

Explore the World of Revenue

**2023 CMRTA Annual Conference
November 8-9, 2023**

DoubleTree by Hilton Berkeley Marina
200 Marina Blvd., Berkeley CA 94710



EXPLORE THE WORLD OF REVENUE

ASSOCIATE MIXER

NOVEMBER 8, 2023
5:00 PM TO 7:00 PM

BAYVIEW BALLROOM



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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 7, 2023

6:00 – 7:30 Board Member Training Dinner

Wednesday, November 8, 2023

7:45 – 10:00 Conference Registration

8:30 – 8:45 Welcome Speaker

8:45 – 9:00 Board Meeting

9:00 – 10:00 Keynote Speaker (I or M)

10:00 – 10:15 Networking Break

10:15 – 11:00 Short Term Rentals (G or H)

10:15 – 11:00 Building Your Ideal Career Path (M)

11:00 – 12:00 Leadership Workshop (M)

12:00 – 1:15 Lunch / Associate Presentations

1:15 – 2:30 CSLB Unlicensed Contractors (B or H)

2:30 – 3:30 Business License: Back to Basics (B or C)

2:30 – 3:30 Skip Tracing (C or H)

3:30 – 3:45 Networking Break

3:45 – 4:45 Customer Service (B or G)

5:00 – 7:00 Associate Mixer

Thursday, November 9, 2023

8:30 – 9:15 CAMTC—Update (B, H, L)

8:30 – 9:15 Cannabis Regulations (L or O)

9:15 – 10:00 Exchange of Expertise

9:15 – 10:00 AB5/ABC Test - 1099 Employees (B, H, L)

10:00 – 10:30 Networking Break

10:30 – 11:45 Legislation Update (L or O)

12:00 – 1:15 Lunch and Awards Presentations

1:15 – 2:30 Entities:

Understanding Legal Structure (B, G, or L)

1:15 – 2:30 Online Tax and License Filing (B or G)

2:30 – 3:30 How to CMRTA/CRO (I)

2:30 – 3:30 Understanding SB205 (G or L)

3:30 – 3:45 Networking Break

3:30 – 4:45 Closing Keynote (M)

2024 Annual Conference

Ontario, CA

More details to come



Join us on LinkedIn



SPEAKERS

Lamar Thorpe
Motivational Speaker & Facilitator
LamarThorpeSpeaks.com
Keynote Speaker and Leadership Workshop




Jose Zaragoza
Revenue Operations Investigator
City of Beverly Hills
Short Term Rentals

Bret Harmon
Director of Client Experience
HdL Companies
Career Advancement; Closing Keynote




Kevin Abbes
Supervising Special Investigator
Contractors State License Board
Unlicensed Contractors

Connor Duckworth
Client Advisor
HdL Companies
Business License: Back to Basics




Ajay Kolluri
Director of Cannabis Services
HdL Companies
Cannabis Regulations

Cabe Silverhame
Engineering Geologist
State Water Resources Control Board
Understanding SB 205




Wendy Anderson
Business License Program Specialist
City of Pleasanton
How to CMRTA/CRO



Fran Mancia
Vice President—Government Relations
MuniServices
Legislative Update

Kelly Parsons
President
Pacific Credit Services
Skip Tracing; Customer Service



Archana Mathur
Payroll Tax Specialist
State of California—Employment Development Department
AB5/ABC Test for contract/1099 employees

Michael Colantuono
Attorney
Colantuono, Highsmith & Whatley, PC
Entities: Understanding the Different Legal Structures




Beverly May
Director of Governmental Affairs
California Massage Therapy Council (CAMTC)
CAMTC Update

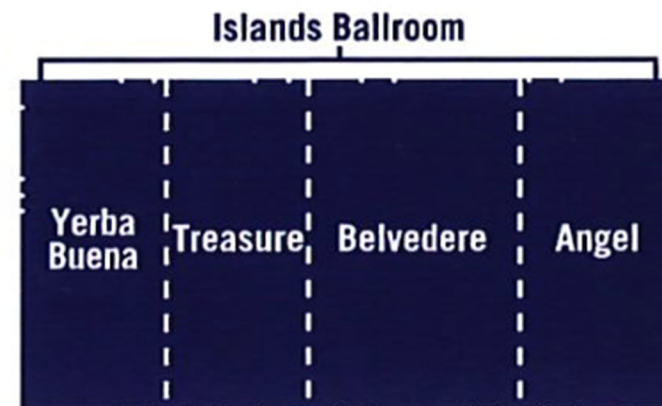
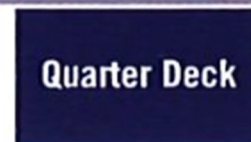
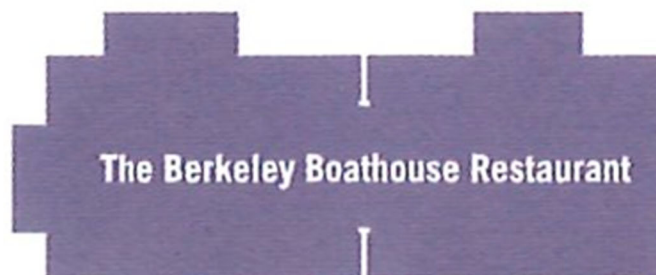
Rick McElroy
Director of Law & Code Enforcement Relations
California Massage Therapy Council (CAMTC)
CAMTC Update




Ricky Hawblitzel
Business Program Leader - Utility Billing Manager
City of Santa Maria
How to CMRTA/CRO

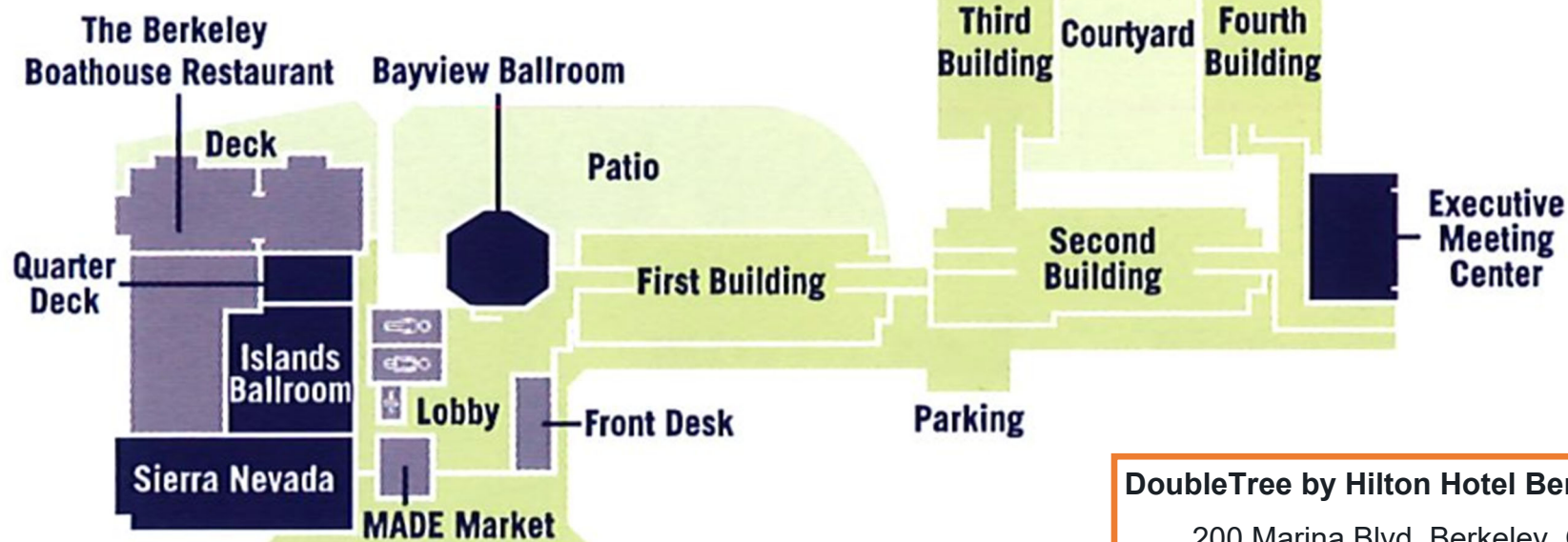
A special thank you to our speakers for your commitment and efforts. It takes time to prepare and deliver compelling presentations, and CMRTA truly appreciates the passion and professionalism you bring to the podium. Your willingness to share your knowledge and engage with our participants exemplifies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

- Meeting/Conference Rooms
- Amenities/Service Areas
- Public Space
- Outdoor Space



Hotel Floor Plan

Berkeley Marina and
San Francisco Bay ↑



DoubleTree by Hilton Hotel Berkeley Marina

200 Marina Blvd. Berkeley, CA 94710



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 Adel, 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 Adel, 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 Adel, City of Vacaville

3rd Vice-President

Deana Cardona, City of Pittsburg

Secretary

Rose Gibbons, City of Pleasanton

Division III Officers:

President

Jose Zaragoza, City of Beverly Hills

1st Vice-President

Alice Silva, City of Gardena

2nd Vice-President

Florence Ruiz, City of Stanton

3rd Vice-President

Nikki Love, City of Chino

Secretary

Leslie Andrews, City of Palmdale

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

Donna Rubalcava, City of La Mesa

Treasurer

Shellie Adel, City of Vacaville

Past President

Vacant

CRO Representative

Vacant

Sergeant at Arms/Parliamentarian

John McGirr, City of Menlo Park

Treasurer

Cristine Gaiennie, City of Carson

Past President

Iris Espino, City of Irwindale

CRO Representative

Vacant

Sergeant at Arms/Parliamentarian

Vacant

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



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

HdL

Pacific Credit Services

Rash Curtis & Associates

Avenu Insights & Analytics

SYNCOM

Starnik

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.**

2022 - Ricky Hawblitzel - Santa Maria	1996 - Steve Hunt - Tulare
2021 - Ricky Hawblitzel - Santa Maria	1995 - Glen Everroad - Newport Beach
2020 - Ricky Hawblitzel - Santa Maria	1994 - Veronica Larsen - Hayward
2019 - Monique Navarette Newport Beach	1993 - Claudia Monahan - El Monte
2018 - Irma Navarro - City of Gilroy	1992 - Eve Fieler - Walnut Creek
2017 - Cristine Gaiennie - City of 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 (Deceased)
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 (Deceased)
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 (Deceased) 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
	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.
- Pay an application fee.
- 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

