



2025
COMPTON
CLERKS &
CONTROLLERS

Winter CONFERENCE

Feb. 25-27 | The Florida Hotel &
Conference Center
Orlando, FL



Pre-Conference Schedule

Monday, February 24, 2025

8:00 a.m. – 5:00 p.m.	Registration (Foyer)
8:00 a.m. – 9:30 a.m.	Budget & Finance Committee Meeting (Heroes Ballroom Salon 2)
10:00 a.m. – 2:00 p.m.	Chief Deputy Roundtable (Legacy South Ballroom 3)
10:00 a.m. – 2:00 p.m.	Executive Session with Working Lunch (Legends Ballroom 3)
2:00 p.m. – 5:00 p.m.	Exhibitor Set-Up (Mezzanine Level)
2:30 p.m. – 5:00 p.m.	CCOC Executive Council Meeting (Legends Ballroom 2)
5:30 p.m. – 7:00 p.m.	Pre-Game Shootaround: Linebarger Reception (Symposium Ballroom)

IT'S TIME TO GET IN THE GAME

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Conference Schedule

Tuesday, February 25, 2025

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| 7:00 a.m. – 8:00 a.m. | Breakfast – Hosted by Platinum and Silver Sponsors
(Heroes Ballroom Salons 1 & 2) |
| 7:00 a.m. – 5:00 p.m. | Registration
(Foyer) |
| 8:00 a.m. – 5:00 p.m. | Exhibit Hall Open
(Mezzanine Level) |
| 8:00 a.m. – 10:00 a.m. | All Tracks – Welcome and Keynote
Keynote Address: Playing to Win: When Clerks Get in the Legislative Game
(Heroes Ballroom Salons 1 & 2)
In this dynamic keynote, Veteran NBA Executive, Otis Smith, explores what it truly means to step up and lead with purpose. From defining what winning looks like for you and your team to understanding who needs to be on the field—and in what position—gain insights on how to play not just to participate, but to win. Dive into the importance of perspective, the value of each team member’s role, and how the right leadership can transform a group into a championship team. Get ready to shift your mindset, align your goals, and take your seat at the table. It’s time to get into the game.
<i>Keynote Speaker: Otis Smith, Management Consultant, Philadelphia 76ers</i> |
| 10:00 a.m. – 10:20 a.m. | Morning Break – Hosted by Platinum, Silver, and Bronze Sponsors |

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10:20 a.m. – 12:00 p.m.

**IG/IA Track – Effective Investigations
(Legacy South Ballroom)**

Investigations are a significant part of the Inspector General's work. From receiving allegations, completing an Investigative Plan, conducting interviews, and analyzing documents to writing a Final Report of Investigation. This presentation is a general discussion on strategies to increase the effectiveness of IG investigations.

Speaker: Kim Likens, MPA, CIG, CIGI, CFE, CPM, FCCM, Director of Investigations, Office of Inspector General, Florida Department of Transportation

10:20 a.m. – 12:00 p.m.

**Finance Track – GASB Update
(Legacy North Ballroom 1)**

Attendees learn the newest GASB standards and those being implemented in the coming year, what is currently on the GASB agenda, and where Clerks and their staff can still have an impact.

Speaker: Jessica Harper, CPA, Deputy Director, Finance & Accounting, Orange County Comptroller's Office

10:20 a.m. – 12:00 p.m.

**Executive Track – Florida Ethics Overview & Update
(Legacy North Ballroom 2)**

This session provides an overview of various ethics laws applicable to Clerks and Comptrollers, as found in the State Constitution and the State Code of Ethics (Part III, Chapter 112, Florida Statutes). Topics include misuse of public position, nepotism, post-office holding restrictions, how to complete a financial disclosure, and the State gift/bribery laws. A general overview of the State Ethics Commission, which enforces each of these laws, will also be provided.

Speaker: Grayden Schafer, Assistant General Counsel, Florida Commission on Ethics

12:00 p.m. – 1:20 p.m.

Lunch
(Heroes Ballroom Salons 1 & 2)

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1:20 p.m. – 3:00 p.m.

IG/IA Track – Risk Assessment (Legacy South Ballroom)

This session covers the risk assessment process and various methodologies internal auditors can adopt, offers frameworks for efficiently organizing the audit universe, and provides examples of risk-scoring templates. It addresses key decision points, including frequency and level of detail. Additionally, the presentation identifies challenges encountered during the annual audit plan risk assessment process and discusses solutions for overcoming these challenges through continuous improvement. Lastly, it shares insights on conducting engagement-level risk assessments.

Speakers: Lita McHugh, CPA, CIG, CIGI, Inspector General, Polk County Clerk of the Circuit Court and Comptroller's Office; Lihong Xia, CPA, CIGA, Deputy Internal Audit Officer, Inspector General Department, Lee County Clerk of the Circuit Court and Comptroller's Office; and Roger Trca, Inspector General, Palm Beach County Clerk of the Circuit Court and Comptroller's Office

1:20 p.m. – 3:00 p.m.

Finance Track – Payroll Issues and Reimbursements with Emergency Management (Legacy North Ballroom 1)

Attendees learn when and how to coordinate with the state Florida Department of Emergency Management. Discussion includes what contracts and documents are required to be completed.

Moderator: The Honorable Greg James, Wakulla County Clerk of the Circuit Court and Comptroller

Speakers: The Honorable Kevin C. Karnes, Lee County Clerk of the Circuit and Comptroller; the Honorable Bill Kinsaul, Bay County Clerk of the Circuit Court and Comptroller; and Zachary Bell, FCCM, Deputy Programmatic Team Lead and Insurance Specialist, Bureau of Recovery, Florida Division of Emergency Management; and Collin Kenline, PA Programmatic Reviewer, Bureau of Recovery, Florida Division of Emergency Management

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1:20 p.m. – 3:00 p.m.

**Executive Track – Sunshine Law & Public Records
(Legacy North Ballroom 2)**

This session discusses sunshine laws regarding open meetings and public records. It provides an overview of access to court records and conflicts related to public requests.

Speakers: Laura E. Roth, Esq., Volusia County Clerk of the Circuit Court; and Sidney Noyes, Chief Deputy Clerk & Chief Counsel, Walton County Clerk of the Circuit Court and Comptroller's Office

3:00 p.m. – 3:20 p.m.

Afternoon Break – Hosted by Platinum and Silver Sponsors

3:20 p.m. – 5:00 p.m.

**IG/IA Track – Guardianship Auditing
(Legacy South Ballroom)**

Florida Clerks serve as an independent “check and balance” in the Florida Guardianship System. Because of the vulnerability of the population served in guardianships, the role of the Clerk is more important now than ever before. In the trenches, Clerks better protect the rights, health, and welfare of legally incapacitated persons. Clerks help assure the public’s trust in a system many advocates believe are stacked against families and vulnerable people. Participants will be given tips on better ensuring the integrity of the guardianship system in their county. Participants are encouraged to ask questions and share information about guardianships in their county. The session will deep-dive into hot topics on auditing guardian financial reports, professional guardian oversight, conveyances of real property, and the Statewide Investigation Alliance.

Speaker: Anthony Palmieri, JD, CFE, CIG, CIGI, CIGA, CIA, CCSA, Deputy Inspector General, Palm Beach County Clerk of the Circuit Court and Comptroller's Office

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3:20 p.m. – 4:10 p.m.

**Executive/Finance Track – CCOC Reporting (50 min.)
(Heroes Ballroom Salons 1 & 2)**

This session provides an overview of recently updated CCOC reports, including the Operational Budget forms, new Payment Plan form, Collections to GR form, and Jury Management form(s).

Speakers: The Honorable Kellie Hendricks Rhoades, CPA, Union County Clerk of the Circuit Court and Comptroller; Jason Welty, Executive Director, Florida Clerks of Court Operations Corporation; and Griffin Kolchakian, Budget and Communications Director, Florida Clerks of Court Operations Corporation

4:10 p.m. – 5:00 p.m.

**Executive/Finance Track – Board Minutes (50 min.)
(Heroes Ballroom Salons 1 & 2)**

This session delves into the important aspects of maintaining board minutes. This session explores a range of topics, including the legal bases for Clerks and Comptrollers' authority as Clerk to the Board of County Commissioners, the scope of services they provide in this role, and helpful tools they use to support their services. Additionally, this session highlights best practices for retention and accessibility of these vital records. Whether you are new to board activities or looking to refine your skills, this session promises valuable insights and practical guidance.

Speakers: The Honorable Kellie Hendricks Rhoades, CPA, Union County Clerk of the Circuit Court and Comptroller; The Honorable Gregory C. Harrell, Marion County Clerk of the Circuit Court and Comptroller; and the Honorable Kevin C. Karnes, Lee County Clerk of the Circuit Court and Comptroller

5:00 p.m. – 6:30 p.m.

Game Time: President's Reception and Exhibitor Game Winner Announcement – *Hosted by Penn Credit*
(Symposium Ballroom and Terrace)

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Wednesday, February 26, 2025

- 7:00 a.m. – 8:00 a.m. Breakfast – Hosted by Platinum and Silver Sponsors
(Heroes Ballroom Salons 1 & 2)
- 7:00 a.m. – 5:00 p.m. Registration
(Foyer)
- 8:00 a.m. – 10:30 a.m. **Exhibit Hall Open
(Mezzanine)**
- 8:00 a.m. – 10:00 a.m. **All Tracks – Debt 101 – A View from the Clerk and Comptroller’s Side
(Heroes Ballroom Salons 1 & 2)**
Attendees explore how elected officials oversee financial records, ensure compliance with debt regulations, and maintain transparency in state debt practices. Topics include the responsibilities of managing government funds, issuance of bonds, and how Clerks and Comptrollers play a crucial role in safeguarding public financial health.
Speaker: Wayne R. Hart, CPA, CGFO, CPFO, Assistant Manager, Financial Reporting, Palm Beach County Clerk of the Circuit Court and Comptroller’s Office
- 10:00 a.m. – 10:20 a.m. Morning Break – Hosted by Platinum, Silver, and Bronze Sponsors
- 10:20 a.m. – 12:00 p.m. **IG/IA Track – FEMA Tips and Tricks
(Legacy South Ballroom)**
This session offers attendees the opportunity to learn and exchange best practices for successful FEMA reimbursement.
Speaker: Nicole Gasparri, CGFO, PHR, Director, Strategic Management & Professional Development, Palm Beach County Clerk of the Circuit Court and Comptroller’s Office

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10:20 a.m. – 12:00 p.m.

**Finance Track – Investments: Maximizing Your Portfolio
(Legacy North Ballroom 1)**

Investment advisors share their varying perspectives on the future of the market and what Clerks' offices should consider when maximizing cash flow for both the BOCC and Clerk-related investments. Learn the tools necessary to develop a successful investment program.

Speakers: Elizabeth M. Westvold, CFA, Director, Payden & Rygel; Lisa Redding, Senior Vice President, Payden & Rygel; and Richard Pengelly, CFA, CIMA, CTP, Managing Director, PFM Asset Management

10:20 a.m. – 12:00 p.m.

**Executive Track – Stress Recognition & Management / De-Escalation Techniques
(Legacy North Ballroom 2)**

This session focuses on identifying the different causes of stress, which include awareness, management, and building a more resilient self and team. This session covers recognizing crisis or conflict interactions that intensify beyond normal communication expectations, necessitating the intentional use of de-escalation techniques to calm ourselves and others.

Speaker: Frank Roberts, Chief Operations Officer, Citrus County Clerk of the Circuit Court and Comptroller's Office

12:00 p.m. – 1:20 p.m.

Lunch – Elected Clerks & Comptrollers
(Legends Ballroom 2)

12:00 p.m. – 1:20 p.m.

Lunch on Your Own
(Food Court)

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1:20 p.m. – 3:00 p.m.

IG/IA Track – Building Your Audit Plan and Setting the Scope (Legacy South Ballroom)

Participants explore the ins and outs of audit shops. Hear firsthand insights from representatives of various counties, sharing their experiences and strategies in building and managing their audit operations. Discover the challenges faced, innovative solutions, and best practices implemented leading to their success in creating effective audit environments.

Speakers: Wendy Kittleson, Assistant Comptroller, Orange County Comptroller's Office; Monica Alvarenga, Assistant Inspector General, Palm Beach County Clerk of the Circuit Court and Comptroller's Office; and Amy Bramlitt, Interim Inspector General, Clay County Clerk of the Circuit Court and Comptroller's Office

1:20 p.m. – 3:00 p.m.

Executive Track – Organizational Office Structure (Legacy North Ballroom 2)

This session provides an overview of the various types of organizational structures. Topics include but are not limited to, understanding different organizational structures and their benefits, how to design an organization that aligns with office goals, and key strategies for managing office restructuring and change.

Speakers: The Honorable Doug Chorvat Jr., CGCIO, CPM, Hernando County Clerk of the Circuit Court and Comptroller; the Honorable Todd Newton, Gilchrist County Clerk of the Circuit Court and Comptroller; and Damaris Rivera, Courts Director, Seminole County Clerk of the Circuit Court and Comptroller's Office

3:00 p.m. – 3:20 p.m.

Afternoon Break – Hosted by Platinum, Silver, and Bronze Sponsors

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3:20 p.m. – 5:00 p.m.

**Finance Track – Automation in Finance
(Legacy North Ballroom 1)**

As artificial intelligence (AI) continues its rapid advancement, it is poised to become a pivotal element in enhancing efficiency within the financial side of the Clerk's office. Attendees can exchange insights into successful and unsuccessful strategies from those who have embraced this evolution and learn how offices can plan transitions from a reactive to a proactive stance, optimizing their operations.

Speaker: Scott B. Curran, Implementation Manager, Vista Solutions Group, LP

3:20 p.m. – 5:00 p.m.

**Executive Track – Courageous Conversations
(Legacy North Ballroom 2)**

Attendees learn skills in problem-solving and how to better communicate with coworkers and the public.

Speaker: Nicole Gasparri, CGFO, PHR, Director of Strategic Management and Professional Development, Palm Beach County Clerk of the Circuit Court and Comptroller's Office

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Thursday, February 27, 2025

8:00 a.m. – 9:00 a.m.

Breakfast – Hosted by Platinum and Silver Sponsors
(Heroes Ballroom Salons 1 & 2)

8:00 a.m. – 10:00 a.m.

Registration
(Foyer)

9:00 a.m. – 10:40 a.m.

**All Tracks – Vendor Fraud
(Heroes Ballroom Salons 1 & 2)**

Attendees learn about essential tools and best practices to strengthen the safeguarding of public dollars.

Speakers: Ben Kincaid, CPA, CFE, CVA, CFF, Partner, Carr, Riggs & Ingram, LLC; and Matthew Blondell, CPA, Director, Risk Consulting, RSM US LLP

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