



CAO Personal Property Division

Presented to the Mecklenburg
Board of County Commissioners
February 20, 2018

Personal Property Defined

According to the North Carolina General Statutes, all property that is not defined or taxed as real property is considered to be personal property.



Personal Property Divisions

- ❑ Account Services & Process Support
- ❑ Personal Property Appraisal & Audit
- ❑ External Audit Team
- ❑ 34 staff members

Personal Property Appraisers

Auditors

Administrative Support Assistants

Managers – 2 received their PPS designation in 2017



Personal Property Divisions 2017 Stats

- ❑ 52,767 calls answered
- ❑ 5,503 walk-in customers assisted
- ❑ 2,056 audits completed
 - \$333M Discovered value
 - \$1.3M Additional tax revenue
- ❑ Process State Certified Public Utility values



Personal Property Divisions 2017 Stats

- ❑ Business Personal Property – 123k properties
- ❑ Individual Personal Property – 27k properties
- ❑ Registered Motor Vehicles – 724k +/- properties

valued annually



Personal Property Divisions 2017 Stats

<u>Property Type</u>	<u>FY18 Actuals</u>
Personal Property	\$9.9B
Registered Motor Vehicles	\$9.5B
State Certifications	\$4.6B



BPP Canvassing Initiative

canvass

verb can·vass \ 'kan-vəs \

Definition of canvass

canvassed; canvassing

transitive verb

1. to examine in detail;
2. to examine officially for authenticity



3rd Party Proposal and Fees

Identify businesses not listing

Review the current tax scroll

Comparison of databases vs. county scroll

Fee:

- \$25,000 First 100 discovered businesses
- \$250/each > 100 discovered businesses



BPP Canvassing Initiative Goal

Goal

- ✓ Discover tax base attributable to non-listing business
- ✓ Avoid the expenditure of outsourcing the endeavor to a vendor



BPP Canvassing Initiative Strategy

Compare data for accuracy

Taxpayer name & business address

- County Tax Scroll = “Reported”
- Variances = “Potential Discovered Businesses”
- Data mining using Excel to identify variances



BPP Canvassing Initiative Tools

FACEBOOK



May 2, 2014 · 🌐

Floors done, lights up and the sinks went in today!! Soft opening will be next week!! Thanks to all of you who have already booked appointments. We will be announcing our opening events soon!



- ❑ Charlotte Better Business Bureau
- ❑ NC Secretary of State
- ❑ Mecklenburg County Environmental Health
- ❑ Facebook
- ❑ ABC Permits



BPP Canvassing Initiative Tools

ABC PERMITS

Business Information

Permittee Information

Current Status:	Active	Ownership Type:	LLC Member Managed
File Number:	00178513DF - 999	Town:	Charlotte
County:	Mecklenburg	Fax:	

Permits

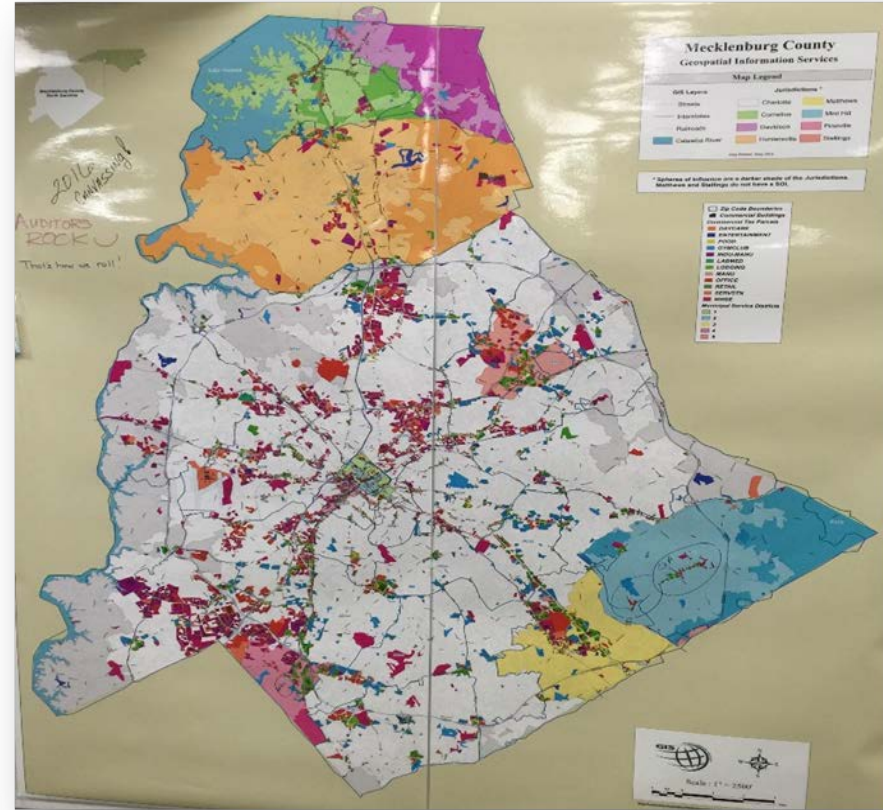
Permit Number	Type	Issued	Reinstated	Cancelled	Suspended	Renewed	Registered
00178513DF	Malt Beverage Tasting	10/27/2010				04/16/2015	
00178513AK	Malt Beverage Off Premise	10/27/2010					04/16/2015
00178513AM	Unfortified Wine Off Premise	10/27/2010					04/16/2015
00178513CE	Wine Tasting	10/27/2010				04/16/2015	



BPP Canvassing Initiative Preparation

Acquired in preparation:

- ❑ Two vehicles
- ❑ Computers and cell phones
- ❑ Route planning software
- ❑ Custom 8' x 8' map
- ❑ Printed bilingual door-hangers
- ❑ Tracking dashboard reports
- ❑ Field Work: Site visits for validation



BPP Canvassing Initiative Dashboards

2016 BPP Canvass

Total Assessed Value Added (in millions)



Total Number of New Businesses Added



New Businesses Added

690

Old Businesses Removed

632

Discovery Abstracts

1,636

Assessed Value Added

\$63,433,562

Estimated Tax Revenue

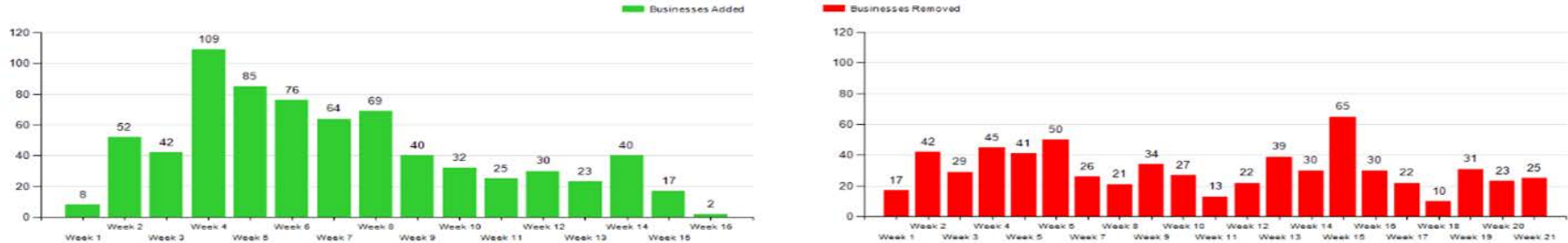
\$796,032



BPP Canvassing Initiative Dashboards

Weekly Results

Businesses Added and Removed



Assessed Value of Discovered Assets



BPP Canvassing Initiative Door Hangers

English



A vertical pink door hanger with a circular hole at the top. It features the Mecklenburg County Assessor's Office logo and text in English. At the bottom, there is a white rectangular sticker with contact information for Sandy Martin, CNCA, Personal Property Appraisal Manager.


Mecklenburg County
Assessor's Office

I visited your business today
_____ to discuss tax
matters related to the business below.

Business Name/Account Name

It is important that you contact our
office immediately. Please contact me at
the number listed below within 24 hours.

Thank you for your immediate attention
to this matter.

 **MECKLENBURG
COUNTY
GOVERNMENT**

SANDY MARTIN, CNCA
Personal Property Appraisal Manager
County Assessor's Office

P.O. Box 36819
Charlotte, NC 28236-6819
Office: 980-314-4310
Fax: 704-336-6386
Sandy.Martin@MecklenburgCountyNC.gov

Spanish



A vertical light purple door hanger with a circular hole at the top. It features the Mecklenburg County Assessor's Office logo and text in Spanish. At the bottom, there is a white rectangular sticker with contact information for Sandy Martin, CNCA, Personal Property Appraisal Manager.

El Condado de Mecklenburg
Oficina del Tasador de Impuestos

Visité su negocio hoy
_____ para discutir
asuntos fiscales relacionados con el
negocio de abajo.

Nombre de la empresa / Nombre de la cuenta

Es importante que se ponga en contacto
con nuestra oficina inmediatamente.
Póngase en contacto conmigo al número
que aparece a continuación dentro de
las 24 horas.

Gracias por su atención inmediata
a este asunto.

 **MECKLENBURG
COUNTY
GOVERNMENT**

SANDY MARTIN, CNCA
Personal Property Appraisal Manager
County Assessor's Office

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BPP Canvassing Initiative Team



BPP Canvassing Initiative Results

Goals Met	Total 2015-2017
<i>New Businesses Added</i>	1,091
<i>Old Businesses Removed</i>	3,074
<i>Discovered Businesses</i>	2,827
<i>Assessed Value Added</i>	\$87.4M
<i>Additional Tax Revenue</i>	\$815K

