

# Under the Sea

Where Revenue is Part of Your World



**2022 CMRTA Annual Conference  
November 2-3, 2022**

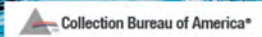
DoubleTree by Hilton Anaheim  
100 The City Drive, Orange, CA 92868

# Under the Sea Where Revenue is Part of Your World

**ASSOCIATE MIXER**

**NOVEMBER 2, 2022  
5:00 PM TO 7:00 PM**

**HERMOSA  
MEETING ROOM**



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### 2022 CMRTA Conference Acknowledgements

A huge thank you to all who helped put this amazing conference together! We are extremely lucky to have such a great group of Associate Members and Volunteers who make this conference possible!

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!**



# SCHEDULE

## Tuesday, November 1, 2022

5:30 – 7:00 Board Member Training Dinner

## Wednesday, November 2, 2022

8:00 – 9:00 Conference Registration

8:45 – 9:00 Welcome Speaker

9:00 – 10:00 Keynote Speaker (M)

10:00 – 10:15 Networking Break

10:25 – 11:00 Introduction to Business License (B,I)

10:25 – 11:00 Customer Service Post COVID (B,G)

11:05 – 12:00 Field Inspections / Enforcement (B,C)

11:05 – 12:00 Cash Handling (B,G)

12:00 – 1:15 Lunch / General Session

1:20 – 2:00 Budget and Revenue Planning (B,H,M)

1:20 – 2:00 Leadership Session (G,I,M)

2:05 – 3:15 Personal Branding (B,G)

3:15 – 3:30 Networking Break

3:35 – 4:30 Municipal Code Modernization (B,G,O)

3:35 – 4:30 Cannabis Update (H,L)

5:00 – 7:00 Associate Mixer - All Welcome!

## Thursday, November 3, 2022

8:30 – 10:00 Legislation Update (L,O)

10:00 – 10:20 Networking Break

10:25 – 11:30 Collections Post COVID (C,G)

10:25 – 11:30 Utility Users Tax Update (B,G,H)

11:35 – 1:00 Awards Presentations and Lunch

1:00 – 1:05 California State License Board (B,G,L)

2:05 – 3:15 CAMTC Human Trafficking (G,L,M)

3:15 – 3:30 Networking Break

3:30 – 4:15 Cyber Security / Digital Signatures (L,G)

4:15 – 5:00 Exchange of Expertise (A)  
and Conference Wrap Up

A = Attendance (1) credit hour each day

## 2023 Annual Conference

Berkeley, CA

More details to come



Visit our website: [www.cmrt.org](http://www.cmrt.org)



# SPEAKERS



**Eric Myers**  
Senior Operations Manager  
HdL Companies  
Municipal Code Modernization

**David McPherson**  
Compliance Director  
HdL Companies

Cannabis - Muddling Along in the Tough Economy



**Corinne Hoffman**  
Business Tax Supervisor  
City of Garden Grove  
Introduction to Business License

**Chu Thai**  
Vice President  
Revenue & Cost Specialist  
Budget and Revenue Planning



**Christelle Biiga**  
Inspirational Speaker and TV Host  
Christelle Biiga Coaching  
Keynote Speaker

**Araceli Jauregui**  
Supervising Special Investigator  
California State License Board (CSLB)  
CSLB Enforcement - New Laws



**Elaine Ketell**  
Senior Management Analyst  
Sunnyvale Department of Public Safety  
CAMTC Human Trafficking

**Rick McElroy**  
Director of Law & Code Enforcement Relations  
California Massage Therapy Council (CAMTC)  
CAMTC Human Trafficking



**Beverly May**  
Director of Governmental Affairs  
California Massage Therapy Council (CAMTC)  
CAMTC Human Trafficking

**Brigitte Elke**  
Finance Director  
City of San Luis Obispo  
Utility Users Tax Administration



**Francie Palmer**  
Consultant  
Francie Palmer Consultation  
Personal Branding; Leadership Session



**Amy Jenkins**  
President  
Precision Advocacy  
Legislative Update



**Jessie Flores**  
Deputy Chief  
California State Contractors Board (CSLB)  
CSLB Enforcement - New Laws



**Mitchell Mason**  
Business Tax Supervisor  
City of Riverside  
Municipal Code Modernization



**Steve LeVan**  
Senior Technical Support Consultant  
Progressive Solutions  
Cyber Security and Digital Signatures



**Fran Mancia**  
Vice President—Government Relations  
MuniServices  
Legislative Update



**Alex Rojas**  
Inspector  
City of San Jose  
Field Inspections / Enforcement



**Ian Davis**  
Compliance Manager  
HdL Companies  
Municipal Code Modernization



**Kelly Parsons**  
President  
Pacific Credit Services  
Cash Handling Best Practices; Customer Service Post COVID

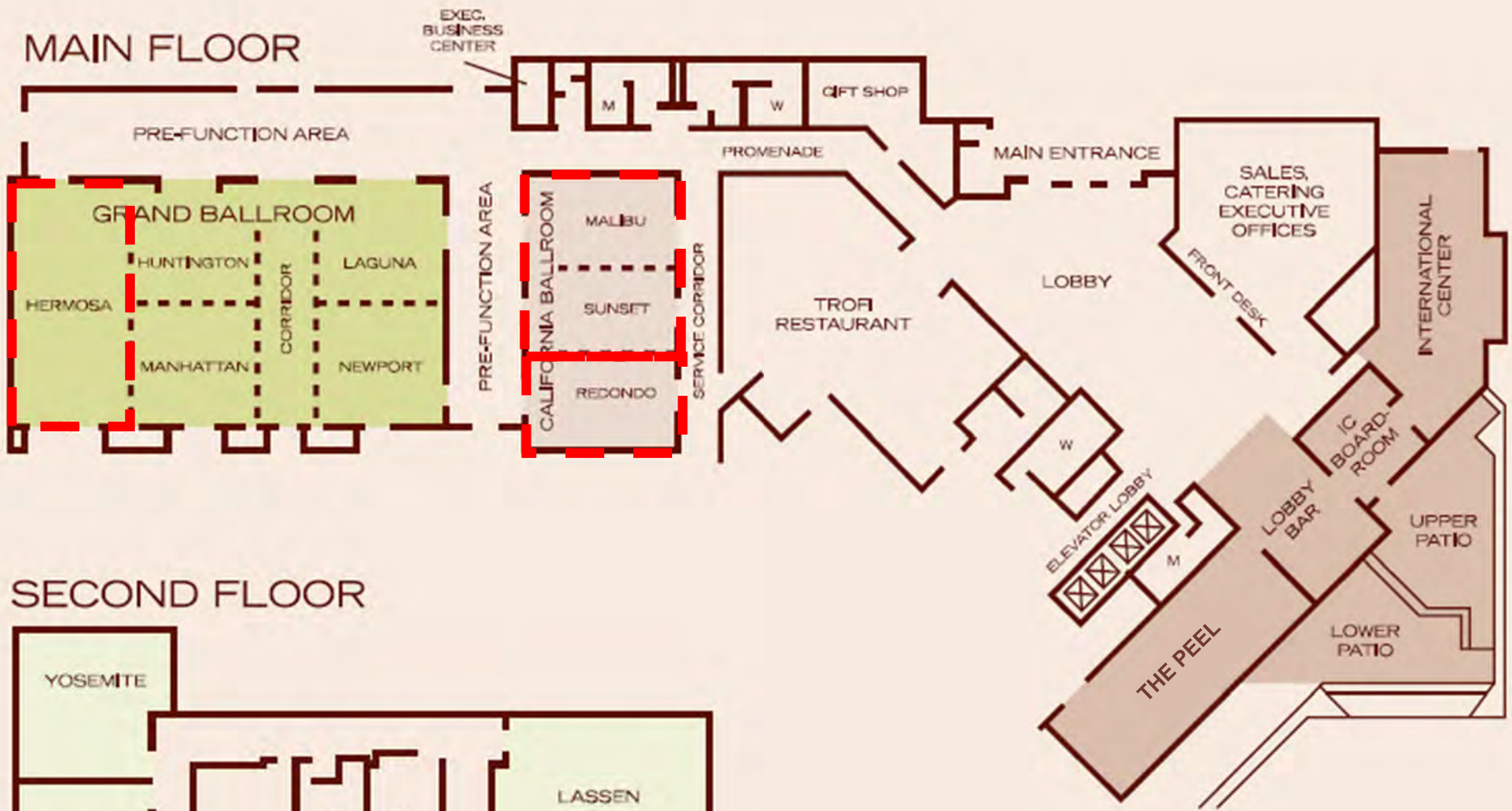


**Shawn DeLuna**  
President  
Collection Bureau of America  
Collections Post COVID



**Vikki Beatley**  
Principal  
HdL Companies  
Utility Users Tax Administration

# MAIN FLOOR



# SECOND FLOOR



**DOUBLETREE BY HILTON ANAHEIM – ORANGE COUNTY**

100 The City Drive Orange, CA 92868 (714) 634 4500



# STATE OFFICERS

# DIVISION OFFICERS



## CMRTA

California Municipal Revenue & Tax Association

### Elected Officers

#### **President**

Ricky Hawblitzel  
City of Santa Maria

#### **1st Vice-President**

Cristine Gaiennie, City of Carson

#### **2nd Vice-President**

Vacant

#### **3rd Vice-President**

Vacant

#### **Secretary**

Shellie Muller, City of Vacaville

#### **Treasurer**

John McGirr, 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 Officers (Non-Voting)

#### **Associate Member Chair**

Shellie Muller, City of Vacaville

#### **Certification Revenue Officer (CRO) Chair**

Wendy Anderson, City of Pleasanton

#### **CRO Librarian**

Lisa Aduna, City of Orange

#### **Parliamentarian**

Filled by Divisions as needed

#### **Revenews Editor**

Vacant

#### **Sergeant at Arms**

Filled by Divisions as needed

#### **Site Selection Chair**

Cristine Gaiennie, City of Carson

#### **Web Manager**

Ricky Hawblitzel, City of Santa Maria

### Division I Officers:

#### **President**

Rick Greenebaum, City of Berkeley

#### **1st Vice-President**

Chuck Maurer, City of Oakland

#### **2nd Vice-President**

Shellie Muller, City of Vacaville

#### **3rd Vice-President**

Deana Cardona, City of Pittsburg

#### **Secretary**

Vacant

#### **Treasurer**

Shellie Muller, City of Vacaville

#### **Past President**

Vacant

#### **CRO Representative**

Vacant

#### **Sergeant at Arms/Parliamentarian**

John McGirr, City of Menlo Park

### Division III Officers:

#### **President**

Jose Zaragoza, City of Beverly Hills

#### **1st Vice-President**

Vacant

#### **2nd Vice-President**

Florence Ruiz, City of Stanton

#### **3rd Vice-President**

Nikki Love, City of Chino

#### **Secretary**

Leslie Andrews, City of Palmdale

#### **Treasurer**

Cristine Gaiennie, City of Carson

#### **Past President**

Iris Espino, City of Irwindale

#### **CRO Representative**

Vacant

#### **Sergeant at Arms/Parliamentarian**

Vacant

### Division IV Officers

#### **President**

Cesar Lucrecio, City of Coachella

#### **1st Vice-President**

Vacant

#### **2nd Vice-President**

Rosa Rosales, City of San Diego

#### **3rd Vice-President**

Mitchell Mason, City of Riverside

#### **Secretary**

Vacant

#### **Treasurer**

Liliana Montes, City of Vista

#### **Past President**

John Sunkel, Sustaining Member

#### **CRO Representative**

Liliana Reyes, City of Calexico

#### **Sergeant at Arms/Parliamentarian**

John Sunkel, Sustaining Member



# ASSOCIATES



## ***What is an Associate Member?***

An associate member is a non-city or county member that provides goods and/or services that are regularly used by city and county members. Examples are 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, particularly as your city or county faces reductions in staffing levels. 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 associate member support, the price to attend 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 it. 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 efforts. Our associates are not looking for an unfair advantage, just the opportunity to compete.

## **Associate Mixer Exhibitors**

**InfoSend**

**HdL**

**Pacific Credit Services**

**Rash Curtis & Associates**

**Anenu Insights & Analytics**

**CB Merchant Services**

**Collection Bureau of America**

**Progressive Solutions**



# PAST PRESIDENTS

# CONTINUING EDUCATION



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

2021 - Ricky Hawblitzel - Santa Maria	1996 - <b>Steve Hunt - Tulare</b>
2020 - Ricky Hawblitzel - Santa Maria	1995 - <b>Glen Everroad - Newport Beach</b>
2019 - <b>Monique Navarette</b> <b>Newport Beach</b>	1994 - <b>Veronica Larsen - Hayward</b>
2018 - Irma Navarro - City of Gilroy	1993 - Claudia Monahan - El Monte
2017 - Cristine Gaiennie - City of Carson	1992 - <b>Eve Fieler - Walnut Creek</b>
2016 - Laura Grijalva - American Canyon	1991 - <b>Jane Harris - Fontana</b>
2015 - Sheri Lund - Walnut Creek	1990 - David Milton
2014 - Sheri Lund - Walnut Creek	1989 - William F. Clark - Norwalk
2013 - <b>David McPherson - Oakland</b>	1988 - Lee Hightower (Deceased)
2012 - Chuck Maurer - Oakland	1987 - Mardine Mazel
2011 - <b>Corinne Hoffman</b> <b>Huntington Beach</b>	1986 - Mardine Mazel
2010 - Frankie Adams - Roseville	1985 - Craig Graves
2009 - <b>Monique Navarette</b> <b>Newport Beach</b>	1984 - Rosetta Johnson
2008 - <b>Robyn Zamora - San Jose</b>	1983 - Sandy Spain
2007 - <b>Leonie Crouch - Orange</b>	1982 - Sanford "Gus" Driskill
2006 - <b>Pam Blythe - Redding</b>	1981 - Wayne L. Ramsey - Palm Desert
2005 - Pamela Gillis - Garden Grove	1980 - Farrel Snead (Deceased)
2004 - <b>Darlyne Demeduk - Pleasanton</b>	1979 - Chris Villalobos
2003 - <b>David McPherson - San Jose</b>	1978 - Don Wieneke
2002 - <b>David McPherson - San Jose</b>	1977 - Judy Sturm
2001 - <b>Debbie Sousa - Apple Valley</b>	1976 - <b>Alex Deleon - Stockton</b>
2000 - <b>Jim Kellas - Clovis</b>	1975 - Gordon Fraser
1999 - <b>Susan Oliver - Escondido</b>	1974 - Gary Ingraham
1998 - <b>Steve Hunt - Tulare</b>	1973 - Lewis Chaney (Deceased) City of Los Angeles
1998 - Tony Sales - Stockton	1972 - Marvin Thompson
1997 - <b>Ed Paul - Fullerton</b>	1971 - Jim Weber
	1970 - Walter Reed
	1969 - Walter Reed

*Names in bold are Bruno Marchetti Award recipients*

## ***What is a Certified Revenue Officer?***

A recognized certification 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.

## ***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. Please see list of class categories and hour requirements.
- Candidate must pass a comprehensive test demonstrating ability in a variety of areas of expertise.
- Application fee is \$60.
- Once all requirements have been met, you may apply for certification. Complete the application and submit with documentation of work history, class/training experience, and application fee. For more details, ask your certification committee member.
- Please 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. [cro@cmrta.org](mailto:cro@cmrta.org)



