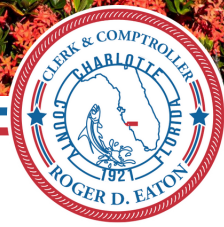


2023 CLERKS ANNUAL REPORT



ROGER D. EATON
Clerk of the Circuit Court & County Comptroller
Charlotte County, Florida
CharlotteClerk.com



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MESSAGE FROM YOUR CLERK AND COUNTY COMPTROLLER

This past year in the Clerk's office was filled with new services provided, improvements on existing services, and accolades within our community for our staff's hard work. As your Charlotte County Clerk of Court, I am proud of the skill and hard work demonstrated in our office each and every day.

In 2023, the Punta Gorda Chamber of Commerce named the Charlotte County Clerk of Court's office its Business of the Year. We were similarly honored in 2021 by the Charlotte County Chamber of Commerce awarding us its large business of the year award. I am appreciative for this award, because it recognizes the accomplishments brought about by our excellent staff throughout the year. This past year, our staff went above and beyond in improving our services for the benefit of all Charlotte County citizens.

We gave our website a major makeover! It's now even easier to navigate and use, with many new and improved features. We've added an easy to use accessibility menu, which provides you easy access to the information you need. Many how-to videos, presenting clear, step-by-step guides to assist you, have been added for your use and convenience. We also enhanced the back end of our website, which in layman's terms means our website is very fast, even for mobile users.

We also instituted a new court e-certify system. This online service lets you obtain certified copies electronically, rather than having to physically come to our office. E-certify eliminates wait times and reliance on the U.S. Postal service. Now, you can immediately secure verifiable certified documents in minutes, all from the comfort of your own device. Safeguarding records and personal information is a must. This past year, we unveiled a new and improved Official Records system. This state-of-the-art system leverages cutting-edge technology to ensure maximum security, functionality, and feature-rich management of your precious and vital records.

While always working to add or improve on the services we provide local citizens, we always do so with an eye toward not increasing our budget. Fiscal responsibility always goes hand-in-hand with the services we provide. For the seventh straight year, your Clerk's office reduced its budget - this year by 1.5%. As a result, your Clerk's office returned over \$1.2 million in taxpayer funds to the Charlotte County Board of County Commissioners in 2023, despite rising staff health care costs and increased Florida Retirement System (FRS) rates.

Since I took office in 2017, your Clerk's office has returned over \$4.8 million in taxpayer funds to the Board of County Commissioners, while continuing to add services provided by our office to local citizens. Excellent staff combined with implementing cutting-edge technology systems provides simultaneous cost savings and increased services for everyone.

The Comptroller Division for your Clerk's office manages all investments for Charlotte County funds. Our financial team ensures the safety, liquidity, and profitability of all county investments. This past fiscal year, at its highest point we managed a Charlotte County investment portfolio of \$961 million, which earned \$33.7 million for the year. Since I took office in 2017, over \$72.8 million has been earned on county funds controlled by your Clerk's office.

For the 37th consecutive year, your Clerk's office was awarded the Certificate of Achievement for Excellence in Financial Reporting by the Government Finance Officers Association. Its Certificate of Achievement is the highest form of recognition in the area of governmental accounting and financial reporting, and its attainment represents a significant accomplishment for our Comptroller Division and staff.

Not only did our office excel in the workplace in 2023, but we continued supporting our community outside of normal business hours. Our office partners with the Animal Welfare League (AWL) and sponsors "Eaton's Eats", which collects food donations for AWL. Our Jury Pay Donation Program benefits the Center for Abuse and Rape Emergencies (CARE) by allowing jurors the option of donating their jury pay to CARE rather than accepting their same-day cash compensation for jury service. In honor of Veterans Day, we offered FREE passport photos to all veterans and active military personnel for the entire month of November.

On behalf of the entire staff at the Charlotte County Clerk's office, thank you again to the Punta Gorda Chamber of Commerce for recognizing our hard work this past year, and naming us its 2023 Business of the Year. Our entire staff excelled this year, and they deserve thanks, appreciation, and recognition for their incredible efforts and accomplishments.

For more information about our office and to access all of our new features, please visit us at CharlotteClerk.com.

Sincerely,



THE CLERK'S ROLE AS A PUBLIC TRUSTEE

Provisions of the Florida Constitutions of 1838, established the Clerk of the Circuit Court as an elected public trustee and set in place at the county level a system of "checks and balances" which has been proven to serve the public for over 186 years.

The role as Public Trustee is evidenced as follows:

COUNTY GOVERNMENT

- Accountant and Auditor for the Board of County Commissioners
- Collector and Distributor of Statutory Assessments
- Guardian of the Public Records, Public Funds and Public Property

COURTS

- Ensures Court's Orders, Judgments and Directives are carried out within the parameters allowed by Law.
- Maintains Court Records.
- Collects and disburses Court Fines, Fees and Assessments.
- Collects and disburses Court Ordered Child Support and Alimony Payments.

STATE GOVERNMENT

- Collects and disburses Documentary Fees and Intangible Taxes for the Department of Revenue.
- Collects and disburses numerous fees and assessments for the Benefit of State Trust Funds.
- Provides informational, financial, and statistical data to the State Legislature, Supreme Court, Florida Department of Law Enforcement, Auditor General, Department of Health and Rehabilitative Services, and Other State Agencies.

CITIZENS' PROTECTION

- As Custodian of County funds, the Clerk ensures that the taxpayer's money is managed according to Law.
- Provides Internal Audits of County government to assure compliance and internal controls.
- Provides Access to Public Records.
- Audits reports of guardians in Guardianship cases.
- Provides assistance to citizens in accessing the courts.
- Processes, maintains, and preserves court documents to ensure that litigant's court cases are handled in a timely manner.

ACCOUNTABILITY AS A PUBLIC TRUSTEE

- The Office of the Clerk is a complex organization that performs a wide range of record keeping, information management and financial management in the judicial system and county government.
- In a study conducted by the Joint Select Committee on Judicial Personnel of the Legislature, it was calculated that the Clerk's office performs over 1,000 constitutional and statutory functions or duties.
- With the magnitude of the impact that the Clerk's duties has on the peoples' rights and property, it is essential that the Clerk be accountable for his/her actions.
- The Clerk is governed by statutory authority in carrying out the duties and functions of the office.
- As auditor and custodian of all county funds, the Clerk is subject to State Auditor general rules and regulations.
- The Clerk is subject to annual audits by an independent audit firm.





CLERK OFFICE LOCATIONS

The State of Florida is divided into twenty (20) Judicial Circuits. Each circuit is comprised of a circuit court and one or more county courts. Charlotte County is in the 20th circuit which includes Collier, Glades, Hendry, & Lee counties. Three County Judges, four Circuit Court Judges and one Magistrate presides over Charlotte County.

The Clerk is responsible for the clerical business of the courts, including maintaining court records and case files, issuing summons, warrants and violation of probation or injunction orders, entering judgments and managing court related fees and fines, just to name a few of the over 1,000 other statutory requirements.

CHARLOTTE COUNTY JUSTICE CENTER

The Charlotte County Justice Center is located in Punta Gorda, the county seat. This is the main courthouse for all of Charlotte County. The departments housed at the Justice Center include:



- Administrative Office of the Clerk
- Criminal Court Services
- Civil Court Services
- Employee Relations
- Information Technology
- Jury Services
- Marriage Licenses and Wedding Ceremonies
- Official Records
- Passport Services and Passport Photos

Charlotte County Justice Center | 350 E. Marion Ave. Punta Gorda, FL 33950 | (941) 505-4716

MURDOCK

The Charlotte County Murdock Administration Center brings "service to the people" by offering convenience to residents in different neighborhoods of Charlotte County, and serves as a branch office. Most services available at the Charlotte County Justice Center are also available at the Murdock Administration Center. Departments housed in the Murdock Administration Center are:



- Administrative Office of the Clerk
- Comptroller/Finance
- Internal Audit
- Minutes
- Value Adjustment Board
- Official Records
- Marriage License and Passport Services

Charlotte County Murdock Administrative Offices | 18500 Murdock Circle, Port Charlotte, FL 33948 | (941) 743-1537

ENGLEWOOD

The Charlotte County Mac V. Horton West County Building provides another convenient location for us to offer services to residents in West County. Many services available at the Justice Center and Murdock Administration Center can also be handled at this location:

- Official Records
- Traffic Payments
- Marriage Licenses
- Passport Photos



Mac V. Horton West County Building | 6868 San Casa Drive Englewood, FL 34224 | (941) 637-2335



ONLINE SERVICES & E-FILING PORTALS



Criminal and Civil Court Records can be viewed on our website:
CharlotteClerk.com



Attorneys can file cases and documents via our e-file portal at:
MyFLCourtAccess.com



Official Records can be viewed on our website:
Recording.CharlotteClerk.com



Marriage License Application & Wedding Ceremony requests are available online at:
Marriage.CharlotteClerk.com



Tax Deed Sales can be viewed, and bids can be made at:
Charlotte.RealForeclosure.com



County Records can be viewed on our website:
Minutes.CharlotteClerk.com



Self-Help Services can be viewed on our website:
SelfHelp.CharlotteClerk.com



Passport Services can be viewed on our website:
Passports.CharlotteClerk.com



E-Certify Services can be viewed on our website:
ECertify.CharlotteClerk.com





WHY WE EXIST



MISSION

To preserve the public trust as guardians of the people's records and assets.



VISION

Serving with compassion, expertise, and efficiency in support of our community.



CORE VALUES

- ★ Working Together To Achieve Shared Success
- ★ Providing Exceptional Service With A Smile
- ★ Continuous Innovation And Improvement
- ★ Dedication To Principled Practice



ENGAGING WITH OUR COMMUNITY

Our mission is to keep our community informed. Throughout 2023, we remained dedicated to utilizing our online communication tools to uphold transparency, ensuring Charlotte County citizens are well-informed about our current priorities and advancements through regular email updates.

TOP EMAILS



Paying Fines and Fees is easier than ever!

<<First Name>>

Charlotte County, or Charlotte County Clerk's office was the first in the State of Florida to offer a remote cash payment option? This program allows people to pay court fines and fees via cash at local 7-Eleven®, Family Dollar®, and CVS® stores around Charlotte County, without ever coming to the Charlotte County Justice Center? Click below and watch the video to learn how!

Charlotte County,

Like a river flows, surely to the sea, so your wedding at the Clerk's office is meant to be.

Take my hand, take my whole life too.

For I can't help but schedule my Valentine's Wedding in the Clerk's Ceremony Room.

The Clerk's office is now offering a Valentine's themed wedding event in our ceremony room, from February 6 - February 27!

Come join us for an extra special event on Valentine's Day February 14 as refreshments and music are provided as part of our Valentine's Day wedding

Clerk's Office Provides Enhanced Services for Lower Cost

Charlotte County,

After winning the Charlotte County Chamber of Commerce's Business of the Year Award in 2021, the Charlotte County Clerk of Court's office didn't rest on its laurels in 2022!

This past year's primary focus was providing better, more efficient, and convenient services to all Charlotte County residents. In early 2022, we held a special passport event which helped families juggle hectic work and school schedules by providing extended office hours for processing passport applications and taking FREE passport photographs. Later in the year, we then launched a self-serve legal website, <https://clerkclerk.com>, allowing litigants without attorney legal fees to use in their cases. We also teamed up with the Charlotte County Legal Aid Society to provide FREE 20 minute legal consultations for pro se litigants. Additionally, we increased hours in our Murdock passport office so Port Charlotte and Englewood residents could more conveniently apply for and receive their passports.

The last time a Clerk's office branch existed in Englewood was 2009, almost 15 years ago. Looking to our local citizens, we responded by opening a new, state-of-the-art Clerk's office branch in Englewood this year, which provides all our Free County citizens more services and convenience. Dedicating this office to the Englewood community, as well as expanding our online services, resulted in a nomination for "Excellence in Business" by the Englewood Chamber of Commerce.

Throughout 2022, our marriage license office offered holiday-themed weddings, Valentine's Day, Halloween, Fall Festival, and Winter Wonderland were all represented this year, and the couples married during our holiday-themed weddings truly enjoyed their special day at the Clerk's office.

Our office not only accepts its responsibility for providing high quality services to our community, but it also bears an obligation to be a helpful community partner within Charlotte County.

Charlotte County,

Get back in the Driver's Seat during Operation Green Light!

During Operation Green Light, customers with suspended driver licenses will have an opportunity to pay overdue court obligations, including traffic tickets, and **save up to 40% in additional fees.**

WHEN:
Monday - Friday
March 13 - 17 8:00 am - 5:00 pm
March 20 - 24 8:00 am - 5:00 pm
Saturday
March 25 8:00 am - 12:00 pm

WHERE:
Charlotte County Justice Center
350 E. Marion Ave, Punta Gorda, FL 33950

Payments must be made in full either in person, online at CharlotteCountyPay.com or by telephone at 855-796-0772.

Honoring Our Heroes: FREE Passport Photos for Veterans & Active Military Personnel

Charlotte County,

In recognition of National Veterans and Military Families Month and to express the Clerk's office appreciation for all those who served our nation, Roger D. Eaton, Clerk of the Circuit Court and County Comptroller for Charlotte County, is proud to provide FREE passport photos throughout the month of November for all Veterans and Active Military Personnel.

FREE PASSPORT PHOTOS FOR VETERANS & ACTIVE MILITARY PERSONNEL ALL NOVEMBER LONG!

Charlotte County,

Oh, the wedding bells, there a ringin',
We gather 'round, loved ones near,
Our love takes flight,
In the soft daylight,
Married in a Christmas Wonderland!



STRENGTHENING COMMUNITY CONNECTIONS ONLINE IN 2023

We aim to keep our community in the loop by regularly sharing updates, photos, announcements, and Clerk-related news. Don't miss out! Follow us on Facebook, Instagram, Twitter, LinkedIn, and YouTube for all the latest updates. Be sure to like, follow, and share our posts. We welcome your comments and questions. Let's stay connected!



3K+ ACTIVE FACEBOOK FOLLOWERS



921 ACTIVE INSTAGRAM FOLLOWERS

QUICK STATS

92.2K

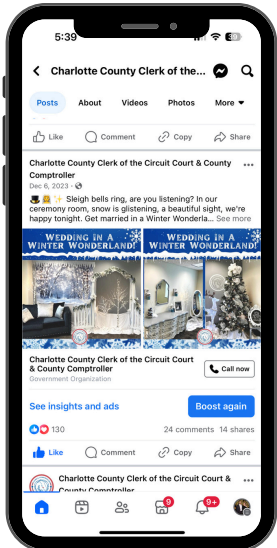
FACEBOOK REACH

1,200

INSTAGRAM REACH

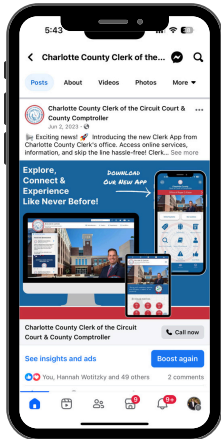
TOP 5 FACEBOOK POSTS WITH THE WIDEST REACH IN 2023

11,856



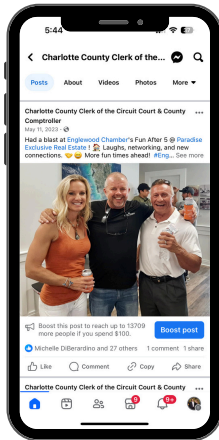
WINTER WEDDING EVENT

8.3K



NEW CLERK APP

5.2K



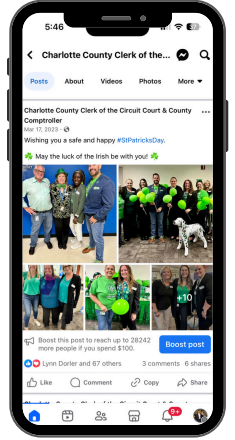
CHAMBER EVENTS

5K



FREE VETERAN PASSPORT PHOTOS

4.7K



OPERATION GREEN LIGHT



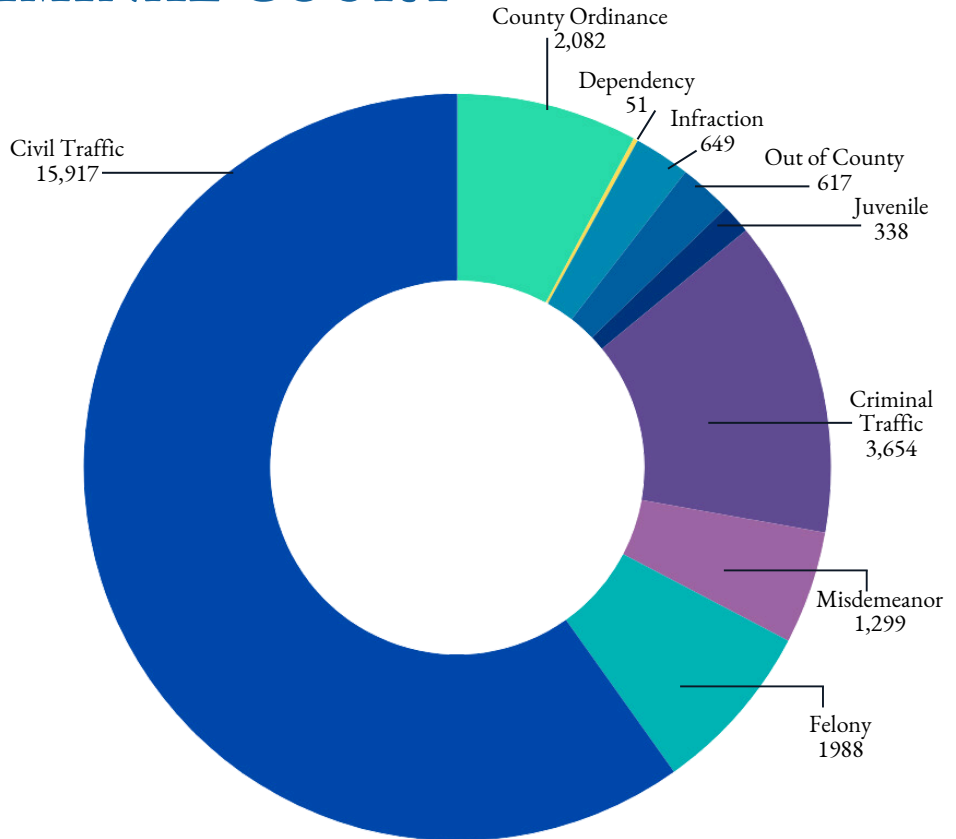
CRIMINAL COURT

The Criminal Courts Division is responsible to open new cases for nine different court types that include Felony, Misdemeanor, Criminal Traffic, Civil Traffic, County Ordinance, Civil Infraction, Juvenile, Dependency and Out of County cases.

The Clerk's Office is dedicated to principled practice by working with other agencies including the Sheriff, State Attorney, Public Defender, Florida Department of Law Enforcement, Pre-Trial Services, Department of Corrections, and County Probation as well as the Judges and their Judicial Assistants and private attorneys to work together to achieve shared success.

One of the duties of the Clerk is to attend Criminal and Civil Court hearings and capture the ruling of the Judge on sentence forms, take court minutes, swear in witnesses, maintain admitted evidence and announce the verdict by the jury on the record.

The Clerk strives to provide efficient customers service both in person and online. Customers can easily review any case online at CharlotteClerk.com by entering a name, case number or citation number.



PAYMENTS



Payments for all case types can be made In person at our Punta Gorda, Murdock or Englewood office locations.



Payments for applicable fines and court costs can be made online at CharlotteCourtPay.com through our partnership with nCourt.



Court and Traffic Fines and Fees can be made at your local 7-Eleven, Family Dollar, CVS.



Payments can also be made over the phone. Call our toll-free payment line (855) 769-5772. Communication is available in both English & Spanish

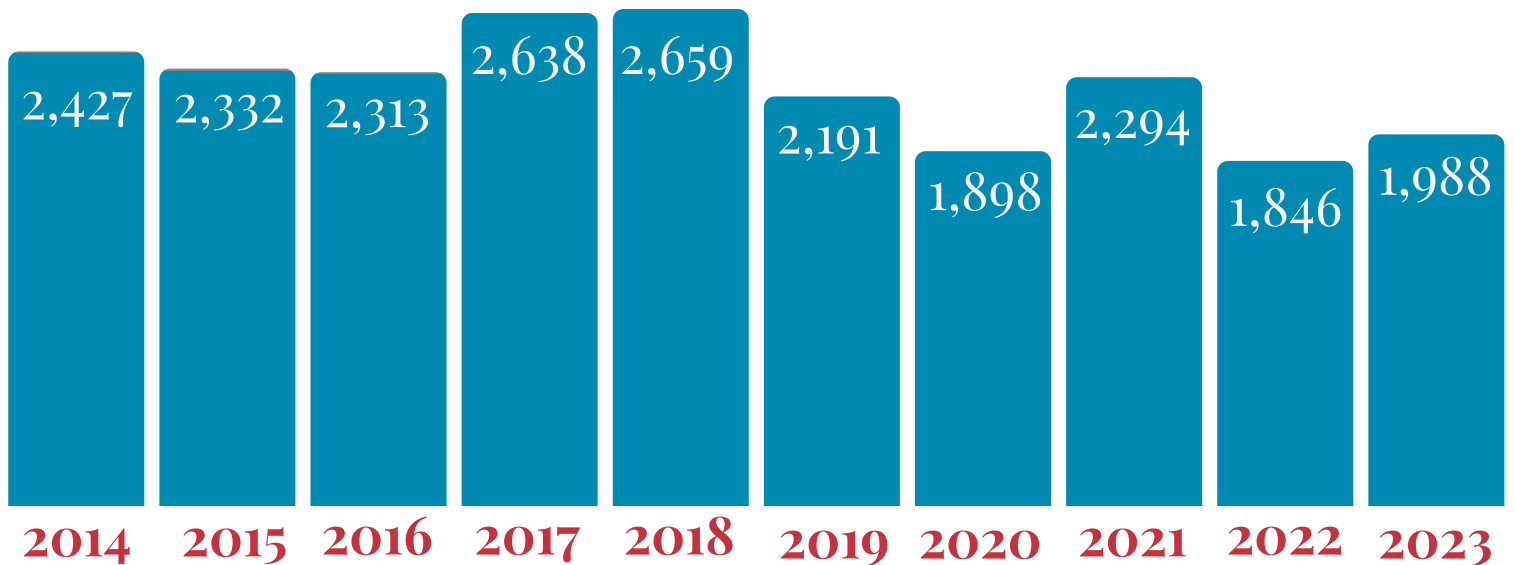


MISDEMEANOR AND FELONY

Misdemeanor Cases Filed



Felony Cases Filed



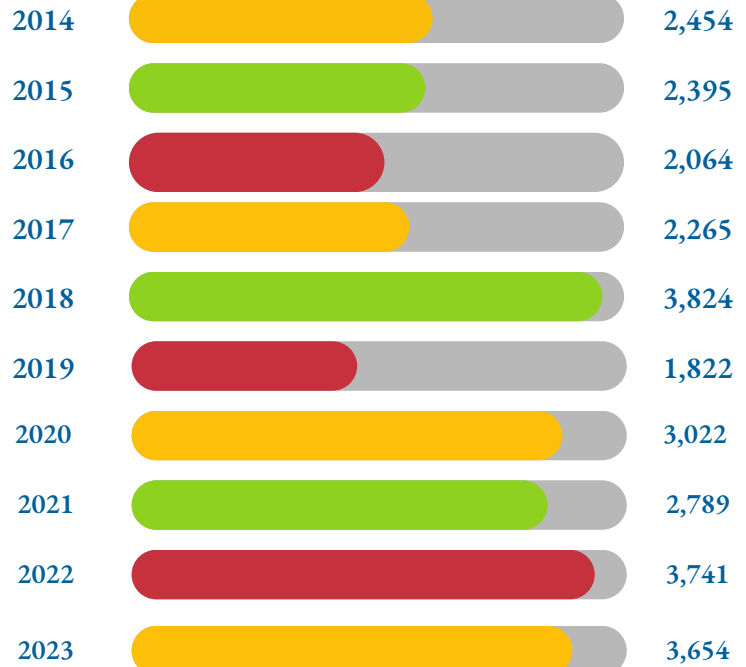


TRAFFIC

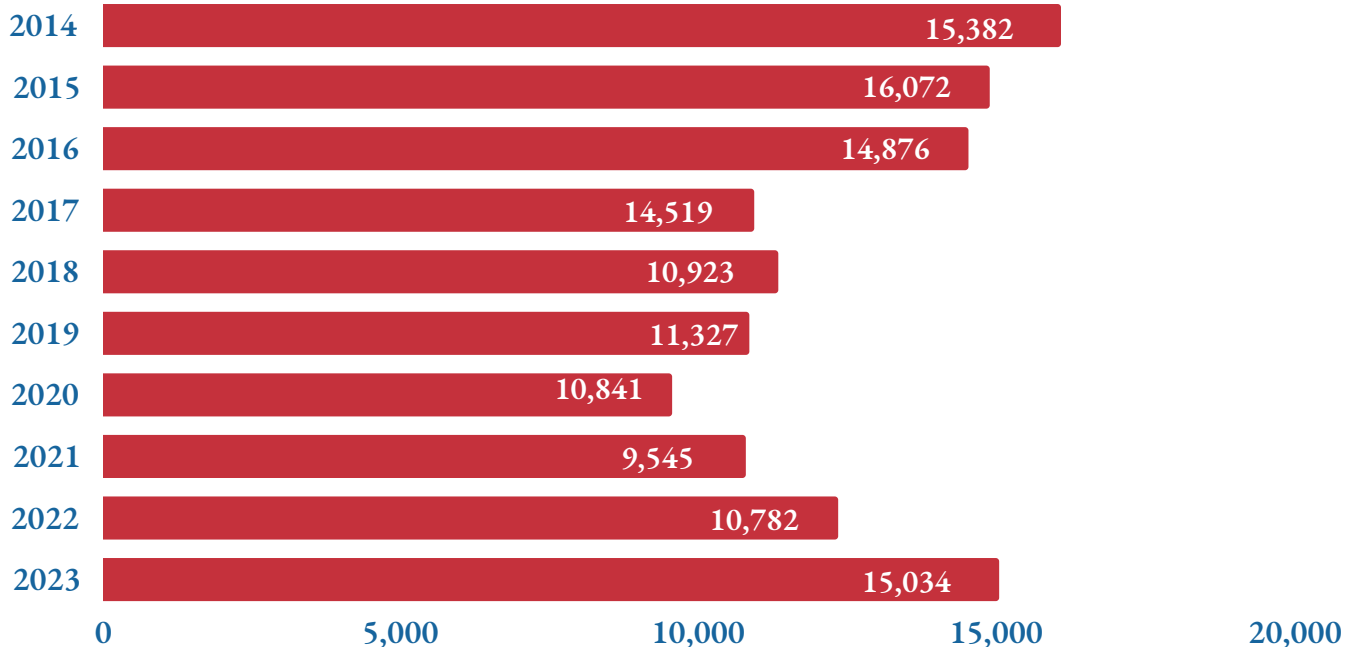
Criminal Traffic Cases Filed

Uniform Traffic Citations are electronically filed through e-Citations as well as hard copy format. Information is submitted from the following agencies: Florida Highway Patrol, Charlotte County Sheriff, and Punta Gorda Police Department.

Citations are issued for parking tickets, animal control violations, code enforcement, alarm violations, boating citations, and Department of Transportation (DOT) violations. Citation payments can be made in person, by mail, online at CharlotteCourtPay.com, or by calling 855-796-5772. You may also use cash at one of our Scan, Pay and Go locations listed on page 10.



Civil Traffic Cases Filed



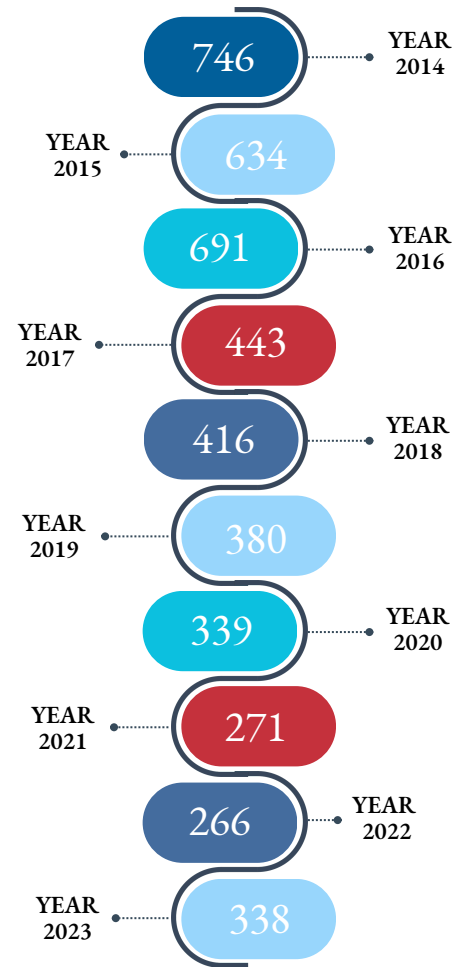


JUVENILE

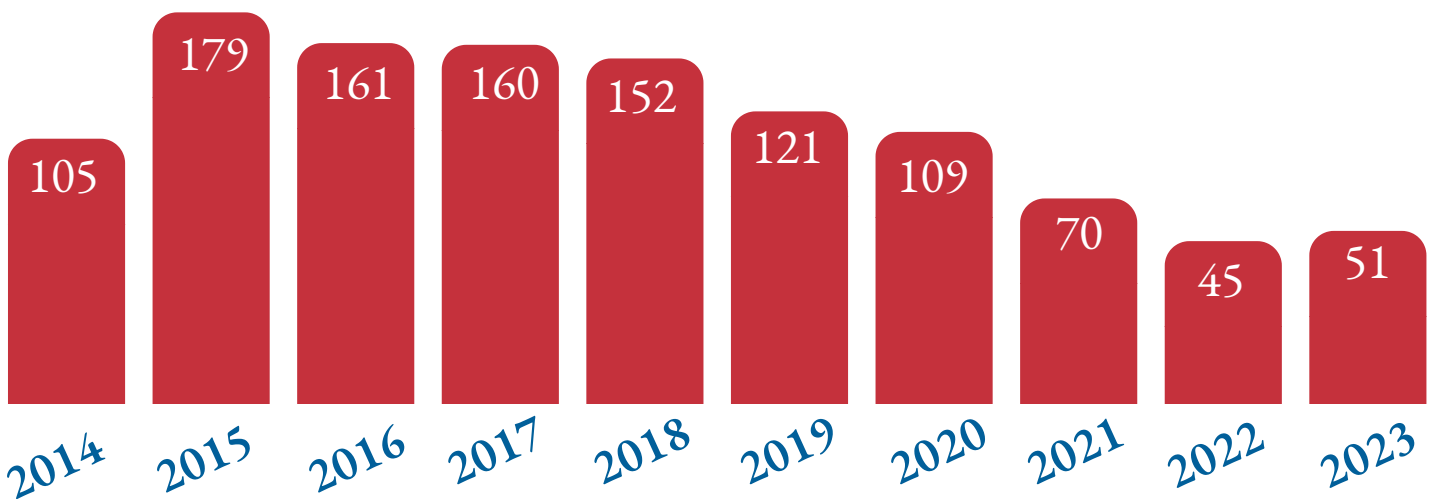
Juvenile Cases Filed

There are two types of cases involving juveniles. Juvenile Delinquency involves anyone under the age of 18 accused of breaking the law. Juvenile Dependency is the removal of children by the Department of Children and Families (DCF). Both case types are confidential and not available to the public. Photo identification will be required to access information about these cases and will only be released to the case parties.

The State Attorney's Office may choose to charge a juvenile as an adult. When this happens, the juvenile case is closed and a felony case would be opened. Juvenile cases can be transferred to the county where the offender resides. This usually happens when the juvenile is sentenced to probation. All dispositions are reported to the state utilizing software that requires special security access to ensure confidentiality is maintained.



Dependency Cases Files

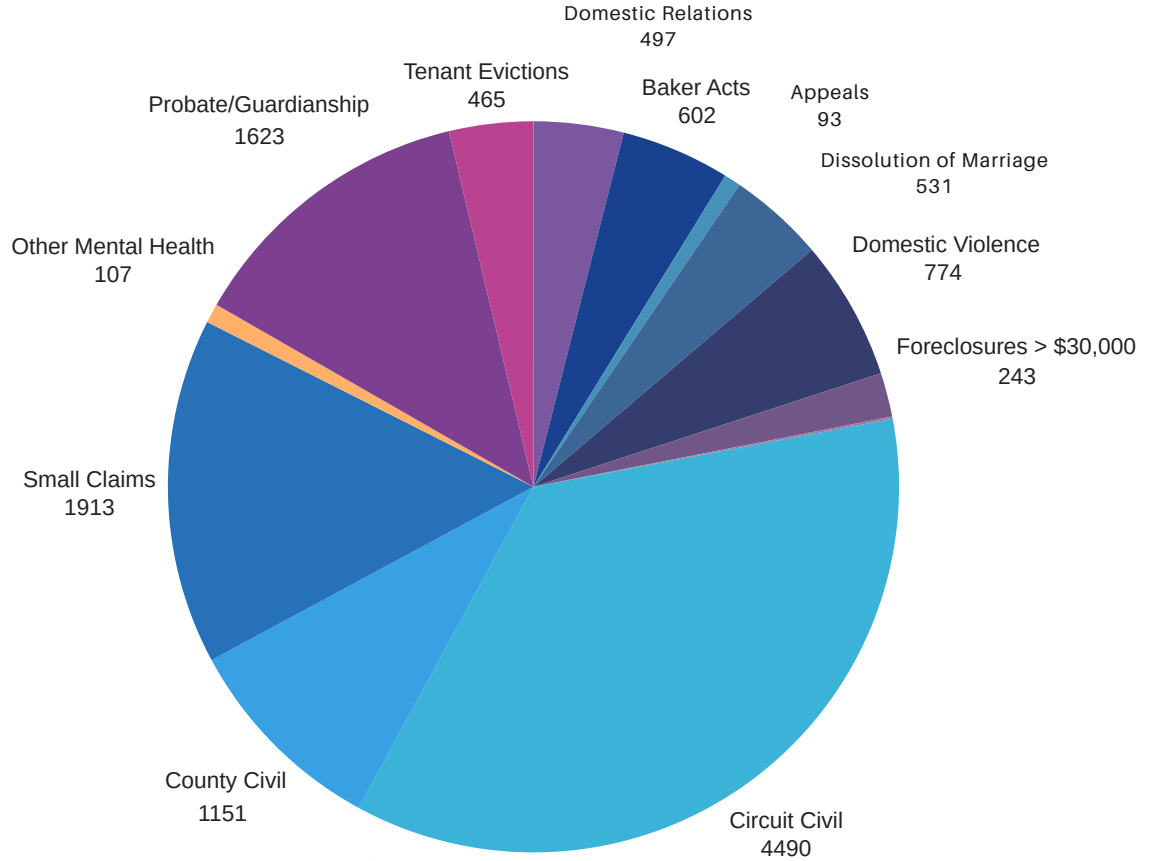




CIVIL COURT

Civil Courts is responsible for processing County Civil, Circuit Civil, Domestic Relations, Probate, Guardianship and Mental Health cases.

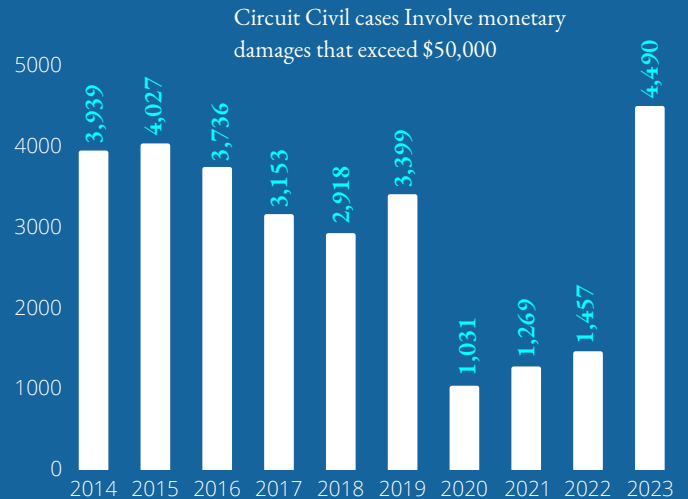
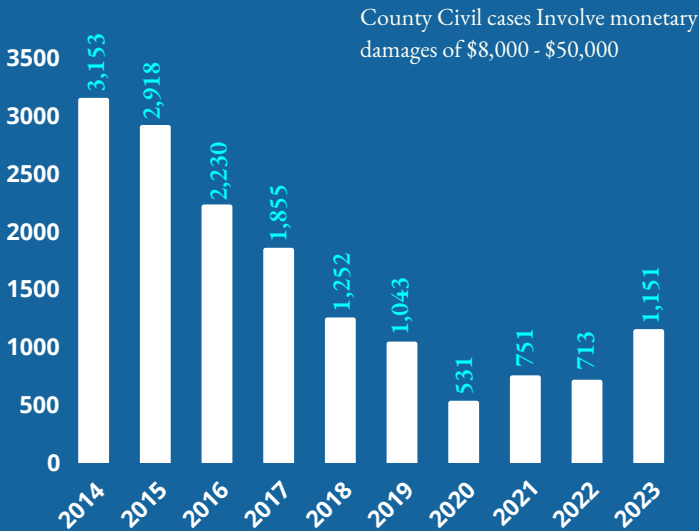
In 2023, the Civil Division processed 12, 101 new cases.



COUNTY CIVIL CASES FILED



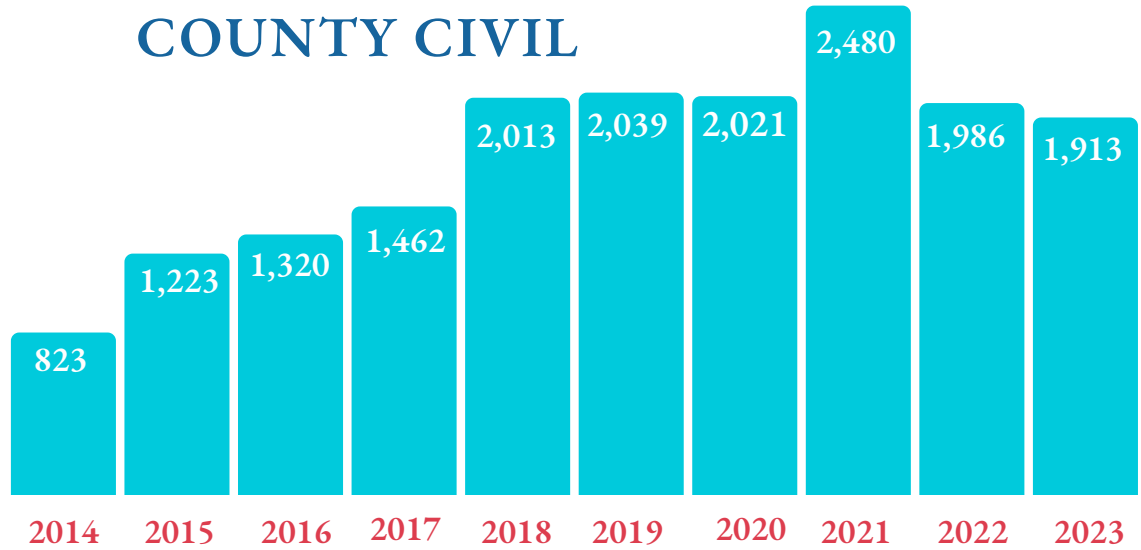
CIRCUIT CIVIL CASES FILED





COUNTY CIVIL

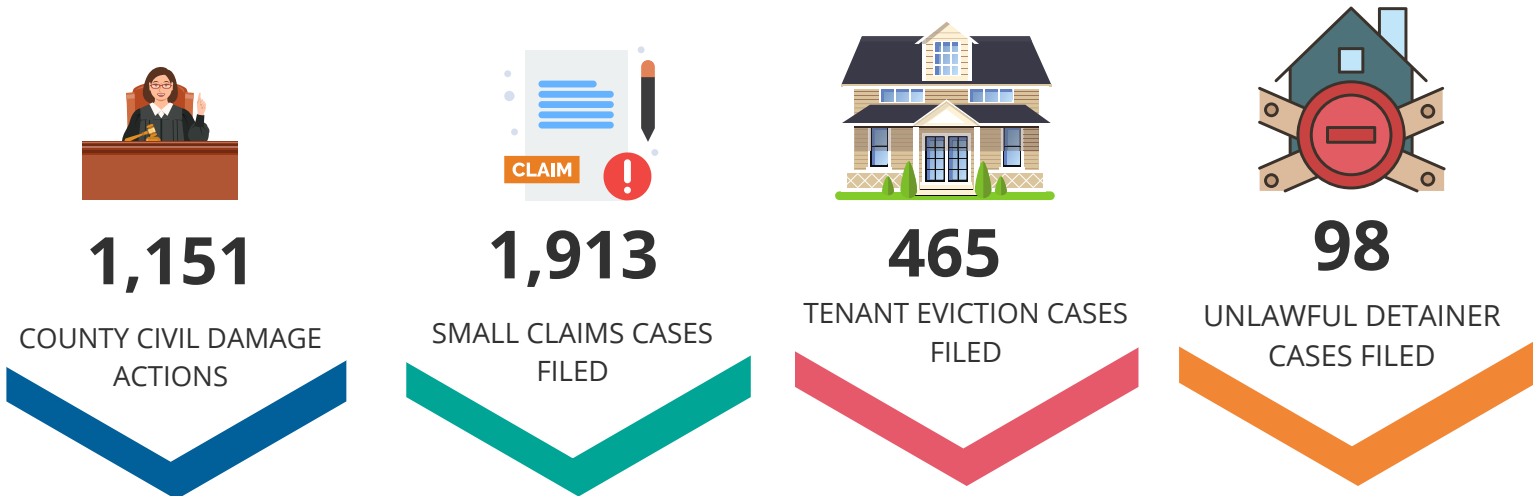
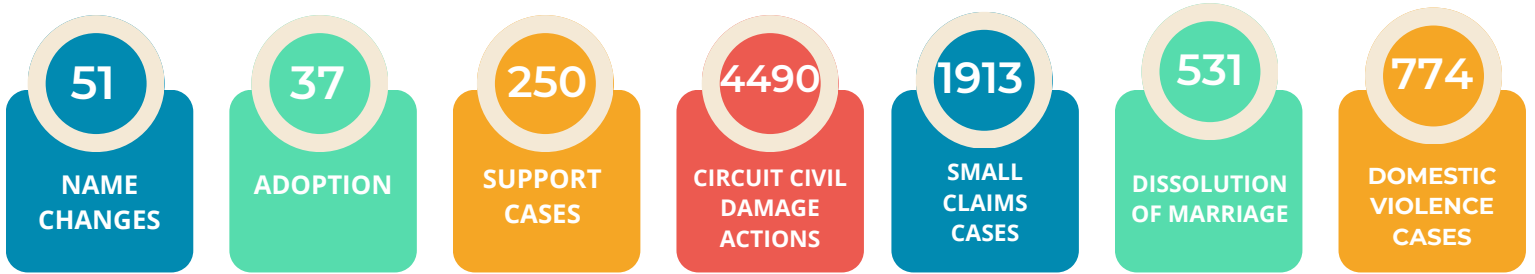
Small Claims involves damages less than \$8,000. Anyone can file a case without representation by an attorney or they can utilize our self-help program at SelfHelp.CharlotteClerk.com. All small claims cases are set for a mandatory zoom hearing before a court date is set with the Judge.



CIRCUIT CIVIL

Circuit Civil includes action with damages that exceed \$50,000 Foreclosures exceeding \$50,000 and all Domestic Relations cases.

As a result of a change to Florida Statute of Limitations, a large increase of negligence and insurance cases were filed in 2023.





DOMESTIC VIOLENCE

At our Justice Center location staff provides victims with a sense of privacy to complete an Injunction for Protection.

An Information brochure is provided to Law Enforcement Officers for distributions on domestic violence calls. The brochure provides victims with information on how to file for an Injunction for Protection and outlines documents that petitioners will need to bring with them to the Clerk's Office. All packets can be located online at: CharlotteClerk.com under Self Help and Forms Online.

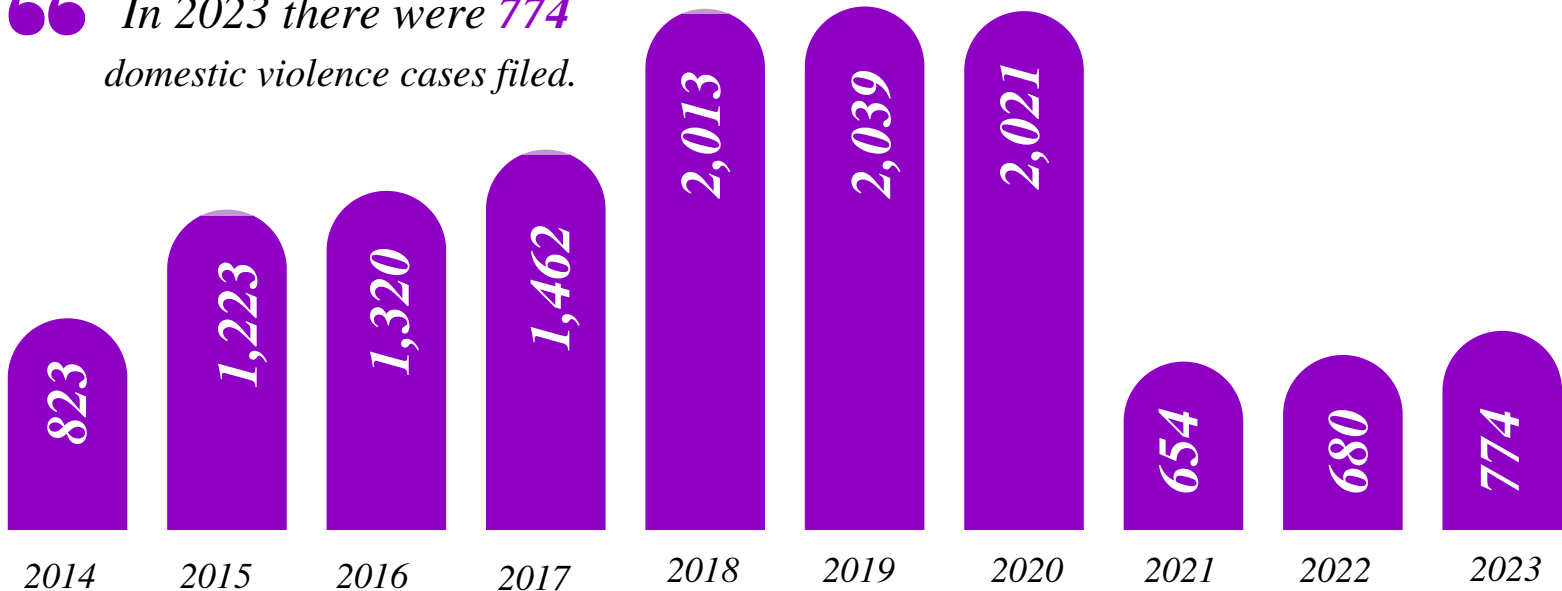


Our Domestic Violence Division is located at the Justice Center on the First Floor. Our staff is available between the hours of 8:00 am and 5:00 pm and on-call if Center for Abuse and Rape Emergencies (C.A.R.E.) needs a petition to be filed.

Should you or someone you know need domestic violence assistance please don't hesitate to contact our office at 941-637-2162. You can also reach the C.A.R.E. at 941-627-6000. IF you are in immediate danger please contact 911.

DOMESTIC VIOLENCE CASES FILED

“ In 2023 there were 774 domestic violence cases filed.





FORECLOSURE

Foreclosure is the proceeding by a creditor to regain property or other collateral following a default on mortgage payments. The Clerk's office processes foreclosure case files and provides a new certified title upon the conclusion of a sale via Real Auction. Charlotte County was the first county in the State of Florida to offer both online sales for foreclosures and tax deeds.

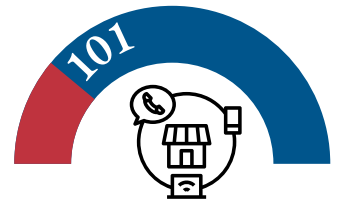
These online auction services offer greater access to records for the public and has improved efficiency in the processing of foreclosure and tax deed sales and new titles. All foreclosure sales are held online at Charlotte.RealForeclosure.com on Monday, Wednesday, Thursday, and Friday at 11:00am as set by judicial order.

Bidders are able to deposit funds through ACH wire transfer from any place in the world, never having to visit the office in person.

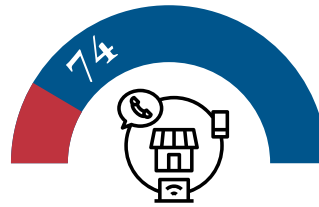
2020 Online Sales



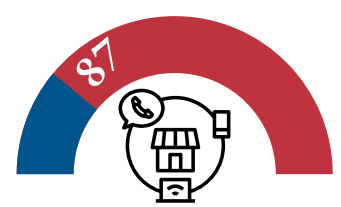
2021 Online Sales



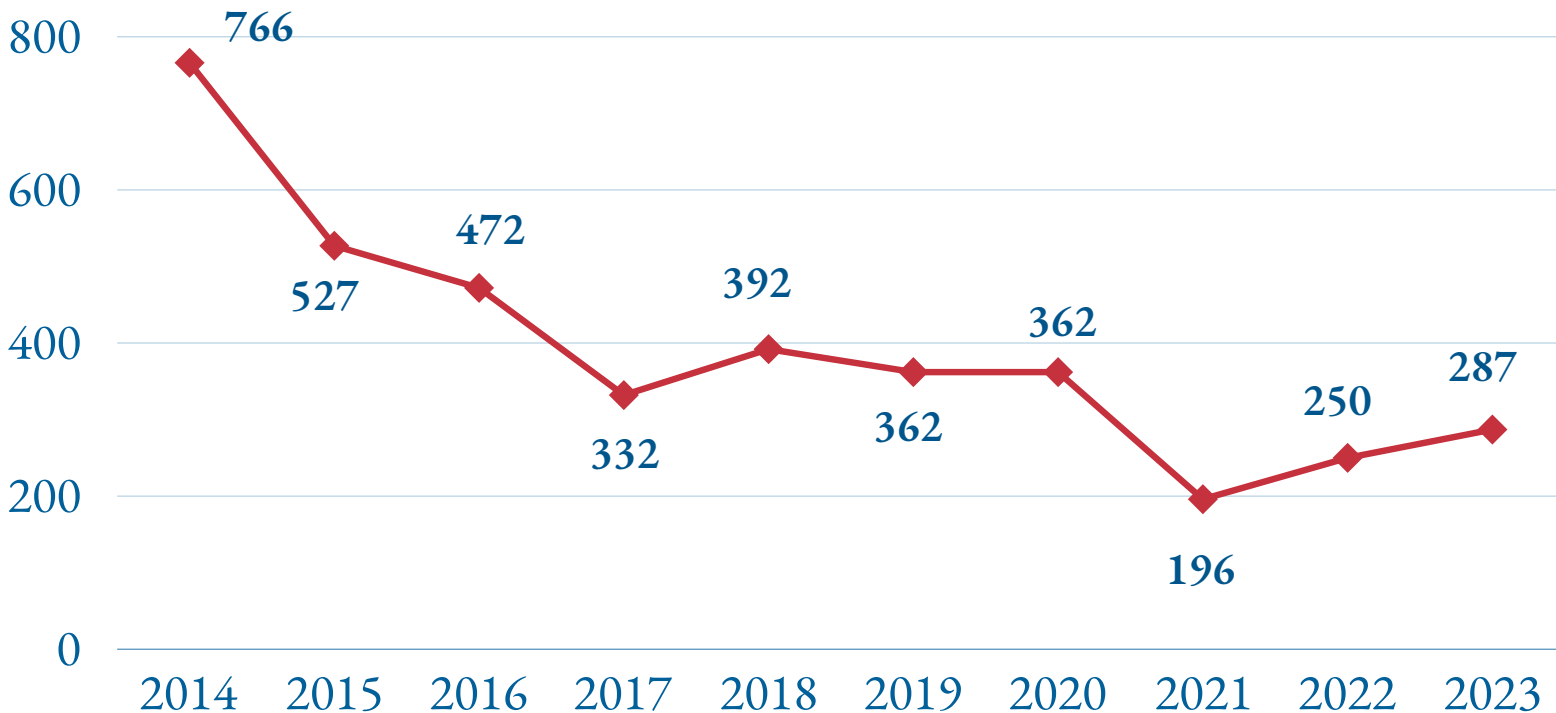
2022 Online Sales



2023 Online Sales



FORECLOSURE CASES FILED





PROBATE, GUARDIANSHIP AND MENTAL HEALTH

The Clerk is responsible for auditing all guardianship cases. This is an essential element for safeguarding the individual, as well as their property and assets.

In 2018, Risk Protection cases were created with the intent to address gun violence by providing law enforcement and the Courts with tools to enhance public safety by temporarily restricting firearm possession by an individual who is undergoing a mental health crisis and when there is evidence of a threat of violence. Since its inception 63 Risk Protection cases have been filed in Charlotte County.

In 2019, legislation passed for the prevention of the Exploitation of Vulnerable Adults. This allows an individual that is concerned that a third party is taking advantage of an elderly or incapacitated adult to file a petition and have a hearing before a judge. Since its inception, 22 cases have been filed.

2023 CASES FILED

1,623 PROBATE CASES

196 INCAPACITY GUARDIANSHIP CASES

602 BAKER ACT CASES

527 WILL ON DEPOSIT CASES

704 MENTAL HEALTH CASES





JURY

When a potential juror receives a jury summons they can visit our website Jury.CharlotteClerk.com or our new app to pre-register. Once the juror has pre-registered they will receive text and email notifications when they are required to report. The website and app also have the functionality that a juror can request a postponement or upload necessary documentation from a doctor without having to contact our office.

Want to see what our jury assembly rooms looks like prior to reporting visit our website Jury.CharlotteClerk.com.

Since September 2020 Jurors have the ability when pre-registering or visiting the jury assembly room to request to donate their \$15 statutory jury duty pay to the Center for Abuse and Rape Emergencies. (C.A.R.E.)



DONATED
\$15,240

2023

JURY TRIALS	JURORS
65	2,741

JURY

JURORS REPORTED





APPEALS

Appeals are cases presented to a higher court to review the decision rendered by a lower court. Most cases are appeals to the District Court of Appeals with the exception of County Ordinances, Civil Traffic Citations and certain boating citations.

Our appeal process is completely electronic, from the submission of the Initial Notice of Appeal to the District Court, and all subsequent pleadings and orders.

81 *TOTAL APPEALS*
FILED IN
2023

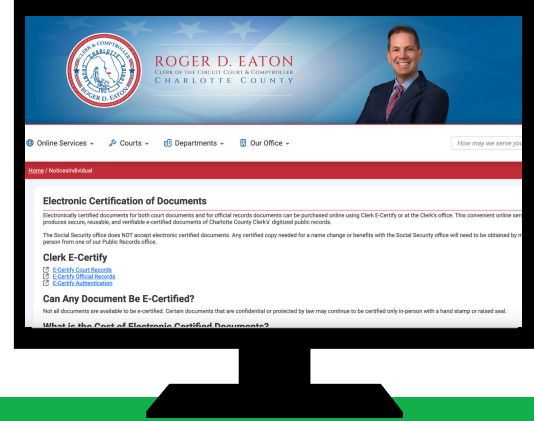




HIGHLIGHTS OF COURT OPERATIONS

This year our office provided citizens of Charlotte County with electronically certified court documents. These documents can be purchased online using Clerk E-Certify or visiting the Clerk's Office. This convenient online service provides secure, reusable and verifiable e-certified documents of Charlotte County Clerk's public records. Visit our website today at: ECertify.CharlotteClerk.com

All electronically certified documents have a flat fee of \$9.00. Electronic certified documents can be saved to your computer or mobile device, emailed and multiple copies printed over time as needed. In person, electronically certified document fee is \$7.00 plus \$1.00 for each additional page.



2023 OPERATION GREEN LIGHT



CHARLOTTE COUNTY
CLERK OF COURTS

OPERATION
GREEN LIGHT

DRIVER LICENSE
REINSTATEMENT DAYS
EVENT

On March 13th – March 25th our office participated in the annual Operation Green Light. This event allows residents with suspended driver licenses an opportunity to pay overdue court obligations while saving up to 40%. This year we collected \$11,444.96 and 90 customers were able to have their license reinstated.





OFFICIAL RECORDS SERVICES

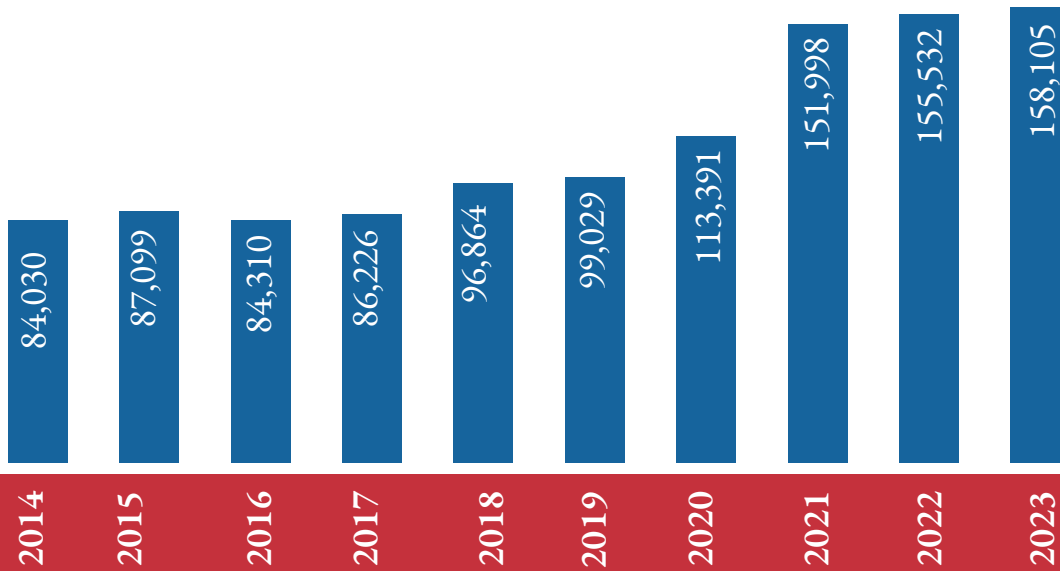
The Clerk is the recorder of all instruments required or authorized to be recorded in one general series of "Official Records" books. Upon payment of the statutory fees, the Clerk Records and indexes a variety of important documents; including deeds, mortgages, judgments, military discharges, domiciles and other authorized documents. Once recorded, a document remains a permanent record, available for public viewing.

Presently, there are over 4.3 million recorded documents dating back to the inception of Charlotte County in 1921 available for the public to view.



Access to the County's Official Records is available to the public via Recording.CharlotteClerk.com.

In 2023, The Clerk of the Circuit Court and County Comptroller recorded, verified, redacted (if needed), and indexed 158,105 documents.



The Clerk provides resources to help the citizens safeguard their property. The Property Fraud alert is a free service that helps protect an individual's property from fraud by monitoring documents such as liens, deeds and mortgage that are recorded in Charlotte County. Over 8,660 owners have registered to get alerted when a document is recorded into Official Records using their individual or business name.

In 2023, new law was passed adding an extra layer of protection for Property owners. HB 1419 states that witnesses must provide their Post Office address on certain document types, such a property transfers, for instance on all Deeds.



SIGN UP, IT'S EASY

1. Visit Fraud.CharlotteClerk.com
2. Enter your Information
3. Click Register!
4. You're all set!



**BE PROACTIVE
IN PREVENTING
PROPERTY FRAUD**

**SIGN UP FOR OUR FREE
PROPERTY FRAUD
ALERT!**

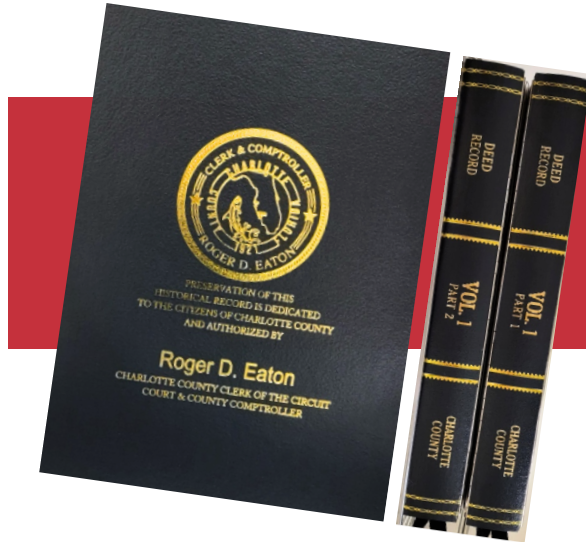


INNOVATION & IMPROVEMENTS

PRESERVATION

Safeguarding History: Preserving Charlotte County's First Deed Book

In 2023, the Clerk's office, driven by Clerk Eaton's commitment to safeguarding the people's records and assets, took a significant step: partnering with document preservation company Kofile, Inc., to preserve the first-ever Deed book of Charlotte County.



Created in May, 1921, this treasured book holds the very foundation of land ownership in the region.



QMINDER KIOSK SYSTEM

Improving customer service this year we implemented kiosk system in our Murdock location to better identify customer needs upon entering our office. The kiosk greets you with a user-friendly interface, helping you identify your needs like filing notice of commencements, recording documents, completing passport application or seeking marriage licenses. Based on your selection, the system intelligently assigns you to a trained clerk, ensuring you receive the fastest and most relevant assistance. This eliminates confusion and streamlines the process, saving you valuable time.

SELF-HELP

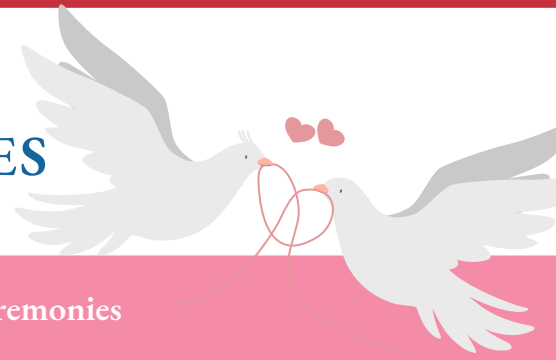
The Clerk's Self-Help Services provides the public with legal resources, including forms, internet access, and a 20 minute free legal consultation with the Charlotte County Legal Aid Society. Self-represented litigants can get answers regarding a variety of civil and family legal matters. Self-Help Services was designed to help litigants who either choose to represent themselves, or cannot afford to hire an attorney.

For more information and to schedule your free legal consultation appointment, visit our website at: SelfHelp.CharlotteClerk.com

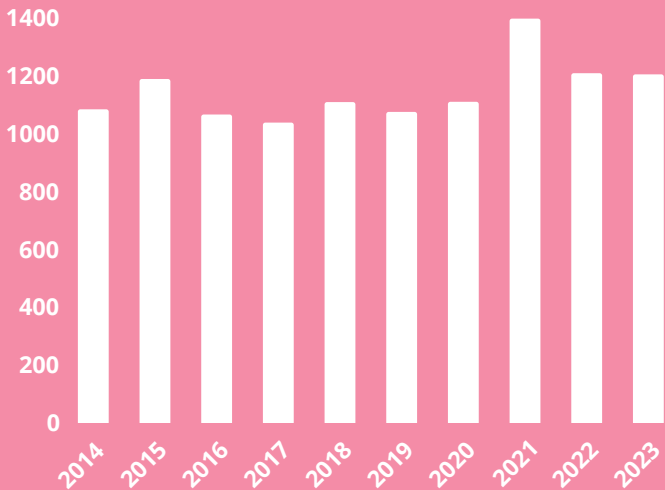




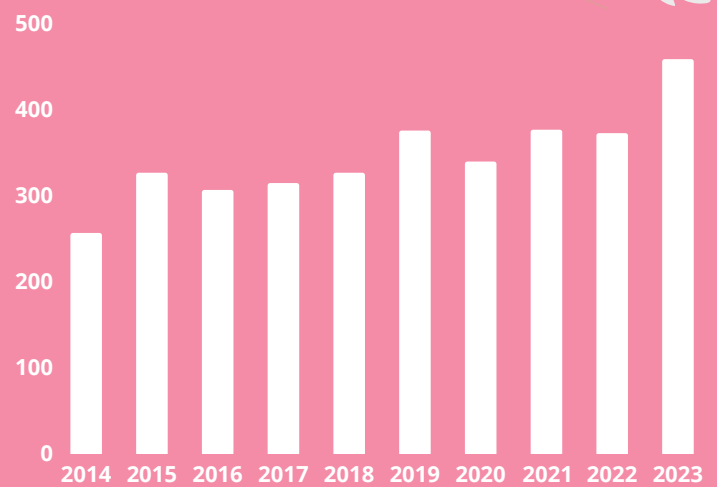
MARRIAGE SERVICES



Marriage Licenses



Marriage Ceremonies



Marriage Licenses can be issued at any of our office locations. The Punta Gorda Official Records division performs marriage ceremonies upon request. In 2023, there were 1,205 licenses processed and 458 ceremonies performed.

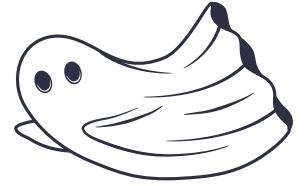
For your convenience, a Marriage License Application request can be prepared or a Marriage ceremony can be scheduled online at our Marriage Services website: Marriage.CharlotteClerk.com

In 2023, our office provided couples with themed wedding ceremonies. For Valentine's Day, love was in air, happiness filled the Clerk's office as we performed marriage ceremonies for 7 different couples on Valentine's Day!





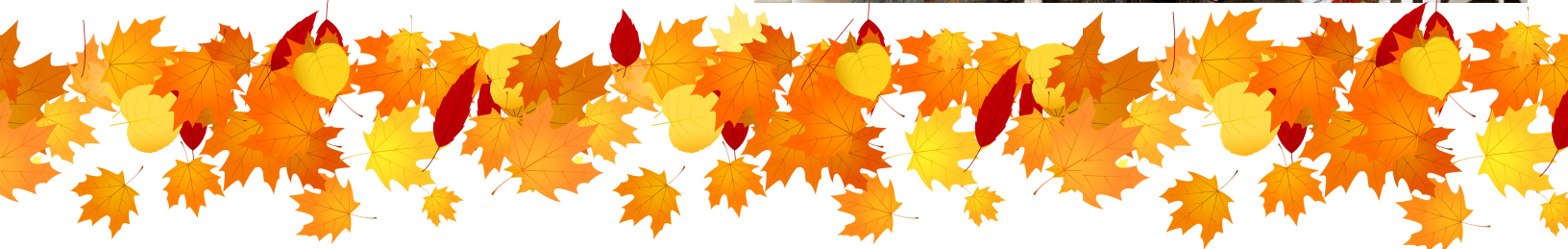
MARRIAGE SERVICES



Halloween day and our enchanting Winter Wonderland weddings were both great events for all couples. They were frightfully delighted with the extra Halloween effect and enchanted by the wintry magic!



During the month of November, couples could say “I Do” in our pumpkin patch. While the leaves fall from the trees and people are falling in love, the Clerk’s office was offering an Autumn themed wedding





PASSPORT SERVICES

New passport, lost passports, children’s renewals (ages 15 or younger) or adults’ passports expired for more than 5 years may be processed at our Murdock and Punta Gorda locations from 8:00 a.m. - 4:00 p.m. The applications are forwarded to the U.S. Passport Agency for processing. For your convenience, passport photos are available to be taken and purchased at any of our office locations, including our new office location in Englewood. The colored photograph of the applicant, which is 2 inches wide and 2 inches long, must accompany every application. We can provide photo services for renewals as well as new passport applications.

THERE WERE

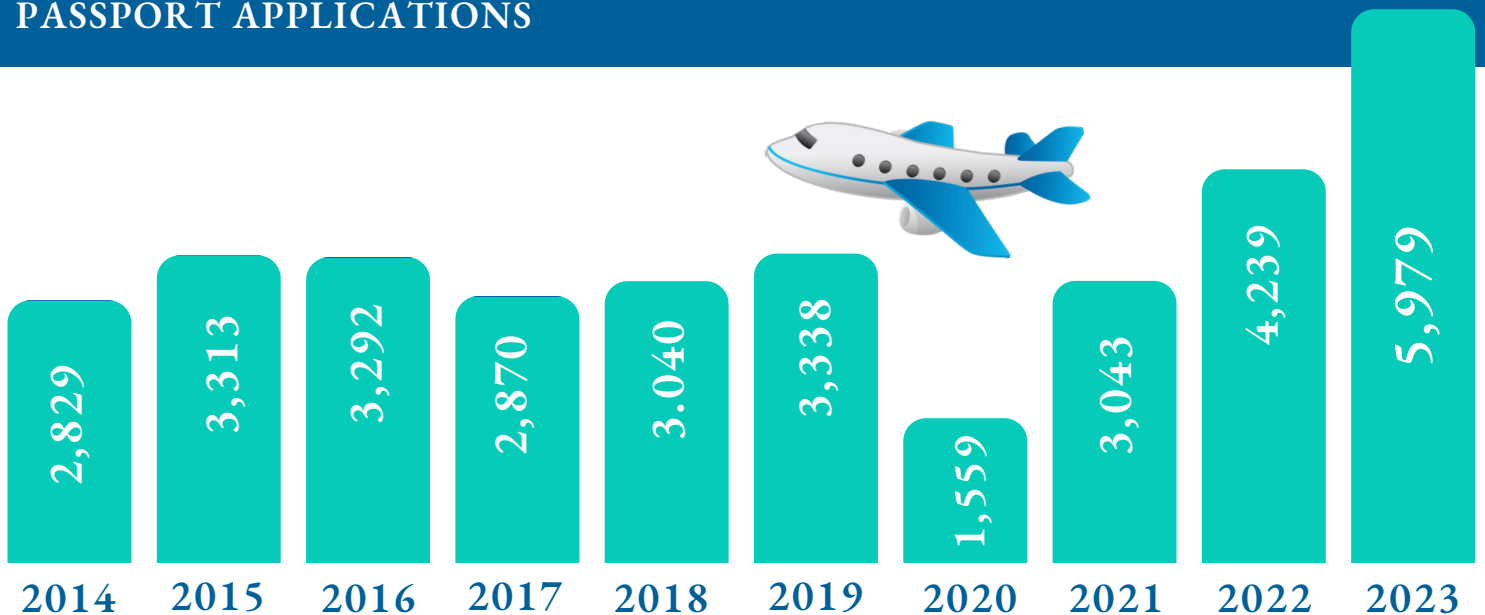
5,979

PASSPORT APPLICATIONS
SENT IN 2023 BY
OUR OFFICE

We are happy to announce that we hosted our 3rd Clerk Passport Day on Saturday, April 1st. We understand how hectic work and school schedule can be for working families. On this day over **450 visitors** entered the Justice Center, **173 applications were processed**, and the Clerk provided **FREE photos!**



PASSPORT APPLICATIONS





TAX DEEDS

Real estate taxes in Charlotte County become due every year on November 1st. Parcels remaining unpaid by mid-April are advertised in the local newspaper by the Tax collector's office in an effort to notify the property owners of the outstanding tax liability.

The Tax deed applications are processed by the Clerk of the Circuit Court and sales of real property are auctioned for non-payment of property taxes. All sales are held on-line through Charlotte.RealForeclose.com and are advertised weekly in the local newspaper.

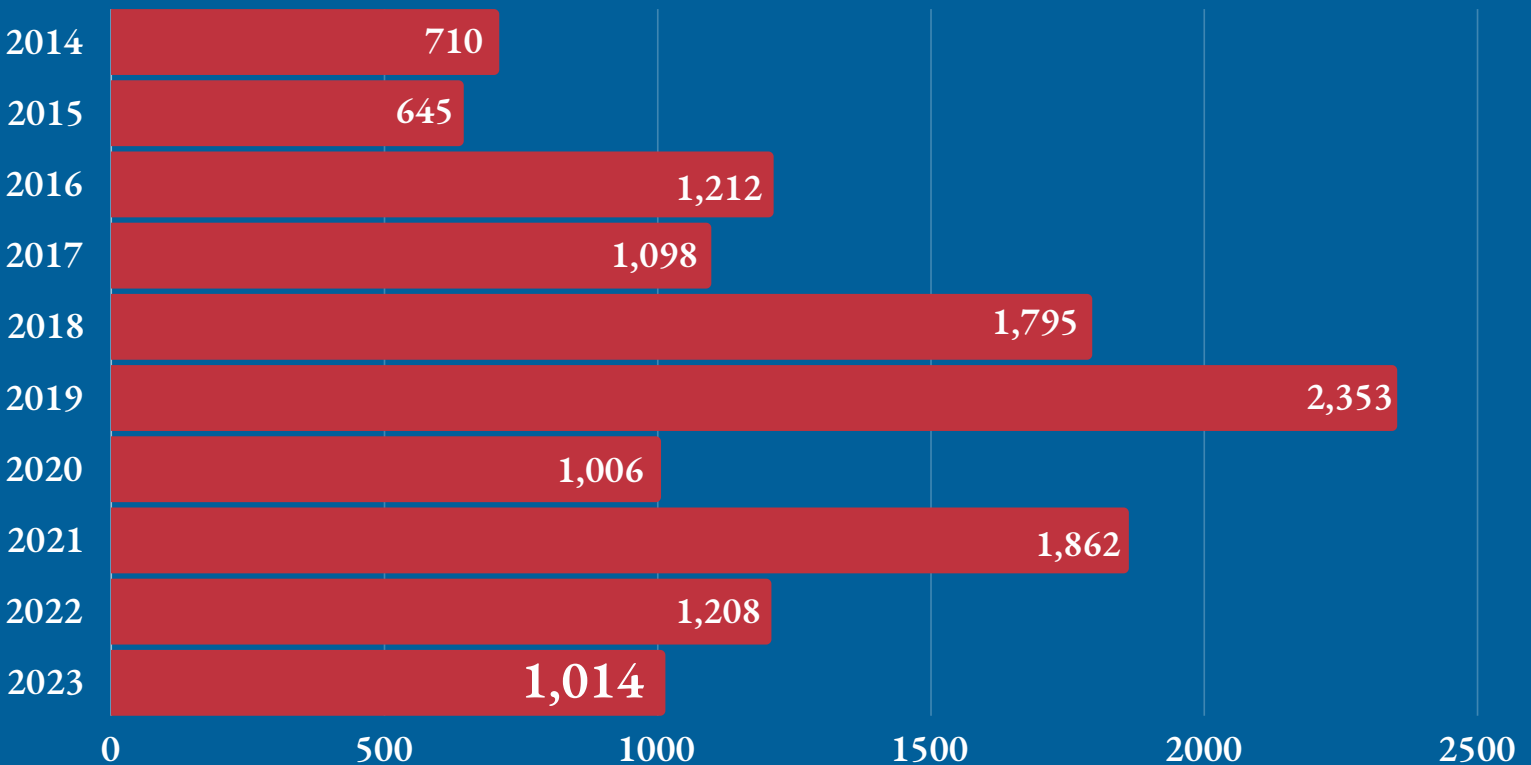
TAX DEED APPLICATIONS

Charlotte County Clerk's Office processed 1,014 applications in 2023.

The owner can redeem the property with the Tax Collector's office, up until the Clerk's Office receives final payment from the successful bidder. Once final payment has been received the Clerk's Office prepares and records the Tax Deed into Official Records.



Anyone wishing to view Charlotte County Tax Deed and Foreclosure information can visit our website saving the customers valuable time.





RECORDS MANAGEMENT

The Records Management Division is responsible for records inventory and classification, retention scheduling, records storage and conversion, vital records, disaster prevention and recovery planning, and disposition. The division establishes and implements policies, systems, and procedures to create, capture, retrieve, access, distribute, use, store, secure and ensure proper disposition of the Clerk's records and information, in accordance with the applicable rules by the Florida Department of State, State Library and Archives of Florida, and the Florida Rules of Judicial Administration.

Think of the Records Management Division as the office's record-keeping superheroes! They partner with every department in the Clerk's office from Courts to Comptroller, offering valuable training and guidance. Their mission? Ensuring all records are meticulously maintained, securely protected, and readily accessible to the public, just as the law demands.

Imagine a mountain of paper over 7,282 boxes high or taller than the torch of the Statute of Liberty. That's the scale of the Clerk's Records Management Division's Records Warehouse, which houses documents for various county departments like Human Resources, Public Works, Community Development, Risk Management and Courts. But fear not, this year, over 9.5 tons of records were digitized or properly disposed of, thanks to efficient record retention practices.

The Clerk is always looking for new innovative ways to ensure records are maintained and made easily accessible. The division managed the digitization of over 1.2 million court documents from microfilm to electronic medium. This effort allows for faster access and retrieval of requested historical court records.

This digitization effort is just one example of the Clerk's commitment to modernizing recordkeeping and making vital information readily available. It's a testament to the power of innovation in keeping history accessible and justice well-served.





COMPTROLLER

Florida Statutes established the Clerk of the Circuit Court as Ex Officio Clerk to the Board of County Commissioners (BOCC), custodian of all County funds and Accountant to the Board. The Comptroller Division provides all business-related services in accordance with Florida Statutes, County Ordinance and Resolutions.

Roger D. Eaton and the Comptroller Division work to ensure all appropriate checks and balances are followed in order to ensure internal controls are successful in protecting the taxpayer's records and assets. The Comptroller Division responsibilities include cash management, payroll, general ledger activity and financial reporting for the Clerk of the Circuit Court & County Comptroller, Supervisor of Elections and the Board of County Commissioners.

The Treasury Management Team performs cash flow analysis and aids in investing surplus funds of the County. As custodian of all County funds, responsibility for the investing of these funds lies with the Clerk of the Circuit Court. The Clerk's office manages the portfolio to maximize investment earnings, while ensuring the tax dollars are protected. At the end of the fiscal year, the investment portfolio was \$922 million, consisting of treasures, agencies, local government investment pools and the Florida State Board of Administration as authorized by F.S. 163.01 and 218.415. The team also works closely with our banking partners to ensure payments are processed promptly and receipts are recorded in accordance with generally accepted accounting principles.

The Payroll team ensures timely and accurate processing of payroll transactions for the Clerk of the Circuit Court, Supervisor of Elections and the Board of County Commissioners. Tasks range from weekly production of payments to employees, compiling deduction information for timely, accurate payments to third parties and balancing all information for accurate quarterly and annually required reporting. The team also fulfills all State of Florida and IRS reporting requirements and payments, as well as managing the Florida Retirement System (FRS) reporting and payment of the monthly retirement contributions.

The Accounts Payable team is responsible for reviewing all payment requests for goods and services made by vendors, travel reimbursements to staff as well as payments for contractors and other outside professional services. The team works diligently to ensure prompt payments to vendors and routinely process payments well below the State requirement of 45 days. During fiscal year ending September 30, 2023, the Accounts Payable team processed approximately 16,000 checks, in excess of \$448 million.

The Enterprise Accounting staff is responsible for all transactions and financial reporting for the County business type activities. These activities include Charlotte County Utilities, various water and sewer districts, the landfill as well as a sanitation district. Enterprise activities are funded through external user fees and charges to the customer of the system. In addition, Internal Service Accounting staff handle all activities that provide goods or services to other funds or departments based on a cost-reimbursement system. These funds would include vehicle maintenance, self-insurance and a health insurance-trust fund.

General Accounting functions are provided by staff in the areas of governmental activities provided by the County such as fire and rescue, emergency management and disaster preparedness in addition to court related activities, road maintenance, libraries and parks and recreation. General accounting functions are those activities typically funded by property, sales and use taxes, grants and intergovernmental revenues.

In addition, the Comptroller Division is responsible for Financial Reporting functions by providing the final check of the financial information for the Clerk, Board and other agencies in accordance with generally accepted accounting principles. The Comptroller Division records and tracks fixed assets inventory of approximately \$1.3 billion. The Clerk's staff performs all accounting functions for over 150 funds and is responsible for grant analysis and reconciliation of an excess of 100 grants.

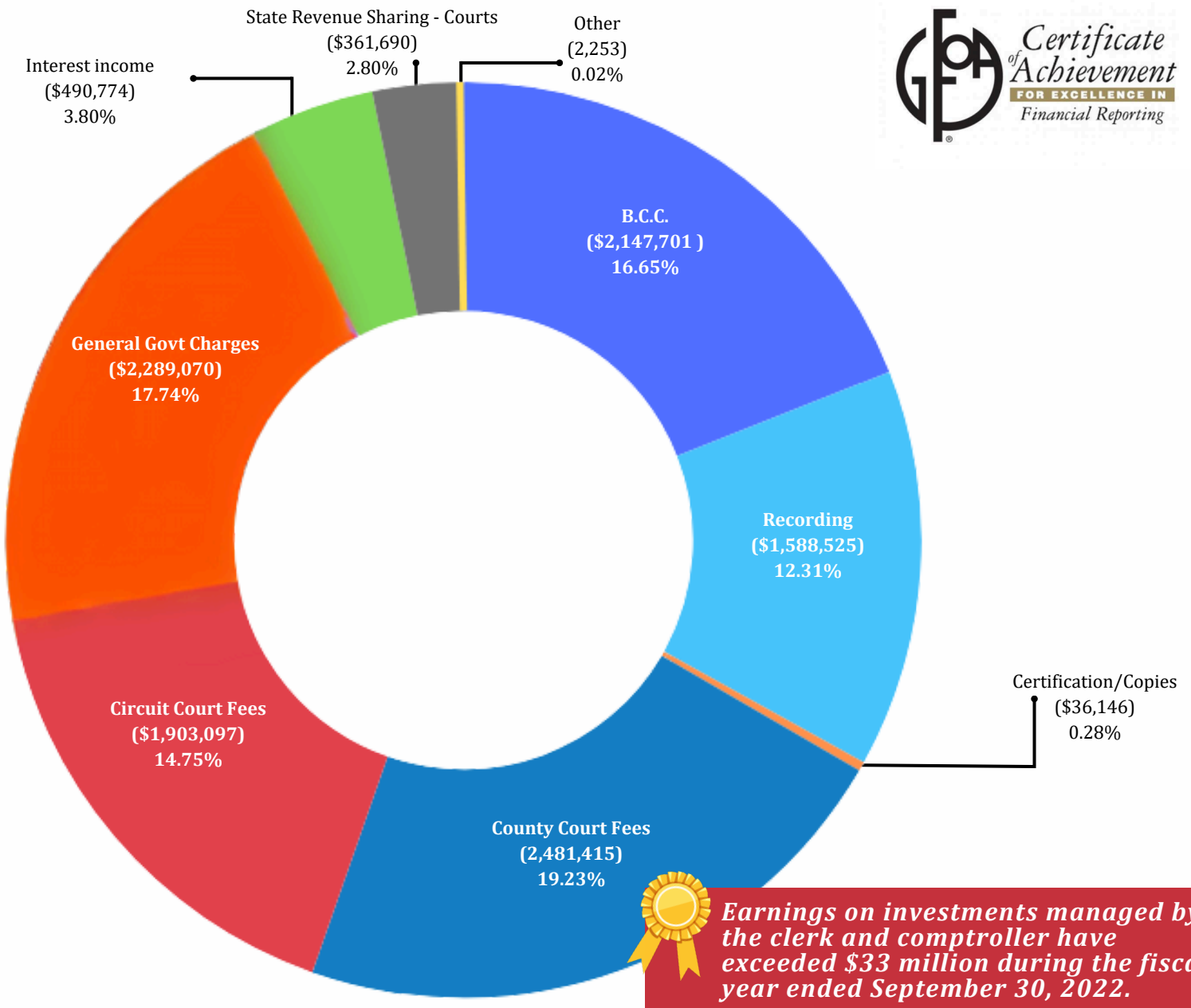




COMPTROLLER

The department also manages obtaining new debt proceeds, processing and monitoring debt payments as well as debt covenant compliance. The financial reporting also includes bond compliance via arbitrage reporting, debt service requirements and reporting to not holders, grant reporting, state financial reports as well as audited financial statements.

In Charlotte County, the Clerk's office prepares the Annual Comprehensive Financial Report (ACFR). The Government Finance Officers Association of the United States and Canada (GFOA) has awarded a Certificate of Achievement for Excellence in Financial Reporting to Charlotte County for the Annual Comprehensive Financial Report for the fiscal year ended September 30, 2022. This is the 37th consecutive year that this prestigious award has been received by Charlotte County Clerk's Office.





MINUTES

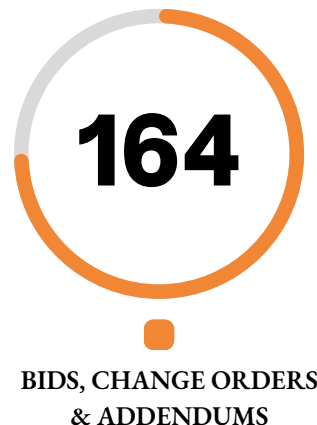
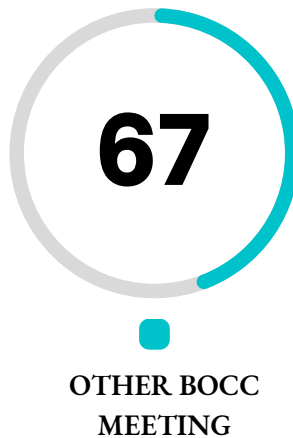
The Minutes Division fulfills the Clerk's constitutional responsibility as Ex-Officio Clerk to the Board of County Commissioners (BOCC).

Among its many responsibilities, Minutes staff attends and records all Board Regular and Land Use Meetings, Workshops, Public Hearings, and Special Meetings when more than two Commissioners will be present. Staff indexes and processes related official Board documents adopted by the BOCC. During each BOCC meeting, staff creates preliminary minutes by means of specialized web-based Granicus software and recording medias to capture a verbatim of the meeting. Minutes are a summary of each meeting and highlight essential information in a concise manner.

Regular Meetings are held on the second and fourth Tuesday of each month. Meeting lengths vary and are dependent on the size of the agenda to be followed.

Once the minutes are finalized and adopted by the Board of County Commissioners at a regular meeting, the official minutes are published to the County website for viewing in conjunction with the video stream, agenda, and any supporting documentation.

Available on our website [Minutes.CharlotteClerk.com](https://www.minutes.charlotteclerk.com) is our robust and easy to use online system that allows you to search the following documents from 1921 to present: Agreements, BCC Agendas and Minutes, Grants, Ordinances, Resolutions, Street Vacations, Charter Review Commission Meetings, Bids and Contracts.










VALUE ADJUSTMENT BOARD

Our office is responsible for the overall Value Adjustment Board (VAB) process. From filing of VAB petitions, scheduling petitions for hearing, attending and recording hearings, sending Special Magistrate Recommendations and holding the Final VAB Hearing to adopt the Special Magistrate Recommendations.

VAB PETITIONS FILED IN 2023

TOTAL PETITIONS FILED:

379

-  HOMESTEAD & AD VALOREM TAX EXEMPTIONS
-  PORTABILITY CLASSIFICATION
-  TAX REFUND CATASTROPHIC EVENT
-  TANGIBLE PERSONAL PROPERTY
-  REAL PROPERTY TAX ASSESSMENTS





INTERNAL AUDIT

The Internal Audit Division performs the duties and responsibilities of the Clerk of the Circuit Court and County Comptroller as auditor and custodian of all county funds as established by Article V, Section 16, Florida Constitution. Additionally, the Constitution of the State of Florida, Article VIII, Section 1.(d), "...the clerk of the circuit court shall be ex officio clerk of the board of county commissioners, auditor, recorder, and custodian of all county funds." The internal audit activity provides assurance to citizens and leadership through audits of risks and corresponding controls.

The Internal Audit Division team includes a Director and an Internal Auditor II with a combined experience of over 17 years in the department. The Division is guided by the mandatory elements of the Institute of Internal Auditors' (IIA) International Professional Practices Framework, including the Core Principles for the Professional Practice of Internal Auditing, the Code of Ethics, the International Standards for the Professional Practice of Internal Auditing, and the Definition of Internal Auditing. The Division performs their responsibilities in accordance with generally accepted accounting principles and generally accepted auditing standards. Certifications held by the Division include Certified Fraud Examiner, Certified Government Auditing Professional, Certified Internal Auditor, and Certification in Risk Management Assurance.

The Division performs a risk assessment at least annually of all responsibilities of the Board of County Commissioners and updates the annual audit plan based on those results. The Charlotte County Clerk of the Circuit Court and County Comptroller ("Clerk") is elected and accountable to the citizens of Charlotte County, thus is independent from the Charlotte County Board of County Commissioners (BCC) and County management. The Division also performs special engagements and consulting projects assessing risks and controls as requested by management, the Board of County Commissioners, and the Clerk of the Circuit Court and County Comptroller.

The Internal Audit staff assists the County's external auditors during the annual audit of the County's financial statements. The external auditors also receive a benefit from the internal audit reports generated during the fiscal year as a planning tool for their audit of County departments and agencies.

TAX DEED SURPLUS REVIEWS

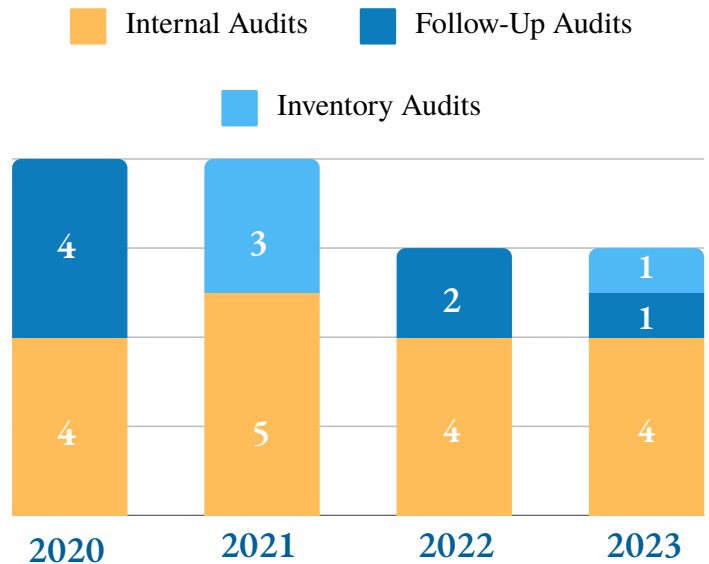


The Internal Audit Division reviews certain Tax Deed surplus payments, ensuring proper identification is provided and that a proper chain of documentation supports their claim. These reviews are part of our Fraud Risk Assessment with an objective to determine that claims are legitimate, claimants are properly identified, and an audit trail from surplus to claimant exists.

The Division reviewed 124 claims for an aggregate payout of \$2,229,584 to property owners, lienholders, entities assigned rights, or powers of attorney to ensure these were the rightful claimants of surplus funds. This was a 63% increase in claim reviews and a 300% increase in payouts audited. These reviews are performed in partnership with the Clerk Official Records Office.

TAX DEED SURPLUS REVIEWS

Internal Audit Reports Issued in the Last 4 Years



As shown in the prior chart, we perform Internal Audits, Follow-Up Audits, and Inventory Audits. Internal Audits review for sufficient internal control, Follow-Up Audits review for the adequacy of corrective action, and Inventory Audits review for the safekeeping and accurate valuation of assets. In 2023, we completed six audits with the current staffing.



INTERNAL AUDIT

2023 REPORT ON GUARDIANSHIPS

This was our third annual report on guardianships. This report provided a quantitative assessment of guardianship audits and reviews. It also showed another slight increase in case counts, as more Alleged Incapacitated Persons (AIPs) entered the court system than left the guardianship system and simplified accounting reviews increased. Another drop-off of annual accountings occurred as more attorneys took advantage of Florida Statute 744.3678 (5) stating "This section (annual accounting) does not apply if the court determines that the ward (AIP) receives income only from social security benefits and the guardian is the ward's (AIPs) representative payee for the benefits." Our guardianship audits enforce the transparency of income and expenses of the AIPs to ensure all sources of revenue are reported, assets are properly tracked, and expenses are only for the benefit of the AIP.

Guardianship plan reviews remained relatively steady, with differences resulting mainly from timing differences. Amended plans almost doubled as guardians were learning about reporting on pre-existing orders, DNRs and remuneration, or guardian compensation reporting. Our guardianship plan reviews enforce the transparency of care for the welfare and well-being of AIPs for both the prior year and the upcoming year.

MID-YEAR INVENTORIES

Hurricane Ian delayed year-end inventories for 2022, and due to hurricane recovery, postponed inventories were scheduled in January 2023. As an added risk, the County performed a system migration from the Enterprise Asset Management System (EAMS) software, to Cityworks software on October 1, 2022. The implementation date was scheduled to occur after the inventory, but due to postponed counts, the inventories occurred three months after implementation. In light of these risks, Internal Audit performed inventory audits to ensure the adequacy and effectiveness of internal controls, the safeguarding of inventory assets, and a proper reconciliation reflected on the general ledger. As a result, we identified weaknesses resulting from the disruption and upgrade, and reported on those weaknesses in our three mid-year 2023 inventory reports issued November 2023. Working with operating departments to obtain proper responses and corrective actions from the operating and administrative County departments involved with the recording and reconciliations ensured adequate actions were taken for corrective action.

PUBLIC WORKS LIGHTING INVENTORY YEAR END SEPTEMBER 30, 2023

This was our audit of physical inventory procedures and segregation of duties to ensure inventory assets are properly safeguarded and totals reconcile with the general ledger. Controls evaluated were considered adequate, appropriate, and effective to provide reasonable assurance that risks are being managed and objectives should be met. Issues previously identified with the system migration from the Enterprise Asset Management System (EAMS) software to Cityworks software were adequately addressed.

BEST PRACTICES

Audit Management continues to attend quarterly Chief Audit Executive Roundtables in order to keep up with prevailing trends and relevant concerns. These roundtables are held in Tampa with opportunities to attend remotely. Discussions include recurring topics, new topics and general topics for the advancement of objectives.

In July, the Director and Auditor II both attended the Florida State Guardianship Association 36th Annual Conference – Orchestrating Change in Orlando. This two-day program covered legislation, Baker Act, Florida Guardianship Law, the Department of Elder Affairs, the Office of Public and Professional Guardians, supported decision-making, guardian advocacy, and Florida's Long-Term Care Ombudsman Program. It was also an opportunity to network with local guardians and attorneys to discuss hot topics of interest.

In October, the Director attended the 2023 National Guardianship Association Conference in Orlando where he attended the National Investigator Training Program. He networked and discussed best practices with guardianship auditors from all over the country. At the conclusion of the program, he earned a Leadership Achievement certificate for successfully completing the second inaugural class of the program.

This year saw the inaugural and quarterly meetings of the Analytics Audit Network of Florida. The purpose of these virtual meetings is to learn best practices of data analytics and review latest strategies for audits using data analytics.



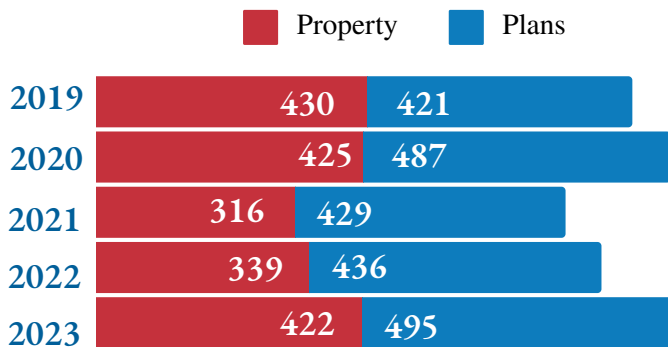
INTERNAL AUDIT

GUARDIANSHIP RESPONSIBILITIES

In addition to internal audits, the Division conducts varying levels of audits / financial investigations related to guardianship reports and activities. The results of audited case files were communicated to the appropriate court in compliance with Florida Statutes. The Division reviews inventories and accountings (Property) of the guardian to ensure reports are timely filed, assets are recorded, receipts/ disbursements are tracked and activity is appropriate and only for the benefit of the AIP or ward, not the guardian and/or attorney. The Division reviews guardianship plans to ensure guardians attend to the ward’s (1) physical and mental health care, (2) personal and social services, (3) residential setting, (4) private insurance and governmental benefits, (5) physical and mental health examinations, and (6) the completeness and timely filing of reports and plans. If we report guardianship inventories, accountings, or plans have deficiencies, the deficiencies will be addressed by the attorneys and/or guardians, and these documents will be resubmitted for our acceptance. This process ensures the integrity of the guardianship program.

As part of our commitment to continuous innovation and improvement, we developed tiers of review for the guardianship audits, based on the amount of assets managed, fees charged, trusts reported, and transactions requiring court orders. These tiers allow us to spend less time on audits with minimal risk, while concentrating our efforts on the larger and more complex cases.

GUARDIANSHIP PROPERTY REPORTS AND PLANS FILED ANNUALLY



Guardianship plans and property guardianships have surged, nearing 500 and 400 respectively. This rise is fueled by exemptions and improved collaboration with filers, reducing late submissions. With more wards entering than leaving, timely reporting minimizes resubmissions and late notices.

PROPERTY

We perform audits of inventories and accountings to ensure the AIP’s assets are identified and recorded. These assets carry forward on at least an annual basis, identifying income, disbursements and capital adjustments. We review all of these transactions to determine activity is complete, accurate and for the benefit of the AIP. In the calendar year 2023, 284 original property filings were audited. Of these, 39, or 14%, of original filings did not pass the audit requirement of the review. Others were not rejected, but instead additional information was requested. This resulted in 78 amended inventories or accountings filed which were subsequently cleared in the same fiscal year. 60 or 21% of original filings were not timely filed and were subsequently reported as past due. This amounts to the 422 reports filed as noted above.

There was a total of \$16,720 in audit fees collected in calendar year 2023 for an average of \$57.29 per original filing. Any guardian unable to pay the audit fee from ward funds may petition the Court for a waiver of the fee. Fees are governed by Florida Statutes. These fees help support the costs of our division to perform guardianship audits and reviews.



PLANS

We perform reviews of plans to ensure the medical, mental and personal needs of the AIP were both addressed in the prior year, and there is a plan to address these needs in the coming year. In the calendar year 2023, 364 original plans of the person were reviewed. Reviews provide no opinion other than to report the completeness of the plan. As a result of our reviews, 38 amended plans were filed, and found to be complete. No audit fees are charged for plans. 93 or 26% of original plans were not timely filed and were subsequently reported as past due. This amounts to the 495 plan reports as noted above.



CLERK INFORMATION TECHNOLOGY

The IT Division serves as the technological backbone for the Clerk's office, supporting not only core operations but also the diverse functions overseen by the Clerk as Chief Financial Officer, County Auditor, Ex-Officio Clerk for the Board of County Commissioners and Courts. We provide comprehensive IT services, from application development and maintenance to network security, ensuring seamless operation for the Finance, Internal Audit, Minutes, and Administrative Divisions.

The Clerk's IT Division isn't just keeping the lights on; it's powering progress. Through strategic use of technology, we provide a rock-solid infrastructure that connects government agencies, supports employees, and empowers the public to interact with the Clerk's office effortlessly.

Gone are the days of waiting on hold or navigating confusing websites for Clerk services. In today's electronic age, people expect information and access instantly, right at their fingertips. That's why we're thrilled with the launch of our brand-new mobile app, bringing the convenience of the Clerk's office directly to your phone! Clerk services such as Jury, Marriage, Self-Help, registering for our Fraud Alert program along many others are available using the latest mobile technology for both Android and Apple.

Continuing to invest in your convenience, we have revolutionized your online experience. Our website has a fresh, user-friendly design that makes finding what you need effortless. And, with our new accessibility features, everyone can now enjoy an equal and smooth experience.

In a world reliant on digital records, the IT department embodies our mission to safeguard public trust. Following Hurricane Ian, they've bolstered data center resiliency, extending battery life for critical systems. This means uninterrupted services even during disruptions, ensuring your vital records and assets remain secure. Fulfilling our mission, we collaborated with an information technology research and advisory firm to accelerate key initiatives. Their expertise helped us modernize infrastructure, strengthen cybersecurity and disaster recovery practices, and lead departmental innovations, effectiveness and technology infusion.





EMPLOYEE RELATIONS

The Employee Relations department is responsible for all aspects of human capital management for this office.

POLICY DEVELOPMENT/ INTERPRETATION

New Federal and State legislation affecting policy compliance in human resource management is monitored and policies are updated accordingly. Each employee receives a copy of the Employee Handbook containing personnel policy and all updates and revisions which is accessible via our intranet. Each year, Clerk Eaton works to enhance employee engagement by introducing new benefits and/or educational resources designed to attract and retain his staff, as his mission is to be the employer of choice within Charlotte County. As such, this office continues to provide a competitive benefits package. In 2023, we continued our commitment to foster in-house team building activities to and enhance communication among staff in support of our Core Values.

EQUAL OPPORTUNITY/LABOR LAW COMPLIANCE

All personnel actions and policies are reviewed for compliance with equal employment opportunity laws as well as the Americans with Disabilities Act, Family and Medical Leave Act, Fair Labor Standards Act, and all other State and Federal employment laws/ regulations prior to implementation as changes to labor laws occur. Updates are posted on our bulletin boards. In the third quarter of 2023, Clerk Eaton provided EEO Discrimination and Harassment training sessions, conducted by a subject matter expert, to ensure that his staff understands the importance of working in a respectful work environment that represents a diverse workforce and his commitment that every individual has an equal opportunity to make the most of their talents.

CLASSIFICATION AND PAY

All classification and pay actions are reviewed for consistency and equity as well as maintaining appropriate records. Employees also contribute to their medical and FRS benefits. To support our recruitment and retention goals, our office offers a highly competitive benefits package to help offset today's challenging recruitment market. As a result, in 2023, Clerk Eaton revised his entry level starting wage for non-exempt employees in order to be competitive within our community and was also able to provide an increase to wages for his entire staff, as all have been impacted by the rising costs of living.

SAFETY/WORKERS' COMPENSATION

Employees are made aware of all safety procedures and workers' compensation compliance policies during their new hire orientation and throughout the year. Safety equipment is made available to all staff requiring lifting and/ or the delivery of supplies and equipment. Annual walk-through safety inspections are also conducted at all Clerk locations by the Charlotte County Facilities and Fire Department staff.

Additionally, our SendWordNow Software, allows us to deliver real time notifications in order to update our employees during critical events. This resource has proven to be both a time and cost savings communication tool for the Clerk and Comptroller's office.





EMPLOYEE RELATIONS

STAFFING AND RECRUITMENT

All recruitment activities, new hire orientation, personnel records, benefits administration, and performance measurement programs are also managed by this division. Employee Relations prepares and coordinates job position descriptions, announcements, advertising, testing and interviews as a part of the recruitment process following all applicable Federal and State laws and Clerk & Comptroller policy and procedures. In 2023, as a result of the staffing shortage in our County, our staff stepped up and worked hard to maintain our high production standards, as we continue to introduce new services and systems. We also utilized every promotional resource available in support of our efforts to attract and recruit the best staff for our office. Additionally, to support our desires to hire the right person for the right position, we use a Predictive Index toolset. The Predictive Index tool helps us to design better teams in order to manage our employees in a way that allows them to perform at their best by measuring an individual's personality from what motivates and inspires them, to how to best communicate with them in utilizing their skills sets in support of our employee engagement and succession planning. We utilize this tool at all levels within our organization as a part of our Mission, Vision and Core Values.



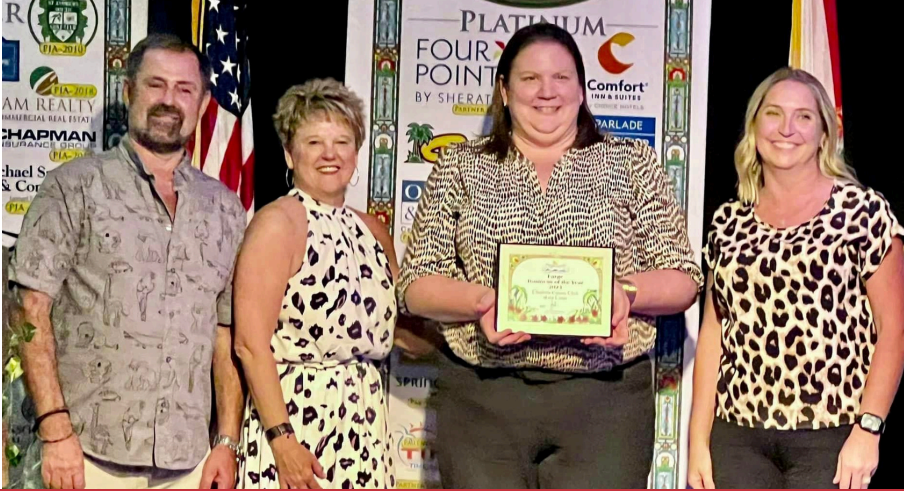
TRAINING

A dedicated Training Coordinator position was established to assist the Clerk in communicating his Mission, Vision and Core Values to staff. This position also oversees all in-house training in various areas such as customer service and communication. Furthermore, employees are provided training in the areas of Florida Statute Laws, county and civil fines, fees, and procedural processes, customer service, and employee development, supervision, word processing and spreadsheet skills. Additional training resources are available to assist employees when implementing new software programs and/or in meeting professional development requirements. Training programs are also provided through the Florida Association of Court Clerks and Comptrollers for management staff.





COMMUNITY INVOLVEMENT



“I'm proud of our clerk staff for earning the Business of the Year award. It reflects our commitment to excellence in serving our community.”
- Roger D. Eaton

In 2023, we were honored as the Business of the Year by the Charlotte County Chamber of Commerce, recognizing the hard work and exceptional service of our clerk staff. This prestigious accolade reaffirms our commitment to excellence.



CONNECTING WITH OUR COMMUNITY THROUGH ACTIVE INVOLVEMENT

The Clerk's Office is deeply involved in our community, engaging in a variety of activities ranging from workshops and networking events to raising awareness for important causes. We actively participate in numerous chamber events across our county, fostering connections and contributing to the vibrant fabric of our local communities.

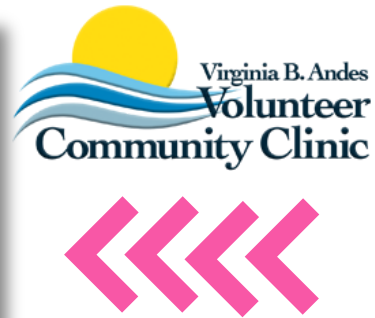
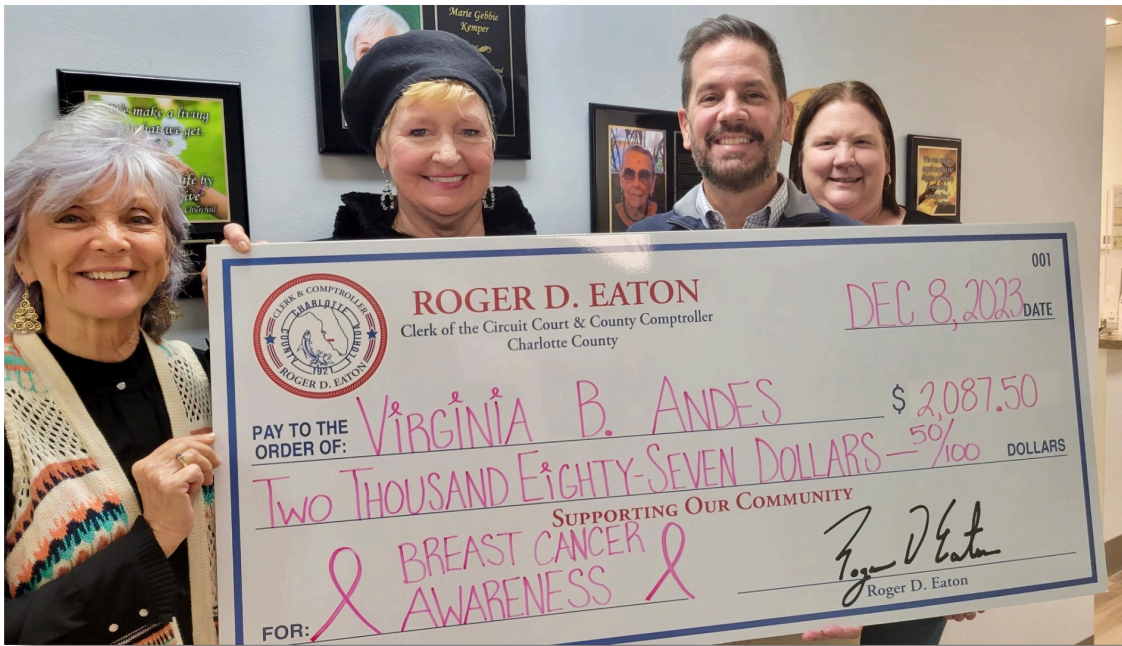




COMMUNITY INVOLVEMENT

NATIONAL DOMESTIC VIOLENCE AND BREAST CANCER AWARENESS

Throughout the months of October and November, the Clerk's office staff continued to support National Domestic Violence and Breast Cancer Awareness month initiatives. Despite the setbacks caused by recent events, we successfully raised a total of \$19,415 for two important causes. **\$17,327.50** was dedicated to C.A.R.E. for Domestic Awareness Month, and **\$2,087.50** was contributed to the Virginia B Andes Volunteer Community Clinic for Breast Cancer Awareness month





ROGER D. EATON
Clerk of the Circuit Court & County Comptroller
Charlotte County, Florida
CharlotteClerk.com

OFFICE LOCATIONS

CHARLOTTE COUNTY JUSTICE CENTER



350 E. Marion Avenue
Punta Gorda, Florida 33950

CHARLOTTE COUNTY JUSTICE CENTER



18500 Murdock Circle
Port Charlotte, Florida 33948

CHARLOTTE COUNTY JUSTICE CENTER



6868 San Casa Boulevard, Office 114
Englewood, Florida 34224
Tuesday and Thursday only from 8:00 a.m. to 1:00 p.m.

OFFICE HOURS

Monday - Friday
8:00am - 5:00pm

SOCIAL MEDIA

