

# CT TAX COLLECTOR'S ASSOCIATION

## EDUCATION COMMITTEE MEETING

*Tuesday October 2, 2018*

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**Officers** – *President Lisa Theroux, CCMC Shelton; 1<sup>st</sup> Vice President Teresa Babon, CCMC, Southington; 2<sup>nd</sup> Vice President Alan Wilensky, CCMC, Waterford; Treasurer Kathy Larkins, CCMC, Darien; Past President Launa Goslee, CCMC, Torrington*

**Committee Chairpersons** – *Certification Chair Patricia Monahan, CCMC, Killingly; Escrow Chair Iris Laurenza, CCMC, East Hartford; Legislative Chair David Kluczowski, CCMC, Fairfield*

**County Presidents** – *Sarah Bruso, CCMC, Norfolk (Litchfield County); Lisa Madden, CCMC, Willington (Tolland/Windham County); Alan Wilensky, CCMC, Waterford (New London County)*

**Attendees** – *Corinne Aldinger, CCMC, Newington; Scott Ferguson, CCMC, Danbury/Audit/Legislation; David Greaves, CCMC, Manchester; Erin Johnson, CCMC, Madison; Paula Poplowski, CCMC, Berlin; Deb Swan, CCMC, Berlin; Paula Usher, CCMC, Bethel*

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### **Meeting Called to Order at 10:02 am by Alan Wilensky**

**Secretary's Report** – Motion to waive the reading of the minutes and accept as is from May 10, 2018 was made by Patricia Monahan and seconded by Lisa Madden. **Motion carried.**

### **Old Business –**

Alan said he thought we were treated fairly at the Water's Edge Conference held March 20 – 22, 2019. He also stated we spent too much money on food. He did inform the Committee that there is a new Banquet Manager at Water's Edge.

### **New Business –**

The next Aqua Turf Meeting will be held on November 8, 2018. Lisa Theroux said we will discuss the Aqua Turf meeting in more detail during CTX Board Meeting afterwards.

The 2019 Conference will be held at the Water's Edge on March 20 – 22, 2019. Alan passed out a Tentative Conference Schedule for all three days. It included the following:

- Wednesday – Legislative Update will be 1:00 – 1:45 pm. There are three open seminars spaces available. Open times are 10 am to 12 pm, 1:45 pm – 3:30 pm and 3:45 – 4:30 pm. Dinner is at 5 pm with Entertainment scheduled for 7 pm.
- Thursday – Has four open seminars spaces available. Open times are 9:45 am to 12 pm, 1:30 – 2:00 pm, 2:00 pm – 3:30 pm and 3:30 pm – 5:00 pm. Cocktail Reception to start at 6 pm with the Banquet at 7 pm.
- Friday – One seminar space is available from 9:45 am to 11:45 am.
- Each day has a breakfast.
- There are 5 Vendor visiting opportunities on Wednesday & Thursday and an Introduction to Vendors on both Wednesday and Thursday.

Alan mentioned that he had an Entertainer who is a Comedian / Hypnotist and wanted to know what was spent on last year's Medium. He said many people seemed to enjoy her, and that she was spot on with him. Kathy Larkins will look up the amount and get back to Alan. They thought around \$1,500.

Alan suggested a FOIA seminar. It is a popular topic right now. Pat Monahan said she is attending a Freedom Of Information Act seminar hosted by CCM next week. She will reach out to them about the possibility of having a seminar at our Conference. It was also mentioned that Fairfield County will be hosting a FOIA meeting this fall. Lisa Madden mentioned that Adam Cohen had recently sent some Tax Collector's "Understanding Connecticut's Freedom of Information

Act” written by his law partner. Linda Gagne emailed Lisa Theroux, suggesting that the book be a gift for everyone at the conference.

Paula Poplowki asked for a session about the Certification Process. She hadn’t realized that two forms needed to be filled out after taking the final. After some discussion, CTX requested that Certification Committee make a checklist. Pat Monahan said she would create a checklist that will be discussed and handed out in both Classes 3 and 4. David Kluczowski said this would be helpful while he teaches Class 4, for at every class, someone has a question about the process. Lisa Theroux also asked Pat Monahan to review the process when she opens her discussion at the Aqua Turf meeting.

Pat Monahan mentioned that there was a new contact at OPM – Martin Heft. He is the new contact for Certification and re-Certification. In 2006, OPM changed the language to say that Certifications will last for 5 years, or until re-registration procedure is in place, whichever is latest. She doesn’t expect any changes soon. Launa Goslee said it is the Long Session next year, so there will probably be other priorities.

Alan Wilensky asked David Kluczowski if he wanted Legislative updates on Wednesday or Friday. David says he prefers Wednesday. There was some discussion about the Friday presentations, and if it was even needed. Historically it has been Legislative to make a “meatier” topic. David said having Friday’s help the Award Ceremony attendance as well as helping offices rotate their staff to attend a day. There was discussion on potentially removing Friday’s. Lisa Theroux wanted to see feedback on this from everyone. David Kluczowski offered to do a monkey survey.

Lisa Theroux asked Alan Wilensky to reach out to Ann Scacco for believes Ann is on a CCMO Board. It would be nice to offer a training class, but a condensed one with credits for those going for their CCMO certification. A three hour class is too long for this venue.

Lisa Theroux suggested we could have a training session on Bank Executions. We could get a panel together for this. She suggested Launa Goslee and Bill Donlin. Lisa Madden & Alan Wilensky suggested adding Michele Wyatt from Colchester for this panel.

Lisa Theroux reminded everyone that we will need to get these presentations tied up right after Aqua Turf for invitations for the March conference go out in December/January.

Lisa Madden suggested basic training on the public information from the Assessor’s and Town Clerk’s Office, and how it can help the tax collection process. Lisa Madden suggested examples as how to read a field card, how to print labels from an abutters report if doing a tax sale, how to find out if a property has a mortgage, how to know if a property has a lis pendens, how to read mapping software etc. Patricia Monahan warned not to get too deep. Lisa Madden said it would just be using the public kiosk’s or the information on a town’s website that contains only general information. She said it’s been a large part of her collection procedures. Lisa Madden said it could also be fun and make interactive calling people from the audience and ask them what address they would like pulled up. Lisa Theroux suggested we could make a panel for this for it has never been presented before.

David Kluczowski said we could bring back on Wednesday morning’s “Speed Dating”. It is setting up groups by rows of long tables and have them solve simple problems. It teaches various ways to solve the same problem. David Kluczowski also mentioned “Rapid Revenue Returns”. There was also discussion about a Jeopardy game, or a County vs County Game Show for Aqua Turf.

Lisa Theroux said that Cinda Buchter, retiree from Fairfield, use to have breakout sessions for newbies versus seasoned collectors.

Iris Laurenza said her Director of Finance gave a great abbreviated synopsis of all the new water and sewer laws and suggested that could be a session. Lisa Madden thought it would be great to have a review of water/sewer collections.

Lisa Theroux also suggested seminars as Interest vs. Collection Rate, or Collections vs. Politics, and Appointed vs Elected. Or how our local government and politics can change how we collect. She gave an example of a property that the town will never get paid on, and how she made disclosures on her reports.

Alan Wilensky asked that any ideas be emailed or texted to him.

## **General Discussion–**

Alan Wilensky said his Assessor is fighting the tax exemption on Solar panels if the panels are for creating a source of revenue, or part of a business. Alan says it's an uphill battle, but confident in his Assessor.

Lisa Madden asked if DMV could stop telling customer's that towns can release immediately. She said that some town's policies are next day. Lisa Theroux and Scott Ferguson said that Gayle has already asked for this, and other things from DMV. DMV does what they want. Lisa Theroux said the statute reads "immediate", but according to DMV, immediate is within 24 hours.

There was a discussion about on line banking and tax payments being later than taxpayers thought. Launa Goslee said that some banks have a disclosure that you should not use their software for tax payments. Launa actually paid her taxes once this way to see the process as a user and collector. Taxpayers have to be aware of the pay date. They think their taxes are paid on time, but tax offices do not receive them on time. Lisa Theroux asked Iris Laurenza if she could ask Bankers to come to the Escrow meeting next year to discuss the problems this creates for their customers and tax offices. Alan Wilensky mentioned that we would probably have to address it to the State's Banking Commission.

Iris Laurenza mentioned putting information on the envelope versus an insert for the bills.

Lisa Madden said she is looking into QR codes.

Lisa Theroux reminded everyone that there will be a Board meeting after the Aqua Turf meeting.

Motion to adjourn by Lisa Madden at 11:31. Seconded by Iris Laurenza. **Motion carried.**

## **Respectfully Submitted by,**

Lisa A. Madden, CCMC  
Recording Secretary