

**CERTIFIED CONNECTICUT MUNICIPAL ASSESSORS COMMITTEE AND THE
CERTIFIED CONNECTICUT MUNICIPAL COLLECTOR COMMITTEE
JOINT MEETING**

Thursday, January 16, 2020
Office of Policy & Management
Intergovernmental Policy & Planning Division - Conference Room 3A
450 Capitol Ave, Hartford, CT

The meeting was called to order by Martin L. Heft, Acting Undersecretary for the Intergovernmental Policy and Planning Division at the Office of Policy and Management (OPM), at 9:05 a.m.

Members present Lucy Hussman, Lisa Biagiarelli, Patricia Moiso, William Donlin, Ann-Marie Heering, Patrick Sullivan, Lisa Theroux, Teresa Babon, John Rainaldi, Thomas DeNoto, Jennifer Gauthier, Patricia Monahan, Denise Talbot, David Dietsch, Shawna Baron, Mary Huda, Martin Heft.

Martin, as host, welcomed everyone and thanked them for coming, gave a brief overview of the meeting, and apologized for the parking issues at our facility. The group participants went through a brief introduction of themselves indicating what municipality they represented, their title and the Committee that they were representing.

Martin started the discussion by referencing Connecticut General Statutes 12-40a and 12-130a and reminded each committee member that the CCMA and CCMC Committees were created by Connecticut General State Statutes (CGS) and are therefore considered to be agencies of the State, per CGS 1-200(1). Additionally, any sub-committee created by either of these two groups would also be considered an agency of the state. The Connecticut Association of Assessing Officers (CAAO) and the Connecticut Tax Collector's Association (CTx) are private organizations and are not agencies of the state.

The meeting was scheduled to bring the groups together and attempt to find ways to streamline services and become more efficient and effective. Martin encouraged everyone to make this meeting the springboard to open the discussion dialog amongst the groups to work toward the greater good and find ways to help each other.

FREEDOM OF INFORMATION

As public agencies, both committees are subject to the Freedom of Information Act (FOIA). The two major requirements of the FOIA are:

- Meetings of the committees must be held in the open; and
- Records of the committees are subject to disclosure and open to public inspection

Martin reviewed the definition of a meeting, and reminded the group that whether the meeting occurred in person or electronically, they are still deemed to be meetings and need to follow the guidelines of the Freedom of Information Act (FOIA) – meaning that an agenda needs to be filed, it needs to be open to the public and minutes need to be taken. Martin expounded on the definition of “electronic” meetings and included telephone conversations, email conversations, Skype, Facetime (among others) in which a quorum of the members participate still constitutes a meeting. He discussed email discussions, noting that the best practice is not to email all members to discuss any committee business, and to be wary of replying to “all” since that may constitute a meeting.

Martin reviewed basic meeting guidelines per the FOIA – the construction, and posting, of the agenda, changes to the agenda after it is posted, the fact that votes must be made in public, a record of votes and/or keeping minutes, and each of the individual posting deadlines. Pat Monahan asked a point of clarification in that CTx and CAAO are not required to follow these requirements and Martin agreed and indicated that they are not public agencies and not subject to the same rules, but as associations would have their own guidelines in their individual Bylaws.

He also reviewed the difference between Regular, Special and Emergency Meetings and the nuances associated with each type of meeting. Ann-Marie asked if the 48 hours' notice was 48 business hours, or 48 actual hours. Martin and Jennifer believed it was strictly 48 hours, but that they would verify. For any Friday meeting, any 48-hour requirements should be posted on Monday morning.

A note was made on the construction of agendas and Martin recommended that "Public Comment" be added to both committees' agendas monthly. This is because the public is invited to all meetings, and, for instance, in the event of a Special Meeting, that person would not have the opportunity to speak if they were not originally on the Agenda.

ETHICS AND SEXUAL HARASSMENT TRAINING

Because both CCMA and CCMC are agencies of the State of Connecticut, all committee members are subject to the same required Ethics Training and Sexual Harassment Training that state employees must adhere to. He noted that the Connecticut Commission on Human Rights and Opportunities (CHRO) and the FOIA both offer training virtually on their websites.

Recent changes to Connecticut state law now require employers to train their employees in Sexual Harassment, so most all committee members and their instructors will have a current certification. If any do not currently have a certification, they can go through the online training offered through CHRO.

As for Ethics training, there is no current law requiring employers to provide this training, but most municipalities already offer this training. OPM cannot require CCMA and CCMC instructors to take Ethics training, but Martin recommend that this topic be reviewed by each Committee at their next meeting to determine if it should be a requirement.

Jennifer asked about the amount of time that can elapse between certifications for each training. Sexual Harassment training is required every 10 years; Ethics training is required for state employees annually, and, as such, this will be the same requirement for all committee members.

INSTRUCTOR/STUDENT RELATIONSHIPS

Martin discussed the Instructor/Student relationship and the boundaries of those relationships and had some recommendations for the Committees to take back and discuss at a near future meeting. Some of these "best practices" to protect both Committees included:

- Not allowing a student and teacher to be alone at any point in time and to use the "buddy system";
- Testing procedures and the assignment of numbers rather than student names;
- The grading and retention of course exams by the Committee and not by individual instructors.

A discussion regarding the correction of exams was had and it is noted that some members voiced their concern with grading examinations for their staff, co-workers and other related entities.

CERTIFICATION OF TAX COLLECTORS AND ASSESSORS

The designations of each committee were discussed. This included levels of certification, levels of education, years of experience and recertification.

There was discussion from both committees where they individually tried to replicate pieces of each other's regulations/guidelines. The pro's and con's of each committee's approach to their certification process was discussed and members for both committees expressed their thoughts about this, knowing that there is no one correct way to address these issues.

A lengthy discussion by the committee members followed regarding the matter of experience and it was ultimately decided that each Committee must create a definition of "related experience" to promote transparency

in the process and to make the process less subjective. Several members also voiced their support for cross-training in their respective offices in order to make more well-rounded employees.

DISCUSSION OF GOVERNOR’S PRIORITIES/LEGISLATIVE

The Governor has a “Whole of Government” approach and has three priorities for his administration, and future legislation. Those priorities are:

- 1) Promoting Economic Growth
- 2) Climate Change
- 3) Making Government more Efficient and Effective

To that end, there is a push to create regional efficiencies amongst our municipalities. There are now several task forces, committees and legislation that have been created to work toward that end and it will continue to be a priority of the current administration.

As for the Assessment and Tax Collection communities as they relate to Regional Efficiencies/Shared Services, there are segments of each office that have and are being investigated as potential places to create and encourage efficiencies among, and across, municipalities. A few of the items that were highlighted were:

- 1) GIS on a Regional or State level
- 2) Back-Office Functions
- 3) Revaluation Zones to Encourage Multi-Municipality Revaluation Contracts
- 4) Elected vs. Appointed Tax Collectors
- 5) Centralized Data System/Parcel Data
- 6) Potential Motor Vehicle, Personal Property and Income and Expense Systematic/Procedure Changes
- 7) Combined Revenue Collection Offices

Some of the items being discussed would require simple policy changes while others some would require legislative changes. There are several state agencies, Councils of Governments (COG), task forces and committees that are constantly working on these issues. Martin made reference to the Secretary’s COG Report that was due at the end of the year where she asked them to identify efficiencies in Public Safety Answering Points (PSAP’s) and Assessment Functions. He is gathering the data from these reports and will share once finalized.

OPEN FORUM

Lisa B. asked about OPM’s role going forward – specifically regarding Tax Collector Audits. Martin discussed the statutory guidelines and restrictions, the political aspect as well as the “ripple effect” of performing internal audits. Martin indicated that OPM has not had someone in a position to perform these types of audits until Jennifer was hired, and he anticipates that they will continue these audits randomly, or as issues arise, and are here to ensure that both Assessors and Collectors are in compliance with state statutes as well as using them as an opportunity to identify areas for potential education and training.

Tom asked Martin to investigate the lost revenue from the state to municipalities relative to reimbursement programs and to try and see that there is little left to create more efficiencies at the local level. He suggested that one way to create guaranteed efficiencies would be to make technology a primary focus to get to the “Virtual Town Hall” that the Governor envisions. Ann-Marie mirrored Tom’s thoughts about the revenue loss from the state to the municipalities and reiterated the distrust on the municipality’s part.

Martin closed the meeting by restating that he wants to work together with all stakeholders involved before creating policies and/or legislation and he is looking forward to taking this initial meeting and making it a platform to move forward.

The meeting adjourned at 10:51 a.m.