

**COALITION FOR A BETTER MEMPHIS**  
**Shelby County Trustee Candidate Questionnaire**  
**Election Date: May 4, 2010**

Name: REGINA MORRISON NEWMAN \_\_\_\_\_

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**Section 1: Qualifications and Background (1 question)**

**Section 2: Vision and Strategies (2 questions)**

**Section 3: Improving the System (1 questions)**

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<b>1. QUALIFICATIONS AND BACKGROUND</b>
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- 1. How does your education, and experience in investment and management of institutional funds, accounting, personnel and technology systems management qualify you for this position?**

My college degree was in political science with emphasis on public administration. I then spent 16 years in government administration, half with the City of Memphis and half with the State of TN. My education and experience have been specific to the position of Trustee and have given me extensive experience in government, tax collection, finance, administration, personnel management and law. At the City, I began in Community Development, then served several years as an internal consultant on budgetary and staffing issues, then ultimately served as Assistant City Treasurer for 3 years. The City Treasurer's office performs the same property tax collection function for the City that the Trustee performs for Shelby County. While serving as Assistant City Treasurer, I implemented procedures which brought collection percentages to their highest points ever at that time, while reducing operating expenses. I left the Treasurer's office in 1987 for an appointment to the TN Department of Revenue under Governor Ned McWherter, where I assisted the Commissioner in researching revenue sources and implementing tax collection procedures for the State. When the Department of Youth Development was formed, I was asked to serve as Personnel Director for the department which ended up having 1200 employees. In 1994, after graduating from law school and passing the bar while working full-time, I returned to Memphis and began the private practice of law concentrating in the area of civil trial law. I have run a business and served individual clients, as well as large and small businesses for 15 years.

I have collected taxes for both the City and the State. I have studied and recommended staffing, budget and technological changes as a consultant. I have managed budgets, been responsible for revenue forecasting, managed large offices, supervised accounting staff, and handled recruitment, training and personnel issues on a much larger scale than the Trustee's office. I implemented technological changes and the first

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PCs in the City Treasurer's office and have kept up to date with technology which is now allowing us vast flexibility in the workplace and numerous options for improving convenience while cutting costs to the taxpayers. As an attorney, I understand the law applicable to the functions of the Trustee, as well as the law applicable to the personnel and banking practices pertinent to the office. As a long-time resident of Memphis and a person actively involved in the community, I feel I have a better concept of how to serve the citizens, as well as a concept of what the citizens want.

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## 2. VISION AND STRATEGIES

### 1. How efficient and technologically up-to-date is our present billing and collection system in the Trustee office?

The vast majority of technology in the Trustee's office is excellent and serves its purpose due to a committed staff, however technology is changing at an ever-increasing rate. The current billing system software functions adequately and still serves its purpose but it is 10 years old as I understand it, is outdated due to that age, and could be greatly improved upon in terms of efficiency. That billing and tracking system is being tweaked constantly and a new system would improve efficiency but would be expensive, costing in excess of \$2 million.

The hardware is less troublesome but an increase in storage capacity will eventually be necessary.

There is software available which would make the **delinquent** tax collection function more efficient than it is at present, at minimal cost in the long run and we are seriously considering that software.

The Trustee's office technology with regard to serving the taxpayers is excellent. The payment kiosks have won awards and more than pay for themselves in collections, and are invaluable in terms of convenience. The website is constantly complimented by taxpayers who can pay 24/7 online. We are testing the 'virtual vault' technology, have implemented positive pay, and are looking at making refunds by ACH. The Trustee's systems are backed up for disaster recovery both online, on our own hardware, and at an offsite disaster recovery location. The mobile cashiering operation this year was invaluable and highly successful and cost little to nothing – we are looking to expand it next year.

Numerous options are available to the citizens for making their payments via the website, and the kiosks but many taxpayers still prefer to deal with humans, thus the mobile cashiers filled that gap this tax season, as did the decision to put a staff member at each kiosk on the last day of tax season. Although many taxpayers are accustomed to coming downtown to make their tax payment with a cashier, the volume seemed significantly lighter this year at the County building due to the other options. We anticipate that as time goes by, and more taxpayers become comfortable with electronic payment options, the last week of tax season will cease to be such a rush.

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**2. How will you ensure effectiveness in the billing and collection of Shelby County taxes?**

We have had no issues I am aware of with the 'effectiveness' of billing on current taxes. 94% of taxes are collected each year before they go to lawsuit. The Trustee's office currently collects 99% of taxes within 2 to 3 years of the taxes becoming due. The ultimate collection rate after about 7 years is 99.9%.

The tax collection software previously mentioned would be beneficial and allow more effectiveness and greater collection opportunities in the area of delinquent tax collections.

We are looking at other options with regard to legislation allowing quicker action on delinquent personalty taxes. The real estate taxes will eventually be collected as the real estate can eventually be sold, however, personal property taxes are more difficult to collect when the personal property of a business has disappeared or a business has closed. More timely action – and legislation to allow same – would assist in effective collections.

**3. IMPROVING THE SYSTEM**

**1. Based on your awareness of voter concerns, what should be the Trustee's priorities during the next four years?**

I believe voters' concerns revolve moreso about government in general than the Trustee's office. The feedback received from taxpayers this tax season about the new programs was excellent and we can continue that excellent service. However, I believe that the voters want to see government in general cost less and do not want to see their taxes go up. At the same time, the voters want funding priorities put on matters that affect them most, whether those be crime or The Med.

Thus, anything the Trustee's office can do to decrease costs while maintaining collection percentages would have to be a priority. In the Trustee's office, it is technology which allows us to decrease costs as time goes by. Tracking our volumes in each section allows us to know how many people we need in the call center or in remittance during the peak season and

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how many the remainder of the year. Using new technology allows us to have payments made via kiosks and the website, other than using personnel which are a more expensive option. Any function which can be automated and streamlined is a priority, but contrary to other offices, we cannot cut back on our primary function of collecting the County's revenues. Allowing collection percentages to decrease would defeat the purpose of the office.

Also, I know that the City's taxpayers would save money by the City outsourcing its tax collections to the Trustee. Finalizing such an arrangement should continue to be a priority for the Trustee.

Community outreach by the Trustee's office to sign up every eligible taxpayer for tax relief should continue to be a priority. Not only is the program beneficial to the taxpayers who qualify, the program shifts dollars from the State to the County bringing in more funds locally.

**2. Do you have an opinion on whether appointments versus election of this office, is a better method?**

I have an ongoing belief that checks and balances are a very necessary process in government. The County government needs funds and that is a situation that has not changed and is not likely to change in these times. The Trustee's function is not only collecting taxes, but accounting for, investing and safeguarding the County treasury. I believe that the treasury duties should remain separate and apart from any other outside influence, except the oversight of the people. Accurate accounting and reporting are vital and should be free from manipulation, influence, conflict of interest, or creative accounting. If a Trustee were appointed by and responsible to any County mayor, rather than to the people of the County, I believe the door would be opened for potential problems which we do not have now. The Trustee has a responsibility to the people to properly maintain the treasury, not to perform the will of any particular County administration or to manipulate accounts to support the position taken by any particular County administration. The County needs an independent banker. The Trustee has a personal bond of \$42 million dollars and is responsible to the people for a reason.

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