

ROGER D. EATON

CLERK OF THE CIRCUIT COURT
& COUNTY COMPTROLLER

The background of the page features a large palm tree on the left and a bridge spanning a body of water in the distance. The sky is clear and blue.

2024 CLERKS ANNUAL REPORT



CONTENTS

03 Message From Your Clerk and County Comptroller	16 Domestic Violence	31 Minutes
04 The Clerk's Role As A Public Trustee	17 Foreclosure	32 Value Adjustment Board
05 Clerk Office Locations	18 Probate, Guardianship and Mental Health	33-36 Internal Audit
06 Online Services & E-Filing Portals	19 Jury	37 Information Technology
07 Why We Exist Mission, Vision, Values	20 Appeals	38-39 Employee Relations
08 Engaging With Our Community	21 Operation Green Light	40-41 Community Involvement
09 Social Media In 2024	22 Official Records Services	
10 Criminal Court	23 Innovation & Improvements	
11 Misdemeanor and Felony	24-25 Marriage Services	
12 Traffic	26 Passport Services	
13 Juvenile & Dependency	27 Tax Deeds	
14 Civil Court	28 Records Management	
15 County & Circuit Civil	29-30 Comptroller	



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 2024, 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 .3%. As a result, your Clerk's office returned over \$1 million in taxpayer funds to the Charlotte County Board of County Commissioners in 2024, 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 \$5.9 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 \$1.105 billion, which earned \$47.4 million for the year. Since I took office in 2017, over \$120.1 million has been earned on county funds controlled by your Clerk's office.

For the 38th 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 2024, 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 and certified copies to all veterans and active military personnel for the entire month of November.

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 187 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



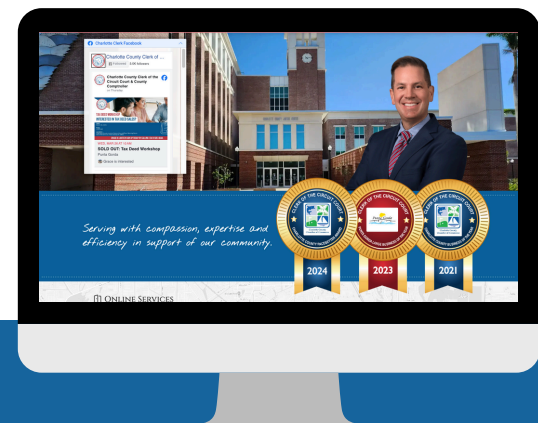
E-Certify Services can be viewed on our website:
ECertify.CharlotteClerk.com



Jury Services can be viewed on our website:
Jury.CharlotteClerk.com



Fraud Services can be viewed on our website:
Fraud.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 2024, we remained committed to transparency by leveraging our online communication tools to keep Charlotte County citizens up to date on key priorities and developments. Through regular email updates, we reached a total of 364,541 sends with an open rate of 32.9%, ensuring vital information was accessible to our community.



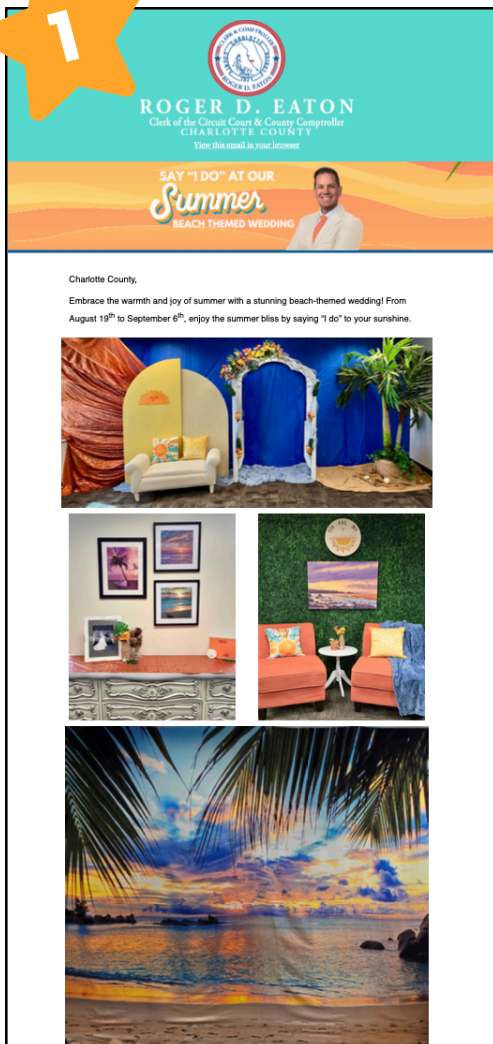
TOP PERFORMERS



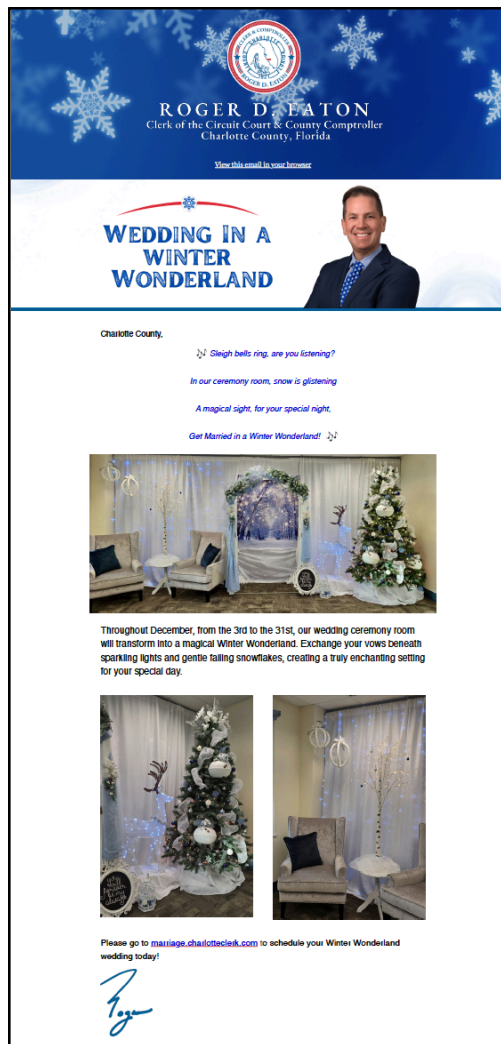
1,345,170

Emails delivered In 2024

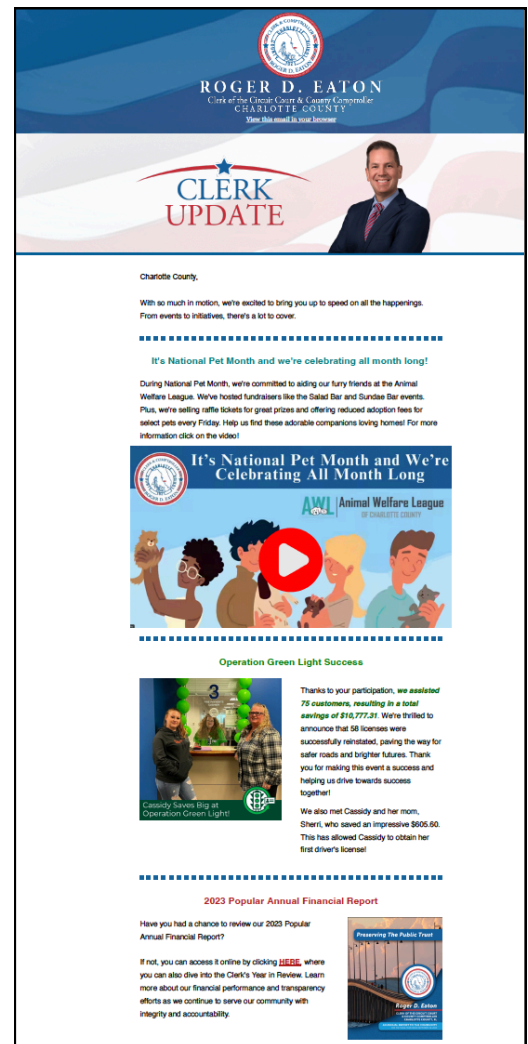
1



SUMMER WEDDING EVENT



WINTER WEDDING EVENT



2023 CLERK UPDATE



STAYING CONNECTED AND BE PART OF OUR GROWING ONLINE COMMUNITY IN 2024!

We're committed to keeping you informed with the latest updates, behind-the-scenes photos, important announcements, and Clerk-related news. Follow us on Facebook, Instagram, X, LinkedIn, and YouTube to stay in the know. Like, comment, and share to help us spread the word—we love hearing from you!



3,515

ACTIVE FACEBOOK FOLLOWERS



1,092

ACTIVE INSTAGRAM FOLLOWERS

124.3K

FACEBOOK REACH

Up 53.3% over 2023!

30.2K

FACEBOOK VISITS

Up 29.3% over 2023!

1.9K

INSTAGRAM REACH

Up 80.5% over 2023!

687

INSTAGRAM VISITS

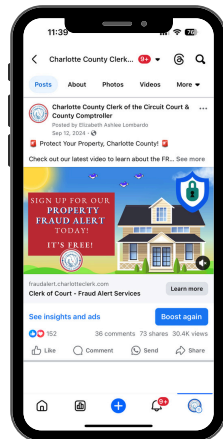
Up 31.6% over 2023!

TOP 5 FACEBOOK POSTS IN 2024



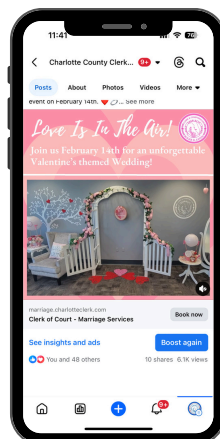
NEW YEAR,
BETTER SERVICE

16.4K



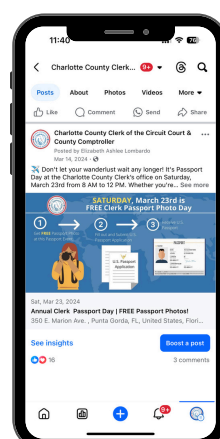
PROPERTY
FRAUD ALERT

14.6K



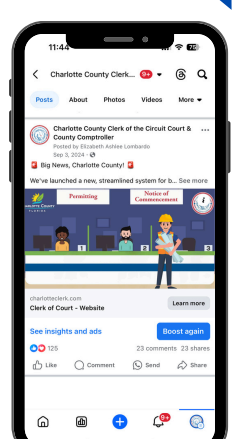
VALENTINES
WEDDING
EVENT

14.4K



FREE PASSPORT
PHOTO EVENT

12.3K



NEW
STREAMLINED
BUILDING
PROCESS



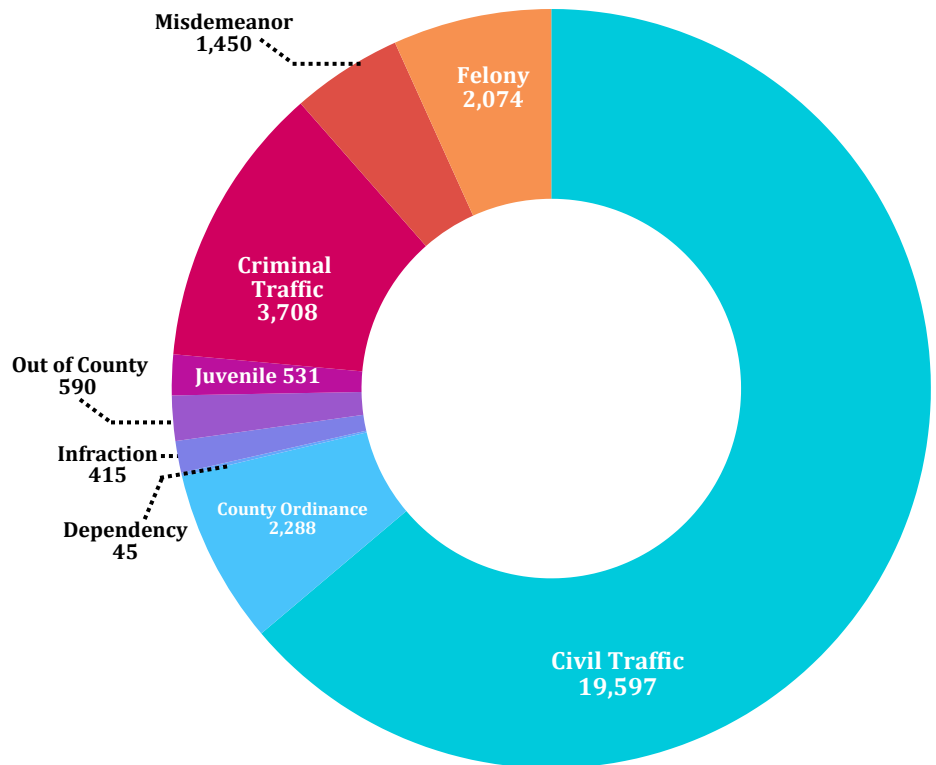
CRIMINAL COURT

Criminal courts are comprised of multiple divisions. These divisions include Felony, Misdemeanor, Criminal Traffic, County Ordinance Violations, Civil Traffic Citations, Civil Infractions, Juvenile Delinquency, Juvenile Dependency, and Out of County cases.

In comparison to 2023, this year has seen an increase of cases across many of the divisions, most notably Felony, Misdemeanor, Civil Traffic, and Juvenile Delinquency; the highest being Juvenile Delinquency with an increase of 57.1%.

Our close partnership with other agencies such as the Sheriff's Office, State Attorney, Public Defender, Florida Departments of Law Enforcement and Corrections, Pre-Trial Services, County Probation, as well as the Judiciary is just one of the many ways the Clerk's Office exemplifies our Core Value "Working Together to Achieve Shared Success". It is these partnerships that ensures community safety through clear and constant communication, immediate action, and vigilant attention to every case opened in Charlotte County.

The individual role of the Clerk's Office in any Criminal Court proceeding varies by court type and the type of proceeding. Typical court dates will find the Clerk preparing the list of cases to be heard, also known as the court docket, recording each case via written minutes and sentence forms, and answering questions in court the attorneys or judge may have about the case. In more involved cases reaching trial status the duties of the Clerk include taking jury attendance, swearing in witnesses, acting as custodian of all admitted evidence, and publishing the jury verdict through oral pronouncement.



Clerks not attending court are present in the Clerk's Office diligently working in accordance with another of our Core Values "Providing Exceptional Service with a Smile". When a customer enters the doors of the Criminal division they are greeted by knowledgeable staff who can answer questions or point the customer in the right direction. Clerks also process all court paperwork by inputting data in our case management system such as new court dates, pleadings, and court notices. Our office takes great pride in striving for same day production.

PAYMENTS MADE EASY!



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



Pay fines online at CharlotteCourtPay.com via nCourt.



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

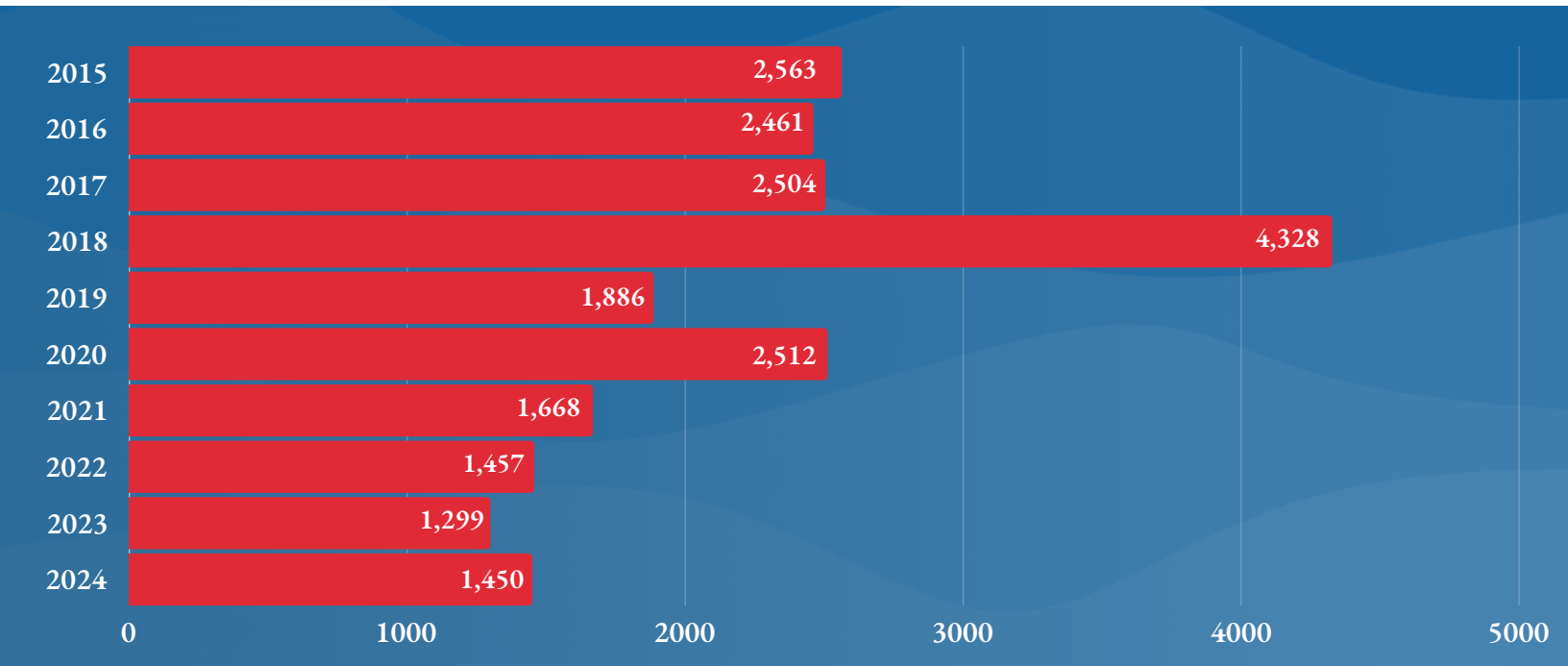


Pay by phone: (855) 769-5772 (English & Spanish available).

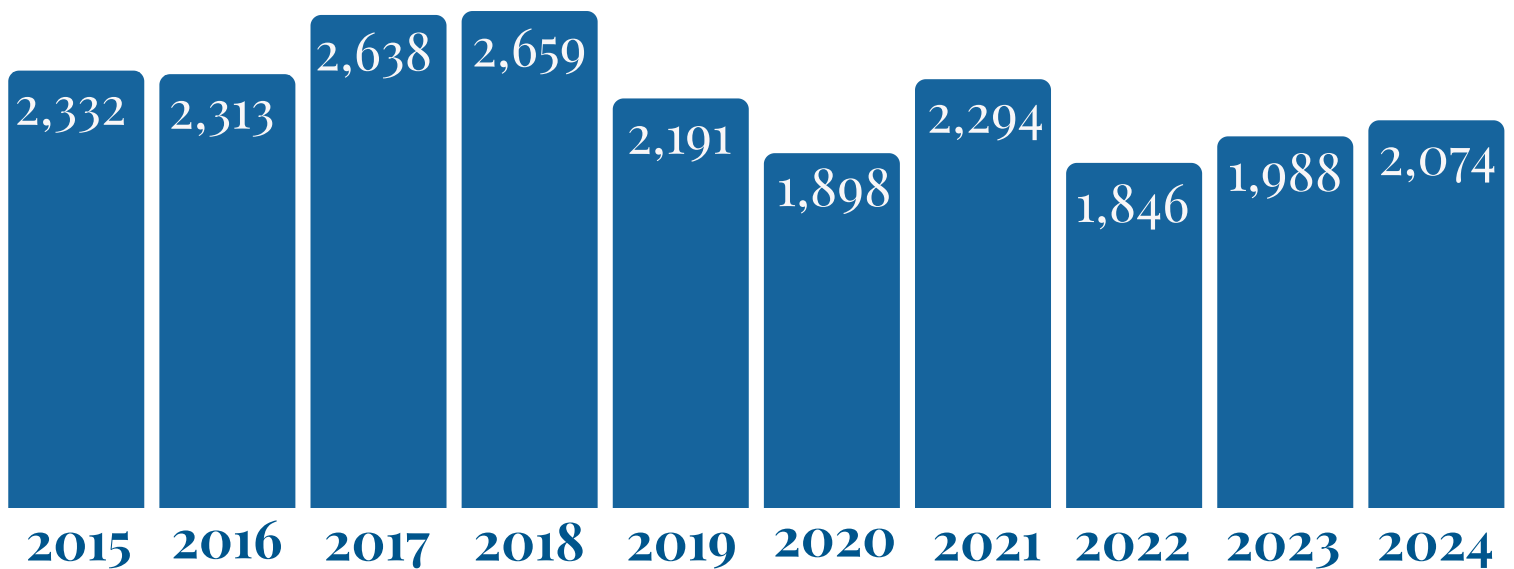


MISDEMEANOR AND FELONY

MISDEMEANOR CASES FILED



FELONY CASES FILED



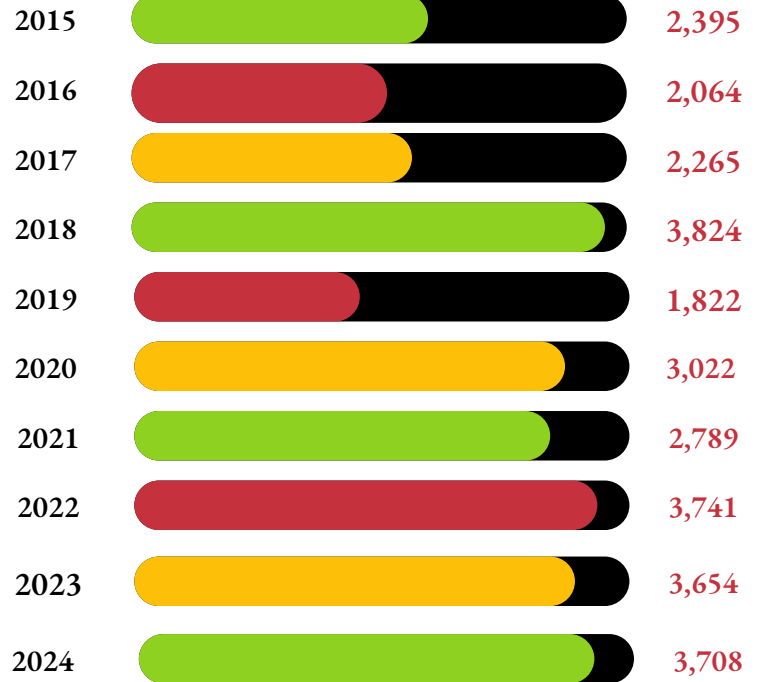


TRAFFIC

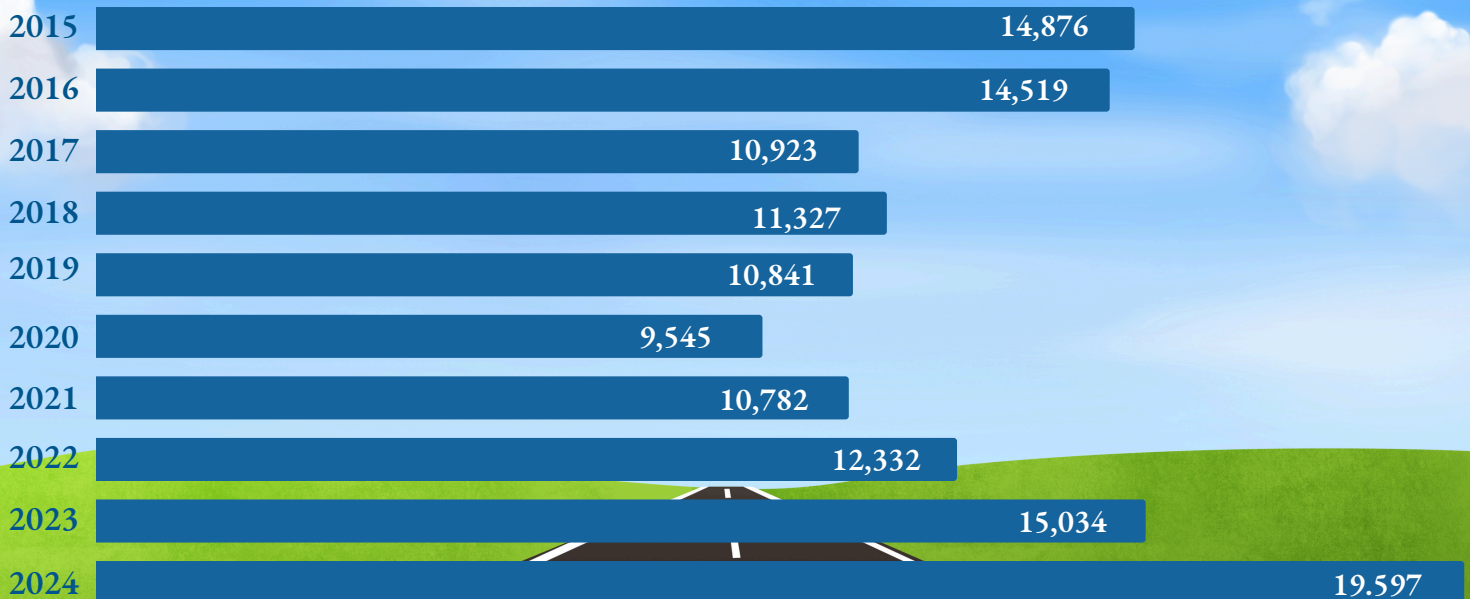
TRAFFIC



A Uniform Traffic Citation is issued by law enforcement for civil traffic offenses. Examples of a civil traffic offense are speeding, no valid proof of insurance or vehicle registration, and careless driving. These types of citations are assessed a monetary penalty that must be paid within 30 days. A defendant has the right to contest any citation, in which case a court date is issued to bring the matter before a judge. Citations filed with our office are received via electronic filing, also known as e-filing, as well as paper citations filed by our local law enforcement agencies. These partnering agencies include the Charlotte County Sheriff's Office, Punta Gorda Police Department, Florida Highway Patrol, and Florida Fish & Wildlife. Payment for civil citations can be made online at CharlotteCourtPay.com, by phone at 855-796-5772, or in person at any of our Clerk's Office locations in Punta Gorda, Murdock, and Englewood. For even greater convenience we offer payment services at any of our Scan, Pay and Go locations. A list of these locations can be found on page 10.



Civil Traffic Cases Filed





JUVENILE



JUVENILE CASES FILED

A juvenile is defined by the State of Florida as any person under 18 years of age. Juvenile cases are separated into two divisions: Delinquency and Dependency. Delinquency involves juveniles accused of committing crimes, and the court proceedings are conducted much like adult criminal proceedings. Juvenile Dependency is the determination by the Department of Children and Families that a child is not properly cared for and/or possibly in danger. When a judge has determined there is merit to these allegations the child(ren) can be removed from the custody of the parent or guardian and placed in a safe environment. The court proceedings after this point involve following the parents as they work on a case plan for potential reunification with their child(ren). Both Delinquency and Dependency cases are confidential and cannot be accessed online. Requests for records must be made in person, can only be released to parties named in the case, and the requestor must have a valid photo ID.

Important Note: Dependency cases involve children at risk and are confidential. Records can only be accessed in person by involved parties with a valid ID.

DEPENDENCY CASES FILES



2015 634

2016 691

2017 443

2018 413

2019 380

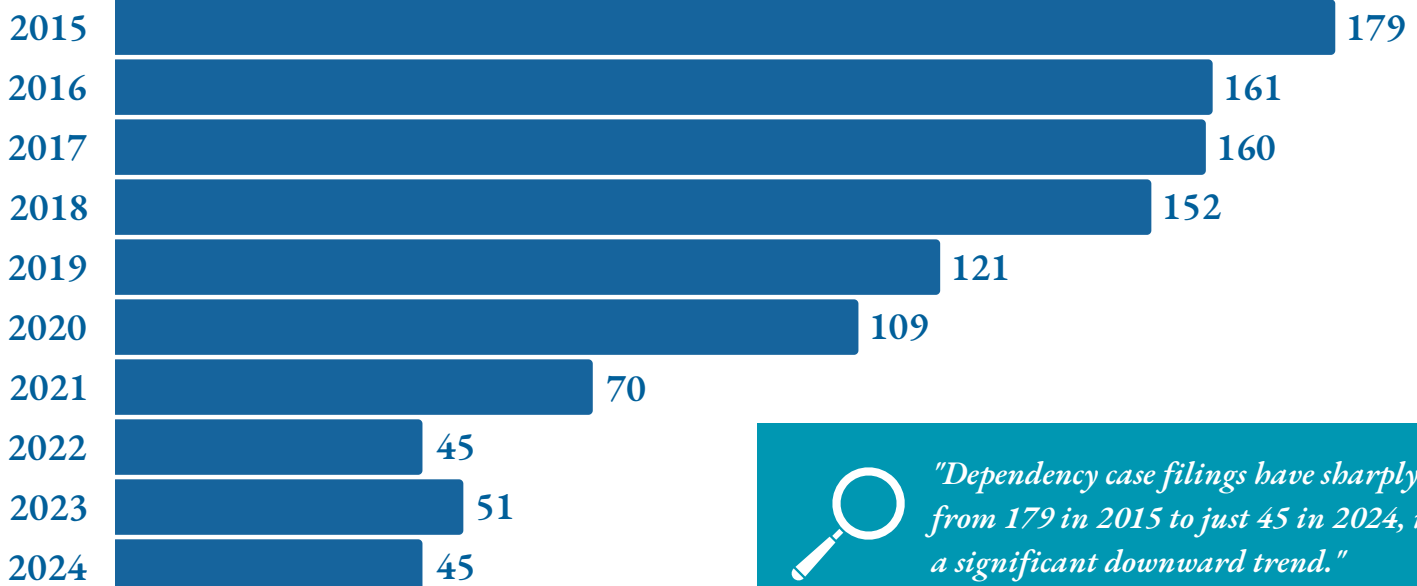
2020 339

2021 271

2022 266

2023 338

2024 531



"Dependency case filings have sharply declined from 179 in 2015 to just 45 in 2024, reflecting a significant downward trend."

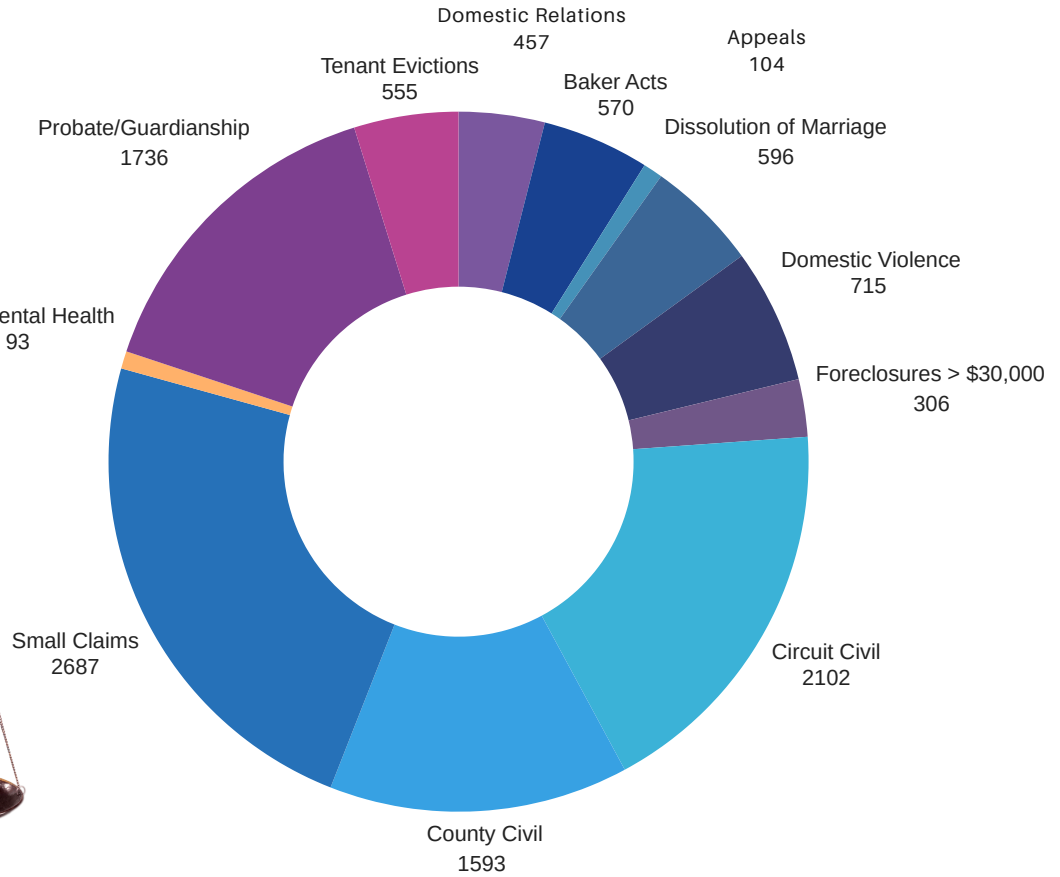


In 2024, the Civil Division managed a total of 11,514 new cases, including Circuit Civil, County Civil, Domestic Relations, Probate, Guardianship, Mental Health, and Appeals.

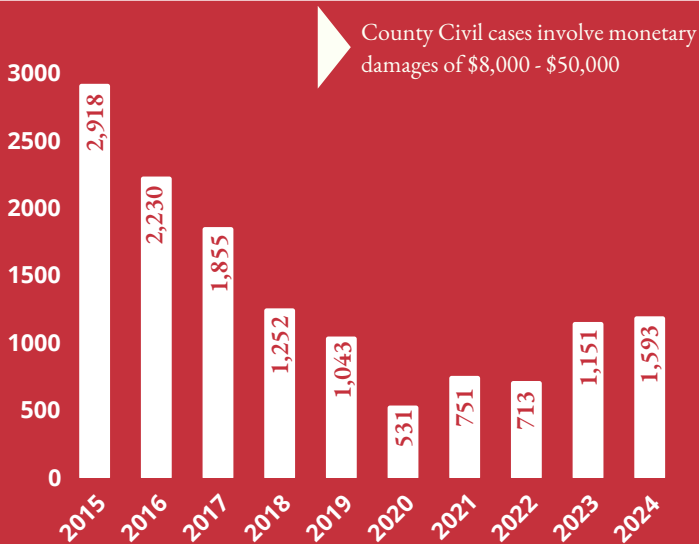
Our Civil Clerks are dedicated to providing exceptional service with a smile. Their responsibilities include accepting and processing filings, scheduling hearings, maintaining records, providing copies and certified documents, collecting fees, and assisting the public while being efficient and knowledgeable.



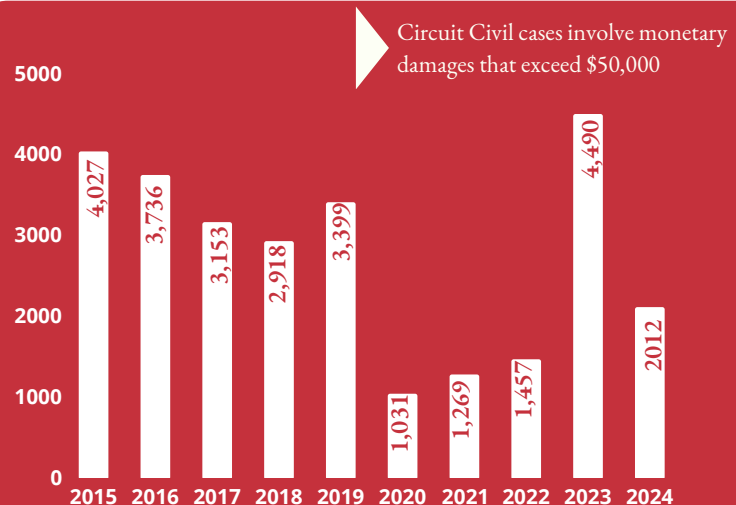
CIVIL COURT



COUNTY CIVIL CASES FILED



CIRCUIT CIVIL CASES FILED



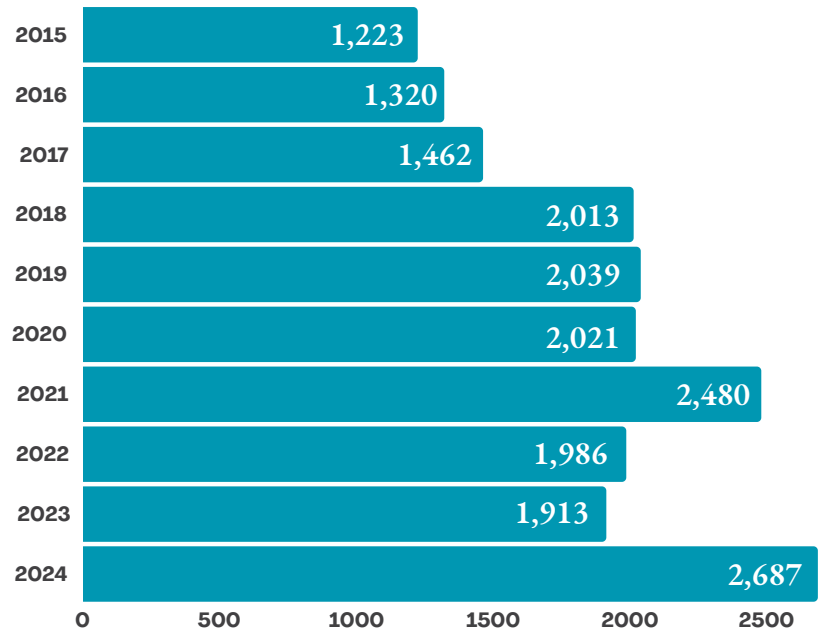


COUNTY CIVIL

Small Claims Court is a way to settle legal disputes in which the amount of damages or value of the property involved does not exceed \$8,000. All small claims cases are set for a mandatory zoom hearing called a Pretrial Conference prior to a trial being set with a Judge.

County Civil Court is cases with claims over the amount of \$8,000 but less than \$50,000, as well as Tenant Evictions and Lien Foreclosures.

"All Small Claims cases under \$8,000 begin with a mandatory Zoom Pretrial Conference before trial is scheduled."



CIRCUIT CIVIL

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

NAME
CHANGES

60

ADOPTION

23

SUPPORT
CASES

258

CIRCUIT CIVIL
DAMAGE
ACTIONS

2,102

DISSOLUTION
OF MARRIAGE

596



1,593

COUNTY CIVIL
DAMAGE ACTIONS



2,687

SMALL CLAIMS
CASES FILED



555

TENANT EVICTION
CASES FILED



104

UNLAWFUL DETAINER
CASES FILED



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 distribution 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: SelfHelp.CharlotteClerk.com

In support of Florida Legislation, Clerk of Courts statewide have implemented a "Hope Card" program to assist people affected by domestic violence. The program offers individuals who have been issued a final injunction for protection the opportunity to apply for a free wallet sized "Hope Card" that can be used to verify with law enforcement that they are covered by a protective order. Petitioners may request Hope Cards at the Clerk's Office.



“ In 2024 there were **715** domestic violence cases filed.

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.

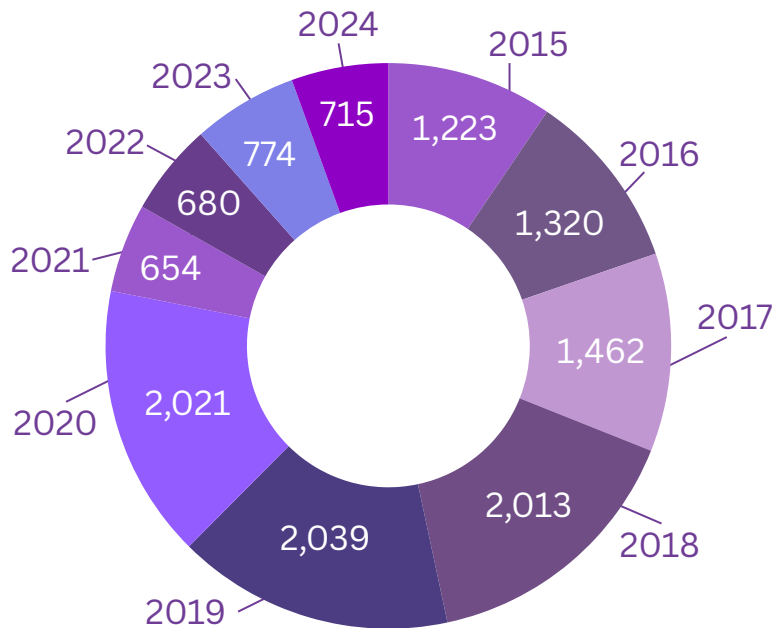
**HOPE
CARD**

Notice of Injunction for Protection

Statewide Domestic Violence Hotline: 1-800-500-1119



DOMESTIC VIOLENCE CASES FILED



Charlotte County Clerk of the Circuit Court
350 E. Marion Ave., Punta Gorda, FL 33950
(941) 637-2162 | CharlotteClerk.com



FORECLOSURE



A foreclosure, also called a judicial sale, is a court-ordered process of selling real property at public auction to recover an amount owed in a civil final judgment.

Foreclosure sales are held online at **Charlotte.RealForeclose.com** every Monday, Wednesday, Thursday and Friday at 11:00 as ordered. Bidders can easily deposit funds through ACH wire transfer from anywhere in the world. Each property is awarded to the participant with the highest bid.

2021 Online Sales



2022 Online Sales



2023 Online Sales



2024 Online Sales



FORECLOSURE CASES FILED





PROBATE, GUARDIANSHIP AND MENTAL HEALTH

In keeping with our mission “To protect the public trust as guardians of the people’s records and assets”, the Clerk’s office conducts audits of all Guardianship cases. This is a critical element in safeguarding the individual, as well as their property and assets.

Risk Protection Orders were enacted by the Florida Legislature in 2018 as a response to the tragic mass shooting at Marjory Stoneman Douglas Public High School. The intention of this law is to equip law enforcement agencies and the Courts with the necessary tools to exercise authority to restrict firearm access to individuals believed to be in a compromised mental state, or who have made threats of violence. The initial restriction is temporary, with the Courts being granted authority by Florida lawmakers to extend restriction based on individual circumstances. Charlotte County had a total of 8 Risk Protection cases filed in 2024.

The State of Florida is committed to protecting the interests of the elderly and otherwise incapacitated members of our population. Legislation was enacted in 2019 to prevent Exploitation of Vulnerable Adults. If there is concern of an elderly or incapacitated person being taken advantage of by a third party, a person can file a petition with the Clerk’s Office and have a hearing before a judge. There were 13 of these cases filed in Charlotte County in 2024.

2024 CASES FILED



1,561 PROBATE CASES

175 INCAPACITY GUARDIANSHIP CASES

570 BAKER ACT CASES

584 WILL ON DEPOSIT CASES

663 MENTAL HEALTH CASES



JURY

Jury service is an integral part of the trial process. When a potential juror receives a jury summons they can quickly scan a barcode located on the summons to visit our website Jury.CharlotteClerk.com where the juror can Pre-Check In and sign up for automatic email and text notifications whether they are required to report or not.

Jurors can also download our new app CharlotteClerk, which offers the same juror options plus office and weather notifications.



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
\$20,070

JURORS REPORTED





APPEALS

An appeal is a legal process by which a higher court reviews a lower court's decision and rules on the legal issues raised by the appellant.

It is not a new trial, but rather a review of any errors made during the trial or sentencing.

Civil Courts handle the filing and process of all appeals including criminal appeals.

104
*TOTAL APPEALS
FILED IN 2024*





OPERATION GREEN LIGHT



CHARLOTTE COUNTY
CLERK OF COURTS

OPERATION GREEN LIGHT

Operation Green Light took place at the Clerk's Office April 6th – 15th. This is a statewide Clerk initiative created to help those with a suspended driver license due to past due financial court obligations get back on the road. The Charlotte County Clerk's Office is proud to report we were able to clear 42 driver licenses for reinstatement, collect over \$10,000 in court fees, and save our customers over \$4,000 in collections fees.



42

DRIVER'S
LICENSE
REINSTATED

\$10,782.91

COLLECTED IN
TRAFFIC FEES

\$4,313.16

TOTAL
SAVINGS



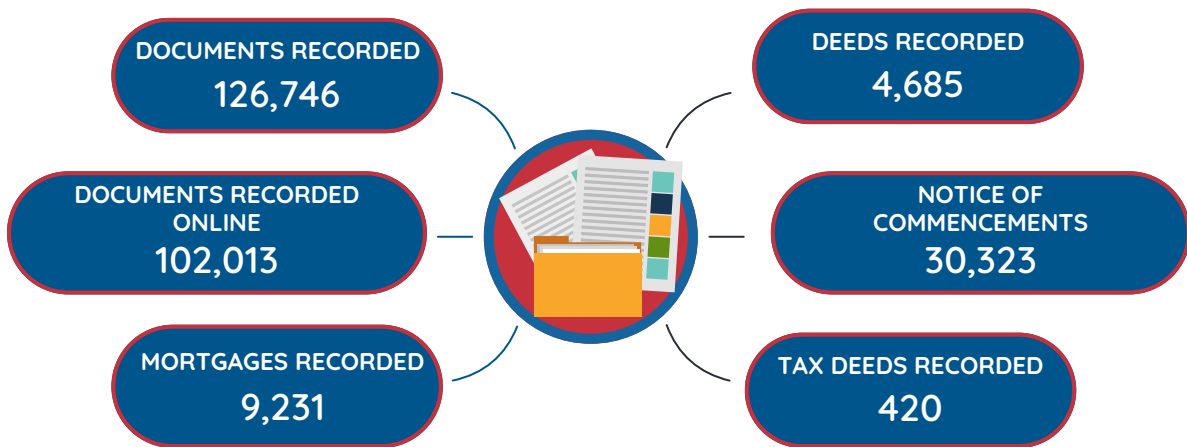


OFFICIAL RECORDS SERVICES

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, which, in most cases, are related to real estate. Examples of such documents include deeds, mortgages, judgments, military discharges, domiciles and other authorized documents. All Official Record documents are electronically scanned, indexed and made available on the Clerk's Website.



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



PROPERTY FRAUD ALERT!

The Clerk's Office provides resources to help citizens safeguard their property. Property Fraud Alert is a free service that helps protect an individual's property from fraud by monitoring documents such as liens, deeds and mortgages that are recorded in Charlotte County.

In 2024, the Charlotte County Clerk's office developed and deployed a new updated Fraud Alert system, that allows signing up for this FREE service to be easier and more efficient for our customers. You can now add or remove individual and business names under one profile by logging in using your email address.

Once a document is recorded and indexed into Official Records using the name in which you are monitoring, an email will be sent to you to notify you of the transaction.



1. Visit Fraud.CharlotteClerk.com or scan the QR code.
2. Enter information.
3. Click Register!
4. You are all set!





INNOVATION & IMPROVEMENTS

SAFEGUARDING HISTORY: PRESERVING CHARLOTTE COUNTY'S FIRST DEED BOOK

Clerk Eaton's commitment to safeguarding the people's records and assets, continues as we partnered 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.

In 2024, the Clerk's office, preserved additional books such as the Commission Minutes books and began on the Official Records books, to date 97 books have been completed.



QMINDER KIOSK SYSTEM

As part of our commitment to continuous innovation and improvement, the Official Records department has introduced kiosks at all locations to quickly identify customer needs. This user-friendly system helps customers with tasks such as filing notices of commencements, recording documents, passport applications, and marriage licenses. The system enables our Clerks to better assist customers by addressing their specific needs more efficiently.

CUSTOMERS SERVED

616

Justice Center

1,221

Englewood

20,032

Murdock

SELF-HELP SERVICES

The Clerk's Office offers self-help services that provide valuable legal resources, including forms and a free 20-minute consultation with the Charlotte County Legal Aid Society.

Our self-help program supports self-represented individuals in civil and family legal matters, whether they choose to represent themselves or cannot afford an attorney.

Visit SelfHelp.CharlotteClerk.com to learn more and schedule your free consultation.

In 2024 our office assisted 781 customers with scheduling appointments with the Charlotte County Legal Aid Society.

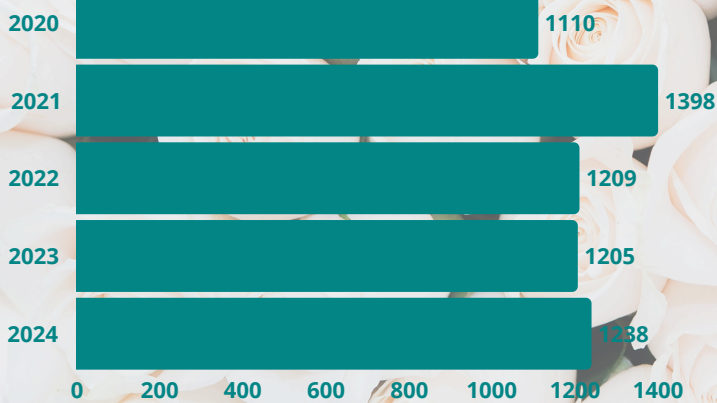




MARRIAGE SERVICES

Marriage Licenses can be issued at any of our office locations. The Punta Gorda Official Records division performs marriage ceremonies based on appointments scheduled on our website. In 2024, there were 1,238 licenses processed and 497 ceremonies performed.

Marriage Licenses



Marriage Ceremonies



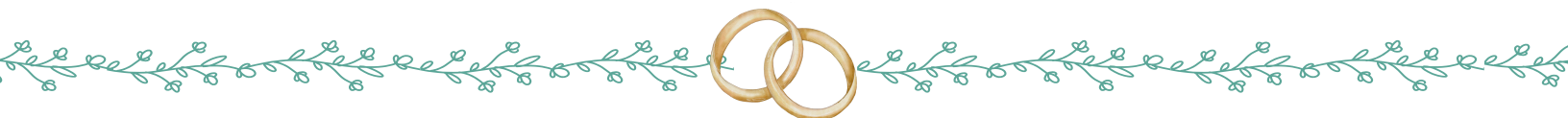
For your convenience, a Marriage License Application request can be started or a Marriage ceremony can be scheduled online at our Marriage Services website: Marriage.CharlotteClerk.com





MARRIAGE SERVICES

The Clerk's Office continues to have Themed Weddings for our couples, such as having the room decorated for Valentine's Day, for 'Fall'ing in Love, Winter Wonderland, and Halloween themed. We have added additional ceremonies for Star Wars day, and a Summer Themed wedding. This allows our couples to say "I do" in a unique setting, beautifully decorated for only \$30.00.





PASSPORT SERVICES

The Clerk's Office accepts passport applications as an agent for the Passport Office of the United States Department of State. New passports, 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 Englewood office location. 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.

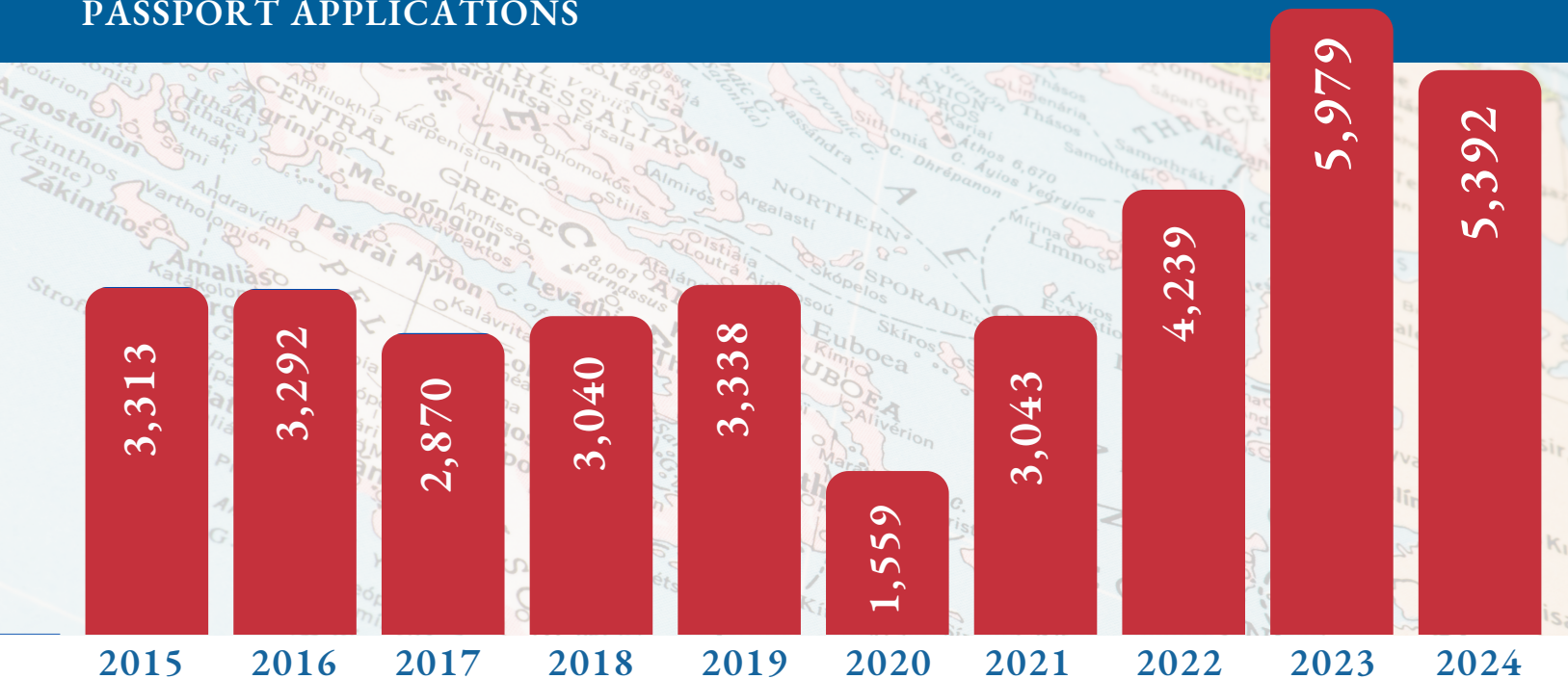


5,392 PASSPORT APPLICATIONS

We are happy to announce that we hosted our 4th Clerk Passport Day on Saturday, March 23. We understand how hectic work and school schedule can be for working families. On this day over 600 visitors entered the Justice Center, 209 applications were processed, and the Clerk provided FREE photos!



PASSPORT APPLICATIONS





TAX DEEDS

Real estate taxes in Charlotte County are 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.RealForeclosure.com** and are advertised weekly in the local newspaper.

TAX DEED APPLICATIONS

Our office processed 1,353 applications in 2024.

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.

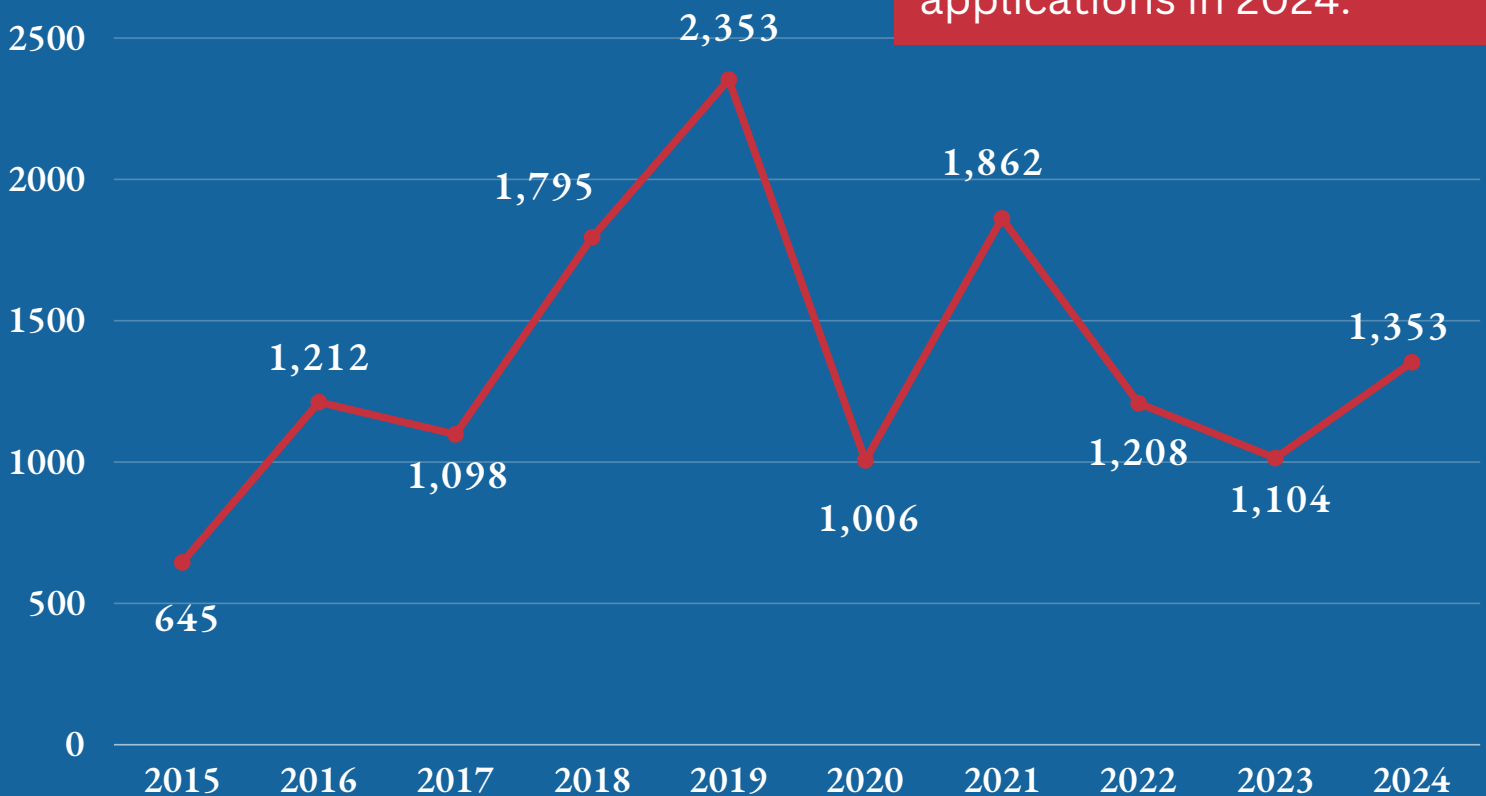


Anyone wishing to view Charlotte County Tax Deed and Foreclosure information can visit our website saving the customers valuable time.

Charlotte County Clerk's Office processed

1,353

applications in 2024.





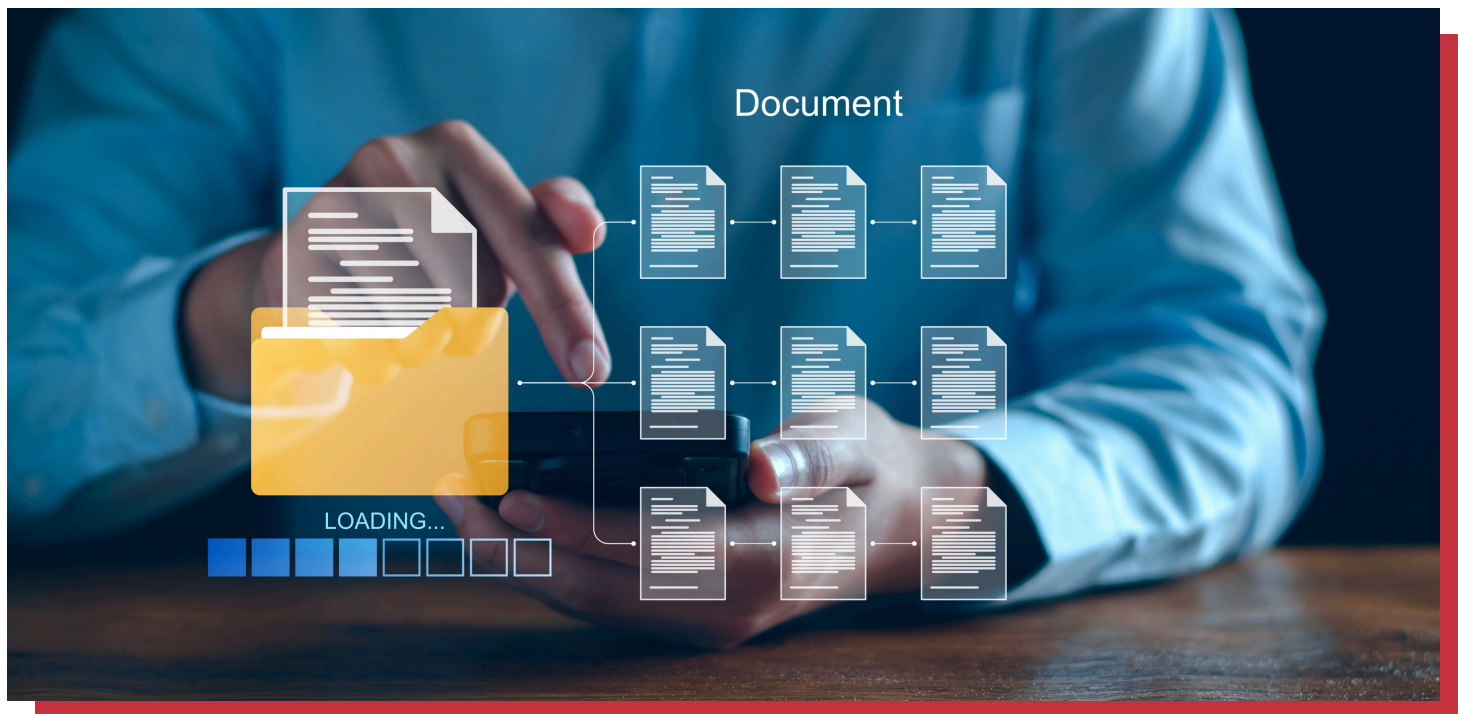
RECORDS MANAGEMENT

The Records Management Division oversees the comprehensive management of records, including inventory and classification, retention scheduling, storage, conversion, vital records management, disaster prevention and recovery planning, and disposition. The division develops and implements policies, systems, and procedures to ensure the efficient creation, capture, retrieval, access, distribution, use, storage, security, and proper disposition of the Clerk's records and information. All activities are conducted in compliance with the relevant regulations established by the Florida Department of State, State Library and Archives of Florida, and the Florida Rules of Judicial Administration.

The records warehouse currently manages nearly 7,000 boxes of paper documents supporting various departments, including the Clerk's Courts, Human Resources, Comptroller, and Minutes divisions, as well as numerous county departments such as Human Services, Building and Construction Services, Risk Management, Utilities, and Public Works, among others. In addition to these records, the facility houses original plat documents and thousands of microfilm rolls, all preserved in a climate-controlled environment to ensure their long-term integrity and accessibility.

The Records Management Division, in collaboration with Charlotte County's Records Department, successfully facilitated the disposal of over 1,000 boxes of documents, amounting to nearly 18 tons of paper. This initiative was conducted in strict compliance with the retention schedules and guidelines established by the Florida Department of State Library and Archives. By efficiently managing the lifecycle of records, the division not only ensures adherence to regulatory requirements but also promotes operational efficiency, reduces storage costs, and supports environmental sustainability through proper document disposal and recycling efforts. This accomplishment underscores the division's dedication to maintaining a streamlined and responsible records management program.

This year, several of Charlotte County's original Official Records underwent a meticulous preservation process, including professional restoration and rebinding, to safeguard these vital historical documents for future generations. This effort reflects the Clerk's commitment to maintaining the integrity and accessibility of its historical records while ensuring compliance with modern archival standards. By investing in preservation initiatives, the Records Management Division continues to protect the cultural and historical heritage of the community, enabling researchers, historians, and citizens to access these invaluable resources for years to come.





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 \$1.077 billion, 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, 2024, the Accounts Payable team processed approximately 23,000 invoices, in excess of \$445 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 \$1.4 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.

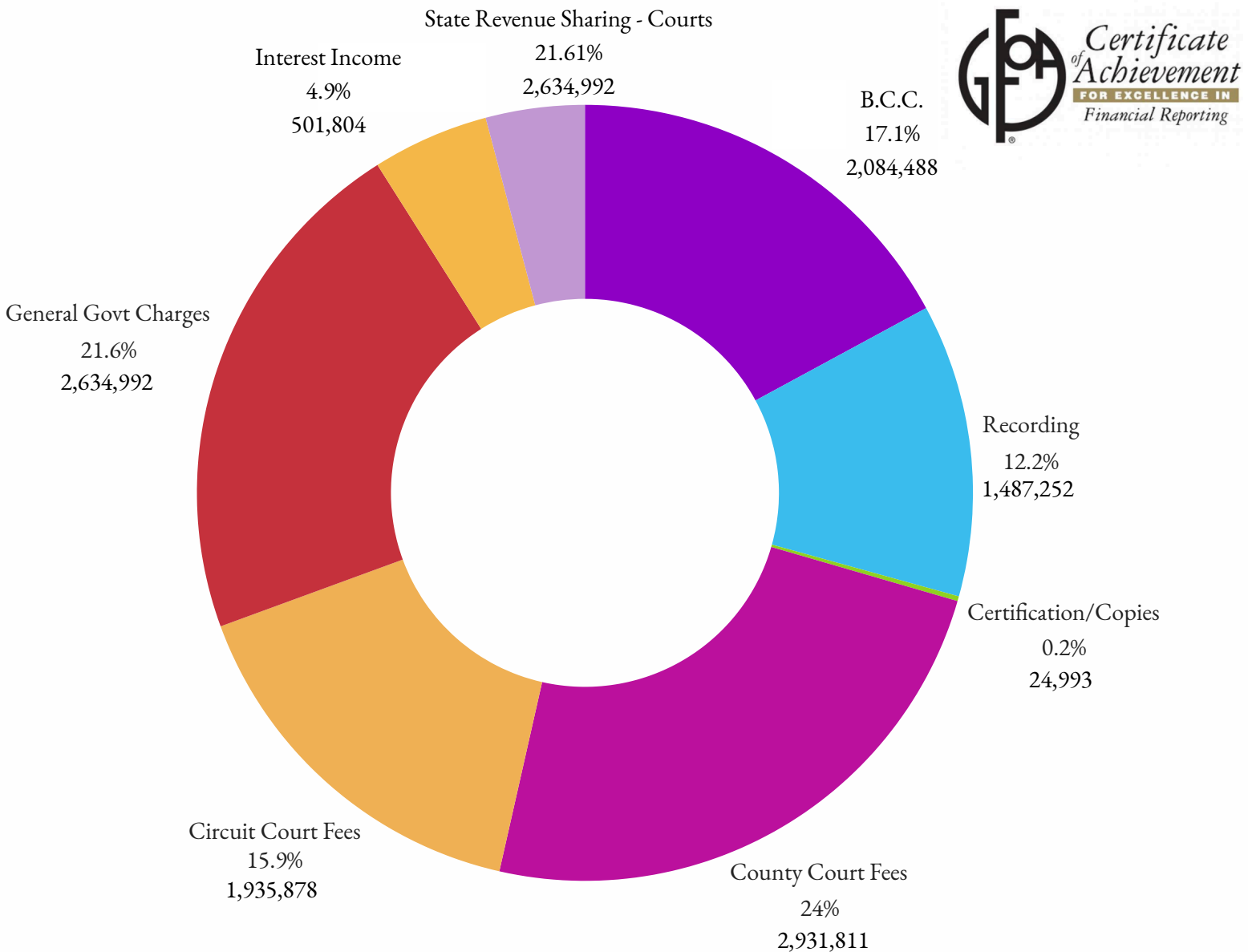




COMPTROLLER

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, 2023. This is the 38th consecutive year that this prestigious award has been received by Charlotte County Clerk's Office.



Earnings on investments managed by the clerk and comptroller have exceeded \$48 million during the fiscal year ended September 30, 2024.



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** 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.

14

GRANTS &
AMENDMENTS
FILED

151

BIDS, CHANGE
ORDERS &
ADDENDUMS

6

REGULAR
BCC
MEETINGS

52

OTHER BCC
MEETINGS

149

AGREEMENTS &
AMENDMENTS
FILED





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.

PETITIONS FILED IN 2024

TOTAL

623



TWO WAYS



CALL PROPERTY
APPRAISER'S
OFFICE

FILE APPEAL
TO VAB
case heard before
a Special Magistrate



13

HOMESTEAD & AD
VALOREM TAX
EXEMPTIONS



25

TANGIBLE
PERSONAL
PROPERTY



347

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 Charlotte County (County) 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 19 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 government 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.

Through continuous innovation and improvement, the 2024 risk assessment included a qualitative survey sent to management of each department and audit area, and observations of Board of County Commissioner regular meetings. These surveys allowed the Internal Audit Division to incorporate management's knowledge of key risk components into the surveys of quantitative data reported by each entity.

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 Public Safety Animal Welfare Agreement was a management requested special engagement completed May 30, 2024, providing a financial analysis of the sources and uses of funds of the Animal Welfare League.

Internal Audit 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. The Internal Audit Division additionally provides assurance and consulting services for Divisions under the Board of County Commissioners and the Clerk of the Circuit Court and County Comptroller.

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 75 claims for an aggregate payout of \$943,047.05 to property owners, lien holders, entities assigned rights, or powers of attorney to ensure these were the rightful claimants of surplus funds. This was a 57% decrease in claim reviews and a 136% decrease in payouts audited from the prior year. These reviews are performed in partnership with the Clerk's Official Records Office

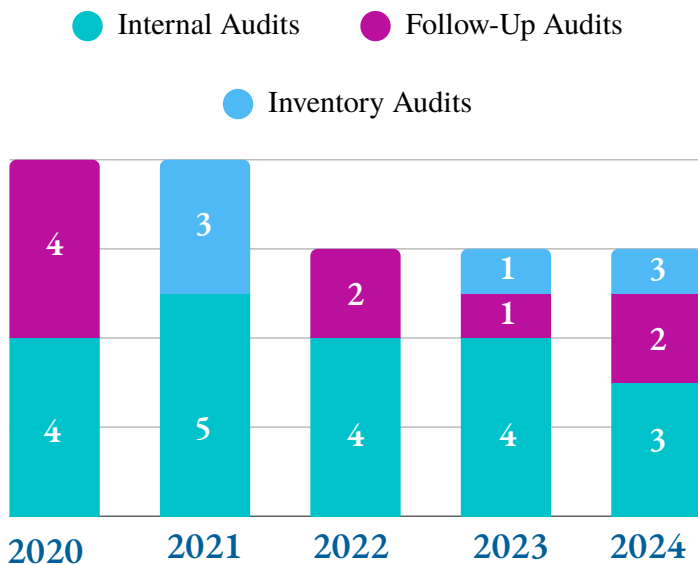


INTERNAL AUDIT

TAX DEED SURPLUS REVIEWS

TAX DEED SURPLUS REVIEWS

Internal Audit Reports Issued in the Last 5 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 2024, we again completed six audits with the current staffing.

2024 REPORT ON GUARDIANSHIPS

This was our fourth annual report on guardianships. This report provided a quantitative assessment of guardianship audits and reviews. It also showed yet 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 remained constant compared to 2022. Annual Accountings increased while interim accountings decreased.

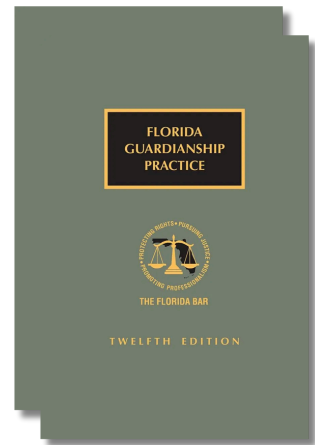
This was our fourth annual report on guardianships. This report provided a quantitative assessment of guardianship audits and reviews. It also showed yet another slight increase in case counts, as more Alleged Incapacitated Persons (AIPs) entered the court system than left the guardianship system and simplified accounting reviews remained constant compared to 2022. Annual Accountings increased while interim accountings decreased.

This was representative of the Charlotte County population continually increasing, along with the rising average age of the Charlotte County citizen. 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 increased 9% , also indicative of a growing population and rising average citizen age. Amended plans dropped by 50% as guardians gained an understanding of reporting pre-existing orders, DNRs, and guardian compensation. 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.

PUBLIC SAFETY ANIMAL WELFARE LEAGUE AGREEMENT

The Internal Audit of the Public Safety Animal Welfare Agreement was a management requested special engagement completed May 30, 2024, providing a financial analysis of the sources and uses of funds of the Animal Welfare League. Our analysis determined growing income and steady expense on par with a growing population bringing animals into the County. The County's contribution defined in the agreement reflected expected growth by increasing service payments by 3% every fiscal year. The concern that prompted this engagement resulted from funding requests above the agreed upon payments and increases to supplement operations, with no clear cause for the operational needs.





INTERNAL AUDIT



Our analysis determined the Pay it Forward Pet Crematory was formed around 2020 as an entity separate from the Animal Welfare League, but combined as one entity on tax returns filed with the Internal Revenue Service. Additionally, while reported separately to the County, an increasing intercompany loan existed between the entities which grew as the crematory operated at a loss consistently for three years.

Overall, we recommended the County revisit the 10+ year old agreement, determine the benefit/cost of the Crematory and revise the agreement as necessary to address these operations.

PARKS AND RECREATION

Parks and Recreation was an audit highlighted by qualitative risk assessment survey results in addition to quantitative support. This review had not been performed recently, and a wide range of amenities and responsibilities prompted a thorough examination of internal controls to ensure operational risk, reputational risk, legal and compliance risks were adequately mitigated. Community Services regularly achieves national accreditation from the Commission for Accreditation of Parks and Recreation Agencies ("CAPRA"), but in summary, we identified control issues with compliance, training on safety, equipment issues, reporting issues, requirements for facility use and oversight. Many issues were corrected timely or in the process of correction, so a follow-up review should be able to substantiate improvements to the system of internal control.



BEST PRACTICES

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

In July, the Director and Internal Auditor II attended the Florida State Guardianship Association 37th Annual Conference – Guardianship Odyssey – Journey to Empowerment in Orlando. This two-day program covered ethics, guardianship law, advance directives, abuse, neglect exploitation, and fiduciary Responsibilities. It was also an opportunity to network with local guardians and attorneys to discuss hot topics.

In October, the Director attended the 2024 Regional Training of the Association of Local Government Auditors in Atlanta for various sessions on artificial intelligence, risk management, communication and report writing, corrective action tracking, interviews, fraud detection, and efficient reviews of financial reports. Training included networking and discussing best practices with government auditors from all over the country. While the program concluded, communication continues with audit management from other states, sharing ideas and experiences.

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 are 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 for the benefit of the AIP or ward. 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 having deficiencies, those deficiencies are addressed by the attorneys and/or guardians, and documents are resubmitted for our acceptance. This process ensures the integrity of the guardianship program.

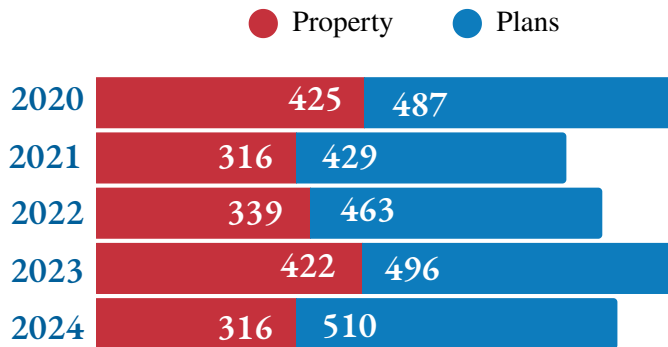


INTERNAL AUDIT

GUARDIANSHIP RESPONSIBILITIES

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



As shown by the graph, guardianship plans have increased to 501 and guardianships of the property have dropped to 317 likely due to more efficient audits and collaborating with filers in attempts to obtain complete and correct information prior to filing our report. Our statistics show more wards, or alleged incapacitated persons entering the system than leaving, so more efficient and timely reporting allows for less resubmissions or late notices.

This year, the Florida Clerks and Comptrollers Association established the Florida Guardianship Database Transparency (FLGDT) System. This is a statewide database of guardian and guardianship case information that aims to facilitate improving court oversight of guardianship cases while also providing transparency to the public. As part of this endeavor, Internal Audit identified all professional guardians past and present in Charlotte County and populated transactions into dockets that would be recognized and captured by the Comprehensive Case Information System. As a result, this database shows how many cases each professional guardian has in Charlotte County and whether reports they filed were acceptable or unacceptable. This aims to improve court oversight of guardianship cases and provide transparency to the public.

REPORTS OF THE 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 2024, 208 original property filings were audited. Of these, 14, or 7%, 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 67 amended inventories or accountings filed which were subsequently cleared in the same fiscal year. 42 or 20% of original filings were not timely filed and were subsequently reported as past due. This amounts to the 317 reports filed as noted above.

There was a total of \$15,665 in audit fees collected in calendar year 2024 for an average of \$75.31 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 2024, 350 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, 60 amended plans were filed, and found to be complete. No audit fees are charged for plans. 91 or 26% of original plans were not timely filed and were subsequently reported as past due. This amounts to the 501 reports of the plan as noted above.



INFORMATION TECHNOLOGY

The IT Division functions as the technological foundation of the Clerk's Office, supporting essential operations and the Clerk's multifaceted roles as Chief Financial Officer, County Auditor, Ex-Officio Clerk to the Board of County Commissioners, and Courts. Our services encompass application development, system maintenance, and network security, ensuring efficient and uninterrupted operations across the Finance, Internal Audit, Minutes, and Administrative Divisions.

The Clerk's IT Division drives innovation and progress, delivering a robust technological infrastructure that bridges government agencies, supports staff, and enables seamless public engagement with the Clerk's Office.

This past year has been highly productive, marked by the introduction of several new service offerings for the citizens of Charlotte County. In the aftermath of Hurricane Ian, we identified opportunities to enhance processes by collaborating with our partners in the Charlotte County government building department. Together, we streamlined the recording of Notices of Commencement and permitting. With the county's full support, we implemented an inter-agency electronic recording system. This innovation allows citizens to file for a permit with the county and submit their Notice of Commencement to the Clerk's Office in a single, seamless transaction—eliminating the need for repeated trips between agencies.

Another notable achievement was the launch of an online passport scheduling service, allowing citizens to book appointments for themselves and their families before visiting one of our offices. This convenient system enables customers to secure their spot ahead of time, streamlining their experience and reducing wait times.

As part of our ongoing process review, we identified opportunities to enhance communication with citizens selected for jury duty. Through our notification system, registered jurors receive timely and consistent updates, ensuring they are well-informed. For example, we notify jurors on Friday about their upcoming jury duty for the following week. Additionally, we provide real-time updates, letting jurors know if they need to report the next day or if their attendance is not required. This system improves clarity and reduces uncertainty for those serving.





EMPLOYEE RELATIONS

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

POLICY DEVELOPMENT/ INTERPRETATION

The Charlotte County Clerk of the Circuit Court's office takes a proactive approach in maintaining human resource compliance by actively monitoring new federal and state legislation, and updating policies accordingly, while ensuring all employees access to the updated Employee Handbook utilizing our Power DMS portal.

New hires receive one-on-one instruction, and our onboarding process covers a wide range of review of our policies and compliance procedures in regards to employment rules, security protocols, and safety, health and wellness.

Furthermore, this office focuses on employee engagement by regularly introducing new benefits and educational resources to remain a competitive employer in Charlotte County, by reinforcing our commitment to our dedicated staff by providing weekly ongoing team meetings and team-building activities aimed at enhancing staff communication which align with our core values.

EQUAL OPPORTUNITY/LABOR LAW COMPLIANCE

Our office assures that our company policies and all personnel actions are carefully reviewed against various employment laws, including the Equal Employment Opportunity (EEO) laws, Americans with Disabilities Act (ADA), Family and Medical Leave Act (FMLA), and Fair Labor Standards Act (FLSA), before they are implemented.

In fact, to assure that we are providing equal treatment to all, several Fair Labor standards policies go above what's required by law to benefit our employees.

Our goal is to maintain a healthy and cooperative work environment, as we manage over 1000 substantive and unique duties with 24/7 responsibilities that support our residential and business community. Based on this, we work and interact with various state and local judicial, administrative, legislative, and financial compliance offices.

In support of our Mission, Vision, and Values, employees also receive annual training on equal employment opportunity and harassment prevention to maintain a respectful and inclusive work environment.

CLASSIFICATION AND PAY

This office strives to be competitive within our community, as our hope is to attract and retain the best qualified staff. In 2024, Clerk Eaton raised the starting wage offered to court, records, and finance clerks in order for this office to remain competitive within our community. This office also takes pride in offering a generous benefits and time off package to support the health and wellbeing of our staff. As a part of our fiscal responsibilities, employees also share in the costs of their medical and Florida Retirement System (FRS) benefits.

To promote our employee engagement goals, employees are also recognized for their length of service every 5 years, with the receipt of a service pin, and accompanying certificate of appreciation recognizing their longevity and commitment to serving our internal and external customers with a smile. We proudly share these milestones via our employee newsletter and social media platforms

SAFETY/WORKERS' COMPENSATION

Clerk Eaton takes a proactive and comprehensive approach to employee safety and workers' compensation administration within the Clerk and Comptroller's office, ensuring all staff are informed about safety protocols through initial training, ongoing communication, and readily available safety equipment for those needing it. Regular facility inspections are conducted by external safety experts, and a real-time notification system is utilized to keep employees updated during critical situations, demonstrating our strong commitment to workplace safety utilizing efficient, innovative communication methods.

In 2024, to further assist his staff in meeting the 24/7 demands of this office, the Clerk assured that his staff has the tools and resources they need to continue our operations, even during emergency events that affect our community and/or electronic communications. As such, this office takes pride in our ability to provide services, even in the most extreme conditions that may affect electronic communications and/or office locations, as we have implemented several emergency protocols and have secured several external facilities should our operations need to be moved within our community. Cloud based services have also facilitated our ability to be mobile if emergency conditions warrant this.



EMPLOYEE RELATIONS

STAFFING AND RECRUITMENT

The Employee Relations department facilitates recruitment activities to include: posting job openings, preparing advertising, candidate management, interview scheduling, and preparing recruitment approval forms following office policy and state and federal rules. They are also required to maintain accurate records of employee information, including personal details, employment history and benefits information, and is also our onsite Florida Retirement Administrator.

This department also participates in the onboarding of new hires, and manages the Clerk's performance management system. Assisting this office in the evaluation of employee performance against established goals and objectives. As a part of this process, employee relations also assist our leadership team in managing relationships with employees, addressing concerns, and ensuring compliance with labor laws. Additionally, our Employee Relations department manages the Clerk's Risk Management and Benefits Administration records utilizing county systems in the administration and access to our health insurance and offsite health centers.

To further assist our management team, this office utilizes a predictive index tool, which is a personality assessment software to help us select the right candidates for the job and optimize team dynamics. This employee development tool is also designed to help management work to support the growth and communication skills of our employees in support of our core values, performance, and succession planning goals.



TRAINING

To ensure that we are meeting our judicial, fiscal, and administrative obligations, this office provides each staff member with the education and resources they need to understand the substantive role we play within our community and the responsibilities of this office. It's important to note, that much of the work we do is time sensitive and requires the interaction with several governmental compliance offices. As such, to assist the Clerk in onboarding employees, a dedicated Training Coordinator conducts the introduction of our Mission, Vision and Values. Our supervisory staff is charged with ensuring training on the specific services each department manages, including use of our time and attendance software. Additionally, our leadership team further works with their staff in managing their training and performance evaluations. The Clerk invests in his staff and works to ensure their success as he understands the value in having an educated and engaged staff. In 2024, this office received the Charlotte County Pacesetter Award, which recognizes his commitment to advance the skills of his staff and the services we offer.



COMMUNITY INVOLVEMENT



This year, Clerk Roger D. Eaton was honored with the prestigious Pacesetter Award at the Charlotte County Chamber of Commerce's 99th Annual Awards Luncheon.

This esteemed recognition is awarded to individuals who exemplify leadership, innovation, and a commitment to excellence in their field and community. Roger's dedication and vision have made a lasting impact on Charlotte County, and this well-deserved achievement reflects his commitment to serving the community.



"This recognition is truly an honor, but it is a reflection of the incredible team I have the privilege to work with and the community we serve. Charlotte County is a special place, and I remain committed to ensuring transparency, efficiency, and excellence in everything we do at the Clerk's Office." – Clerk Roger D. Eaton

CONNECTING WITH OUR COMMUNITY THROUGH ACTIVE INVOLVEMENT

The Clerk's Office remains actively engaged in the community, participating in a wide range of initiatives, from educational workshops and professional networking to supporting meaningful causes. Through involvement in chamber events and other local activities, we continue to build strong connections and contribute to the growth and vitality of Charlotte County.





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 \$3,600.00 for two important causes. **\$1,800.00** was dedicated to C.A.R.E. for Domestic Awareness Month, and **\$1,800.00** was contributed to the Virginia B Andes Volunteer Community Clinic for Breast Cancer Awareness month.





OFFICE LOCATIONS

Charlotte County Justice Center
350 E. Marion Avenue
Punta Gorda, FL 33950
Monday - Friday 8am - 5pm

Charlotte County Administration Center
18500 Murdock Circle
Port Charlotte, FL 33948
Monday - Friday 8am - 5pm

Mac V. Horton West County Annex
6868 San Casa Blvd.
Englewood, FL 34224
Clerk of The Court, Office 114
Tuesday and Thursday Only
8am - 1pm

CharlotteClerk.com

