sets required by specific function and are structured to improve the understanding of management skills, job function, and changing rules and requirements.

Roundtables are offered in the following areas:

- Administrative/Human Resources
- Internal Auditors
- Legal Counsels
- Child Support
- Courts
- Technology
- Records

Workshops are ideal for the use of online training and interactive Specialty Roundtable discussions. FACC currently utilizes a web-based software to conduct trainings. The online registration process is very effective and provides many reporting tools for certification purposes. FACC intends to conduct both planned and on-demand training to fully provide access at the lowest cost. On-demand training is provided in a Webinar-based training format and may be viewed at:

<https://flclerks.webex.com/mw03061/mywebex/default.do?siteurl=flclerks>



2.7 Provide Online Support for Training

FACC currently provides online electronic event registration through its Eventek software on the FACC Intranet. The usage of this software is an effective and efficient tool for the Clerks, eliminating many previous manual processes. Clerks welcomed the use of this easy-to-use solution. Most, if not all, counties are currently registering for seminars and conferences in this manner. Eventek provides FACC with many tools to help with planning for training sessions. It provides FACC with accurate attendee totals for each session, thus helping FACC make the proper event accommodations. FACC is also able to track registration totals and generate accurate administrative reports. The program includes comprehensive financial tools and assists in tracking fees and payments as part of the registration process.

2.8 Updating Maintenance of the Clerk Digest

Deleted by CCOC

3.1 Services

Services will be provided at the CCOC offices where appropriate; however, most meetings, trainings, and seminars are too large for this venue.

3.2 Subcontracting not allowed

It is understood that subcontractors, other than those providing facilities and technical equipment, are not allowed under the proposal.

3.3 Minimum Services

It is understood that there is no minimum service amount guaranteed by the CCOC. However, it is noted that in order to fulfill certification, Clerks must have certain minimum training hours completed and this contract is the primary vehicle for doing so.

4.1 Formats

The format requirements are understood and adhered to.

4.2 Respondent

The Proposal is signed by the Committee Chair and the primary representative.

4.3 Information

- 4.3.1 Florida Association of Court Clerks and Comptrollers, Inc
3544 Maclay Boulevard
Tallahassee, FL 32312
850-921-0808
- 4.3.2 See Tab A
- 4.3.3 Please see responses to each section
- 4.3.4 References:
Jim Fuller, Clerk of Duval County
Regina Parrish, Clerk of Union County
Neil Kelly, Clerk of Lake County
- 4.3.5 Fees required to be submitted in separate package
- 4.3.6 Litigation No Litigation meeting the criteria

5.0 References

Jim Fuller, Clerk of Duval County
330 East Bay Street, Room 103
Jacksonville, Florida 32202
904-630-2039

Regina Parrish, Clerk of Union County
Union County Courthouse #103
Lake Butler, Florida 32054
386-496-3711

Neil Kelly, Clerk of Lake County
550 West Main Street
Tavares, Florida 32778
352-742-4102

6.0 Evaluation

It is understood that evaluations will be conducted by CCOC.

7.0 Evaluation Criteria

7.1 Flexibility - FACC demonstrates flexibility with the style, timing and types of education and training programs available. FACC has vast experience requiring minimum direction and maximizing existing skills to provide service in a variety of venues with constantly updated training opportunities.

7.2 Capability - FACC demonstrates capability by showing in-depth knowledge of the issues Clerks and their staffs confront, by arranging appropriate level of information in a timely manner, and utilizing internal resources for a variety of topics.

7.3 Experience - FACC is the most experienced provider of Clerk education and training with over 30 years of active service. FACC spans small and large programs and covers the complicated facets of Clerk operations that only an experienced vendor can provide.

7.4 Cost- As directed, costs are under separate cover.

8.0 Communication

It is understood that no communication regarding this RFP other than section 1.2.

9.0 Contract

It is understood that the contract will comply with stipulations 9.1 through 9.4.

10.0 Due Date

It is understood the due date is December 23, 2009.

Proposed Training and Seminar Calendar

The Schedule for the upcoming training and seminar sessions is as follows:

Date	Location	Purpose	Hours-Topics
February 16-17, 2010	Tallahassee	Executive Session/Training	12 Legislative Training, State Government Training, Clerk of the Supreme Court
May 22-26, 2010	Hilton Orlando	FGFOA Partnership Training and Clerk Specific Training	8 Clerk Specific Finance, Treasury Management
June 28-30, 2010	Renaissance Resort, St Augustine	Executive Session, Summer Conference	20 Child Support, Legislative Updates, Court, Technology and Admin
September 2010	Tampa Airport	Executive Session/Training	12 TBD
December 7-9, 2010	Sanibel Harbor, Ft. Myers	Executive Session, Winter Seminar	20 TBD

Online and Webinar Training

March 2010	Records and Technology	Process Implementation Training and Best Practices
August 2010	Administration	Management and HR Training
October 2010	Finance	Legislative Implementation and Impact on the Federal Fiscal Year

FACC Staff Biographical Information and Program Role

Employee Profile

Employee Name: Beth Allman **Job Title:** Director of Communications
Department: Communications **Education:** B.A., Art History, Virginia Tech;
M.A., English, Florida State

Experience

Years of Service: 10 years with FACC, 5 years with Florida Senate
Related experience: Worked in Senate process writing, interpreting and assisting in legislative implementation oversight for five years. Assisted in coordination of legislation, drafted legislation and assisted in implementation of legislation impacting the Clerks and Comptrollers for the last 10 years. Assisted in developing the Clerks Fee Schedule. Provided Technical Assistance and Article V Training to all 67 counties. County specific technical assistance Assisted in crafting Article V legislation that created the CCOC and budget process.
Program role: Contributes to and provides support for the development of documentation for specific education and training.

Employee Profile

Employee Name: Cyndi Andrews **Job Title:** Business Analyst
Department: Projects **Education:** AA Paralegal

Experience

Years of Service: 4 years with FACC
Related experience: Worked with the Leon County Clerk's Office for nearly 10 years. Trained staff, completed the pre and post court work, assigned staff to cover daily hearings. Managed court staff, created procedures, gathered information required by OSCA and requests by judges.
Program role: Provides assistance in training, testing and documentation.

Employee Profile

Employee Name: Peggy Ball **Job Title:** Director Management Services
Department: Management Services **Education:** B.A., Social and Behavioral Sciences, USF; M.S., Administration, Florida State

Experience

Years of Service: 3 years with FACC, 20 years state government
Related experience: Peggy has more than twenty years of state and local government experience in the areas of management, administration, budget and finance. She also has supervised purchasing, accounting, management information and human resources.
Program role: Coordinates and develops training for the overall program.

Employee Profile

Employee Name: Lex Ballantyne **Job Title:** Project Specialist II
Department: FACC Services Group **Education:** Computer Graphics and Design Degree,
Keiser College

Experience

Years of Service: 9 years with FACC (10 years in January 2010)
Related experience: Technical writing, graphic design and documentation for FACC applications. Webmaster for www.flclerks.com. Designs and produces custom PowerPoint presentations for seminars, conference and various staff members. Prepare and install forms as well as maintain the application for online registration of Association events. Edits and renders training videos from conferences and produce in-house training videos. Prepares interactive training materials for online use. Designs, develops and programs RoboHelp html for FACC applications. Prepares various brochures, promotional materials, designs and produce booth layouts for the Association and Services Group conferences. Prepares the Clerk's eNewsletters for the Association, Services Group and TCATS
Program role: Prepares interactive training materials for online use and develops some of the documentation for education classes.

Employee Profile

Employee Name: Melissa Bennefield **Job Title:** CLERICUS Project Manager
Department: Information Technology **Education:** B.S., Business Administration, Nova
Southeastern University, PMP

Experience

Years of Service: 2 Years with FACC
Related experience: Project Manager for CLERICUS. Extensive experience in Project Management, Account Management, Customer Service and Business Analysis.
Program role: Provides training and consultation on technical education topics.

Employee Profile

Employee Name: Tami Black **Job Title:** Human Resources Manager
Department: Human Resources **Education:** B.S.B.A. with a concentration in HR

Experience

Years of Service: 2.5 years with FACC; 19 years Human Resources/Payroll related experience
Related experience: Prior to joining FACC Tami worked for Fortune 500 companies in the areas of Human Resources, Payroll, and EEO/Affirmative Action. Administers and manages compensation, benefits, recruiting, performance management systems, employee relations, training and safety programs for FACC staff. She advises managers on organizational policy matters such as equal employment opportunity and sexual harassment.
Program role: Provides assistance in program development and training.

Employee Profile

Employee Name: Jeanni Brown **Job Title:** Business Analyst
Department: Projects **Education:** H.S. Diploma

Experience

Years of Service: 6 years with FACC
Related experience: 4 years of FACC Help Desk experience focusing on My Florida County and financials. Team Lead on CLERICUS ORI implementation.
Program role: Provides training and education support.

Employee Profile

Employee Name: Melvin Cox **Job Title:** Director of Technical Services
Department: Information Technology **Education:** B.S., Management Information Systems; FSU

Experience

Years of Service: 12 years with FACC
Related experience: Melvin directs the technical staff responsible for the ongoing development and support of the Association's technical projects, including Child Support, TCATS, CLERICUS, MyFloridaCounty.com Internet Portal and CCIS (Comprehensive Case Information System).
Program role: Directs the technical staff responsible for the development and delivery of technical education topics.

Employee Profile

Employee Name: Jim Cleek **Job Title:** Projects Manager
Department: Projects **Education:** College coursework in Management Information Systems and Business, U.S. Army training

Experience

Years of Service: 10 years with FACC, 10 years with Gadsden County Clerk of Court
Related experience: Worked for major Computer Company implementing multiple statewide and national systems including police and fire dispatch systems. Served many roles in local Clerk's office, including Chief Deputy, management information systems which included CLERC, County, Sheriff and local state agencies (State Attorney, Public Defender and DOR) with additional duties in finance. Over 25 years experience software development, databases, operations, installations and training. Helped installed six separate applications to 35 counties at various levels. Provides system, hardware, database and application software support. Provides ongoing support and help with conversions. Provides data quality and operational support.
Program role: Provides technical training and support for education program.

Employee Profile

Employee Name: Jessica Harrell

Job Title: Resolution Team Supervisor

Department: Child Support

Education: High School Diploma

Experience

Years of Service: 5 years with FACC

Related experience:

Joined FACC in December 2004 and supervises the Resolution Team (Child Support), an escalated issue Help Desk. The Resolution Team's primary function is to resolve payments that are receipted at the State Disbursement Unit which are lacking the needed information to disburse the payment to the custodial parent. In 2008, the Resolution Team was able to put an additional \$8 million dollars in the hands of Florida's custodial parents and children that may otherwise still be suspended at the SDU.

Program role: Provides round table support and onsite training, coordination and consultation.

Employee Profile

Employee Name: Sean Hudson

Job Title: Communications Specialist

Department: Communications

Education: B.A., Journalism, Auburn

Experience

Years of Service: 3 years with FACC, 10 years as writer, designer with newspapers

Related experience:

Served as reporter and writer for three daily newspapers. Designed and developed graphic art for various newspaper sections. Designed front page sections for newspaper. Writes and develops content for newsletters, training materials and other documentation. Uses editing skills for review of many forms of documentation and communication products produced by FACC staff.

Program role: Sean will provide communications support for education and training onsite and online.

Employee Profile

Employee Name: Kenneth A. Kent

Job Title: Executive Director

Department: N/A

Education: B.A., Political Science, Georgia;
M.A., Public Administration, Georgia

Experience

Years of Service: 18 years with FACC

Related experience:

Since 1992, Ken has also worked with FACC's continuing education programs with an emphasis on finance, internal audit, and child support. During 1995, Ken participated in the drafting of section 218.415.Florida Statutes -- local government investment policies. In 1998, Ken participated in the development of the Florida State Disbursement Unit program and federal reimbursement for Clerks of Court child support operations. Since then, he has worked on a variety of policy issues impacting the Clerks of Circuit Court, including testimony before the Florida supreme Court on electronic records and privacy issues, cutting edge technology projects including CLERICUS and the Clerks' ePortal and presentation to Clerks and Legislators on Clerk and Association activities and operations. Ken has more than 18 years experience working with the Clerks of Circuit Court and has 25 years experience in local government finance and administration.

Program role: Ken is responsible for the overall operations and management of the Florida Association of Court Clerks, Inc., and is the principal leader of the education and training initiatives.

Employee Profile

Employee Name: Randy Long **Job Title:** Director of Research and Analyses
Department: Research and Analyses **Education:** B.A., Saint Leo

Experience

Years of Service: 6 years with FACC; 27 years as Chief Deputy in Pasco and Charlotte Counties
Related experience: Local Clerk's Article V Project Manager until employment with the FACC. Joined the Article V team with the major focus on legislative initiatives and operational knowledge of a Clerk's office. 27 years Clerk's operational management including the review of the Clerk's budgets. Graduate of American Management Association. Assisted in developing the Clerk's Court-Related budget and performance measures. Continually working with and revising the Clerks Fee and annual Distribution Schedule. Continually working with stakeholders in the improvement of the guidelines for reporting Assessments and Collections. Provides technical assistance and training to all 67 counties and County specific technical assistance as requested. Past six legislative sessions assisted in crafting Article V and non-Article V legislation for the benefit of the Clerks and Comptrollers. Staff Director in support of the Clerks General Operations Committee, General Operations Subcommittee on Court Operations, Judicial Relations Committee and Best Practices Committee. Assists the Department of State in voter improvement processes. Worked the Florida Department of Law Enforcement to obtain CJNET Certification for the FACC. Works with the Department of Corrections to automate restitution payments with the Courts on the e-filing process.
Program role: Provides legislative and court function training, education and support on and off site.

Employee Profile

Employee Name: Vicky Laurienzo **Job Title:** Publications Specialist
Department: Communications **Education:** B.S., English Education, Troy State, Graphic Arts certificate

Experience

Years of Service: 6 years with FACC, 15 years total as graphic designer
Related experience: Develops and writes content for newsletters for Clerks and Comptrollers. Develops various Association and Services Group brochures and promotional material. Designs graphic art for presentations and other forms of media.
Program role: Develops documentation for education and training.

Employee Profile

Employee Name: Gwendolyn Marshall **Job Title:** Member Services Manager
Department: Administration/Education **Education:** B.S, Criminology, FSU

Experience

Years of Service: 10 years with FACC
Related experience: Worked in Trust Services as well as other areas of the Association prior to hiring as member services manager by Executive Director. Active TSAE member and FSAE member.
Program role: Provides management and administrative support for current FACC educational programs.

Employee Profile

Employee Name: Anthony Miller

Job Title: Business Analyst II
B.S., Management Information Systems (Minor) Finance; Florida State University (2000)

Department: Projects

Education: State University (2000)

Experience

Years of Service: 8 years with FACC

Related experience: Main focus areas at FACC are the support, development, testing, and functionality of the CLERICUS System. Previous experience includes the same areas on the FACC ORI portion of the CLERICUS system and technical support to the CLERC System.

Program role: Provides assistance with technical education.

Employee Profile

Employee Name: Vickie Miner

Job Title: Business Analyst
B.S., Management Information Systems, Florida State University

Department: Projects

Education: State University (2000)

Experience

Years of Service: 2 years with FACC

Related experience: Main focus area at FACC is CLERICUS in analysis, design, training, documentation, testing, change management and problem resolution.

Program role: Provides assistance with technical education.

Employee Profile

Employee Name: Michael Moreno

Job Title: Program Manager
B.M., Vocal Performance, FSU; M.B.A., Business Administration, FSU

Department: Child Support

Education: FSU

Experience

Years of Service: 1.5 years with FACC

Related experience: Michael Moreno joined the Florida Association of Court Clerks in April 2008 and oversees the Resolution Team (Child Support), an escalated issues Help Desk. The Resolution Team's primary function is to resolve payments that are receipted at the State Disbursement Unit which are lacking the needed information to disburse the payment to the custodial parent. In 2008, the Resolution Team was able to put an additional \$8 million dollars in the hands of Florida's custodial parents and children that may otherwise still be suspended at the SDU.

Program role: Provides technical and operational training and outreach initiatives to the Clerks.

Employee Profile

Employee Name: Allison L. Newman

Job Title: Project Specialist I
B.A., English, The University of

Department: Projects

Education: Texas at Austin

Experience

Years of Service: 8 years with FACC

**Related
experience:**

Main focus areas at FACC include documentation of CLERICUS, CLERC, Legacy CCM applications and NetDMS. Previous experience includes Research Specialist on the Resolution Team (Child Support), Management Analyst for the Resolution Team, and Help Desk Operator.

Program role: Provides documentation development and technical assistance.

Employee Profile

Employee Name: Alex Nicholas

Job Title: Strategic Programs Manager
BA, History, Florida State; Certified
Project Manager (PMP); Certified

Department: Research and Analysis

Education: Information Systems Auditor (CISA)

Experience

Years of Service: 7 total years with FACC; 5 years with KPMG/BearingPoint Management Consulting

**Related
experience:**

Alex performs a variety of tasks and project management activities for FACC. He provides support to the Clerk's Strategic Planning, General and Court Operations and Best Practices Committees. He has managed large FACC projects with FDLE (Disposition Improvement Project), DHSMV (TCATS Study) and others. As a Consultant with KPMG/BearingPoint he worked a variety of assignments in the public sector including with OSCA (Court's Data Elements and Process Identification Project) and with the Georgia State Retirement System assisting building their new retirement system. Alex was an original member of the FACC team implementing the statewide Child Support SDU and IV -D Child Support Cost Reimbursement Programs.

Program role: Provides documentation, technical training and consultation to Clerks on specific topics.

Employee Profile

Employee Name: Sharon Paulett

Job Title: Senior Internal Auditor

Department: Financial and Audit Services

Education: B.S., Accounting, M.P.A., FSU

Experience

Years of Service: 3 years internal auditing experience with FACC; 20 years experience in governmental, non-profit, and private accounting and auditing services.

**Related
experience:**

Provide professional financial, accounting, auditing, quality assurance, and consulting services to internal and external customers.

Program role: Coordinates audit related training.

Employee Profile

Employee Name: Sara Sanders

Job Title: Program Services Analyst
B.A., University of Florida;

Department: Research and Analysis

Education: M.S., Florida State University

Experience

Years of Service: 1 year with FACC; 3 years with the United States Senate

Related experience: 3 years with the United States Senate

Program role: Provide support for program development and training.

Employee Profile

Employee Name: Michele Sculley

Job Title: Systems Project Analyst II
College coursework in English and

Department: Projects

Education: Computer Science

Experience

Years of Service: 7 years with FACC, 8 years with Highlands County Clerk of Court.

Related experience: Served different levels of work in traffic, criminal traffic and juvenile departments in Clerk's office. Serves as data analyst and provides support with conversions and installations of software. Provides system, hardware, database and application software support. Experienced in SQL server databases and can provide training for one-on-one sessions or for groups of more than 100 personnel.

Program role: Provides assistance in training and technical support.

Employee Profile

Employee Name: Bethannie Smith

Job Title: Project Specialist I
B.A., Psychology, Sweet Briar

Department: Projects

Education: College, Virginia

Experience

Years of Service: 6 years with FACC

Related experience: Main focus areas at FACC are training and documentation: CLERICUS, CLERC, Legacy CCM applications and NetDMS. Previous experience includes Help Desk Operator, Technical Support and Training.

Program role: Provides training, documentation development and technical support.

Employee Profile

Employee Name: Brenda W. Standish
Department: Service Center

Job Title: Service Center Manager
Education: College coursework, ITIL certification

Experience

Years of Service: 12 years with FACC, prior with Franklin County Clerk of Court
Related experience: Manages the FACC Service Center. Responsible for insuring timely, professional and exemplar customer support for the Association's technical projects, including Child Support, TAPS, CCM, TCATS, CLERICUS, CLERC, MyFloridaCounty.com Internet Portal and CCIS (Comprehensive Case Information System). Responsible for training support staff, operational, file monitoring, technical and e-commerce support for the CLERC Application and MyFloridaCounty.com. Extensive child support program knowledge. Member of NCSEA (National Child Support Enforcement Association) and HDI (Help Desk Institute). Worked in both the Finance Department and as Child Support Deputy Clerk in a Clerk office. Worked for Children and Family Service Child Abuse Unit.
Program role: Provides support and coordinates training and education on technical matters and Clerk specific issues.

Employee Profile

Employee Name: Janice Thompson **Job Title:** Executive Assistant
Department: Executive **Education:** Bryant & Stratton Bus. Inst. Niagara University

Experience

Years of Service: 18 years with FACC
Related experience: Provides administrative support to Executive Director and Clerks.
Program role: Provides administrative support for Clerk education and training program and seminars and conference planning and support.

Employee Profile

Employee Name: Riley Watson **Job Title:** Systems Project Analyst II
Department: Project Management **Education:** A.A.,MCP; University of Central FI, TCC

Experience

Years of Service: 3 years with FACC
Related experience: 9 plus years professional experience in the field of Information Technology with a focus in systems administration, implementation strategies, and project management.
Program role: Provides training and technical support for Clerk related programs.

Employee Profile

Employee Name: Ron Webster **Job Title:** Chief Financial Officer

Department: Accounting

Education: B.A., Accounting, West Florida,
C.P.A., C.I.A., C.P.M.

Experience

Years of Service: 9 years with FACC. 27 years of professional auditing experience.

**Related
experience:**

Performed auditing projects for Fortune 500 companies for an International CPA firm. Performed quality assurance for a national corporation, and provided "on site" certification of the nightly Florida Lottery results. Serves on the independent Leon County Audit Committee and as the Treasurer for the State-wide Certified Public Managers Association. Certified Public Accountant (CPA) and Certified Internal Auditor (CIA). Provides FACC with audit and quality assurance services within strict standards and performs accounting and cost accounting and provides financial consulting.

Provides Provides technical assistance on accounting education components.

Employee Profile

Employee Name: Mary Whitaker

Job Title: Project Specialist I

B.S.B.A., Human Resources
Management, University of Central
Florida

Department: Projects

Education: Florida

Experience

Years of Service: 6 months with FACC

**Related
experience:**

Provides FACC training and support for the CLERICUS application. Experience also includes human resources, project management, technical support and employee training and development.

Program role: Provides on-site training and assist in technical support.

Employee Profile

Employee Name: Sheila Wolfe

Job Title: Court Services Coordinator

Department: Court Services

Education: 2 years coursework at FSU

Experience

Years of Service: 9 years with FACC

**Related
experience:**

18 Years-Leon County Clerk of Court-Supervisor for Felony, Traffic, Family Law and Civil Divisions.

Program role: Provides coordination and onsite services in Clerk specific areas and education in records management, best practices and court related functions.

Employee Profile

Employee Name: Phil Zaidan

Job Title: Systems Project Analyst II

Department: Projects

Education: B.S., Management Information
Systems and Management,
Valdosta State

Experience

Years of Service: 7 years with FACC

Related experience: Provides FACC business analysis, quality assurance and training for the CLERICUS application. Previous experience includes department manager, project management, technical support and training

Program role: Provides technical education and support.

FACC Education and Training Fee Schedule

2.0 Planning & Development of an Annual Training Program: \$48,000

→ Topics are addressed in items 2.1.1 through 2.1.8

2.2 Planning & Acquiring Facilities to Conduct Training Program: \$98,000

→ Planning and facilities acquisition includes facilities for onsite seminar, on site conference and eight special workshop training facilities

→ Seminar in November Registrant room rates not to exceed \$149.00 per night

→ Conference in June. Registrant room rates not to exceed \$149.00 per night

→ Eight workshops located around the state

2.3 Planning & Development of a Seminar Series: \$44,000

→ This includes 4 seminars

→ Includes speaker fees, travel, planning, staff support, AV needs and per diem

→ This includes on line access to three seminars, web service and training library

2.4 Planning & Development for the Clerks of Court Summer Conference: \$60,000

→ This includes planning and development for the main education at the summer conference

→ This includes speaker fees, travel, planning, staff support and AV needs

→

2.5 Planning & Development of an Training Program for New Clerks: \$44,000

→ This includes planning and development for the New Clerk training

→ This includes speaker fee, travel, planning, staff support and AV needs

→ Registrant room rates not to exceed \$149.00 per night

2.6 Planning & Development

for special workshops: \$48,000

- This includes planning, development and site support for special workshops
- This includes facility, speaker fees, travel, planning, staff support and AV needs
- This includes on line access to education where appropriate for the topic

2.7 Provide Online Support for Training: \$3,500

- This includes the on line registration program and accounting for education registration, staff time for compiling certification reports and filing with the Supreme Court for certification.
- This includes the submittal of information to licensure organizations for CPE credits where appropriate.

Hotel rooms are not included in the costs.

Total Proposed Costs \$ 345,500