



2016 CMRTA ANNUAL CONFERENCE  
Uncover the Mystery to Exceptional Performance  
October 19 – 21, 2016  
Sacramento, CA

**Class Schedule**

**Wednesday, October 19<sup>th</sup>**

- 9:00-10:15     **General Session**  
Welcome speaker, roll call business meeting, swearing-in of 2017 officers, presentation of Certified Revenue Officer certificates, and President's speech.
- 10:15-10:30    **Networking Break**
- 10:30-12:00    **Keynote Speaker – Brenda Knight – Bridging the Generation Gaps in Government**  
Brenda will enlighten us and help us bridge the differences in generation gaps in our government work to help us uncover the mystery to exceptional performance.
- 12:00-1:00     **Lighthouse Luncheon**  
This luncheon recognizes the cities that have won CMRTA's 2016 Lighthouse award.
- 1:00-1:45      **Business License Mentorship & 101 – Laura Banta, CMRTA State President and City of American Canyon**  
Whether you are brand new to business license or seasoned in the profession this class is for you! Everyone will work together in an interactive class with real life challenges on topics we deal with every day. Seasoned professionals are encouraged to become mentors and will have an opportunity at this training to volunteer their expertise to newer members who would like someone they can contact throughout the year with individual questions.
- 1:45-2:45      **Franchise Tax Board Interagency Intercept Collection Program Speakers**  
Speakers will provide an overview of the Franchise Tax Board's Interagency Intercept Collection Program. The interagency Intercept Collection Program intercepts (offsets) refunds when individuals have delinquent debts owed to government agencies and California colleges.
- 1:45-2:45      **Franchise Tax Board City/County Business Tax Program and Disclosure Overview Training  
Felicia Hicks, Program Manager for the FTB City/County Business Tax Program**  
Felicia will provide an overview of The City/County Business Tax program, a no cost agreement between FTB and Cities/Counties to share limited confidential information. The information provides Cities/Counties potential leads in finding unlicensed businesses in their jurisdiction and FTB to identify businesses who are not filing required tax returns. Felicia will also provide information for safeguarding confidential information received from California FTB, including California Laws & Penalties, Legal Authority, the Confidentiality Statement, and the Safeguard Review.

### Wednesday, October 19<sup>th</sup> Continued

- 2:45-3:00      **Networking Break**
- 3:00-4:00      **Code Enforcement Citation Process – Carl Simpson, Code and Housing Enforcement Chief, City of Sacramento**  
Carl Simpson will walk us through the steps taken from beginning to end to process a code enforcement citation.
- 3:00-4:00      **Bureau of Gambling Control (BGC) Charitable Gambling – Jeff Smith, Special Agent Supervisor, BGC**  
Special Agent Smith's presentation will focus on the Charitable Gambling laws in California, including the history of charitable gambling, registration requirements, and proper use for funds generated by charitable gambling. He will also briefly address BINGO games in California and the laws pertaining to BINGO.
- 4:05-5:00      **Skip Tracing Practices- Alex Rojas, Senior Investigator Collector, City of San Jose**  
Alex will walk us through the practice of using skip tracing to locate delinquent accounts and facilitate revenue collections.
- 4:05-5:00      **Updating an Outdated Ordinance – MuniServices panel of guest speakers**  
A panel of guest speakers will walk us through the process of updating an outdated ordinance, including the steps to prepare prior to going to a ballot measure.
- 5:30-7:00      **Annual Opening Night Reception – Hosted by Muniservices**  
MuniServices is graciously hosting the opening night reception for attendees to continue to network with colleagues in a casual environment. This is a great opportunity to catch up with old friends and make some new ones.

### Thursday, October 20<sup>th</sup>

- 8:00-9:00      **CRO Certification Examination Prep – Maria Ibarra, City of Commerce**  
This is class walks you through the process of becoming a Certified Revenue Officer, including step by step instructions on filling out the application, documentation of experience and details about the CRO exam. Maria will be able to answer any questions. This class will help prepare you to take the exam on Friday or in the future.
- 9:00-10:15      **Legislative Update – Fran Mancina, MuniServices**  
Fran brings us the latest news and updates on proposed and adopted legislation from Sacramento that can affect our cities. This class continues to be one of the most popular classes because of Fran's ability to present legislation and its ramifications in an easy to understand way.
- 10:15-10:30      **Networking Break**
- 10:30-11:45      **Ethics in Government – Commander Dave Bertini, Menlo Park Police Department**  
Commander Bertini brings us an inspiring presentation on the ethics in government and the ethical obligation to do our jobs right.

## **Thursday, October 20<sup>th</sup> Continued**

- 11:45-12:30     **Technology Update**  
Come see the latest hardware, software, and tools on display from our associate members. Talk to associates about the latest trends in their field and how they can help your city “Uncover the Mystery to Greater Performance.” It’s a great venue in a casual environment, as well as lots of fun with raffles and giveaways. Don’t forget your business cards!
- 12:30-1:30     **Associate Members’ Appreciation Luncheon**  
Associates are valuable partners in our organization, and they help us make these great conferences possible. This luncheon is our way to say “Thank You!” to the associates and to give them an opportunity to address the group to share a little about what their businesses can offer.
- 1:35-2:45     **Technology Update Continued**
- 2:40-3:40     **BOE Sales Tax and Prepaid Wireless Surcharge Collections – Nicole Lestanguet and Brian Kelly, California State Board of Equalization**  
Our speakers will provide us with an overview and updates on sales taxes, as well as information on the Prepaid Wireless Surcharge collections.
- 2:40-3:40     **How the Marijuana Industry is Reshaping Our Communities – David McPherson, HDL**  
David will discuss how the new State regulatory scheme MMRSA, the ballot initiative AUMA, and the cannabis industry recent trends are reshaping land use, public safety, and economic strategies for local agencies in California. His presentation will explore why current bans are not effective and how cities can determine which type of cannabis business are best suited for their community and the financial benefits of that decision.
- 3:50-4:50     **Collecting Within the Law – Susan Morado, Financial Credit Network (FCN)**  
This presentation will give you guidelines to help you stay compliant with all first party collection laws. It covers some of the FDCPA (Fair Debt Collection Practice Act) laws, which all third party collection agencies are governed to follow. It helps answer the following questions:  
    What time may I call a consumer?  
    Must an account meet a certain “age delinquency” prior to sending to an agency?  
    May I speak with a delinquent account’s relative about the account?  
    Is it okay to charge interest on an account?
- 3:50-4:50     **Communicating Effectively with our Communities – Noah Moerbeek, Progressive Solutions**  
This presentation brings to light how important it is for our agencies to communicate effectively with our perspective communities.
- 6:00-7:00     **President’s Reception – Hosted by HDL**
- 7:00-10:00    Awards Banquet & Fundraiser Event

## **Friday, October 21th**

### **8:30-10:00 CRO Examination**

The examination will be administered to all applicants who have timely submitted an application, met the requirements, and have been approved to take the test. The exam begins promptly at 8:30 a.m.

### **9:00-10:30 Short-term Rentals – Daniel Carrigg, Deputy Executive Director/Legislative Director, League of California Cities and Gary Ameling, Director of Finance/Assistant City Manager, City of Santa Clara**

Our speakers will discuss the growing trend of short –term rentals, as well as a legislative update on this industry.

### **10:30-11:15 Exchange of Expertise & Conference Wrap Up**

This is a great opportunity for our attendees to bring questions and challenges to the panel and the membership at large. We encourage everyone to attend this session. Feedback regarding the conference is essential for improvement. What went right or could be better? What classes or topics would you like to attend? These suggestions and feedback helps us improve future conferences, as well as identify desired classes for next year.

### **11:15-1:45 State Board Meeting (Everyone is invited to attend)**

Interested in becoming a CMRTA board member or hold an appointed position? Come to our State Board meeting and talk to us about being a part of this core group of people who make these conferences possible!