

CCMC Committee Meeting

Thursday, January 5, 2023 at 1:00 pm
E-Meeting via Gotometing.com

Meeting access was as follows: Please join my meeting from your computer, tablet or smartphone.
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The meeting was called to order at 1:49 pm by Chairman John Rainaldi. In attendance were Committee members David Kluczwski, Lisa Madden, Beth Hamel, Launa Goslee, and Lisa Biagiarelli. This meeting immediately followed the prior meeting with the instructors and the Committee.

David had sent a Treasurers' report prior to this meeting. Through the end of December 2022, we had a balance of \$21,355.85. The instructors' stipends had mostly cleared, but we still owe Berlin for room rentals. We will have money coming in now in 2023. John made a motion to waive the reading of the report, and to approve it; this motion was seconded by Beth. The motion was approved unanimously.

John moved on to discuss workshop requests. Kathy Larkins, CTx Education Committee Chair, has worked hard to provide the Committee the information for sessions at the 2023 seminar. First for consideration was a legislative update for 1 hour on March 22, 2023, done by David Kluczwski. Lisa Madden made a motion to approve; Beth seconded. All were in favor, except that David abstained, and the motion to approve carried. Next was a 1.5 hour workshop on March 23, also presented by David Kluczwski and J. Stacey Yarbrough, using material from Course 4. They would present material related to Maslow's Hierarchy and motivation in the tax collector's office, using the movie Castaway; and discuss the various forms of local government in Connecticut. The workshop would be a refresher of Course 4 material. Beth made a motion to approve; Lisa Madden seconded. Lisa reminded David there were problems with playing video when presenting via Zoom; David said they will try to use images instead, or come up with another workaround. All were in favor, except that David abstained; the motion to approve carried.

Next was a question and answer panel comprised of Carla Hamel, Attorney Adam Cohen, and Lisa Biagiarelli. It would be for 1.5 hours on March 22, and would include Powerpoint. John made a motion to approve; Launa seconded; five were in favor; Lisa Biagiarelli abstained, and the motion to approve carried. Next was a 1 hour session on March 23, presented by Webster Bank, on risk management / counterfeit bills and check washing. This would address stolen mail and similar situations, as well as preventative measures. Lisa Biagiarelli made a motion to approve; seconded by Lisa Madden. All were in favor, and the motion to approve carried. Next was a 2 hour workshop to be held on March 23, on how assessors impact tax collectors. This would be taught by John Rainaldi and the Groton assessor, Mary Gardner, and would follow the assessor's calendar. It would start in October, and go through their year. Lisa Madden made a motion to approve, and Beth seconded. All were in favor, except John abstained; the motion to approve carried. Finally, there was a request for a workshop to be held on March 22 on the CT Big List – Claiming Unclaimed Property. The workshop is for 1 hour, presented by the office of the state treasurer. Beth made a motion to deny, and said it was not related to tax

collection; Launa agreed and seconded the motion to deny. Lisa Madden said Kathy was excited about this because she was able to get money for her town through this program. The motion to deny carried 6-0. Launa said she will submit material for the Committee to consider in order to approve the workshop she is presenting on wage garnishment and wage execution. This will be considered at a subsequent meeting.

Lisa Biagiarelli left the meeting at approximately 2:10 pm to attend another meeting.

John moved on to consider three applications for recertification. These were the first applications to be considered by the Committee for calendar year 2023. They were as follows: Kristi Merrifield from East Hampton submitted with 61.5 hours; Denise Dill from East Haddam submitted with 67 hours; and Cheryl Higgins from Hartland submitted with 56.5 hours. All the applications were in order. Launa questioned whether applicants needed to submit their actual individual class certificates; Lisa Madden said if the session was in Kintone, they did not need to provide the individual certificates for those classes or workshops that were listed. John made a motion to approve all three applicants; Lisa Madden seconded. There was some further discussion about the format of the applications and what was required. A vote was taken, and all were in favor of approving the three recertification applications, 5-0.

John called for old business. Lisa Madden noted there were two individuals from 2022 that did not timely submit to recertify. Both had been notified they needed to send in their renewal applications by December 31, 2022, and neither did. John said he would notify those two individuals that their CCMC designations have expired, and will also notify their First Selectmen / Mayors, as had been done last year. John said it should not be a surprise to anybody; Lisa Madden noted everybody had been emailed numerous times over the course of the year. She noted we start emailing notifications to everybody who needs to recertify very early in the year. Lisa Madden said she is sending the list of those who will need to recertify in 2023 to the Committee members. She is always concerned that everybody's names be listed correctly on certificates and in the various databases, and asks for the Committee's help in perusing the lists of names.

John noted that he needs a new nametag. Lisa Madden said this can now be done online; this was changed just two weeks ago.

Launa asked if John needs to be a tax collector to serve on this Committee. John said he is sensitive to the issue of his continuing to serve now that he is employed in an assessment only capacity. He realizes some within the CTx and / or the CCMC community, or OPM, might have an issue. He is open to discuss the issue if asked. Launa noted that the statute does not say "collector," but rather "proficiency in tax collection," and the consensus was that according to the statute, he should be able to continue.

Lisa Madden noted we needed to change the 2023 calendar to add the meeting we had discussed at the prior meeting with the instructors. She made a motion to change the meeting scheduled for December 19, 2023 to include a virtual meeting with the CCMC instructors; Beth seconded the motion. The motion passed 5-0.

Launa said Lisa Biagiarelli had asked if she was interested in being Secretary of the Committee, but she declined. Beth said she also had been asked and had declined. John said Lisa Biagiarelli was having difficulty keeping up with doing the minutes. He said he was secretary prior to Lisa Biagiarelli and said she could work to shorten the minutes. Launa noted Lisa could go back and watch the recordings. Nothing was resolved on this issue.

Launa and Lisa Madden discussed sending out the revised calendar to the Committee members.

There being no further business, John made a motion to adjourn at 2:19 pm; Lisa Madden seconded. All were in favor and the meeting was briefly adjourned. However, John made a motion to re-open the meeting at 2:21 pm, and that motion was approved by acclamation. The meeting was reopened to discuss who would audit the courses for the spring 2023 session.

Course 1 will be audited by David; Course 2 will be audited by Launa; Beth will audit Course 3; Lisa Madden will audit Course 4. Launa questioned if we need to audit each of the classes every session; John said he felt we did. Discussion ensued. Beth felt the audits that were being written up were too long, too detailed, and that there was too much included in the reports. David and Beth both said the audits should be more like an evaluation; there should be more structure on how we conduct the audits. Beth and Launa will work on this, and come up with a form or format.

Lisa Biagiarelli rejoined the meeting at about 2:40 pm. Beth suggested to Lisa Biagiarelli that we should come up with a format for the audit rather than a lengthy unfocused narrative; she asked Lisa Biagiarelli to forward the course evaluation to her. Lisa Biagiarelli will send the revised student evaluation to everybody.

Launa noted that the CCMC Committee had asked her and Carla Hamel to do a workshop on February 14, 2023. It would be a virtual workshop and the CCMC Committee would send out a notice about it. Launa will go to Carla's office and they will present from there. It will start at 10 am. This will be a recap of Course 1 material. The Committee had previously approved six workshops to be broken out of Course 1 material, presented by Launa and Carla. Lisa Madden noted we discussed doing four online workshops during 2023, and we might ask her and Carla to present another one later in the year.

There was no further business; Launa made a motion to adjourn at 2:33 pm; Lisa Madden seconded and all were in favor.

Respectfully submitted by Lisa Biagiarelli, Secretary

CCMC Committee Meeting with Instructors

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A quorum was present, and the meeting was called to order at 1:04 pm by CCMC Committee Chairman John Rainaldi. Attending were: from the CCMC Committee: David Kluczowski; Beth Hamel; Lisa Madden; and instructors J. Stacey Yarbrough, Launa Goslee, Carla Hamel, William Donlin, and David Greaves.

John Rainaldi noted the instructors' meeting would be held first, followed by the regular Committee meeting. He welcomed Launa Goslee, who has been appointed to the CCMC Committee as our newest member.

John introduced discussion of New Business by bringing up the spring 2023 CCMC course schedule. Courses to be offered will be the Precourse, CCMC Course I, CCMC Course II, CCMC Course III, and CCMC Course IV.

Ana LeGassey joined the meeting at about 1:06 pm.

Launa said Course 1 will begin on Feb. 28, 2023 and will be held in Berlin on Tuesdays from 3 – 6 pm; Course 1 will end April 25, 2023. They plan to skip the week of the CTx seminar. Ana and David discussed when would be a good time to start the Precourse, given the start date of Course 1. It was noted Carla and Launa are teaching a workshop of February 14. It was agreed they would schedule the Precourse to be Wednesday, Feb. 15, 2023 in Berlin from 9:30 am – 4 pm. Beth Hamel will instruct the Precourse with Launa and David Greaves.

Lisa Biagiarelli joined the meeting at 1:10 pm but noted she would be in and out due to a conflicting meeting.

Course 2 was represented by William Donlin; Peter Juszczynski was not able to attend. They plan on teaching Course 2 from Wednesday, March 29 – May 17, from 10 am – 1 pm, in Berlin. There will be no break, and the course will run straight through.

Course 3 will be taught by Lisa Biagiarelli and Lisa Madden (“Lisa squared”) and the dates will be Tuesdays, 10:30 am – 1:30 pm, from March 14 through May 9, 2023, running for 9 weeks, in Berlin. There will be a double class on May 2 that will run until 5 pm with a half hour for lunch.

Course 4 will be taught by David Kluczowski and J. Stacey Yarbrough. David said they will start on Thursday, March 30, and end on Thursday, May 11; they are skipping Thursday, April 13 due to school

vacation. Classes will be held in Berlin, from 9:30 am -2:30 pm, for four weeks; and class from 9:30 am – 12:30 pm for the last two sessions. Final exam applications are due by May 11 for the final exam being held on June 1, 2023. Applicants can submit their application for the final exam prior to knowing whether or not they passed Course 4; they would apply subject to passing that course.

Lisa Biagiarelli asked about remote teaching. She inquired if an instructor became ill, would they be allowed to teach remotely. John noted the latest directive from OPM was encouraging remote options. Discussion focused on providing the option to teach remotely. It was questioned whether students also would have the option of attending remotely, if instructors did. Lisa Madden asked if this would be allowed only for a limited number of sessions. There was concern someone might simply decide they did not want to drive to Berlin. Stacey said she did not think remote attendance was a good idea. Carla said last session, for Course 1, they did allow two students who were ill with COVID to watch the lecture remotely and this was only because they were ill with COVID. They had to do this only twice, and it worked out well. Stacey reiterated that she felt this was subject to abuse and that it should be only on an as needed, emergency basis.

John asked how this should be written in the course announcement. Beth suggested it should be at the discretion of the instructors. David Kluczowski said he thought it should not even be mentioned, because this would just encourage it. Lisa Madden felt it should be addressed. John opined that there would be problems whatever we decided to do in this case. It was agreed by all that it should be at the instructors' discretion.

Ana said it should be kept vague in the instructions. Stacey reiterated that it should not be encouraged. Both David and Stacey said it would be very difficult for people at home watching to fully participate in Course 4, given how they teach it. Students are going to miss a lot if they are remote. John said he would try to write up something that captured the discussion. The Committee talked about how difficult it was to teach remotely due to technical issues. There was no vote taken.

Beth inquired if she was to be involved in teaching Course 1 again for the spring 2023 session. Carla said she would love to have Beth participate in Course 1 again. John inquired if we can afford to have three instructors given how we are trying to have the courses pay for themselves. Lisa Biagiarelli said she was cognizant of the cost of the classes and the burden on the towns, but that we do need to increase our capacity to offer the courses; we need to bring more instructors into the fold, and we should be trying to break even. Other groups are charging \$200 - \$300 for one two or three hour course, and we are charging that for an eight or nine week course. She thinks we should have three instructors, because eventually some of the current instructors are going to step down.

Lisa Madden asked if it would be better to have Beth go to Class 2 instead of Class 1. William said he felt Beth would be helpful in Course 2 given her experience as a collector; but he felt Peter Juszczynski should be given the opportunity to weigh in.

William said he was very impressed with how the classes are advancing to take better advantage of new technology, for example using less paper and making better use of the computer; but he remains very concerned that it is difficult to get new instructors because it is a huge commitment. William said he does eventually plan to step down and realizes they will need to replace him in the program. David Greaves said he had no real preference regarding which course to teach. He also saw improvement in the format and material for Course 2. John asked Beth which course she wanted to join; she said she would go wherever needed. It was decided Beth would join Course 2. William heard from Peter, and at

his request, asked to change their time from 10 am – 1:30 pm, to allow time for a review. It had been mentioned that Course 2 students noted there had been no review prior to the course exam. This extra time will allow the instructors to build in time for a review prior to the examination.

William noted he now needs a computer for use in Course 2. Lisa Madden said she would coordinate with Peter and William. John has the computer formerly used by Dorian; it is a Chromebook. David Greaves said he has a computer he can give to John or Lisa for William's use; they will connect at some point.

Lisa Madden noted at the Committee's direction, she bought projectors for each of the classes. Each class will now have its own projector. We won't have to try to share. Lisa also noted if we have two projectors at the conferences and meetings, we might now be better able to show videos.

John moved on to discuss student evaluations. They were very strong for the fall 2022 session. He noted Lisa Biagiarelli revised the evaluation form to be more abbreviated going forward. Lisa Biagiarelli said she will send it out to everybody for review, and any changes can be incorporated into the shorter form. The Committee wanted the instructors' feedback before changing forms.

Lisa Madden said we are researching having the comprehensive final examination administered online. If this proves successful, we can also consider doing it for the classes as well; this would eliminate handwritten examinations. John said we had looked into this years ago, but it was cost prohibitive because we did not have a sufficient quantity of examinations to make it feasible. Kim Desimone from GEMS is working with us on this.

Carla inquired if there was going to be a "universal make-up" date for missed exams for this session. It was agreed the universal make-up date would be Wednesday, May 24, 2023. John will reserve the room in Berlin in case it is needed.

John said it was hard to schedule these meetings with the instructors because it seems every session, there is demand for course information earlier and earlier. Launa said it would be helpful to try to schedule the instructors' meeting next time when the offices are not so busy; this one was scheduled at a difficult time. It was suggested that December 19, 2023 would be a better date for the next instructors' meeting.

John wished all the instructors a successful session. He will send the schedule out as soon as possible.

There was no further business to discuss. At 1:49 pm, the meeting was adjourned by acclamation.

Respectfully submitted,
Lisa Biagiarelli, Secretary