

CCMC Committee Regular Meeting (Virtual)

Thursday, January 6, 2022 10:00 am

<https://global.gotomeeting.com/join/180022005>

or via dialing in: 1-669-224-3412 Access code 180-022-005

A quorum was present and the meeting was called to order at 10:05 am by CCMC Committee Chairman John Rainaldi. Attending virtually were, from the CCMC Committee: David Kluczowski; Lisa Madden; Beth Hamel; Jennifer Gauthier; and Lisa Biagiarelli. Sarah Bruso, Tax Collector of Norfolk, CT also attended. Denise Talbot joined the meeting slightly later.

John noted that the minutes of the December 8, 2021 meeting had been sent and made available prior to this meeting. There were several corrections including: the stipend for the pre-course should have been listed as \$50 prior to 2022 and increased to \$150 for 2022. Lisa Madden made a motion to waive the reading of minutes and to accept them with the aforementioned corrections; Lisa Biagiarelli seconded. All were in favor of approving the minutes with the corrections.

David noted that he had emailed the Committee a Treasurer's report on January 3, 2022, and there had been no changes since that time. The balance was \$23,039.07. Lisa Biagiarelli made a motion to accept the Treasurer's report as presented by David; Lisa Madden seconded. All were in favor. John indicated the change over from William Donlin's stewardship to David's was complete. John said he now has Paypal set up and that the Committee will be able to offer the Paypal payment option for the spring 2022 course offerings.

John introduced discussion of new business to include public comment and introduced Sarah Bruso. John announced he was recusing himself from the discussion of this agenda item. He intended to turn the meeting over to the next senior member of the Committee. Denise Talbot is the next senior member but was not yet online and he asked Lisa Biagiarelli to oversee the meeting for this agenda item. Several members of the Committee discussed their belief that it was not necessary for John to recuse himself. John thanked the members but recused himself anyway, and shut off his microphone and video. At some point during the discussion of this item, Denise came online.

Sarah Bruso thanked the Committee for the work being done on behalf of tax collectors in Connecticut and presented correspondence that she had emailed to John prior to the meeting. She asked for clarification of the CCMC Committee's requirement that a CCMC designee have three years' experience being employed in a Connecticut tax collector's office. Cory Iacino received her CCMC designation in November 2021 at Aquaturf. It was brought to the Committee's attention that she might not have met the experience requirement. Records indicate Cory had worked in the town of Burlington under the title of Land Use Clerk and that her duties during that time were described by the town, in response to an FOI request, as Administrative Assistant for the Land Use Office, rather than tax collector's office staff, from Sept. 17, 2007 – October 25, 2010. Her direct supervisor was Jim Koplak, the Building Official; her work done in the tax office was not regular, but only seasonal and unofficial, such as to assist the tax collector during peak collection periods, or when the tax collector was on vacation.

Sarah asked that the Committee clarify if this constitutes "three years experience," because it had been the understanding of others that seasonal or unofficial work was not sufficient, and that work in other

municipal offices does not count. She was looking for clarity and uniformity in how the requirement was interpreted.

Several members of the Committee explained the process by which applicants apply for their designation, and what type of documentation is submitted and who reviews it. In this situation, the designation was awarded in November 2021. Cory submitted paperwork to Patricia Moisio on the Committee; it appeared to be in order, and she was approved to receive the designation. Section 12-130(a)(3) requires a minimum of three years' experience in a tax collector's office, but does not clarify whether seasonal or part time work is sufficient. Beth Hamel said when she applied for her own designation, the CCMC Committee at that time required her work experience to be for four years, rather than three years, because at the time her employment was not considered a sufficient number of hours per week to meet what they deemed the "three year" requirement to entail.

Sarah noted she submitted a Freedom of Information request to the town in question to obtain more information, including compensation / payroll records for this employee. The town had responded to her but some of the records were not available due to the length of time that had passed and records retention schedules.

The Committee noted that Patricia Moisio had received an application from this candidate that included the candidate's statement that she met the requirements, including the experience requirement. Cory referred to herself as having "...worked as the assistant to the tax collector" when describing herself to members of the Committee including the Chair. Her resume states "Assistant to Tax Collector" and under certification / training states "CCMC (Certification Pending) in addition to CCMA 1 and other certifications.

A supplementary letter from the tax collector in Burlington, Allison Breithaupt (formerly Yudelson), written in April 2021 to Patricia Moisio and submitted with Cory's application for the designation, states she (Allison) has personally known Cory for fifteen years and worked with her for four years. Allison stated Cory "... worked as my Assistant in the Tax Office from Sept 2007 through October 2010" and that "during her time in the Tax Office Cory was exposed to all aspects of tax collection" including processing payments, preparing tax bills for mailing, monitoring and collecting delinquencies, compiling tax reports and maintaining and preparing billing for water accounts.

Based on these representations, the application for the designation was approved. It was reiterated that nobody was accusing the CCMC Committee of having done anything wrong with this application, but the issue was whether the applicant had, or had not, in fact done actual work sufficient to meet the experience requirement as defined by the Committee.

There was also an email from Cory to the Chair, where they were discussing which department had paid her salary during the time in Burlington. It was Cory's contention that regardless of which line item her salary came from, she said she was physically working in the tax office for more than three years. Cory stated in this email that Patricia Monahan, former Chair of the CCMC Committee had told her in the past that she was not eligible for the CCMC designation because she did not have the requisite experience, and that having been paid from other departments meant she did not qualify.

Copies of the emails from Cory and copies of the letters including the letter from Allison Breithaupt and the Burlington First Selectman's FOI response to Sarah, were all included in the packet of information provided to the CCMC Committee prior to this meeting.

Lisa Biagiarelli stated seasonal, part time or unofficial work "helping out" in a tax office did not meet what the Committee considered "experience working in a tax collector's office" as she understood the requirement, either historically or currently. Jennifer said this issue has arisen both in the realm of assessors as well as collectors in Connecticut, and that she agreed with Lisa Biagiarelli.

A lengthy discussion ensued concerning seasonal work. It was noted offices that are "part time" where they may be open less than 37 or 40 hours a week are nonetheless considered "full time" for purposes of determining experience because all of the necessary functions are being performed during the course of a 12 month year. It was noted it might be difficult to delve into whether a candidate was paid by one department or another particularly when payroll records are no longer available. David agreed that seasonal work in the tax office was not sufficient to meet the experience requirement and that if it came to light that we had awarded a designation based on misunderstanding of what the applicant had actually done, the candidate should not in fact have been certified. The Committee discussed what the next step should be and Jennifer said she felt we should invite Cory to a meeting to discuss her application.

David made a motion to invite Cory Iacino and Allison Breithaupt to our next Committee meeting so we could discuss the application and allow them to answer questions and respond to us. Beth seconded the motion.

There was further discussion as Jennifer noted there have been instances in which assessor's office personnel have been denied on a case by case basis and that due to the increasing number of combined offices she expects this situation to arise again in the future. Lisa Madden asked for further clarification on what a seasonal employee is and whether or not seasonal work qualifies as experience. Jennifer said she felt it had to be decided on a case by case basis because the towns were different and what any one employee was doing might not necessarily be the same as another employee in another town. Jennifer said she felt the Committee needed to delve deeper into the actual applications, and perhaps even invite the candidates to clarify if there were any question as to what their experience was. Jennifer noted in some cases the CCMA Committee has to go back to pay records to determine what work was done.

David noted the situation is different for the assessors because you are not allowed to sit for the CCMA exam without first having achieved the experience requirement, whereas with the CCMC Committee we made the decision to allow candidates to sit for our exam even without having achieved their three years' experience. He said maybe we would revisit that in the future. Denise said candidates for our examination would complain they would forget what they learned in class if they had to wait years to sit for the comprehensive final examination. Lisa Madden expressed the desire for the Committee to create a policy concerning what constitutes experience and that this was needed as a basis to review applicants' experience. Jennifer responded that in fact we do have a policy, and that the issue is that perhaps an applicant may have misrepresented their actual experience and that is what the Committee needs to investigate. Jennifer said the candidate needs to be given the opportunity to address the

Committee because perhaps their understanding of experience was different from ours. Jennifer also noted there is an appeal process if they disagree with the Committee's decision.

Lisa Biagiarelli called for a vote on the motion to invite the two individuals to our next meeting; voting in favor of the motion were David, Denise, Beth, and Lisa Biagiarelli; Lisa Madden voted against the motion and John abstained. The motion passed. At this time John Rainaldi rejoined the meeting and Lisa Biagiarelli turned the meeting back over to him.

Lisa Madden made a motion to create a policy to clarify what constitutes experience; Lisa Biagiarelli seconded. Discussion ensued. Jennifer opined it would be hard to create a specific policy because every application is different. Denise questioned if we really needed a policy. John said this issue has arisen before. There was at least one other applicant who was an assessor who was denied the CCMC designation based on lack of tax collectors' office experience; this applicant appealed the denial to OPM and OPM denied the appeal and the CCMC Committee's decision stood. It was noted in the past, former CCMC Chair Patricia Monahan applied to sit for the CCMA examination and was denied based on lack of experience. John felt it was unfair at the time, and as a member of the CCMA Committee at the time, he voted against denying her the opportunity to sit for the exam. Beth suggested the Committee do some research on how to quantify experience. Lisa Biagiarelli suggested the Committee check with Launa Goslee, because the last time the CCMC Committee dealt with this issue, Launa was involved with Litchfield County and had concerns about the smaller towns that have collectors' offices that are not open five days a week. Those towns had concerns about how experience would be determined. Lisa Madden amended her motion to recommend the Committee *continue to discuss the idea of creating a policy to clarify what constitutes experience*; Lisa Biagiarelli seconded the amended motion. The amended motion passed unanimously, 6 – 0.

John said he would draft a letter and invite Cory and Allison to our next meeting, which will be held on February 10, 2022 at 9:30 am.

John moved forward to the next agenda item, 2021 re-certifications. There were three individuals who did not have enough hours to achieve their recertification for 2021 and / or who did not submit completed applications. One had submitted an application in March 2021 with only 37 hours and had been asked to resubmit with additional hours but had failed to do so. These three individuals did not meet the requirements to maintain their CCMC designations and are no longer certified tax collectors. John said he would write to each of the three to inform them of this and invite them to a meeting to discuss. Jennifer questioned if the Committee also had a responsibility as a Committee to notify the towns in which these individuals work that their collectors are no longer certified. Lisa Biagiarelli suggested we could notify the individuals and send a copy of that letter to the CEOs of each of the towns. Beth agreed with this proposal. John will draft a letter that will be sent to each individual with a copy to the CEO of each of their towns; it will clarify that the individuals can still function in their positions but that their certifications have expired. Lisa Madden clarified that out of the 46 individuals who needed to recertify by the end of calendar year 2021, 33 had successfully recertified; 10 let us know were not reapplying, or had since retired; and finally, these three, who were still working tax collectors, had failed to follow through with their submissions.

The next agenda item was workshop approvals. There were three submitted for consideration. Lisa Madden put forward a 2.5 hour presentation on First Amendment Audits to be offered by Keith Hummel at the March 2022 CTx conference. This was a longer version of a workshop offered and approved for

credits at the 2021 Northeast Regional Conference. Lisa Biagiarelli made a motion to approve; Beth seconded. Discussion ensued as to whether an individual applying for recertification could claim credit for both the workshop offered on this topic at Northeast in 2021 as well as this one offered at CTx in 2022. It was decided they could use both on the theory they were being offered in two different years, and would probably be significantly different because there were different audiences. The motion passed 5 – 0 with Lisa Madden abstaining from the vote.

The next workshop offered for approval was an active shooter workshop taken by Thomas Lyon of West Haven. Denise made a motion to deny approval; Lisa Madden seconded. Discussion ensued with Beth opining this should be approved because it is the exact same topic that had been approved at other times. Denise explained that when we first began deliberating on approving these workshops we were not as aware as we currently are of how strict the regulations are concerning what relates to tax collection and that we were not following our own regulations as strictly as we should have been, but that does not mean we should not currently strive to follow them exactly. There was also discussion about when workshops approved from prior years will drop off the approval list if they occurred more than five years' prior to the application year. It was noted we should update the list of what is currently approved to include the appropriate year it was offered. The vote to deny approval was called, and the vote to deny was unanimous, 6 – 0.

The last workshop to be considered was a sexual harassment prevention workshop that was another version of a workshop previously approved. John noted the state mandates all employees have this training since 2019. Lisa Madden asked if CCMA approves these workshops for recertification credit and Jennifer responded that they do. John made a motion to approve this workshop and Beth seconded. All were in favor.

The next item on the agenda was 2022 recertification applications. There are 53 candidates eligible to recertify in 2022; six individuals have indicated they are not reapplying. For this meeting, there were six applications for recertification. John made a motion to approve four of the applications; Lisa Biagiarelli seconded. Discussion followed. The four applicants were: Patricia Kratchovil of East Windsor with 56.5 hours; Karen Stockno of Kensington Fire District with 52 hours; Emanuel "Manny" Cambra, retired, formerly of Monroe, with 61 hours; Kimberly Bratz of Westbrook with 50 hours. There were two other applicants who met the required number of hours but whose applications were incomplete due to lack of payment; those two applications were tabled pending receipt of their payment, in accordance with our regulations. It was noted that all four of the applicants being considered for approval had fifty or more credit hours, and their applications had been reviewed and were in order. The motion carried unanimously, and all the applicants were approved.

John noted the remaining two would be considered at our subsequent meeting in February. John asked Jennifer to update the OPM website to reflect the newest members of the CCMC Committee. Denise inquired of Jennifer as to when individuals could expect their recertification certificates. Jennifer said they needed to be printed and signed by the Governor and then would be sent to John and that it should take about 30 days. It was noted there was one individual, Liana Paglia, who should have received a CCMC certificate at the November 21 meeting but had mistakenly been left off the list; there was also one individual with a name change who requested a new certificate. These will be corrected and certificates for these two will be obtained. Lisa Madden noted the individuals who just recertified, whose applications were just approved at this meeting, should not expect to receive their

certificates until February of 2023 because their current CCMC designations do not expire until the end of 2022.

Jennifer inquired how the Committee intended to number the new certificates and what to do about individuals' original CCMC certificate numbers. Extensive discussion ensued. It was ultimately decided that recertification certificates would be issued new numbers based on the year of recertification, and be numbered sequentially within that particular year, alphabetically from A to Z within that group, and that the recertification certificates would bear an "R" in advance of the year to designate "recertification," as opposed to an original issue. So for example the 33 quantity 2021 recertifications would be identified as R 2021-1 through R 2021- 33.

Lisa Madden raised the issue of fees charged for CCMC events and presented information for the Committee to review about expenses and revenues. It was noted that one of our biggest expenses is the cost of maintaining the CCMC website. At the last meeting we dealt with changes in reimbursement costs and we would now consider changing what we are charging for attending our events.

It was determined the cost for a new certificate due to name change would remain at \$20.

The cost of CCMC courses was discussed; courses had been offered at \$200 each. It was noted CCMA charges \$450 for a course and assesses a \$25 technology fee. Lisa Madden indicated the Committee and CTx were incurring significant additional expenses to acquire the technology to present remotely and it was noted that due to the surge in COVID 19 transmissions now, we are not sure whether our spring courses will be offered live or remotely. Lisa Biagiarelli made a motion to increase the cost of the CCMC courses for spring 2022 from \$200 to \$300 each. Denise seconded. All were in favor.

Lisa Madden made a motion to increase the cost of the pre-course from zero (no cost previously) to \$100. Lisa Biagiarelli seconded. Discussion ensued. All were in favor.

Lisa Biagiarelli made a motion to increase the cost of applying to sit for the final exam from \$25 to \$35. Denise seconded. It was noted the assessors charge \$30. It was noted Paypal will charge a 2.5% fee. The idea of passing the fee along to the user was discussed. Assessing a separate technology fee was discussed. The motion to increase the fee to \$35 passed with all in favor.

John made a motion to increase the cost of online course offerings from \$5 per credit hour to \$10 per credit hour. Lisa Biagiarelli seconded and discussion ensued. Beth expressed concern that some of the smaller towns with limited educational budgets would be hard pressed to support significant increases in these costs. Lisa Madden noted again that there have been significant expenses on the part of the Committee and CTx to pay for the technology required to present properly in the virtual environment. The costs of presenting online material are significant and the Committee is responsible for passing those costs along to the users. The vote was called and the motion to increase the cost of the online offerings to \$10 per credit hour passed unanimously.

John made a motion to increase the cost of attending a road show from \$25 to \$40. Beth seconded. It was again noted that there might be some smaller towns for whom this would be a hardship but still the road show is a four hour event, and this is only \$10 per credit hour. The motion passed unanimously.

Lisa Madden made a motion to keep the cost of applying for recertification at \$20. Denise seconded. It was noted this is only the second year we are doing this and it's still relatively new to our members. The motion passed unanimously.

John introduced discussion of old business. Lisa Biagiarelli noted there was a discrepancy on the 2022 calendar for the December meeting date and John clarified that the meeting will occur on Thursday (not Tuesday) December 8, 2022.

Jennifer said the calendar needed to be addressed because there would potentially be two additional meetings needed for the purpose of certifying who was eligible to sit for the spring and fall administrations of the final written examination. The regulations say the deadline to submit an application is 21 days before a scheduled exam date. Jennifer recommended we schedule meetings even if they are potentially virtual meetings for the purpose of reviewing candidates and possibly dealing with appeals. Extensive discussion ensued.

It was agreed that we would add to the calendar two meetings before the spring exam, and two meetings before the fall exam. John made a motion to amend the calendar to correct the date previously mentioned (Thursday, December 8, 2022), and to add four meetings to the calendar as follows:

Virtual meetings to be scheduled Monday May 16, 2022 to review applications to sit for the final exam; and Tuesday May 31, 2022 to address appeals, if any; and virtual meetings to be scheduled Tuesday November 15, 2022 to review applications to sit for the final exam; and Tuesday November 29 to address appeals, if any; all four meetings being scheduled for 2 pm. Denise seconded. The motion was approved unanimously, 6 – 0. John will send out an amended calendar.

Jennifer noted the regulations require the Committee to post annually and to report to the Secretary of OPM a list of approved courses for recertification. She suggested in order to comply with the regulations we adopt the practice of doing this annually in January and submit and post the courses that were approved from the prior calendar year.

There was some discussion of the spring 2022 course schedule. John indicated we would solidify the schedule after meeting with the instructors in February. There was concern expressed that the Committee was in danger of running out of time if we waited until mid February to meet and subsequently announce a course schedule that might start within weeks of the meeting. It was agreed we would change the date of the instructors' meeting from February and move it up to January 20, 2022 at 1 pm.

It was noted we have road shows scheduled for April 12 and May 17 and that we don't know what might happen due to the surge in COVID transmissions; it was decided to leave these as is for now and wait to see what is happening closer to the dates. It was felt it is not feasible to have online road shows, but we would discuss at a later time.

Lisa Biagiarelli noted we had offered an online class on a Saturday in March 2021 for the purpose of allowing individuals who need recertification hours to earn hours, and she suggested offering something in March or even February 2022. It was noted the Committee had previously approved a proposed

workshop for 4.0 hours on preparing for the audit to be presented by Lisa. It was agreed this workshop would be offered on Saturday February 12, 2022 from 10 am – 2:30 pm with a half hour lunch break.

There was no further business. At 12:45 pm, Denise made a motion to adjourn the meeting; Lisa Madden seconded the motion. All were in favor.

Respectfully submitted by Lisa Biagiarelli, Secretary