

CCMC Committee Regular Meeting

Thursday, February 10, 2022 9:30 am

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The scheduled meeting with the CCMC Committee and the CCMC instructors slated to follow this meeting at 11:00 am was cancelled as the instructors' meeting was held on January 20, 2022.

A quorum was present, and the meeting was called to order at 9:39 am by CCMC Committee Chairman John Rainaldi. Attending virtually from the CCMC Committee were: Jennifer Gauthier; Denise Talbot; David Kluczowski; Lisa Madden; Beth Hamel; and Lisa Biagiarelli. Attending also were Cory Iacino, and Allison Breithaupt, Tax Collector of the town of Burlington.

John Rainaldi noted that the minutes for the January 6, 2022 and the two January 20, 2022 meetings had been sent prior to this meeting, and required consideration and approval. Denise made a motion to accept all three sets of minutes; Lisa Madden seconded. All were in favor.

John asked for a treasurer's report. David noted that there was \$23,372.45 on hand, and that the report had been sent prior to this meeting. Denise made a motion to accept the treasurer's report presented by David; Lisa Madden seconded. All were in favor.

The CCMC Committee awarded Cory Iacino her CCMC designation in November 2021 based on experience claimed in the town of Burlington, Connecticut from September 2007 through October 2010. In furtherance of this, in April 2021, Allison Breithaupt submitted to the CCMC Committee a supplementary letter concerning Cory's experience while working for the town of Burlington. That letter was included in Cory's application for her designation. The details of this matter were discussed by the CCMC Committee at the January 6, 2022 meeting, and Cory and Allison were invited to this meeting to follow up. thanked Cory Iacino and Allison Breithaupt for accepting the Committee's invitation to be present for this meeting, and invited Cory to speak. John recused himself from the discussion of this agenda item, and turned control of the meeting over to Denise Talbot.

Cory said she had asked Allison to write the letter to the CCMC Committee detailing her experience in the town of Burlington. She had been hired as a clerk in the assessor's office and the land use department. During June, July and August and in January and February, she also assisted when needed in the tax collector's office. Her duties included posting payments, responding to inquiries and producing delinquent statements. She also helped with water and sewer billings.

Several committee members asked specific questions concerning the nature and frequency of the work and Cory responded that she worked in this capacity for at least three years. She clarified that it was not full time work in the tax collector's office, but part time or as needed, and that she and the tax collector would cover for each other. In response to a question, Cory indicated her compensation was paid out of the land use budget or the assessor's office budget and was not paid out of the tax collector's office budget.

Lisa Madden clarified that it was her understanding that the work in question would be considered assisting in the tax collector's office. She inquired as to the size of the levy in the town and Cory

responded that the town has about 10,000 people and an annual tax levy of \$33 million. Lisa Biagiarelli said this would not have met what had been her understanding of the three years' experience requirement as it had been interpreted by the CCMC Committee in the past.

Jennifer asked Cory if she had had other duties and if her position had been split three ways. Denise felt a key factor was that the salary had never been paid from the tax collector's office. Jennifer asked if there were any other collector's office employees at the time, and Cory and Allison said there were not.

Allison said that Cory did everything in the tax collector's office during her (Allison's) absence. There was discussion among the Committee members and more questions.

Denise said she was not comfortable with the experience described being considered "three years" experience for the purpose of being awarded the designation, and that having been paid from departments other than the tax collector's office budget was also a factor. Denise said she felt being paid from one office's budget, but working in other departments sporadically, does not constitute three years' experience. David agreed, and said it was unclear as to whether this would rise to the level of meeting the experience requirement, and that it was too hard to quantify how much experience is gained in this type of arrangement. He felt if we say it constitutes the experience requirement, it would open the door to other interpretations of what the three years' experience requirement would be.

Cory clarified that she had been hired as assistant assessor, and subsequently had been put into the land use office. She said she always had the tax collection software on her office computer. She worked under the purview of the First Selectman. She said about 25% of her time was spent in the tax collector's office, and that during her time there she was exposed to all the operations and duties of the office. She said that when she passed the CCMC written examination, she spoke with Patricia Monahan, who was Chairman of the CCMC Committee at that time. Cory said Patricia told her at that time her experience would not qualify for the designation, and that the fact of not having been paid out of the tax collector's office was a determining factor. Cory said she "put it on the back burner" for two years, and then wrote to John Rainaldi. John advised her that it would be a Committee decision, and that she should apply to the Committee because there was no hourly minimum. She said her experience during those three years was valid, and noted that the hours she worked were more than many fire district tax collectors worked. She said she never lied and that she has been very transparent throughout this whole process.

Jennifer expressed concern about separation of duties. She clarified that Cory indicated she had been exposed to all aspects of the work while in the tax collector's office, and simultaneously had been working as assistant assessor. Jennifer questioned how one person could be working in the assessor's office performing those duties, and simultaneously have access to the tax collector's system, and perform duties there. Allison responded that Cory's exposure to Quality Data Software was at an inquiry level. She would be able to print delinquent statements and do inquiries. Cory clarified and explained that she was not doing certificates of correction in the assessor's office and then going next door to the collector's office and processing payments there.

Beth said that when she applied for her CCMC designation, she had been required to present longer than three calendar years' experience because she had been working in a smaller town and was told she had to present a longer time to meet the experience requirement. The Committee members discussed variations between full time and part time work. Lisa Madden said she understood the dynamics of

working in smaller towns with smaller staffs and customer service concerns and issues. Lisa Madden said it was common for employees from one division to step into another division to answer a question on behalf of another department when needed. Lisa Madden asked Cory if she had worked 36 consecutive months in the arrangement she presented and Cory responded yes. She said she had been available and that there would not have been one month during that time when she was not available to aid the tax collector. Lisa Madden asked Allison if Cory was available, for example, during April or May, which are non tax collection months, and Allison said yes, because the town does a quarterly billing and she would lean toward saying yes.

At 9:45 am Bill Napolitano, Director of Assessment and Collection of the City of Stamford, joined the meeting. Lisa Biagiarelli made a motion to table discussion of the item that was on the floor; Denise seconded the motion. All were in favor.

Cory stated that she wanted the Committee to have this issue either begin or end with her. She asked that the matter be clarified going forward. If the approval was given originally and was subsequently not to be approved, she said she expected things to be clear to all going forward. She said she took zoning and town clerk classes in order to improve herself professionally. She said she felt this was a positive for the town, if she were able to become more educated in different fields. Cory and Allison thanked the Committee for listening and for hearing their input. Cory and Allison left the meeting at 10:04 am.

At this time John Rainaldi assumed control of the meeting, and invited Bill Napolitano to address the committee with his concerns.

Bill indicated he had presented several courses to the Committee to consider for continuing education approval, and that the courses had not been approved. He was in attendance today to ask for reconsideration. The courses were management level courses on how to better run an office. He indicated he manages an office with a staff of 14. He said conflict resolution is a key element of effective management, and that he felt the courses presented were relevant to his performing his duties as tax collector. He noted that the Committee approved courses in sexual harassment prevention although those courses are not specific to tax collection, and that the committee should consider approving other courses similarly related, including courses in communication, customer service, supervisory skills, and resolving conflicts. He said all these courses are geared toward running an office. Even if they are not specific to tax collection, they are still making him a better manager. He also noted that he did not have all the material for the course on change management that he had originally submitted for consideration and that he was withdrawing his request for that course, so he was requesting reconsideration of only four rather than five courses.

Lisa Biagiarelli said she understood his argument, and that the courses were unmistakably valuable for professional development, but that the Committee was supposed to follow what the CCMC regulations say, which is that in order to merit approval, courses need to be directly related to property tax collection. Jennifer agreed, and said that is what the regulations call for. Bill indicated that he felt there was some inconsistency in what the Committee had approved in the past and was now refusing to approve. He noted that the sexual harassment courses were approved, even though they were not directly related to tax collection. Lisa Biagiarelli explained that when the continuing education and recertification requirements initially were adopted, the Committee was still learning what its role was

and was not as clear as they should have been about what was required in order for a course to be approved in accordance with the regulations. She said that over time, the Committee had gotten better about understanding how strict the regulations are. She said it is inconsistent that some courses were approved while others were not, but that the Committee is trying to deal with this now by strictly following the regulations. Jennifer concurred, and said that she felt the Committee might need to rescind some of its prior approvals in order to address the inconsistencies.

Lisa Biagiarelli expressed that the Committee has been very concerned about the inconsistencies and discusses this issue frequently. Lisa Madden added that we now include approval dates on the list online, in order to try to show when things were approved, and that some of the earlier approvals will eventually drop off. She said that the Committee now understands the regulations better. John said that he has been the most liberal member of the Committee when voting on course approvals. Bill thanked the Committee for listening and for the explanations, and said he now had a much better understanding of the process.

Bill Napolitano left the meeting at 10:17 am.

John moved the agenda forward to discuss several courses presented to the Committee for consideration to earn recertification credits. Lisa Madden noted that there had been five workshops presented, but one had been removed from consideration by Bill Napolitano, leaving four workshops, as follows: The Role of the Manager; Communication For Results; Coaching, Counseling and Challenging Employees; and Resolving Conflicts Constructively. All were offered for the City of Stamford by Contract Trainers Inc., and each was a four hour workshop.

Lisa Biagiarelli made a motion to deny all four; David seconded the motion, and discussion ensued, with continued concern regarding the Committee's attempt to adhere to the regulations' requirement that in order to qualify for approval, the course must be related to tax collection. Lisa Madden said she felt resolving conflicts was very much part of a tax collector's job, and that we should consider approving that workshop. Lisa Biagiarelli amended her motion to address the other three workshops only, so that we could further discuss the workshop on conflict resolution; the amended motion was to deny recertification credit to the other three workshops. The motion to deny passed, with five voting in favor and John abstaining. Lisa Biagiarelli then made a separate motion to deny the workshop on conflict resolution; Beth seconded, and there was more discussion. Dave said he felt we needed to deny approval of this workshop, because we had already denied numerous similar requests in the interest of consistency with the regulations. Jennifer said the backup presented showed this class was more about management and was not at all tax collection related. The motion to deny approval of the conflict resolution workshop passed, with five in favor of denying approval, and John abstaining.

Another request had been sent today, and was not on the list John had sent out prior to the meeting. This request was for a CCM workshop on Budgeting 101, presented in West Haven. The workshop was 1.5 hours. Beth made a motion to approve and Denise seconded. It was noted we have approved similar workshops from CCM. The vote to approve was unanimous, 6-0.

John moved to the next item on the agenda, and asked the Committee to consider approval of six applications for recertification. Beth expressed concern that some applicants were filling the application out completely while others were not. Some were simply saying "see attached," and referring to the CCMC Committee's own records. John said that this was probably because we as a Committee were

maintaining information in our database in order to try to help applicants get through the recertification process at the inception of recertification. Lisa Madden said she sends applications back to people if they are not complete. Jennifer said if the applicants are signing the application they should be presenting something that is complete on its own. Beth said she felt the applications should be completely filled out by the applicants. John said he will discuss with the webmaster about having a fillable form, rather than a blank PDF that people can print out.

The first application to be considered was that of Brenda Carter of Middlebury with 56 hours. Denise made a motion to approve; the motion was seconded by John, and all were in favor.

The second application was from Jocelyn Ruffo of Brooklyn with 68 hours. This application was received last month but without payment, and so it was not addressed by the Committee at that time. Denise said she would like the applicant to be required to completely fill out the application. John said the application had been tabled last month; Jennifer suggested the better procedure would be to deny it and send it back. John made a motion to deny; the motion was seconded by Beth. Lisa Madden said she would return the application to Jocelyn.

The next application was from Stephanie Irving of Stafford with 50 hours. Beth made a motion to approve; Denise seconded. All were in favor. The next application was from Wanda Cardozo of the Georgetown Fire District with 70 hours. Denise made a motion to approve; Beth seconded. All were in favor. The next application was from Paula Usher of Bethel with 50 hours. Lisa Madden noted that Paula actually had 110 hours, according to our own records. John made a motion to approve Paula's application and Denise seconded. All were in favor. The last application was from Lauren Stuck of Granby with 57.5 hours. John made a motion to deny, as the application was incomplete ; Beth seconded the motion to deny, and all were in favor. The application will be returned to Lauren by Lisa Madden.

John proceeded with additional new business, and asked for input on performing class audits for the Spring 2022 session. Audits will be conducted as follows: Course 1 will be audited by Lisa Biagiarelli; Course 2 will be audited by Lisa Madden; Course 3 will be audited by Dave; and Course 4 will be audited by John.

Another item of new business was presented by Lisa Madden. She said we have 50 people registered for the workshop on the Audit presented by Lisa Biagiarelli. She said that the spring certification classes are filling up. She said there was one person who has signed up for the precourse but not for Course 1 because Course 1 is already full. Lisa Madden made a motion to allow individuals to take only the precourse if Course 1 was full, and not to deny somebody the chance to take the precourse even if they could not follow up with course 1. Beth seconded the motion and all were in favor. Registrations so far for the courses are as follows: Precourse: 11 students; Course 1: 18 students; Course 2: 18 students; Course 3: 14 students; Course 4: 4 students. It was noted that Course 4 does not start until March 31 and that people might be waiting to sign up because it starts later. It was also noted that students can take courses 3 and 4 in the same semester.

Jennifer questioned whether the regulations require students to take courses 1 and 2 before 3 and 4. During COVID 19, we did allow students who could not get into 1 or 2 to take 3 and / or 4. She suggested we could invite people who were waitlisted for courses 1 and / or 2 to take 3 or 4. Discussion

ensued. John said he would send an email inviting those who could not get into 1 and / or 2 to join 3 or 4.

John noted that he did not hear from those individuals whose certifications lapsed in 2021 due to failure to reapply. He said he wrote to those individuals to let them know they had lost their designations, and that he had not heard back from them with any challenges.

At 10:53 am, John moved the agenda back to discussion of the issue of the certification designation that had been given to Cory Iacino in 2021. John recused himself from the discussion, and direction of the meeting was again assumed by Denise.

Lisa Madden asked whether we were considering distinctions between full time and part time work. Beth said it was more about being consistent doing tax collection work, and that moving around from one department to another during the same time period, having to cover different departments, was an issue.

Lisa Biagiarelli made a motion to rescind the designation that had been awarded to Cory Iacino. Denise seconded, and further discussion ensued. Jennifer said that Cory indicated she had access to tax collection software and processes, but that she was not satisfied that Cory had actually and consistently performed all of the duties of the position. Jennifer said being exposed to the QDS software was not enough, and questioned what actual work had been done. She said that although she does not have a vote on the Committee, she is uncomfortable with the CCMC designation having been awarded based on the experience presented. Denise said she does not feel the applicant has met the experience requirement. Jennifer said she wanted it to be clear that she felt this was an issue of a misunderstanding and not an ethical violation on the part of the applicant.

The vote on the motion to rescind the designation was 5 – 0 – 1, with Lisa Biagiarelli, Denise Talbot, David Kluczowski, Lisa Madden and Beth Hamel in favor, and John Rainaldi abstaining. Jennifer said the Committee should send a letter to OPM asking the Secretary to rescind the designation. John said he still has his original letter to OPM. Lisa Biagiarelli made a motion that the Committee send a letter to OPM asking for the designation to be rescinded; Lisa Madden seconded, and discussion ensued. The Chairman of the committee will write the letter. The letter will state that the Committee determined that the experience requirement was not met. The minutes of the meeting will be made available and attached to the letter that will be sent to OPM. The Committee members were of the opinion that there was no malfeasance on the part of the applicant, but that the experience requirement had not been met. The vote on the motion regarding the letter to OPM was 5 – 0 – 1 with John abstaining from the vote. John said that if we needed to have an emergency meeting to review the letter, perhaps we could do that.

Lisa Madden said that the Committee should develop a policy about the experience requirement, and ensure that everybody has a better understanding of what the policy will be going forward. There was discussion about how to go about developing this policy. Lisa Madden will start writing something up and will send it out to the Committee members for further discussion and follow up.

Denise made a motion to adjourn the meeting at 11:15 am; Beth seconded the motion. All were in favor.

Respectfully submitted by Lisa Biagiarelli, Secretary