



November 5-7, 2025

Anaheim Majestic Garden Hotel
900 Disneyland Dr, Anaheim, CA 92802

Agenda

Time Start	Time End	Class Title	Description
Wednesday, November 5, 2025			
7:45 AM		Registration Opens	
8:30 AM	8:45 AM	Welcome Speaker - City of Anaheim	
8:45 AM	9 AM	Board Meeting	
9 AM	10 AM	Mentoring in Action; Building Relationships That Grow People	Speaker: Alexis Gillam Learn how to create impactful networking relationships.
10 AM	10:15 AM	Networking Break	Connect with fellow attendees and build valuable relationships.
10:15 AM	11AM	Navigating the Regulatory Landscape: Cottage Food Operations (CFOs), Temporary Food Facilities (TFFs), Microenterprise Home Kitchen Operations (MEHKOs) and Sidewalk Vending	Speakers: Brian Wong and Wida Rahimi Learn the regulatory requirements for small-scale food operations, including CFOs, TFFs, MEHKOs, and sidewalk vending, covering food safety, permitting, compliance with local and state laws and relevant financial considerations under the California Retail Food Code.
10:15 AM	11AM	CyberSecurity, PCI compliance and	Speaker: Darren Somo

		Ransomware	Learn about importance of cyber security for your network. This session will discuss lessons learned and sample policies.
11 AM	12 PM	Networking strategies connections for professional growth	Speaker: Alexis Gillam Learn about interview tactics, resume layout/content, and other tips and tricks about expanding your team.
12 PM	1 PM	Lunch	Enjoy a networking lunch with peers.
1:15 PM	2:15 PM	From Forecast to Fiscal Health	Speakers: Steve Toler and Don Rhoads Learn how to build a fiscal sustainability plan for local governments in California.
2:15 PM	3:15 PM	The Nuts and Bolts of Fees	Speakers: Eric Johnson and Gregory Brown Learn the process of calculating and adopting fees, the effects of recent legislation and court cases and best practices for properly accounting for and reporting your agency's fees.
3:15 PM	3:30 PM	Networking Break	Another chance to mingle and make connections.
3:45 PM	4:45 PM	Revenue 101	Speaker: Kristi Bartelmie Attendees will learn how to navigate the revenue process efficiently and access resources to support their operations.
3:45 PM	4:45 PM	Democracy's Ghostwriters	Speaker: Bret Harmon, Learn about building your staff report writing skills.
		Offsite Activity Downtown Disney	End your day with a fun activity in Downtown Disney.
Thursday, November 6, 2025			
8:30 AM	9:30 AM	Business License 101	Speaker: Connor Duckworth

			This breakout session will provide an overview of business license requirements, including who needs a license, fees and compliance obligations. Attendees will gain clarity on the process, benefits of compliance and resources available.
8:30 AM	9:30 AM	Outsourcing Auditing with an Emphasis on TOT	Speakers: Travis Fletcher Learn how Transient Occupancy Tax (TOT) audits are conducted, the advantages of outsourcing them, key steps for implementation and how addressing noncompliance can boost city revenue.
9:30 AM	10:15 AM	CMRTA Awards	Celebrate achievements and milestones in our prestigious CRO ceremony lead by Wendy Anderson
10:15 AM	10:30 AM	Networking Break	Another opportunity to connect and share experiences.
10:30 AM	11:30 AM	Using Data to Build Fiscally Sustainable Communities	Speakers: Patrick Lawler Use of revenue analytics, primarily sales and property tax, to determine the profitability of historic methods and using those methods to project the profitability of future land uses.
10:30 AM	11:30 AM	Foundations of Governmental Accounting	Speaker: Don Rhodes and Steve Toler A session on governmental accounting for the non-accountant.
11:30 AM	12:15 PM	Exchange of Expertise	Participate in a collaborative session to exchange insights and best practices.

12:15 PM	1:15 PM	Lunch	Enjoy a delicious lunch and further your networking opportunities.
1:15 PM	2:15 PM	Applying Governmental Accounting in Practice	Speakers: Don Rhoads and Steve Toler A session on governmental accounting for the non-accountant.
1:15 PM	2:15 PM	Inspections/Enforcement	Speaker: Niecy Davis Gain a 360-degree view of business license inspections and compliance while learning strategies to improve municipal licensing operations for greater efficiency, accuracy, revenue and solutions to key tax compliance challenges.
2:15 PM	3:30 PM	2025 Legislative Year in Review	Speakers: Ben Triffo and Melissa Sparks-Kranz Learn about the legislative year, including the state budget, economic outlook, major tax, utility, and energy bills and their impact on local governments.
3:30 PM	3:45 PM	Networking Break	Final networking break to solidify connections and gather insights
3:45 PM	4:45 PM	Human Trafficking Affecting Cities	Speakers: Elaine Ketell Learn how city and county staff can prevent human trafficking in massage establishments by identifying traffickers, optimizing investigative resources, and applying strategies while issuing permits and business licenses.
5:00 PM	7:00 PM	Associate Mixer	Relax and socialize with our Sponsoring Associates in a casual setting
Friday, November 7, 2025			

8:30 AM	9:15 AM	The White Glove Treatment of Clients and Community have Long-Term Benefits	Speaker: Dustin Reilich Learn practical tips and tricks that will help improve customer service at your organization.
9:15 AM	10:15 AM	Records Retention	Speaker: Laura Aguilar Learn the laws and best practices for records retention, including requirements under the Public Records Act (PRA) and other key regulations.
10:15 AM	11:00 AM	Conference Wrap Up / Board Meeting	Hear from the new president of CMRTA as we wrap up the conference with a farewell session. At the end, the floor will be open for participants to voice their ideas for next year's conference.