



Navigating Financial Runways

Taking Off to Revenue Success

2024 CMRTA Annual Conference



October 9-10, 2024
DoubleTree by Hilton—Ontario Airport

222 North Vineyard Avenue,
Ontario, CA 91764

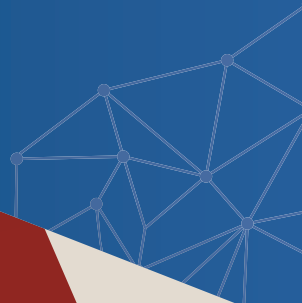


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CMRTA Conference Acknowledgements

Thank you to all who helped put this amazing conference together!
 A special thanks to those Associates who donated. Without your invaluable help and resources we would not be able to put on this educational conference each and every year. It is through this wonderful opportunity for exposure and advertising that we are able to provide our vital conference needs.
 Finally, to all those in attendance and their cities, thank you for recognizing the importance of our CMRTA Conference. The classes and networking opportunities give us the tools necessary to generate revenues that are vital to our city services.

THANK YOU!

Navigating Financial Runways
 Taking Off to Revenue Success

Associate Mixer

October 9, 2024
5-7 p.m.
Harvest Room



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 marketing • technology • public affairs

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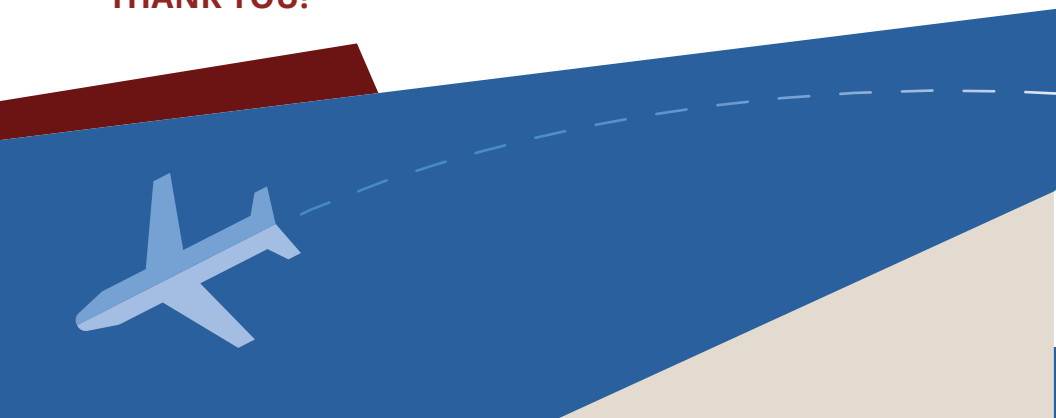


PCS
 PACIFIC CREDIT SERVICES







October 9

Time	Title	CRO	Room
7:45 a.m. – 5:00 p.m.	REGISTRATION		Empire Foyer
8:30 a.m. – 8:45 a.m.	WELCOME SPEAKER		Grove Room
8:45 a.m. – 9:00 a.m.	BOARD MEETING		Grove Room
9:00 a.m. – 10:00 a.m.	KEYNOTE SPEAKER Personal Branding — LinkedIn Optimization	M	Grove Room
10:00 a.m. – 1:00 p.m.	PROFESSIONAL HEADSHOTS Refresh your headshot		Empire Foyer
10:00 a.m. – 10:15 a.m.	NETWORKING BREAK		Empire Foyer
10:15 a.m. – 11:00 a.m.	BREAKOUT SESSION 1 Ballot Measures	M or O	Grove Room
	BREAKOUT SESSION 1 Introduction to Business License	B or G	Lake Arrowhead
11:00 a.m. – 12 p.m.	CRO CEREMONY	I	Grove Room
12:00 p.m. – 1:00 p.m.	LUNCH		Courtyard
1:15 p.m. – 3:30 p.m.	BECOMING A PERSON OF INFLUENCE	M	Grove Room
3:30 p.m. – 3:45 p.m.	NETWORKING BREAK		Empire Foyer
3:45 p.m. – 4:45 p.m.	BREAKOUT SESSION 2 Utility Users Tax Update	C or H	Grove Room
	BREAKOUT SESSION 2 Department of Cannabis Control, An Overview of State Cannabis Licensing	H or L	Lake Arrowhead
5:00 p.m. – 7:00 p.m.	ASSOCIATE MIXER		Harvest Room

October 10

Time	Title	CRO	Room
8:30 a.m. – 9:15 a.m.	BREAKOUT SESSION 1 The CPUC: How it Works and an Update on Utility Bills	G or H	Grove Room
	BREAKOUT SESSION 1 Business Writing	G or M	Lake Arrowhead
9:15 a.m. – 10:00 a.m.	SHORT TERM RENTAL	C, G, or H	Lake Arrowhead
10:00 a.m. – 10:30 a.m.	NETWORKING BREAK		Empire Foyer
10:30 a.m. – 11:30 a.m.	LEGISLATION UPDATE	L or O	Grove Room
11:30 a.m. – 12:15 p.m.	EXCHANGE OF EXPERTISE	B or G	Grove Room
12:15 p.m. – 1:15 p.m.	LUNCH		Courtyard
1:15 p.m. – 2:30 p.m.	BREAKOUT SESSION 2 Alcoholic Beverage Control	G or L	Grove Room
	BREAKOUT SESSION 2 Business License 201	B, G, or H	Lake Arrowhead
2:30 p.m. – 3:30 p.m.	BREAKOUT SESSION 3 City of Santa Monica Bitcoin Office — Case Study	H or L	Grove Room
	BREAKOUT SESSION 3 Finances, Municipalities, and the Ties to Industrial Cyber Security	G or L	Lake Arrowhead
3:30 p.m. – 3:45 p.m.	NETWORKING BREAK		Empire Foyer
3:45 p.m. – 5:00 p.m.	ASK A CITY MANAGER	G or M	Grove Room



Speakers



Christian Alejandro

Industrial Cybersecurity Specialist

Black and Veatch
Finances, Municipalities, and the ties to Industrial Cyber Security



Vikki Beatley

Principal

HdL Companies
Utility Users Tax Update



Dom Bei

Founder

Proof of Workforce
City of Santa Monica
Bitcoin Office - Case Study



Richard Bernard

Partner

FM3
Ballot Measures



Elisa Cox

Assistant City Manager

City of Rancho Cucamonga
Ask a City Manager



Connor Duckworth

Client Advisor

HdL Companies
Legislation Update
Business License 201



Brigitte Elke

Principal

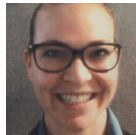
HdL Companies
Utility Users Tax Update



Cris Gaiennie

Client Experience Advocate

HdL Companies
Introduction to Business License



Hayley Gonzalmen

Supervising Agent

Department of Alcoholic Beverage Control
Alcoholic Beverage Control



Bret Harmon

Director of Client Experience

HdL Companies
Business Writing
Ask a City Manager



Ricky Hawblitzel

Utility Billing Manager

City of Santa Maria
Exchange of Expertise



Marie Knight

Owner and Chief Influencer

Knight Leadership Solutions
Becoming a Person of Influence



Chris Moore

Central Coast Local Government Liaison

California Public Utilities Commission
The CPUC: How it Works and an Update on Utility Bills



Lana Negrete

Vice Mayor

City of Santa Monica
City of Santa Monica
Bitcoin Office - Case Study



Kristin Nevedal

Public Engagement Manager

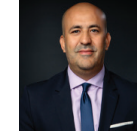
Department of Cannabis Control
Department of Cannabis Control, An Overview of State Cannabis Licensing



Scott Ochoa

City Manager

City of Ontario
Ask a City Manager



Tarik Rahmani

Deputy City Manager

City of Carson
Ask a City Manager



Ryder Todd Smith

President

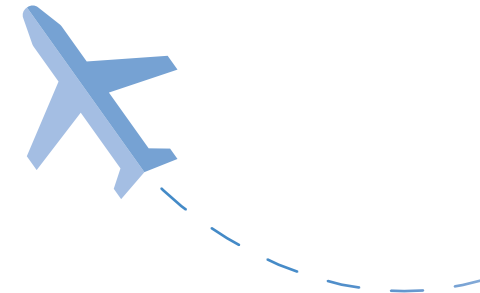
Tripepi Smith
Personal Branding - LinkedIn Optimization
Ballot Measures



Jose Zaragoza

Revenue Operations Investigator

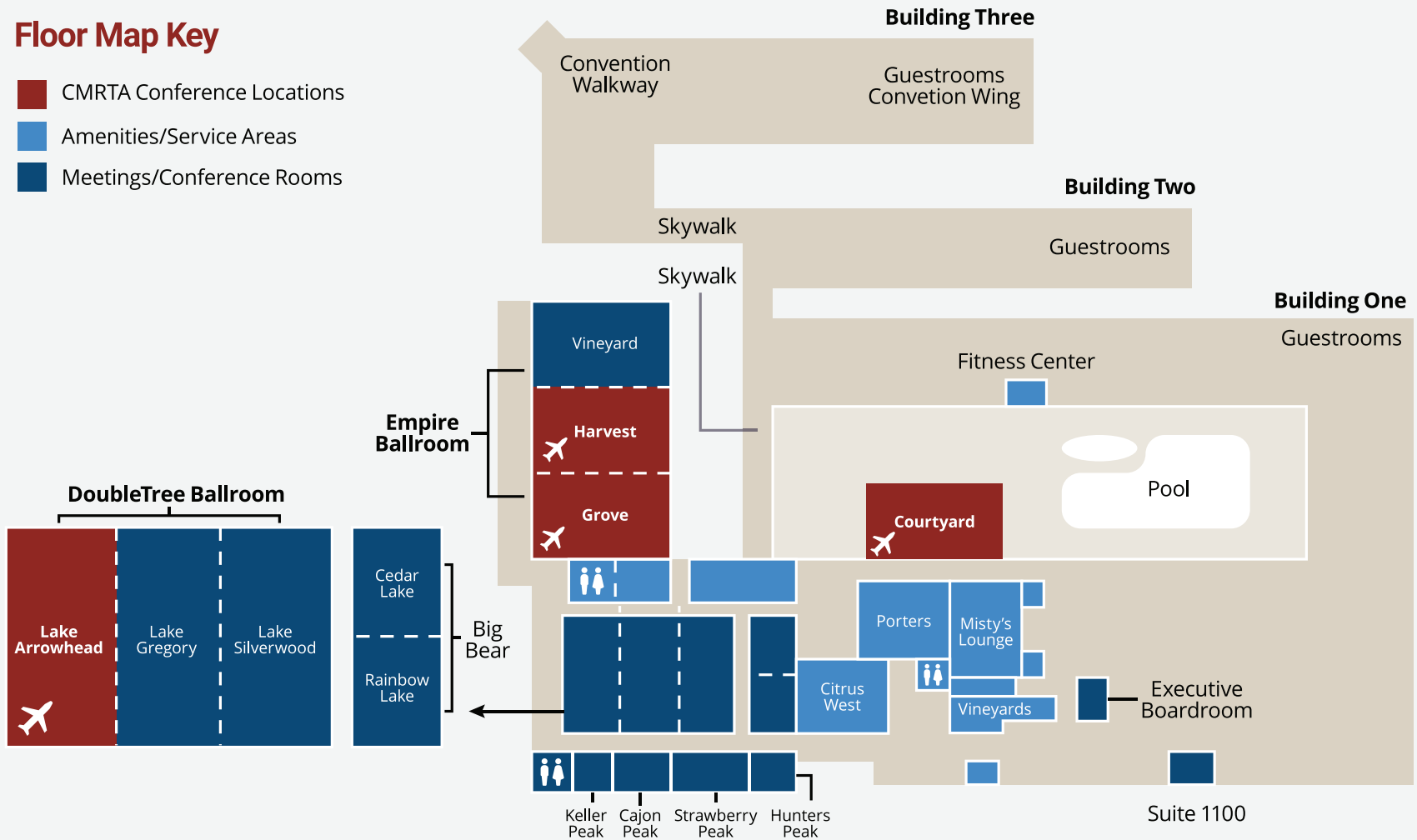
City of Beverly Hills
Short Term Rentals



A special thank you to our speakers for your commitment and efforts. It takes time to prepare and deliver compelling presentations and CMRTA truly appreciates the passion and professionalism you bring to the podium. Your willingness to share your knowledge and engage with our participants exemplifies the spirit of our association.

Floor Map Key

- CMRTA Conference Locations
- Amenities/Service Areas
- Meetings/Conference Rooms



State Officers

Elected

President

Ricky Hawblitzel,
City of Santa Maria

1st Vice-President

Cristine Gaiennie,
Retired, City of Carson

2nd Vice-President

Vacant

3rd Vice-President

Vacant

Secretary

Shellie Adel,
Retired, City of Vacaville

Treasurer

John McGirr,
Retired, City of Menlo Park

President, Division 1 & 2

Rick Greenebaum,
City of Berkeley

President, Division 3

Jose Zaragoza,
City of Beverly Hills

President, Division 4

Cesar Lucrecio,
City of Coachella

Past President

Corinne Hoffman,
City of Garden Grove

Appointed

(Non-Voting)

Associate Member Chair

Shellie Adel,
Retired, City of Vacaville

Certification Revenue Officer (CRO) Chair

Wendy Anderson,
Retired, City of Pleasanton

CRO Librarian

Lisa Aduna,
City of Orange

Parliamentarian

Filled by Divisions as needed

Revenues Editor

Vacant

Sergeant at Arms

Filled by Divisions as needed

Site Selection Chair

Cristine Gaiennie,
Retired, City of Carson

Web Manager

Ricky Hawblitzel,
City of Santa Maria

Division Officers

Division I

President

Rick Greenebaum,
City of Berkeley

1st Vice-President

Chuck Maurer,
City of Oakland

2nd Vice-President

Shellie Adel,
Retired, City of Vacaville

3rd Vice-President

Deana Cardona,
City of Pittsburg

Secretary

Rose Gibbons,
City of Pleasanton

Treasurer

Shellie Adel,
Retired, City of Vacaville

Past President

Vacant

CRO Representative

Vacant

Sergeant at Arms/ Parliamentarian

John McGirr,
Retired, City of Menlo Park

Division III

President

Jose Zaragoza,
City of Beverly Hills

1st Vice-President

Alice Silva,
City of Gardena

2nd Vice-President

Josh Grady,
City of Manhattan Beach

3rd Vice-President

Florence Ruiz,
City of Stanton

Secretary

Leslie Andrews,
City of Palmdale

Treasurer

Cristine Gaiennie,
Retired, City of Carson

Past President

Iris Espino,
City of Irwindale

CRO Representative

Vacant

Sergeant at Arms/ Parliamentarian

Vacant

Division IV

President

Cesar Lucrecio,
City of Coachella

1st Vice-President

Vacant

2nd Vice-President

Rosa Rosales,
City of San Diego

3rd Vice-President

Hoarcio Celaya,
City of Palm Desert

Secretary

Donna Rubalcava,
City of La Mesa

Treasurer

Javier Estrada,
City of Indo

Past President

John Sunkel,
Sustaining Member

CRO Representative

Liliana Reyes,
City of Calexico

Sergeant at Arms/ Parliamentarian

John Sunkel,
Sustaining Member

Associates

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Servus

What is an Associate Member?

An associate member is a non-city or county member that provides goods and/or services regularly used by city and county members. Associates might provide business, sales, property and utility tax auditing and consulting services, hardware and software for all revenue applications, code enforcement, utility billing and cashing, collection of bad debts and location of businesses. Some associates are other government agencies that have similar goals as CMRTA.

How do Associate Members benefit CMRTA?

The associate members provide a ready source of talent to help meet the needs of your city or county. They are also a reliable source of speakers for division meetings and the annual conference.

The single thing that stands out about our associate members is their support of the annual conference. Their exhibit fees, hosting events, donating prizes and other contributions enable CMRTA members to attend a first-rate conference for a reasonable price. Without the support of associate members, the price of attending the annual conference would almost double, making it unaffordable for many of us.

What is your role?

When your city or county needs outside services, check the CMRTA website and see if any of our associate members can provide them. Let the associate member know about the RFP or other selection process so they may be able to compete. You may not be a decision-maker but you are an information provider. Let your boss or contracting people know about these firms that are supportive of CMRTA's efforts. Our associates are not looking for an unfair advantage, just the opportunity to compete.

Associate Mixer Exhibitors

- HdL
- Pacific Credit Services
- Progressive Solutions
- Avenu Insights & Analytics
- Collection Bureau of America
- Rash Curtis & Associates
- Tripepi Smith
- Starnik
- GovOS

Past Presidents

Thank you to all of our Past Presidents of CMRTA.
We would not be here today without your passion and dedication.

2020 - Current	Ricky Hawblitzel, Santa Maria	1994	Veronica Larsen, Hayward
2019	Monique Navarette, Newport Beach	1993	Claudia Monahan, El Monte
2018	Irma Navarro, Gilroy	1992	Eve Fieler, Walnut Creek
2017	Cristine Gaiennie, Carson	1991	Jane Harris, Fontana
2016	Laura Grijalva, American Canyon	1990	David Milton
2015	Sheri Lund, Walnut Creek	1989	William F. Clark, Norwalk
2014	Sheri Lund, Walnut Creek	1988	Lee Hightower (<i>Deceased</i>)
2013	David McPherson, Oakland	1987	Mardine Mazel
2012	Chuck Maurer, Oakland	1986	Mardine Mazel
2011	Corinne Hoffman, Huntington Beach	1985	Craig Graves
2010	Frankie Adams, Roseville	1984	Rosetta Johnson
2009	Monique Navarette, Newport Beach	1983	Sandy Spain
2008	Robyn Zamora, San Jose	1982	Sanford "Gus" Driskill
2007	Leonie Crouch, Orange	1981	Wayne L. Ramsey, Palm Desert
2006	Pam Blythe, Redding	1980	Farrel Snead (<i>Deceased</i>)
2005	Pamela Gillis, Garden Grove	1979	Chris Villalobos
2004	Darlyne Demeduk, Pleasanton	1978	Don Wieneke
2003	David McPherson, San Jose	1977	Judy Sturm
2002	David McPherson, San Jose	1976	Alex Deleon, Stockton
2001	Debbie Sousa, Apple Valley	1975	Gordon Fraser
2000	Jim Kellas, Clovis	1974	Gary Ingraham
1999	Susan Oliver, Escondido	1973	Lewis Chaney (<i>Deceased</i>), City of Los Angeles
1998	Steve Hunt, Tulare	1972	Marvin Thompson
1998	Tony Sales, Stockton	1971	Jim Weber
1997	Ed Paul, Fullerton	1970	Walter Reed
1996	Steve Hunt, Tulare	1969	Walter Reed
1995	Glen Everroad, Newport Beach		

*Names in bold are Bruno Marchetti Award recipients

Continuing Education

What is the Certified Revenue Officer (CRO) Program?

A transformative initiative designed to elevate your professional journey and enrich the municipal revenue administration landscape. The CRO certification is achieved through an exam process based on mastering a level of knowledge obtained through educational training and work experience in a municipal revenue and tax collection position. The CRO Program is the gold standard in revenue administration and distinguishes you as a leader in your field.

Requirements for Certification

Candidates must:

- Have 4,000 hours of business license (tax) experience which may include:
 - Processing business license applications and renewals.
 - Performing field enforcement procedures related to business licensing.
 - Performing audits for business license purposes.
 - And/or other experience which may be determined as applicable by the Certification Committee.
- Complete a total of 30 hours of educational experience to include all required classes.
- Pass a comprehensive test demonstrating ability in a variety of areas of expertise.
- Prepare and present a relatable topic via PowerPoint at one of the division meetings.

Once all requirements have been met, you may apply for certification. Complete the application and submit it with documentation of work history, class/training experience, and application fee. It is recommended that you keep records of each class you attend.

If you need help, please ask your division certification committee member. Division agendas and binders from prior conferences will be helpful. For more details reach out to your division CRO representative or the CMRTA Certification Chair at cro@cmrta.org.

A special thank you to our associate members



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Stay in Touch

Follow CMRTA on LinkedIn to get the latest industry updates and connect with other finance professionals across the state.

