

BOARD OF EQUALIZATION AND REVIEW

Vote on Nominees listed below, nominated at the December 18, 2018 meeting

Two (2) appointments for three-year terms expiring April 16, 2022

See attached letter of recommendation from the Board's Ad Hoc Interview Committee recommending the appointment of Steven Dobbs and Gregory Roberts.

| Nominees | Round 1 | Round 2 | Round 3 | Round 4 |
|---|----------------|----------------|----------------|----------------|
| Steven Dobbs District 4 (White) | | | | |
| Gregory Roberts District 6 (White) | | | | |
| Jeffery Scott District 5 (White) | | | | |

Current District Representation: District 1 (2) - District 2 (3) – District 3 (1) – District 4 (0) – District 5 (7) – District 6 (5)

Current Membership Racial demographics: White (14) – Black (4)

Nominees Racial demographics: White (5)

Note: Eric Anderson and Russell Allen were nominated but unable to accept the interview invite due to prior engagements.

BOARD OF EQUALIZATION AND REVIEW

AD HOC COMMITTEE RECOMMENDATION



MECKLENBURG COUNTY
Board of County Commissioners

MEMORANDUM

To: Board of County Commissioners

From: Commissioner Susan Harden, Ad Hoc Appointment Committee Chair

Date: January 14, 2019

Subject: Report of the Board of Equalization and Review Ad Hoc Appointment Committee

On Monday, January 14, 2019 the Board of Equalization and Review Ad Hoc Appointment Committee interviewed candidates for appointment consideration to the Board of Equalization and Review. The Committee was comprised of myself and Commissioners Leake, Cotham, and Rodriguez-McDowell.

The committee interviewed the following candidates who were nominated at the December 18, 2018 meeting of the Board of County Commissioners: Steven Dobbs, Gregory Roberts, and Jeffery Scott. Russell Allen and Eric Anderson were nominated but unavailable to be interviewed on this date and therefore unable to be considered at this time.

After interviewing the candidates, the committee voted to recommend to the full Board, the appointment of Steven Dobbs and Gregory Roberts for a three-year term expiring April 16, 2022 on the Board of Equalization and Review effective January 15, 2019.

The Board is scheduled to make appointments to the Board of Equalization and Review at the January 15, 2019 Board of County Commissioners meeting.

BOARD OF EQUALIZATION AND REVIEW

Nominees



Mecklenburg County Advisory Board Application

- **Name of Advisory Board:** Board of Equalization and Review
- **Name:** Russell Allen
- **Home address:** 601 Queens Rd. #E
- **City:** Charlotte
- **Zip code:** 28207
- **Home Phone:** 704-591-9460
- **Work Phone:** 704-332-3933
- **Email:** rallen@sullivancpapa.com
- **Occupation:** Accountant
- **Place of employment:** Sullivan, CPA PA
- **Race:** White
- **Sex:** Male
- **Age:** 66
- **Hours per month available for position:** 10-15
- **County advisory board currently serving on:**
- **Expiration date:**
- **Education:** Master's Degree
- **How did you learn of this vacancy?** Other -- Asked to serve by a current board member
- **If you selected Other, please explain:**
- **Business and civic experience:** I have lived in the county since 1961, owned property in the county since 1984, and owned and operated an accounting practice in Charlotte since 1981. I am a graduate of UNCC. My wife is and both her parents were native Charlotteans. I volunteer in the public schools, I am an active member of my church. I have at various times been active in numerous civic organizations. I strongly believe in giving back to my community! I have previously served on this board and am willing to do so again.
- **Areas of expertise and interests/skills:** While in business as a public accountant my firm prepared numerous business personal property tax listings. I have represented my clients with their business personal property tax issues before the Board. While a business owner I traveled the count extensively and I am familiar with the growth that has occurred in our county and with the change in real estate values in our county over the last fifty years. I believe all citizens of the county should be treated fairly with regards to their county taxes and that they deserve a fair and complete hearing when they have concerns about how they are being treated by the county.
- **Am I a current vendor with Mecklenburg County?** No
- **County Commission District:** 5

- **I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that the information contained in this application is true and correct according to the best of my knowledge and belief. I understand that this application is subject to the N.C. Public Records Law (NCGS 132-1) and may be released upon request. I agree**
- **Signature of applicant:** Russell N. Allen
- **Date:** 04/24/2018



Mecklenburg County Advisory Board Application

- **Name of Advisory Board:** Board of Equalization and Review
- **Name:** Eric Anderson
- **Home address:** 6018 Paddington Court
- **City:** Charlotte
- **Zip code:** 28277
- **Home Phone:** 704-708-5641
- **Work Phone:** 704-564-2851
- **Email:** e.g.andersongs@gmail.com
- **Occupation:** Retired after 33.5 years as an appraiser/manager with Meck CAO
- **Place of employment:** Retired
- **Race:** White
- **Sex:** Male
- **Age:** 65
- **Hours per month available for position:** 40+
- **County advisory board currently serving on:** BA in journalism, Univ. of SC
- **Expiration date:** None
- **Education:** BA on Journalism, Univ. of SC
- **How did you learn of this vacancy?** Other
- **If you selected Other, please explain:** BOCC televised meeting 9/5/18
- **Business and civic experience:** Commercial appraiser for Greenville County (SC) Tax Administration (1978 -1984). In Mecklenburg County, served as Multi-Family and Commercial appraiser (1984-1996), Appeals and Special Purpose Appraisal (1996-2006), Assistant Assessor (2006-May 2018).
- **Areas of expertise and interests/skills:** Familiarity with ad valorem appraisal of real property (commercial, multi-family, residential) and personal property, particularly from working for the Mecklenburg County Assessor's Office from October 1984 until June of 2018. Served as Assistant Assessor from 2006 until retirement, including serving as Clerk to the BER for a number of years. I hold certifications from the NC Department of Revenue and designations from the NC Association of Assessing Officers (CNCA) and from the International Association of Assessing Officers (Personal Property Specialist - PPS).
- **Am I a current vendor with Mecklenburg County?** No
- **County Commission District:** 6
- **I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that the information contained in this application is true and correct according to the best of my knowledge and belief. I understand that this**

application is subject to the N.C. Public Records Law (NCGS 132-1) and may be released upon request. I agree

- **Signature of applicant:** Eric G Anderson, PPS, CNCA, CRPA III and CRPA II
- **Date:** 9/5/2018



Mecklenburg County Advisory Board Application

- **Name of Advisory Board:** Board of Equalization and Review
- **Name:** Steven Dobbs
- **Home address:** 322 S Cedar Street
- **City:** Charlotte
- **Zip code:** 28202
- **Home Phone:** 404-784-4918
- **Work Phone:** 404-784-4918
- **Email:** speak2steve63@hotmail.com
- **Occupation:** Self-Employed, Investments; Semi-Retired
- **Place of employment:** Home Office
- **Race:** White
- **Sex:** Male
- **Age:** 54
- **Hours per month available for position:** 80+; depending upon month
- **County advisory board currently serving on:** None
- **Expiration date:** N/A
- **Education:** BA; Business Administration
- **How did you learn of this vacancy?** Other
- **If you selected Other, please explain:** Referred by Christine Lantis
- **Business and civic experience:** Owned hospitality industry company for 13 years before selling it; served on HOA boards for over 26 years, including President of my current HOA, Cedar Crest. Also, now serving as a volunteer for the Joedance Film Festival in Charlotte.
- **Areas of expertise and interests/skills:** Owning a business required me to understand financials. Editing an internationally distributed publication required me to perfect my written communication skills. HOA board membership, and becoming a landlord, required an understanding of real estate.
- **Am I a current vendor with Mecklenburg County?** No
- **County Commission District:** 4
- **I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that the information contained in this application is true and correct according to the best of my knowledge and belief. I understand that this application is subject to the N.C. Public Records Law (NCGS 132-1) and may be released upon request. I agree**
- **Signature of applicant:** Steven D. Dobbs
- **Date:** 8/10/2018



Mecklenburg County Advisory Board Application

- **Name of Advisory Board:** Board of Equalization and Review
- **Name:** Gregory Roberts
- **Home address:** 6111 Providence Country Club Drive
- **City:** Charlotte
- **Zip code:** 28277
- **Home Phone:** 704-214-0480
- **Work Phone:** 980-388-0120
- **Email:** Gregory.roberts5@gmail.com or greg.roberts@baml.com
- **Occupation:** Real Estate Capital Markets/Commercial Real Estate Banking
- **Place of employment:** Bank of America Merrill Lynch
- **Race:** White
- **Sex:** Male
- **Age:** 32
- **Hours per month available for position:** 10-15
- **County advisory board currently serving on:** NA
- **Expiration date:** NA
- **Education:** UNC-Charlotte: MBA, Finance Concentration; Queens University of Charlotte: BA, Business Administration
- **How did you learn of this vacancy?** Other
- **If you selected Other, please explain:** Mecklenburg County Website
- **Business and civic experience:**
 - Civic Experience
 - City of Charlotte Civic Leadership Academy: Fall 2018 Cohort
 - Providence Country Club Homeowner's Association: Board Member
 - UNC-Charlotte Belk College of Business Alumni Council: Council Member
 - Business Experience
 - Bank of America Merrill Lynch, Real Estate Structured Finance, 2014-Present
Primary Role: Commercial Real Estate Underwriter and Asset Manager
 - Paragon Bank, Commercial Real Estate Banking, 2013-2014
Primary Role: Commercial Real Estate Analysis
- Licenses:
 - NC Real Estate Broker License: 2011 (Currently Expired)
- **Areas of expertise and interests/skills:** Commercial Real Estate Analysis (Valuation, Research, Underwriting)

- **Am I a current vendor with Mecklenburg County?** No
- **County Commission District:** 6
- **I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that the information contained in this application is true and correct according to the best of my knowledge and belief. I understand that this application is subject to the N.C. Public Records Law (NCGS 132-1) and may be released upon request. I agree**
- **Signature of applicant:** Gregory Austin Roberts
- **Date:** 10/17/2018



Mecklenburg County Advisory Board Application

- **Name of Advisory Board:** Board of Equalization and Review
- **Name:** Jeff Scott
- **Home address:** 1300 Blueberry Lane
- **City:** Charlotte
- **Zip code:** 28226
- **Home Phone:** 510-928-2879
- **Work Phone:**
- **Email:** jeffscot@speakeasy.net
- **Occupation:** Financial Consultant
- **Place of employment:** Darton Group
- **Race:** White
- **Sex:** Male
- **Age:** 60
- **Hours per month available for position:** 16
- **County advisory board currently serving on:** N/A
- **Expiration date:**
- **Education:** BA Economics, BS Statistics, Phi Beta Kappa
- **How did you learn of this vacancy?** Website
- **If you selected Other, please explain:**
- **Business and civic experience:** Over 30 yrs banking, finance and technology with major banks. Limited civic experience in public arts, CMS volunteering and political party development and campaigning.
- **Areas of expertise and interests/skills:** Mortgage finance, credit analysis, business intelligence, business process improvement, new technology adoption. You can read more about me at LinkedIn <https://www.linkedin.com/in/jeffscot/> and read my publications at <https://www.scribd.com/user/170507234/Jeff-Scott>
- **Am I a current vendor with Mecklenburg County?** No
- **County Commission District:** 5
- **I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that the information contained in this application is true and correct according to the best of my knowledge and belief. I understand that this application is subject to the N.C. Public Records Law (NCGS 132-1) and may be released upon request. I agree**
- **Signature of applicant:** Jeffery Scott
- **Date:** 1/2/2018

Mecklenburg County
Advisory Boards, Committees and Commissions
Board Appointments Due

Renewals From 1/1/2019 To 1/31/2019

BOARD OF EQUALIZATION AND REVIEW

Number of BOCC Members: 20 Term Length in Years: 3

Purpose

The Board of Equalization and Review (BER) hears appeals of taxpayers on assessed values and reviews current assessments made by the Tax Assessor. Appointments are made for three-year terms with no one serving more than two full consecutive terms. The Chairman and Vice-Chairman are designated by the Board of County Commissioners.

Qualifications

To qualify for appointment as a member, each nominee to the Board shall be of good moral character, shall have resided in Mecklenburg County at least two (2) consecutive years prior to the appointment, shall remain as a resident for the duration of service as a member, shall be knowledgeable of real estate or personal property valuation matters, and shall not have been convicted of a felony.

Special Notes

APPOINTMENTS NEEDED FOR:

Two (2) three-year terms expiring April 16, 2022

There are five (5) nominees, nominated at the December 18 meeting.

Note: This is one of the seven advisory boards that require an interview process conducted by an Ad Hoc Committee of the Board. This is one of seven advisory boards that receive compensation. The Board of Equalization and Review Chairperson receives \$125/meeting and Members receive \$100/meeting. Overtime is \$15 per hour after the initial three-hour period.

2 Appointment(s) For 3 Year Term:

| Name | Qualifications | Appointed: | Expires | Eligibility |
|-------------|----------------|------------|------------|-------------|
| 1, New Slot | | 11/7/2018 | 11/30/2018 | New Slot |
| 2, New Slot | | 11/7/2018 | 11/30/2018 | New Slot |

BOARD OF EQUALIZATION AND REVIEW Applicants:

| Name | BOCC Dist | Qualifications | Race/Sex |
|-------------------|-----------|----------------|----------|
| Allen, Russell | 5 | | W / M |
| Anderson, Eric | 6 | | W / M |
| Butts, Emmitt | 3 | | B / M |
| Dobbs, Steven | 4 | | W / M |
| Hastings, Zanthia | 4 | | B / F |
| Roberts, Gregory | 6 | | W / M |

Mecklenburg County
Advisory Boards, Committees and Commissions
Board Appointments Due

Renewals From 1/1/2019 To 1/31/2019

BOARD OF EQUALIZATION AND REVIEW Members:

| Name (* = Chairman) | BOCC Dist | Qualifications | Race/Sex | Appointed | Expires | Elig Code | Expired Position |
|-------------------------|-----------|----------------|----------|-----------|------------|--------------|---------------------|
| 1, New Slot | Unknown | | / | 11/7/2018 | 11/30/2018 | NS | <== |
| 2, New Slot | Unknown | | / | 11/7/2018 | 11/30/2018 | NS | <== |
| Babb, Fela | 2 | | B / F | 4/3/2018 | 4/16/2021 | EL | |
| Bass, Paul | 6 | | W / M | 4/16/2013 | 4/16/2021 | EL | |
| Berry, Barrett | 2 | | B / M | 4/3/2018 | 4/16/2021 | EL | |
| Bordini, Vincent | 5 | | W / M | 11/7/2018 | 4/16/2021 | EL | |
| Calder, James | 5 | | W / M | 4/16/2013 | 4/16/2020 | NE | |
| Davis, Kathy | 5 | | W / F | 4/16/2013 | 4/16/2019 | NE | |
| Hammond, Ken | 6 | | W / M | 5/7/2014 | 4/16/2020 | NE | |
| Hawkins, William | 5 | | W / M | 3/3/2015 | 4/16/2021 | EL | |
| Hemphill, Pamela | 3 | | B / F | 11/7/2018 | 4/16/2021 | EL | |
| Hutchinson, Rufus | 5 | | W / M | 4/16/2013 | 4/16/2021 | EL | |
| Kessler, Steven | 1 | | W / M | 4/5/2016 | 4/16/2019 | EL | |
| Munn, George | 5 | | W / M | 11/7/2018 | 4/16/2021 | EL | |
| Petoskey, John | 6 | | W / M | 11/7/2018 | 4/16/2021 | EL | |
| Poore, Eugene | 6 | | W / M | 5/7/2014 | 4/16/2020 | NE | |
| Reid, Joyce | 2 | | B / F | 4/4/2017 | 4/16/2021 | EL | |
| Thrasher, Nobie | 6 | | W / M | 5/7/2014 | 4/16/2019 | EL | |
| Vilord, Nick | 5 | | W / M | 4/16/2013 | 4/16/2019 | NE | |
| *Miller, Robert "Bruce" | 1 | | W / M | 4/16/2013 | 4/16/2019 | NE | |