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Tax Management Associates, Inc.



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we've moved

Yes, we are finally unpacked | by Chip Cooke

Growth can be an interesting problem to mitigate. In 1996 when Tax Management Associates (TMA) built its Coronation Boulevard headquarters in Charlotte, it did so thinking that only half of the roughly 8,000 square feet would be occupied. This space would account for about twelve offices that would comfortably house the corporate headquarters employee base. Fast forward just a few short years and the entire building was full of TMA team members.

Roughly ten years later, growth occurred throughout the company and our Charlotte location was busting at the seams. We looked at all options,

but ultimately leased the same amount of space next door to accommodate our Special Projects Division as well as other aspects of the TMA Charlotte Operation. At that point I started to notice a change in our culture that was not necessarily for the better. There were fewer face to face meetings, management groups began to feel compartmentalized, and we really started to lose that family feel.

In 2013 we were again forced to find new space in Charlotte for additional growth. Since that time we have called the Graylon Park location our “Charlotte Operations Center”, or “Ops” for short. That location

houses Charlotte based Audit, Audit Support, Homestead Exemption Audit, Special Projects, and all associated management. This division left Corporate, Sales and Marketing, and Technology at the original corporate headquarters. We at TMA were officially split – you over there, and us over here. I found myself exactly where I didn’t want to be. Physical isolation from one another was no way to run an efficient and innovative shop. We needed a change.

Although our work delivery to our clients never faltered, I set off shortly after that move to put an end to Charlotte’s two office dilemma.



For two long years we searched the Charlotte region for a location that would allow us to return to living as one family. In late 2016, we identified the ideal property. After nine months of negotiation, planning, and upfit we proudly call 5121 Parkway Plaza Boulevard our new consolidated Corporate Headquarters.

Parkway is a truly unique property in its ability to completely fill TMA Charlotte's needs. The 23,500 square foot facility sits on a wonderful wooded 4.2 acre lot near Charlotte Douglas International Airport and downtown Charlotte. It also sits close to major interstates, making the

building easily accessible from every point on the compass. With the ability to house over ninety (90) Charlotte based team members, Parkway easily accommodates our sixty-five (65) current Charlotte employees that previously occupied two separate locations.

The interior of the building was almost custom made for TMA's strengths and needs. While Charlotte has its own group vertical areas (Audit, Homestead, Support, Technology, etc.), we also find the need to come together to share ideas and concerns. During our search for the ideal building, we wanted a combination of private offices, group work areas, and collaborative space for interaction. Parkway Plaza's first floor is comprised of individual offices, two board rooms, a technology open space, and many support areas. A hallway collaboration area makes for a casual environment to have impromptu meetings on almost any topic.

The second floor is broken into private offices, pods, and a large open central area. This format lends itself nicely for individual TMA teams to call home until it becomes necessary to meet as a larger or smaller group. The upstairs main conference room can comfortably seat twenty for quarterly meetings or large client events.

If I had to sum up Parkway's intent when we decided to make the move, I wouldn't hesitate to use the three C's. Parkway is built for Collaboration, Communication, and Creation of Value.

Through collaboration, we lean on and utilize all of our various strengths and experiences through group productivity and idea sharing. We at TMA have always talked about rowing in the same

direction. This building embodies that sentiment.

Communication builds on the idea of collaboration. We listen to our clients as they communicate their needs to us. We communicate with one another across the company to implement creative solutions to these problems. Hopefully we are then communicating the correct fix to ensure our clients' obligations to their taxpayers is met at the highest level.

Lastly, we at TMA are only in this job for one reason – creating value. Creating value is at the heart of everything we try to accomplish in our corporate lives. This means creating valuable services, tools, and products for our clients across a broad spectrum of issues. This also means that we create value for our fellow team members through the free and truthful exchange of ideas in a welcoming environment. That is what TMA Corporate seeks to achieve in our new home.

Although the entire staff from our original location has made a successful transition to Parkway, we are still in the process of integrating the Operations Center. Everyone agrees that the move, while hopefully expedited, should be in the best interest of our clients' ongoing needs. This will require a graduated move over the next two quarters with the entire Charlotte team in place in 2018. In the meantime, please feel free to come and visit! We have been giving tours to employees, business partners, and clients since August. We would be delighted to see you as well. This has been a unique and challenging project this year; and we know that we have created a home of collaboration, communication, and value for years to come.



ask scott

Scott Smith, Director of Human Resources, answers 25 questions | by Jennifer Dixon

I understand that you have spent time serving our country! Can you tell us about your background? *I was active duty Air Force for 5 years and the Navy Reserves for about 4 years. I was stationed in Arkansas and a Northern Italian village called Aviano.*

What is something that you learned during your time in the military? *The most important lessons were about responsibility and discipline.*

What led you to a career in Human Resources? *Customer service. It is an important component of any job. I have done things in and around HR throughout my career, but the transition to HR began with customer service training.*

How do you use your customer service skills at TMA? *I try to treat employees like customers. An important customer service practice is to make it easy for customers to do business with us. I try to employ that same strategy when working with TMA employees. I want to make everything easier for them!*

If you were in any other profession, then what would you want to be? *I would be a cowboy. Although I was born in Florida, the town I grew up in felt like the Midwest. We had a big rodeo arena where I would stop by to watch cowboys rope, ride, and everything for hours.*

Are you qualified to be a cowboy? *While stationed in Italy, I rode a bull for the first time ever. First time I rode I covered — meaning that I was able to stay on the bull for eight seconds. The reason I covered was that I was holding on for dear life and was too terrified to let go.*

Do you get to do something at work every day that you love? *Absolutely! I get to interact with our employees.*

Can you tell me about some of the objects in your office? *The most sentimental would be the artwork my daughters made in school along with pictures of my wife and kids. The bamboo on top of my bookshelf is a gift from an employee that I received about 11 years ago. I was also gifted the wooden Italy plaque upon the completion of my service.*

What is your greatest achievement? *Being a Dad. It's an amazing thing. You marvel in their accomplishments. They arrive as little blank slates and you are responsible for teaching them everything. My daughters have grown up to be such cool people. I'm a proud papa!*

Where are you from originally? *I spent equal amounts of time growing up in Southern Florida and Tennessee. I claim both as home.*

Who was your greatest influence growing up? *My mom. She taught me the importance of patience and often quoted a line from a Kenny Rogers song. "You've gotta know when to hold 'em. Know when to fold 'em." It's very good advice!*

What aspect of your personality adds the most value to the world? *My ability to talk to people and reason with them. This is something I perfected while working in hospitality.*

If you were to get a tattoo, what would the graphic be? *It would be the Yin and Yang symbol. I have joked with my wife about this over the years. The symbol represents peace and unity.*

What builds you up when you are in a bad mood? *Watching House Hunters International.*

If you could only choose one vacation destination where would you pick? *The beach. I can't go too long without the beach. There's sand in my blood!*

If you could live in any sitcom, which one could it be? *Cheers. Funniest show ever!*

What quote best describes your personal philosophy? *"When jarred, unavoidably, by circumstances, revert at once to yourself, and don't lose the rhythm more than you can help. You'll have a better grasp of the harmony if you keep on going back to it." - Marcus Aurelius*

What is the most recent advice that you gave your kids? *Save for retirement!*

If you were a city, which one would you be? *Ft. Lauderdale. It's close to the ocean and fun!*

What was the most embarrassing moment in your life? *When I was conducting a training class and ripped my pants in front of a group of people. You could hear the material rip. Everyone knew.*

What were your favorite bands during your teenage years? *Bad Company, Foreigner, and Styx. One of my cousins made me a mixtape, and I wore it out from listening to it all of the time on road-trips. Windows down and volume up!*

Are there any interesting skills that you want to learn? *I'd love to learn how to play music. I have the desire, but not the ability. My daughters play piano and guitar. I live vicariously through them.*

If you could write a book, what would it be called? *Expectations Will Be The Ruination Of The World*

Can you share a secret to your success? *Would it be repetitive to say you've gotta know when to hold 'em and know when to fold 'em?*

What would you most like to be remembered for? *A sense of humor!*



CAVA

Bringing our Cost Analysis Valuation System into a new era | by RJ Dellinger

As TMA grows from both an audit and a technology standpoint, so must the applications that support our business and customers. The evolution of a product is key to its success and longevity. This helped to make the case for updating our Cost Analysis Valuation System, or CAVS for short. CAVS was one of our first applications built for use by customers and has been a mainstay for TMA over the last 7 years.

If you have ever wondered what the solution is for taxpayers that do not file their business personal property tax listing, then the answer is CAVS!

Jurisdictions that use CAVS are offered a method of obtaining reliable and defensible valuations for assets in hundreds of business types using our accurate and up-to-date cost data. This functionality saves users the trouble of making arbitrary decisions on various business costs. Everything our current clients know and love about CAVS has been improved. An all new look and some additional features are just a couple of the enhancements that were made to improve the overall user experience.

The primary driver for updating CAVS

is to increase client engagement and enhance the customer experience. New coding practices, standards, and database architecture made this the opportune time for these changes. TMA will continue to offer a high level of support for the application, and the updates will allow TMA to easily make future enhancements, increase application stability, and keep the application much more user-friendly.

new look

The most readily apparent changes can be seen in the logo and color scheme (we know, the green logo will be sorely



missed). By updating the logo and color scheme, we have created a more refined look that pairs well with the modern layout of the new CAVS portal. The new look will also be featured in the future CAVS mobile app.

new login

CAVS login method has been updated to match the login for TMA's AuditPro and ProServ platforms. This equips users with a single sign-on that grants access to all of their TMA platforms.

new functions

The "Archive Estimate" function is

new and allows users to archive an estimate for viewing later on instead of completely deleting an estimate. Users can move archived estimates back into the "My Estimates" tab by choosing to unarchive an estimate.

new files

The Estimate PDF layouts have been changed to be more readable and user-friendly. We have not excluded any information from the old layouts. We just made them easier to read! A Summary PDF option has been added per request for those who prefer not to provide the valuation details.

new forms

The electronic CAVS subscription form within the TMA website has been updated to make it easier for future customers to sign up!

We feel confident that these updates to CAVS will help optimize user workflows and overall, make using the CAVS application more enjoyable.

New CAVS is available now, and all new subscriptions will be created in the new system. If you are an existing user, then you can transfer your existing estimates to the new system after registering. Old CAVS will only be available until January 31st, so be sure to start using the new CAVS before then. Stay tuned for news surrounding our upcoming CAVS mobile app that gives users all the power and capabilities of the CAVS web version, but on-the-go!

Questions about the update CAVS? Contact Renee Abernathy at 704.814.7602 or Renee.Abernathy@tma1.com.

available now!

If you are an existing CAVS customer, then follow the steps below to begin using the newest version of CAVS.

1. Call TMA toll-free at 800.951.5350
2. Check your inbox. We will generate an email to you with a link to the newest version of CAVS. Follow the link in the email to get started! All of your existing estimates from the former version of CAVS will still be available.

HOMESTEAD

Eliminate invalid residence exemptions



SOFTWARE

Asset valuations and online listing systems designed by TMA



AUDIT

Fairness and Equity across the taxbase



DISCOVERY

Locate non-filing businesses



DATA ANALYTICS

Open-source tool revolutionizing the way governments work with data

