

# Sharon R. Bock, Esq.

*Clerk & Comptroller*

*Palm Beach County*

## Biography, Achievements and Civic Involvement

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### BIOGRAPHY

Clerk & Comptroller Sharon R. Bock, Esq., was first elected to the office of Clerk of the Circuit Court in November 2004 and is now in her fourth four-year term. She is a tireless advocate for innovation, public access, transparency and technology to promote continuous government improvement and efficiency in Palm Beach County.

Upon taking the oath as Clerk, her primary goal was to update the organization's name to Clerk & Comptroller to more accurately reflect the office's duties, services and public purpose. The Clerk & Comptroller, Palm Beach County is the third largest county in Florida and serves a local population of more than 1.3 million citizens as the [Chief Financial Officer, Treasurer and Auditor](#), [Clerk of the Circuit Court](#), [County Recorder](#) and [Clerk of the Board of County Commissioners](#). Clerk Bock administers a \$58 million annual operating budget and oversees more than 720 employees in [seven locations](#).

Clerk Bock brings to her position nearly 25 years of experience in the private sector as a financial consultant, real estate lawyer, title company owner and general manager. She first joined the Clerk's office in 1998 as Chief Deputy for Court Services. She was promoted to Chief Deputy Clerk in 2003, and maintained that position until she was sworn into office as Clerk & Comptroller in 2004.

In addition to her role as Clerk & Comptroller, Clerk Bock is the President of the Florida Court Clerks & Comptrollers (FCCC), the non-profit members association comprised of the state's Clerks of the Circuit Court and Comptrollers. She also serves on the Florida Courts E-Filing Authority, the Florida Courts Technology Commission, and is a former member of the Executive Council of the Clerks of Court Operations Corporation (CCOC).

## ACHIEVEMENTS

The Clerk & Comptroller's vision is to be a world-class leader in customer service, employee satisfaction and standards of excellence. The strategic direction is to deliver outstanding service, be effective and efficient, and a great place to work.

### ***BE EFFECTIVE AND EFFICIENT:***

#### **Palm Beach County's Fiscal Steward**

As the County's Chief Financial Officer, Clerk Bock is the ward for the taxpayers. Clerk Bock has identified an estimated \$26 million in questionable costs, lost revenue, and potential losses and damages with her high-profile audits. She protected \$70 million of taxpayer dollars by removing funds from the state investment pool prior to a freeze of the fund in 2007, and each year makes a series of financial recommendations to Palm Beach County in her [State of the County Address](#).

Clerk Bock's investment strategy produced \$20.2 million in investment income for the County despite a down market and has reduced the Comptroller's operations budget by 20 percent over the past seven years. Her strong reputation in the financial arena has resulted in requests from County Commissioners for financial analyses and trend reports necessary for effective decision-making and from other constitutional officers, the courts and community leaders for objective financial and performance audits.

Her financial reports have consistently received top honors from the Government Finance Officers Association. The Fiscal Year 2012 edition of [Checks & Balances: Your Guide to County Finances](#) placed 35th in its category of the "Top 50 Annual Reports Worldwide" by the League of American Communications Professionals (LACP).

Among Clerk Bock's most important duties as Clerk & Comptroller is identifying fraud, waste and government inefficiencies through her [Division of Inspector General](#). Equally important is promoting public education and engagement in government finance through her award-winning [County Financial Reports](#).

Under Clerk Bock's leadership, the Division of Inspector General launched its Guardianship Fraud Hotline in 2010 which led to the development of her cutting-edge Guardianship Fraud Program. To date, the program has identified over \$4 million in unsubstantiated disbursements, missing assets and fraud.

In 2014, Clerk Bock successfully advocated the Florida Legislature for changes in state laws which empowered all 67 Florida Clerks to investigate questionable activity in court-appointed

guardianships and create a broad guardianship program. As a result, Florida is now among the top states in protecting the assets of guardianship wards.

Clerk Bock's guardianship program has been upheld as a model at the World Congress on Adult Guardianship and at the National Guardianship Association. The program is recognized by the National Adult Protective Services Association and has been replicated throughout the state.

The important work of Clerk Bock's guardianship program has been featured on local broadcast stations, in the American Bar Association Bifocal Journal, nationally and internationally on news, radio and television in Missouri, Tennessee, Ohio, and New York as well as in Canada. Her many accomplishments led to her being named one of the Top 20 Women in Law by the Daily Business Review and the recipient of the 2014 Joanne Otto Distinguished Service Award from the National Adult Protective Services Association.

Her Division of Inspector General also conducted high-profile audits of the county Convention & Visitors Bureau, Convention Center and Debt Issuance Process.

In 2014, Clerk Bock launched Operation Green Light. This special inaugural campaign focused on addressing the thousands of overdue Palm Beach County traffic tickets. During this one day event the Clerk & Comptroller offered anyone with an outstanding traffic ticket turned over to a collection agency the opportunity to pay their violations in full without having to pay the 40 percent collections surcharge. Operation Green Light not only brought in more than half a million dollars in revenue, but allowed almost 450 citizens to reinstate their driver's license and restore their driving privilege. Due to the success of this pilot program in Palm Beach County, Operation Green Light went statewide on April 18, 2015, collecting \$5.4 million in revenue, processing 27,000 cases and reinstating or making eligible for reinstatement 9,500 drivers' licenses in Florida.

### **DELIVER OUTSTANDING SERVICE:**

#### **Technology and Innovation Leader**

Clerk Bock is a firm believer in free, unfettered public access to court and official records. She also believes in the power of technology and improving the efficiency of Florida's courts. The addition of eRecording – the secure online submission of documents to the Clerk & Comptroller's office for recording in the Official Records of Palm Beach County, is a primary example. With the expedited service, customers are now able to submit documents electronically 24 hours a day, 7 days a week for recording.

Clerk Bock's belief that the Clerk & Comptroller's office is the gateway to the courts system motivated her to ensure that all citizens have access to justice, regardless of if they are represented by an attorney or are representing themselves. That prompted her to create a

nationally recognized [Self Service Center](#) to help people navigate their way through the court system. A key feature of the Self Service Center is the Florida Supreme Court approved interactive forms that guide users to ensure that forms are completed properly.

As Clerk, she oversaw development of a public web portal that provides access to [court information and official records in Palm Beach County](#). She was one of the first Clerks in Florida to require her staff to scan and redact court documents, years before the Florida Supreme Court lifted the statewide moratorium on providing court records online. Citizens can currently review electronic versions of case files from 2008 to present at any Palm Beach County courthouse location; those records should be available online in the third quarter of 2015.

Clerk Bock's passion for technology led to seats on two important statewide boards charged with bringing innovation to Florida's courts. In 2010, Clerk Bock was elected to the [Florida Courts E-Filing Authority](#), the rulemaking body for the statewide electronic filing portal that allows anyone to file court documents from a computer rather than at the courthouse.

She was appointed by the Florida Supreme Court in 2012 to the [Florida Courts Technology Commission](#) (FCTC), a statewide organization that creates policy for and oversees technological applications in Florida's courts.

### **BE A GREAT PLACE TO WORK:**

#### **Commitment**

Clerk Bock's commitment to creative solutions and continuous improvement is reflected in every aspect of the Clerk & Comptroller's office. She played a significant role in the office's earning the prestigious [Governor's Sterling Award](#) for Organizational Performance Excellence, the highest achievement of business excellence in the state of Florida, and earned only by organizations who subject themselves to rigorous measurements of process efficiency and customer satisfaction. After her election in 2004, Clerk Bock created the organization's first-ever customer feedback system, which has been used as a model in other organizations. That system is now online and accessible from customers' smartphones and tablets.

Exemplifying the value of the workforce and her continued commitment to employees, Clerk Bock remains a strong advocate who is constantly working toward implementing innovative ideas. Under her direction a creative *promote-from-within* program was developed, providing employees the opportunity to grow and develop their careers as public servants.

With an eye to keeping her workforce healthy, she implemented a successful wellness program for her employees. The Clerks 4 Wellness program earned Platinum status from the American Heart Association's Fit-Friendly Companies Recognition program, and [received honors](#) from the South Florida Business Journal and Cigna.

# CIVIC INVOLVEMENT, EDUCATION, HONORS

## Education:

- Houston College of Law (formerly South Texas College of Law), Juris Doctorate
  - Law Review Assistant Managing Editor
  - Studied International Commerce Law at the University of Hong Kong
- Slippery Rock University, B.A.

## Accreditations, Certifications and Licenses (Current and Former):

- Licensed to practice law in Florida
- Supreme Court Certified Clerk
- Accredited Investment Fiduciary®
- Real Estate Sales License
- Insurance License
- Securities Licenses Series 7, 63 and 65
- Certified Scuba Diver
- General Aviation Pilot License

## Author:

“Electronic Access to Court Records — A Virtual Tightrope in the Making,” *Florida Bar Journal*, November 2004

## Statewide Committee List Membership/Participation:

- American Bar Association
- Association of Inspectors General
- Civitek National, Inc., Treasurer
- Florida Association of Women Lawyers
- Florida Bar Association
- Florida Clerks of Court Operations Corporation
- Florida Court Clerks & Comptrollers, President
- Florida Courts E-Filing Authority Board
- Florida Courts Technology Commission
- Florida Government Finance Officers Association
- Florida State Guardianship Association
- National Association for County Recorders, Elected Officials and Clerks
- National Committee for the Prevention of Elder Abuse
- National Guardianship Association

## Appointments:

- Florida Courts Technology Commission

- Florida Court Clerks & Comptrollers Committees: Budget, Personnel, Legislative (Vice-Chair), Self Help/Pro Se (Chair), Strategic Planning, Forerunners Courageous
- Florida Clerks of Court Operations Corporation Committees: Budget and Legislative
- Florida Courts E-Filing Authority Board
- Palm Beach County Criminal Justice Commission

**Honors:**

- 2017 National Guardianship Association Member of the Year
- 2017 Route Fifty Navigator Award Finalist, State and Local Executive Leadership
- 2016 4th World Congress on Adult Guardianship
- 2016 Quality Senior Living Award, Florida Council on Aging
- 2015 Recipient of the Rusty Gordon Award for the Protection of Personal Freedom
- 2014 South Florida Business Journal, CFO Award Finalist
- 2014 Named one of Top 20 Women in Law by the Daily Business Review
- 2014 Recipient of the Joanne Otto Distinguished Service Award, National Adult Protective Services Association
- 2010 Susan B. Anthony Award, Palm Beach County National Organization for Women
- 2009 Named one of the Most Powerful & Influential Women in Florida by *Florida Diversity Magazine*
- 2008 Leadership Palm Beach County Leadership Excellence Award
- 2007 Named one of the 40 Most Powerful People in Palm Beach County by *The Palm Beacher*
- 2007 Honorary Co-Chair, American Heart Walk, Palm Beach County
- 2007 Palm Beach County Voters Coalition Civic Leader of the Year Award
- 2007 Executive Women of the Palm Beaches' Women in Leadership Award
- 2007 Junior Achievement Rising Star Award
- 2006 American Jewish Congress Civic Leader of the Year Award
- 2005 Caribbean American for Community Involvement, Business Awareness Program Certificate of Participation
- 2004-2005 and 2001-2002 Small Group Leader Award, Inns of Court
- 2003, Key Contributor to Clerk of the Circuit Court's receipt of the Florida Governor's Sterling Award for Organizational Performance Excellence
- 2001 Florida Association of Women Lawyers Glass Ceiling Breaker Award

**Memberships:**

- American Bar Association
- Association of Inspectors General
- Craig S. Barnard American Inns of Court, Emeritus
- Florida Association for Women Lawyers, Palm Beach County Chapter
- Florida Bar Association
- Florida Government Finance Officers Association
- Florida Tax Watch
- The Forum Club of the Palm Beaches
- Leadership Palm Beach County Alumnus
- National Association of County Recorders, Election Officials and Clerks
- Palm Beach County and South Palm Beach County Bar Associations

- Palm Beach County Government Finance Officers Association
- Palm Beach County League of Women Voters

### **Prior Appointments:**

- American Bar Association, Law Student Liaison to the Practice Management Section
- City of Miami Commission on the Status of Women
- Florida Association of Court Clerks & Comptrollers Article V, Communications, E-Filing Workgroup, Education & Judicial Relations Committees
- Florida Bar Grievance Committee
- Leadership Palm Beach County Board of Governors
- Planning & Zoning Board, Town of Palm Beach Shores
- Florida Senate Appointee to the Executive Council of the Florida Clerks of Court Operations Corporation
- Women's Business Development Center at Florida International University

### **Clerk & Comptroller's Office Awards:**

#### **2018**

- Distinguished Budget Presentation Award for the Clerk's Fiscal Year 2018 budget, Government Finance Officers Association (GFOA)
- Silver Level Recipient of the American Heart Association's Workplace Health Achievement Index Recognition
- 2018 Achievement Award in Criminal Justice and Public Safety, National Association of Counties, for Court Compliance Program

#### **2017**

- Most Innovative Passport Acceptance Facility, United States Department of State
- CEFEX Certified Investment Steward, Center for Fiduciary Excellence
- National Guardianship Association Member of the Year - Clerk & Comptroller Sharon R. Bock
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2016, Government Finance Officers Association
- Outstanding Achievement in Popular Annual Financial Reporting for "Checks & Balances: Your Guide to County Finances," for FY 2016, Government Finance Officers Association
- Route Fifty Navigator Award Finalist, State and Local Executive Leadership - Clerk & Comptroller Sharon R. Bock
- PRSA Palm Award, Community Relations Program - Operation Fresh Start
- PRSA Palm Award, Community Service - Clerks for a Cause
- PRSA Sunshine District Award of Commendation, Community Relations, for Operation Fresh Start
- Advanced Commitment to Excellence (ACE) Award, Government Finance Officers Association (GFOA) for developing the Virtual Fund Analysis Dashboard.
- Distinguished Budget Presentation Award for the Clerk's Fiscal Year 2017 budget, Government Finance Officers Association (GFOA)
- Prudential Productivity Award for Operation Fresh Start, in conjunction with the 15th Judicial Circuit, State Attorney and Public Defender

- Prudential Productivity Award for the implementation of DUS Court, in conjunction with the 15th Judicial Circuit, State Attorney and Public Defender
- Justi Award, Operation Fresh Start
- Bernays Award, Gold Coast Public Relations Council, Nonprofit/Charity Project or Campaign, Operation Fresh Start
- Innovations in American Government Bright Idea, Harvard University's Ash Center for Democratic Governance and Innovation, for the Clerk's Summer Financial Literacy Work Experience program

## 2016

- CEFEX Certified Investment Steward awarded to the Clerk's investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2015, Government Finance Officers Association
- 4th World Congress on Adult Guardianship in Berlin, Germany, international special project winner for the Clerk's Guardianship Fraud Hotline program
- Quality Senior Living Award, Florida Council on Aging, for the Clerk's Guardianship Fraud Hotline program
- Outstanding Achievement in Popular Annual Financial Reporting for "Checks & Balances: Your Guide to County Finances," for FY 2015, Government Finance Officers Association
- PRSA Sunshine District Radiance Award, one-day special event, for Passport Day
- PRSA Sunshine District Radiance Award, public service program, for Property Fraud Alert
- Distinguished Budget Presentation Award for the Clerk's Fiscal Year 2016 budget, Government Finance Officers Association (GFOA)
- Healthiest Employer Award, Finalist, South Florida Business Journal
- Platinum Level Recipient of the American Heart Association's Fit-Friendly Companies Recognition program
- United Way Palm Beach County's 2015-2016 Campaign - Driven to Donate Award
- Designated a Top 50 Active Company as part of WELCOA's On the Move Initiative, a nationwide corporate fitness competition

## 2015

- Rosalinde Gilbert Innovations in Alzheimer's Disease Caregiving Legacy Award, Policy and Advocacy - Guardianship Fraud Program and Hotline
- Recipient of the 2015 Palm Beach County Law Enforcement Award
- Florida Government Finance Officers Association Advanced Commitment to Excellence (ACE) Award for Process Improvement
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2014, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2015, Government Finance Officers Association
- Distinguished Budget Presentation Award for the Clerk's Fiscal Year 2014 Budget, Government Finance Officers Association (GFOA)



- CEFEX Certified Investment Steward awarded to the Clerk’s investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures
- Palm Award – Clerk & Comptroller Annual Report
- Recipient of the Justi Award for “In Court Processing”
- Recipient of “eRecording Rookie of the Year” Award,
- Public Relations Society (PRSA) Palm Beach Palm Awards
  - Product Awards - Annual Reports - 2014-2015 Annual Budget Document
  - Program Awards - Internal Communications - Financial Wellness Campaign
  - Program Awards - Special Events and Observances - Operation Green Light
- Public Relations Society (PRSA) Sunshine District (Statewide)
  - Program Awards - Internal Communications - Financial Wellness Campaign
  - Program Awards - Special Events and Observances - Operation Green Light
- South Florida Business Journal’s Healthiest Employer Awards, 5<sup>th</sup> Place among large employers (500+ employees)
- Platinum Level Recipient of the American Heart Association's Fit-Friendly Companies Recognition program, for our commitment to providing physical activity and wellness opportunities for our employees
- Cigna Well-Being Award for Building and Maintaining an Outstanding Culture of Well-Being
- United Way Hunger Heroes, Day of Action – Donated the most food in Palm Beach County
- The League of American Communications Professionals (LACP) Bronze Award designation for *Checks & Balances: Your Guide to County Finances, FY 2014*

## 2014

- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances for FY 2013*, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2013, Government Finance Officers Association
- Human Resources Association of Palm Beach County -2014 Human Resources Professional of the Year - Lisa Turner, Chief Human Resources Officer
- Cigna Well-Being Award for Building and Maintaining an Outstanding Culture of Well-Being
- CEFEX Certified Investment Steward awarded to the Clerk's investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record- keeping procedures
- Platinum Level Recipient of the American Heart Association's Fit-Friendly Companies Recognition program, for our commitment to providing physical activity and wellness opportunities for our employees
- Distinguished Budget Presentation Award for the Clerk’s Fiscal Year 2014 budget, Government Finance Officers Association (GFOA)
- Healthiest Employer Award, Honoree, *South Florida Business Journal*
- United Way of Palm Beach County's Team Spirit Award for the Clerk's 2013 United Way fundraising campaign
- The League of American Communications Professionals (LACP) Gold Award designation for *Checks & Balances: Your Guide to County Finances, FY 2012*
- Vision Award for *Checks & Balances: Your Guide to County Finances for FY 2012* in the Annual Reports Competition

## 2013

- CEFEX Certified Investment Steward awarded to the Clerk's investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record- keeping procedures
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2012, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2012, Government Finance Officers Association\*
- Distinguished Budget Presentation Award for the Clerk's Fiscal Year 2013 budget, Government Finance Officers Association (GFOA)
- Vision Award for Popular Annual Financial Report (PAFR) for FY 2011 in the Annual Report Competition
- ShowCase Innovator Award
- Healthiest Employer Award, Finalist, *South Florida Business Journal*
- Palm Award of Excellence for *Checks & Balances: Your Guide to County Finances* (PAFR for Fiscal Year 2011) in Product Awards - Annual Reports, One- to Three-Color Reports category, Public Relations Society of America, Palm Beach Chapter
- Palm Award of Quality for 12-12-12 Wedding Event in Program Awards - Special Events and Observances, One Day or Less category, Public Relations Society of America, Palm Beach Chapter
- Hermes Creative Platinum Award for "Annual Financial Education & Reporting" for the FY2011 CAFR, PAFR, Annual Investment Guide & Annual Debt Guide
- Hermes Creative Gold Award for Popular Annual Financial Report (PAFR) for FY2011 in "Publications – Annual Reports" category
- Impact Award for "Annual Financial Education & Reporting" for the FY2011 CAFR, PAFR, Annual Investment Guide & Annual Debt Guide in the Strategic Communications Competition
- Gold Level Recipient of the American Heart Association's Start! Fit-Friendly Companies Recognition program, for our commitment to providing physical activity and wellness opportunities for our employees

## 2012

- Gold Level Recipient of the American Heart Association's Start! Fit-Friendly Companies Recognition program, for our commitment to providing physical activity and wellness opportunities for our employees
- Palm Award for Excellence in Public Relations for Domestic Violence Month Public Service Announcement & Cell Phone Challenge top winner in "Audio Visual Productions" category, Public Relations Society of America, Palm Beach Chapter
- Palm Award for Excellence in Public Relations for *Checks & Balances: Your Guide to County Finances*, FY 2010, top winner in "Annual Reports" category, Public Relations Society of America, Palm Beach Chapter
- Bernays Award for "Special Event" for 2011 Valentine's Day Wedding, Gold Coast PR Council
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2011, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2011, Government Finance Officers Association

- CEFEX Certified Investment Steward awarded to the Clerk's investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures

## 2011

- Palm Award for Excellence in Public Relations for *Clerks 4 Wellness Campaign* top winner in “Internal Communications” category, Public Relations Society of America, Palm Beach Chapter
- Accredited Inspector General Agency, Commission for Florida Law Enforcement Accreditation, which means Clerk auditors follow the high standards set for Offices of Inspector General.
- The American Heart Association Gold Achievement as a Fit-Friendly Company
- The American Heart Association Worksite Fitness Innovation Award
- Outstanding Achievement in Popular Annual Financial Reporting for Checks & Balances: Your Guide to County Finances for FY 2010, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2010, Government Finance Officers Association
- CEFEX Certified Investment Steward awarded to the Clerk’s investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures

## 2010

- Standard & Poor’s assigned the county’s investment portfolio the highest rating category AAf/S1, which represents extremely strong protection against credit losses from credit defaults and low volatility, or sensitivity to changing market conditions. The portfolio is managed by the Clerk & Comptroller.
- CEFEX Certified Investment Steward awarded to the Clerk’s investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2009, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2009, Government Finance Officers Association
- Best Practices in HR, a publication by Business and Legal Resources (BLR), featured Clerk & Comptroller's "We're All in This Together" transition program
- Work Life Innovative Excellence Award from the Alliance for Work-Life Progress, an affiliate of WorldatWork®
- Palm Award for Excellence in Public Relations for [www.mypalmbeachclerk.com](http://www.mypalmbeachclerk.com) Web site redesign (top winner in “Web sites – Government/Public Service” category), Public Relations Society of America, Palm Beach Chapter
- Palm Award for Excellence in Public Relations for *Sensible Start Wedding* promotion for 9/09/09 (top winner in “Public Affairs/Government Relations” category), Public Relations Society of America, Palm Beach Chapter

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- CEFEX Certified Investment Steward awarded to the Clerk's investment program by the Center for Fiduciary Excellence, which signifies adherence to best practices in the industry and excellence in investment record-keeping procedures
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2008, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2008, Government Finance Officers Association\*
- Bernays Award for "Best PR Campaign by a Large Company or Firm" for Best Practices 2008, Gold Coast PR Council
- Best Places to Work Award, Finalist, South Florida Business Journal
- Palm Award for Excellence in Public Relations for Annual Report, *Checks & Balances: Your Guide to County Finances* FY 2007, Public Relations Society of America, Palm Beach Chapter

## 2008

- Standard & Poor's assigned the county's investment portfolio the highest rating category AAf/S1, which represents extremely strong protection against credit losses from credit defaults and low volatility, or sensitivity to changing market conditions. The portfolio is managed by the Clerk & Comptroller.
- Best Places to Work Award, Finalist, South Florida Business Journal
- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2007, Government Finance Officers Association
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2007, Government Finance Officers Association
- Horizon Interactive Awards, Gold Recognition for Government Web sites
- Best Government Microsite/Web Landing Page, Web Marketing Association's Internet Advertising Competition

## 2007

- Outstanding Achievement in Popular Annual Financial Reporting for *Checks & Balances: Your Guide to County Finances* for FY 2006, the office's inaugural Popular Annual Financial Report, Government Finance Officers Association
- Overall Silver Spotlight Award in the category of Print, Video & Web Communications for *Checks & Balances: Your Guide to County Finances*, League of American Communications Professionals
- ATHENA Award, Finalist, Chamber of Commerce of the Palm Beaches
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2006, Government Finance Officers Association

## 2006

- ATHENA Award, Finalist, Chamber of Commerce of the Palm Beaches
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2005, Government Finance Officers Association

## 2005

- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2004, Government Finance Officers Association

## 2004

- Excellence, Values, Integrity and Ethics (EVIE) Award for Corporate Best Practices Not-for-Profit/Government, Professional and Business Forum, Palm Beach County
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2003, Government Finance Officers Association

## 2003

- Governor's Sterling Award for Organizational Performance Excellence, Executive Office of the Governor, Florida Sterling Council
- Certificate of Achievement for Excellence in Financial Reporting for the Palm Beach County Comprehensive Annual Financial Report FY 2002, Government Finance Officers Association