TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

BOARD MEMBERS
TOM BUCKLE
DR. OSEZUA EHIYAMEN
BRUCE ELFANT
VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

LEANA MANN
CHIEF APPRAISER

850 EAST ANDERSON LANE and VIA VIDEOCONFERENCE
The public may hear and view this meeting while in progress online at
https://traviscad.org/boardmeetings

AGENDA
PUBLIC HEARING – THURSDAY, JUNE 13, 2024- 11:30 a.m.

1. CALL TO ORDER
2. ESTABLISHMENT OF QUORUM
3. CITIZENS COMMUNICATION - All public comment will occur at the beginning of the meeting starting at 11:30 AM.
4. **PUBLIC HEARING ON PROPOSED 2025 TRAVIS CENTRAL APPRAISAL DISTRICT BUDGET**
    a. OPEN PUBLIC HEARING
    b. RECEIVE PUBLIC COMMENT ON 2025 PROPOSED BUDGET
    c. CLOSE PUBLIC HEARING
5. **PUBLIC HEARING ON PROPOSED 2025/2026 TRAVIS CENTRAL APPRAISAL DISTRICT REAPPRAISAL PLAN AMENDMENTS**
    a. OPEN PUBLIC HEARING
    b. RECEIVE PUBLIC COMMENT ON PROPOSED 2025/2026 REAPPRAISAL PLAN AMENDMENTS
    c. CLOSE PUBLIC HEARING
6. ADJOURNMENT

THE BOARD MAY MEET IN EXECUTIVE SESSION TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 *et seq* [THE TEXAS OPEN MEETING ACT] INCLUDING:

SEC. 551.071;	Consultation with attorney regarding pending or contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas.
SEC. 551.072;	Deliberations regarding real property
SEC. 551.074;	Personnel matters; to deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of the Chief Appraiser or other public officer or employee; or to hear a complaint or charge
SEC. 551.076;	Deliberations regarding security devices

The Travis Central Appraisal District is committed to compliance with the Americans with Disabilities Act. Reasonable modifications and equal access to communications will be provided upon request. Please call 512-834-9317 extension 313 for information. For a sign language interpreter, please call 48 hours prior to the meeting.

CERTIFICATE OF POSTING

I, Davina Barton, Executive Assistant of the Travis Central Appraisal District, do hereby certify that on the 3rd day of June 2024, by 4 o'clock P.M., this Notice of Meeting was posted at the District's Offices, located at 850 East Anderson Lane, Austin, Texas 78752. This Notice of Meeting was posted in a place readily accessible to the general public at all times for 72 continuous hours prior to the meeting, filed with the Travis County Clerk for posting by the Clerk at the Travis County Courthouse, and posted on the District's website.

By: *Davina Barton*
Printed Name: Davina Barton
Title: Executive Assistant

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
THERESA BASTIAN
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AGENDA
REGULAR MEETING –THURSDAY, JUNE 13, 2024 – 11:35 A.M.

1. CALL TO ORDER

2. ESTABLISHMENT OF QUORUM

3. CITIZENS COMMUNICATION – *Public comment will be allowed via teleconference. All public comment will occur at the beginning of the meeting. To speak at this meeting, persons must register online at* ***https://traviscad.org/speakerregistration*** *no later than 1.5 hours prior to the meeting start time. Approximately one hour prior to the meeting start time, remote speakers will receive email instructions on how to log in to participate in the meeting. Emails will come from outreach@tcadcentral.org.*

4. CONSENT AGENDA—*These items may be acted upon by one motion. No separate discussion or vote on any of the items will be held unless requested by a board member.*
   a. APPROVAL OF THE MINUTES OF THE APRIL 29, 2024, REGULAR MEETING
   b. APPROVAL OF THE MINUTES OF THE MAY 13, 2024, SPECIAL MEETING
   c. SECTION 25.25B REPORT
   d. ACCOUNTING STATEMENTS
   e. BUDGET LINE-ITEM TRANSFERS
   f. PERSONNEL REPORT

5. REGULAR AGENDA
   a. DISCUSSION AND POSSIBLE ACTION ON TAXPAYER LIAISON REPORT
   b. DISCUSSION AND POSSIBLE ACTION ON APPRAISAL REVIEW BOARD CHAIRMAN REPORT
   c. DISCUSSION AND POSSIBLE ACTION ON 2023 ANNUAL COMPREHENSIVE FINANCIAL REPORT AND AUDIT RESULTS
   d. DISCUSSION AND POSSIBLE ACTION ON CHIEF APPRAISER REPORT TO INCLUDE: 2024 CERTIFICATION STATUS, COMMUNITY OUTREACH, TAXPAYER EXPERIENCE SNAPSHOT, AND FINAL UPDATE ON BOARD OF DIRECTOR ELECTION COST
   e. DISCUSSION AND POSSIBLE ACTION TO INCLUDE ADOPTION OF 2025 PROPOSED BUDGET
   f. DISCUSSION AND POSSIBLE ACTION TO INCLUDE ADOPTION OF 2025/2026 REAPPRAISAL PLAN
   g. DISCUSSION AND POSSIBLE ACTION TO INCLUDE ADOPTION OF TEXAS COUNTY AND DISTRICT RETIREMENT SYSTEM (TCDRS) RETIREMENT PLAN RATE FOR 2025 PLAN YEAR
   h. DISCUSSION AND POSSIBLE ACTION TO INCLUDE ADOPTION OF PROPOSED PERSONNEL POLICY
   i. DISCUSSION AND POSSIBLE ACTION ON PURCHASE OF DELL SERVERS FOR VIRTUAL DESKTOP ENVIRONMENT
   j. DISCUSSION AND POSSIBLE ACTION ON LITIGATION AND APPEALS RELATED TO PENDING AND ANTICIPATED LAWSUITS

k. DISCUSSION AND POSSIBLE ACTION TO ADD ITEMS TO FUTURE AGENDAS
l. ADJOURNMENT

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SEC. 551.074;	Personnel matters; to deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of the Chief Appraiser or other public officer or employee; or to hear a complaint or charge
SEC. 551.076;	Deliberations regarding security devices

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CERTIFICATE OF POSTING

I, Davina Barton, Executive Assistant of the Travis Central Appraisal District, do hereby certify that on the 6th day of June, 2024, by 5 o'clock P.M. this Notice of Meeting was posted at the District's Offices, located at 850 East Anderson Lane, Austin, Texas 78752. This Notice of Meeting was posted in a place readily accessible to the general public at all times for 72 continuous hours prior to the meeting, filed with the Travis County Clerk for posting by the Clerk at the Travis County Courthouse, and posted on the District's website.

By: *Davina Barton*
Printed Name: Davina Barton
Title: Executive Assistant

Travis Central Appraisal District

Board of Director's Meeting June 13, 2024 11:35 a.m.

Prepared: June 10, 2024
Revised: June 12, 2024

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
THERESA BASTIAN
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

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REGULAR MEETING –THURSDAY, JUNE 13, 2024 – 11:35 A.M.

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   d. ACCOUNTING STATEMENTS
   e. BUDGET LINE-ITEM TRANSFERS
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By: *Davina Barton*
Printed Name: Davina Barton
Title: Executive Assistant

CONSENT AGENDA

4A

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

LEANA MANN
CHIEF APPRAISER

BOARD MEMBERS
TOM BUCKLE
BRUCE ELFANT
VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
DR. OSEZUA EHIYAMEN
BLANCA ZAMORA-GARCIA

TCAD - BOARD OF DIRECTORS
MINUTES OF THE APRIL 29, 2024 MEETING

1. Call to order

Meeting called to order by James Valadez at 11:36 a.m. on April 29, 2024.

2. Establishment of Quorum

James Valadez, Chairperson	Travis County	Present
Nicole Conley, Secretary	City of Austin	Present
Tom Buckle	West Travis County	Present- Late
Elizabeth Montoya	East Travis County	Absent
Debbie Cartwright	Austin ISD	Absent
Vivek Kulkarni	Travis County	Present
Dr. Osezua Ehiyamen	Austin ISD/City of Austin	Absent
Blanca Zamora-Garcia	City of Austin	Present
Bruce Elfant	Travis Co. Tax Assessor-Collector (Non-voting)	Present
Jie Li	Austin ISD	Present

Also present were Leana Mann, Chief Appraiser, Mike Mills, Deputy Chief Appraiser, and Dustin Banks, In-house Counsel

3. Citizens Communication

4. Consent Agenda

a. APPROVAL OF THE MINUTES OF THE February 1, 2024, MEETING
b. SECTION 25.25B REPORT
c. ACCOUNTING STATEMENTS
d. PERSONNEL REPORT

MOTION: Approve the Consent Agenda
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Nicole Coney **SECONDER**: Blanca Zamora-Garcia

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Jei Li, Vivek Kulkarni

ABSENT: Debbie Cartwright, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

5A. Discussion and possible action on Taxpayer Liaison Report.

Members of the board heard from Betty Thompson, Taxpayer Liaison

RESULT: DISCUSSED

5B. Discussion and possible action on Appraisal Review Board Chairman Report

Members of the board heard from Craig Phifer, Appraisal Review Board Chairman, and Dustin Banks, In-house Counsel

RESULT: DISCUSSED

5C. Discussion and possible action on the 2025 proposed budget to include directives to staff regarding the proposed budget.

Members of the board heard from Leana Mann, Chief Appraiser

MOTION: Approve the 2025 proposed budget
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Nicole Conley **SECONDER**: Blanca Zamora-Garcia

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Jei Li, Tom Buckle, Vivek Kulkarni

ABSENT: Debbie Cartwright, Elizabeth Montoya, Dr. Osezua Ehiyamen

5D. Discussion and possible action on Chief Appraiser Report to include: 2023 Annual Report, 2024 Mass Appraisal Report, 2024 Notices of Appraised Value, 2024 Protest Season, Taxpayer Outreach Programs, and Public Relations Procedure Manual.

Members of the board heard from Leana Mann, Chief Appraiser

RESULT: DISCUSSED

5E. Discussion and possible action on Taxpayer Experience Evaluation Program.

Members of the board heard from Cynthia Martinez, Chief Strategy Officer

RESULT: DISCUSSED

5F. Discussion and possible action related to appointment of Deputy Taxpayer Liaison Officer.

Members of the board heard from Leana Mann, Chief Appraiser

MOTION: Motion to appoint the Deputy Taxpayer Liaison Officer.
RESULT: **APPROVED [UNANIMOUS]**

MOVER: Blanca Zamora-Garcia **SECONDER**: Tom Buckle

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Jei Li, Tom Buckle

ABSENT: Debbie Cartwright, Elizabeth Montoya, Dr.Osezua Ehiyamen, Vivek Kulkarni

5G. Discussion and possible action on the election for Travis Central Appraisal District Board of Directors, Place 1, Place 2, and Place 3.

Members of the board heard from Leana Mann, Chief Appraiser

RESULT: DISCUSSED

5H. Discussion and possible action on litigation and appeals related to pending and anticipated lawsuits.

RESULT: NONE DISCUSSED

5I. Discussion and posible action to add ítems to future agendas.

- 2023 auditor presentation in June meeting
- Public hearings for 2025 proposed budget and 2025/2026 reappraisal plan will be held in June

5J. Adjournment

MOTION: Approve to adjourn meeting at 1:22 PM
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Blanca Zamora-Garcia

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Jei Li, Tom Buckle

ABSENT: Debbie Cartwright, Elizabeth Montoya, Dr.Osezua Ehiyamen, Vivek Kulkarni

Respectfully submitted,

_____
Nicole Conley, Secretary

Approved:

_____
James Valadez, Chairperson

4B

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
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SECRETARY/TREASURER

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VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
DR. OSEZUA EHIYAMEN
BLANCA ZAMORA-GARCIA

TCAD - BOARD OF DIRECTORS
MINUTES OF THE MAY 13, 2024 MEETING

1. Call to order

The meeting was called to order by James Valadez at 2:38 p.m. on May 13, 2024.

2. Establishment of Quorum

Section 67.004 of the Election Code states two members of the authority constitute a quorum for purposes of canvassing an election.

James Valadez, Chairperson	Travis County	Present
Nicole Conley, Secretary	City of Austin	Absent
Tom Buckle	West Travis County	Absent
Elizabeth Montoya	East Travis County	Absent
Debbie Cartwright	Austin ISD	Absent
Vivek Kulkarni	Travis County	Present
Dr. Osezua Ehiyamen	Austin ISD/City of Austin	Present
Blanca Zamora-Garcia	City of Austin	Present
Bruce Elfant	Travis Co. Tax Assessor-Collector (Non-voting)	Present
Jie Li	Austin ISD	Absent

Also present was Leana Mann, Chief Appraiser

3. Citizens Communication

4A. Discussion and possible action to approve a resolution canvassing the results of the May 4, 2024, election.

Members of the board heard from James Valadez, Chairperson.

Travis Central Appraisal District Board of Directors Place 1:

1. Don Zimmerman with 15,720 votes for 30.54% of the votes.
2. Jett Henna with 35,761 votes for 69.46% of the votes.

The total vote count on Place 1 was 54,481 total vote count cast.

Travis Central Appraisal District Board of Directors Place 2:

1. Shenghao Daniel Wang with 34 661 votes, for 67.4% of the votes.
2. Jonathan Patschke with 3,935 votes for 7.65% of the total votes.
3. Matt Mackowiak, with 12,832 votes cast for 24.95% of the total vote.

With 54,428 of the total votes cast for Place 2.

Travis Central Appraisal District Board of Directors Place 3:

1. Bill May 13,560 votes for 26.96% of the total vote.
2. Dick Levine with 26,746 votes for 73.04% of the votes.

For Place 3, a total of 50,306 total votes were cast.

MOTION: Approve the Resolution as drafted
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Blanca Zamora-Garcia **SECONDER**: Dr.Osezua Ehiyamen

AYES: James Valadez, Blanca Zamora-Garcia, Dr. Osezua Ehiyamen

ABSENT: Debbie Cartwright, Elizabeth Montoya, Jei Li, Nicole Conley, Tom Buckle, Vivek Kulkarni

5. Adjournment

MOTION: Approve to adjourn meeting at 2:42 PM
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Dr. Osezua Ehiyamen **SECONDER:** Blanca Zamora-Garcia

AYES: James Valadez, Blanca Zamora-Garcia, Dr. Osezua Ehiyamen

ABSENT: Debbie Cartwright, Elizabeth Montoya, Jei Li, Nicole Conley, Tom Buckle, Vivek Kulkarni

Respectfully submitted,

_____
Nicole Conley, Secretary

Approved:

_____
James Valadez, Chairperson

4C

CONSENT AGENDA

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
160030	2021	FIELD STEVEN JOHN &	LOT 730 BRIARCLIFF INC SEC 11	21927 BRIARCLIFF DR, TX 78669	$416,061	$416,061
CORRECT HOMESITE PER TIMELY FILED APPLICATION. 5/7/24 CML						
160030	2020	FIELD STEVEN JOHN &	LOT 730 BRIARCLIFF INC SEC 11	21927 BRIARCLIFF DR, TX 78669	$376,092	$376,092
CORRECT HOMESITE PER TIMELY FILED APPLICATION. 5/7/24 CML						
160030	2019	FIELD STEVEN JOHN &	LOT 730 BRIARCLIFF INC SEC 11	21927 BRIARCLIFF DR, TX 78669	$376,092	$376,092
CORRECT HOMESITE PER TIMELY FILED APPLICATION. 5/7/24 CML						
190417	2023	ALTER KENNETH	PERSONAL PROPERTY MOBILE HOME 1980 14 X 40 S# MANATEE	5710 GILBERT RD, TX 78724	$6,384	$0
REMOVING PER CONVERSATION WITH CUSTOMER AND CUSTOMER SERVICE. 5/15/2024 RCJ						
190417	2022	ALTER KENNETH	PERSONAL PROPERTY MOBILE HOME 1980 14 X 40 S# MANATEE	5710 GILBERT RD, TX 78724	$6,384	$0
REMOVING PER CONVERSATION WITH CUSTOMER AND CUSTOMER SERVICE. 5/15/2024 RCJ						
244346	2019	FRITZ BOBBY G & YVONNE	ABS 217 SUR 15 DAVIS G W ACR .09	BURRELL DR, TX 78757	$22,800	$22,800
DELETE - DOUBLE-ASSESSED W/PID 244302 FOR 2019-2023						
244346	2020	FRITZ BOBBY G & YVONNE	ABS 217 SUR 15 DAVIS G W ACR .09	BURRELL DR, TX 78757	$22,800	$22,800
DELETE - DOUBLE-ASSESSED W/PID 244302 FOR 2019-2023						
244346	2021	FRITZ BOBBY G & YVONNE	ABS 217 SUR 15 DAVIS G W ACR .09	BURRELL DR, TX 78757	$22,800	$22,800
DELETE - DOUBLE-ASSESSED W/PID 244302 FOR 2019-2023						
244346	2022	FRITZ BOBBY G & YVONNE	ABS 217 SUR 15 DAVIS G W ACR .09	BURRELL DR, TX 78757	$38,000	$38,000
DELETE - DOUBLE-ASSESSED W/PID 244302 FOR 2019-2023						
244346	2023	FRITZ BOBBY G & YVONNE	ABS 217 SUR 15 DAVIS G W ACR .09	BURRELL DR, TX 78757	$26,000	$26,000
DELETE - DOUBLE-ASSESSED W/PID 244302 FOR 2019-2023						
431254	2023	MEADOWS RANDY	PERSONAL PROPERTY MOBILE HOME 1996 14 X 66 FLEETWOOD	25504 RANCH RD, LEANDER TX	$10,450	$0
REMOVING MOHO PER OWNER TO BE ABLE TO CLEAR LIENS FOR TAX OFFICE TO DEMOLISH MOHO. 2/15/2024 RCJ						
431254	2022	MEADOWS RANDY	PERSONAL PROPERTY MOBILE HOME 1996 14 X 66 FLEETWOOD	25504 RANCH RD, LEANDER TX	$12,862	$0
REMOVING MOHO PER OWNER TO BE ABLE TO CLEAR LIENS FOR TAX OFFICE TO DEMOLISH MOHO. 2/15/2024 RCJ						
431254	2021	MEADOWS RANDY	PERSONAL PROPERTY MOBILE HOME 1996 14 X 66 FLEETWOOD	25504 RANCH RD, LEANDER TX	$16,496	$0
REMOVING MOHO PER OWNER TO BE ABLE TO CLEAR LIENS FOR TAX OFFICE TO DEMOLISH MOHO. 2/15/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
431254	2020	MEADOWS RANDY	PERSONAL PROPERTY MOBILE HOME 1996 14 X 66 FLEETWOOD	25504 RANCH RD, LEANDER TX	$16,496	$0
REMOVING MOHO PER OWNER TO BE ABLE TO CLEAR LIENS FOR TAX OFFICE TO DEMOLISH MOHO. 2/15/2024 RCJ						
431254	2019	MEADOWS RANDY	PERSONAL PROPERTY MOBILE HOME 1996 14 X 66 FLEETWOOD	25504 RANCH RD, LEANDER TX	$16,496	$0
REMOVING MOHO PER OWNER TO BE ABLE TO CLEAR LIENS FOR TAX OFFICE TO DEMOLISH MOHO. 2/15/2024 RCJ						
575642	2023	PUSATERI MICHAEL A & BRENDA L	PERSONAL PROPERTY MOBILE HOME 2003 28 X 44 S#PH178822A/B PALM HARBOR/KSP344C6	7707 WYNNE LN, AUSTIN TX 78745	$56,881	$0
MOBILE HOME SOLD IN 2011 AND MOVED TO BASTROP COUNTY. 3/29/2024 RCJ						
575642	2022	PUSATERI MICHAEL A & BRENDA L	PERSONAL PROPERTY MOBILE HOME 2003 28 X 44 S#PH178822A/B PALM HARBOR/KSP344C6	7707 WYNNE LN, AUSTIN TX 78745	$59,875	$0
MOBILE HOME SOLD IN 2011 AND MOVED TO BASTROP COUNTY. 3/29/2024 RCJ						
575642	2021	PUSATERI MICHAEL A & BRENDA L	PERSONAL PROPERTY MOBILE HOME 2003 28 X 44 S#PH178822A/B PALM HARBOR/KSP344C6	7707 WYNNE LN, AUSTIN TX 78745	$45,709	$0
MOBILE HOME SOLD IN 2011 AND MOVED TO BASTROP COUNTY. 3/29/2024 RCJ						
575642	2020	PUSATERI MICHAEL A & BRENDA L	PERSONAL PROPERTY MOBILE HOME 2003 28 X 44 S#PH178822A/B PALM HARBOR/KSP344C6	7707 WYNNE LN, AUSTIN TX 78745	$45,709	$0
MOBILE HOME SOLD IN 2011 AND MOVED TO BASTROP COUNTY. 3/29/2024 RCJ						
722155	2023	RENAVATA MANUEL	JOHN'S MH PARK, SPACE H, SN1 5X12R2535; HUD# TXS0521164	3904 PRAIRIE LN H, TX 78728	$1,910	$0
MOBILE HOME MOVED TO BASTROP IN 2022. 1/29/2024 RCJ						
766985	2023	WOODS BOBBIE	PERSONAL PROPERTY MOBILE HOME 10 X 32	3000 WHITESTONE BLVD, TX 78613	$4,576	$0
MOBILE HOME MOVED OFF THE PROPERTY IN 2015. REMOVING VALUATION. 3/13/2024 RCJ						
766985	2022	WOODS BOBBIE	PERSONAL PROPERTY MOBILE HOME 10 X 32	3000 WHITESTONE BLVD, TX 78613	$4,805	$0
MOBILE HOME MOVED OFF THE PROPERTY IN 2015. REMOVING VALUATION. 3/13/2024 RCJ						
766985	2021	WOODS BOBBIE	PERSONAL PROPERTY MOBILE HOME 10 X 32	3000 WHITESTONE BLVD, TX 78613	$2,320	$0
MOBILE HOME MOVED OFF THE PROPERTY IN 2015. REMOVING VALUATION. 3/13/2024 RCJ						
766985	2020	WOODS BOBBIE	PERSONAL PROPERTY MOBILE HOME 10 X 32	3000 WHITESTONE BLVD, TX 78613	$2,667	$0
MOBILE HOME MOVED OFF THE PROPERTY IN 2015. REMOVING VALUATION. 3/13/2024 RCJ						
811893	2021	HUTSON RUSSELL	LOT 14 BLK 26 MUELLER SEC VI SUBD	2133 ROBERT BROWNING ST, 78723	$198,000	$198,000
CORRECT HOMESITE PER TIMELY FILED APPLICATION. 5/7/24 CML						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
831681	2021	VAN HEE RYAN A & LEAH JEAN ARNELL	LOT 23 BLK 95 MUELLER SEC VII-C SUBD AMENDED	4007 VAUGHAN ST, AUSTIN TX 78723	$225,001	$225,001
CORRECT HOMESITE PER TIMELY FILED APPLICATION. 5/7/24 CML						
836784	2023	RENDON RUDOLPH	RIVER RIDGE MH PARK, SPACE 413, SN1 CSS012737TXA; SN2 CSS012737TXB; HUD# HWC0422961; HUD#2 HWC0422962	1601 E SLAUGHTER LN 413, TX 78747	$95,472	$0
NEW OWNER OF PID FOR 2023 TAX YEAR. 1/29/2024 RCJ						
839680	2024	FISHER GREGORY D	PERSONAL PROPERTY M/H SERIAL# APTX085213A LABEL# NTA1592321	11809 SCHRIBER RD, BUDA TX 78610	$73,776	$0
MOBILE HOME SOLD 11/28/2023. REMOVING FROM 2024 ROLL. 4/25/2024 RCJ						
839781	2023	LEE VERONICA K &	PERSONAL PROPERTY M/H SERIAL# TXFLY12A58716AV11 LABEL# RAD1229595	19915 LOCKWOOD RD, TX 78653	$24,721	$0
MOBILE HOME SOLD AND MOVED IN 2021. REMOVING 2023 AND 2022 VALUATIONS. 3/4/2024 RCJ						
839781	2022	LEE VERONICA K &	PERSONAL PROPERTY M/H SERIAL# TXFLY12A58716AV11 LABEL# RAD1229595	19915 LOCKWOOD RD, TX 78653	$28,625	$0
MOBILE HOME SOLD AND MOVED IN 2021. REMOVING 2023 AND 2022 VALUATIONS. 3/4/2024 RCJ						
855713	2023	SUN HOMES SERVICES	RIVER RANCH MH PARK, SPACE 266, SN1 CW2015760TXA; SN2 CW2015760TXB; HUD# NTA1619615; HUD#2 NTA1619616	13021 DESSAU RD 266, TX 78754	$46,208	$0
NEW MOHO OWNER FOR 2022, REMOVE FROM 2023 ROLL. 2/1/2024 RCJ						
870910	2022	HERNANDEZ MARIA GUADALUPE	CHATEAU AT ONION CRK MH PARK, SPACE 260, SN1 TXFLW66B03543CG12; SN2 TXFLW66A03543CG12; HUD# RAD1083798; HUD#2 RAD1083799	4646 EDGE CREEK DR 260, TX 78744	$30,260	$0
MOBILE HOME DUPLICATE OF 914307. REMOVING 2020-2022 VALUATION. 3/13/2024 RCJ						
870910	2021	HERNANDEZ MARIA GUADALUPE	CHATEAU AT ONION CRK MH PARK, SPACE 260, SN1 TXFLW66B03543CG12; SN2 TXFLW66A03543CG12; HUD# RAD1083798; HUD#2 RAD1083799	4646 EDGE CREEK DR 260, TX 78744	$24,976	$0
MOBILE HOME DUPLICATE OF 914307. REMOVING 2020-2022 VALUATION. 3/13/2024 RCJ						
870910	2020	HERNANDEZ MARIA GUADALUPE	CHATEAU AT ONION CRK MH PARK, SPACE 260, SN1 TXFLW66B03543CG12; SN2 TXFLW66A03543CG12; HUD# RAD1083798; HUD#2 RAD1083799	4646 EDGE CREEK DR 260, TX 78744	$24,976	$0
MOBILE HOME DUPLICATE OF 914307. REMOVING 2020-2022 VALUATION. 3/13/2024 RCJ						
871469	2024	CARDENAS GUADALUPE	DESSAU FOUNTAIN ESTATES, SPACE 367, SN1 CHVM119768012375; HUD# RAD0978243	508 E HOWARD LN 367, TX 78753	$18,337	$0
THIS OWNER HAS SOLD THE MOBILE HOME BACK IN 2017. REMOVING 2024 VALUATION. 5/9/2024 RCJ						
871469	2023	CARDENAS GUADALUPE	DESSAU FOUNTAIN ESTATES, SPACE 367, SN1 CHVM119768012375; HUD# RAD0978243	508 E HOWARD LN 367, TX 78753	$16,440	$0
THIS OWNER HAS SOLD THE MOBILE HOME BACK IN 2017. REMOVING 2020-2023 VALUATION. 5/9/2024 RCJ						
871469	2022	CARDENAS GUADALUPE	DESSAU FOUNTAIN ESTATES, SPACE 367, SN1 CHVM119768012375; HUD# RAD0978243	508 E HOWARD LN 367, TX 78753	$16,440	$0
THIS OWNER HAS SOLD THE MOBILE HOME BACK IN 2017. REMOVING 2020-2023 VALUATION. 5/9/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
871469	2021	CARDENAS GUADALUPE	DESSAU FOUNTAIN ESTATES, SPACE 367, SN1 CHVM119768012375; HUD# RAD0978243	508 E HOWARD LN 367, TX 78753	$8,896	$0
THIS OWNER HAS SOLD THE MOBILE HOME BACK IN 2017. REMOVING 2020-2023 VALUATION. 5/9/2024 RCJ						
871469	2020	CARDENAS GUADALUPE	DESSAU FOUNTAIN ESTATES, SPACE 367, SN1 CHVM119768012375; HUD# RAD0978243	508 E HOWARD LN 367, TX 78753	$8,896	$0
THIS OWNER HAS SOLD THE MOBILE HOME BACK IN 2017. REMOVING 2020-2023 VALUATION. 5/9/2024 RCJ						
872685	2023	HERNANDEZ ADAN	COMFORT MH PARK, SPACE 8, SN1 12523719; HUD# TEX0550213	7403 E RIVERSIDE DR 8, TX 78741	$21,280	$0
MOBILE HOME ALONG WITH MH PARK DEMOLISHED IN 2020. 4/4/2024 RCJ						
872685	2022	HERNANDEZ ADAN	COMFORT MH PARK, SPACE 8, SN1 12523719; HUD# TEX0550213	7403 E RIVERSIDE DR 8, TX 78741	$21,280	$0
MOBILE HOME ALONG WITH MH PARK DEMOLISHED IN 2020. 4/4/2024 RCJ						
872685	2021	HERNANDEZ ADAN	COMFORT MH PARK, SPACE 8, SN1 12523719; HUD# TEX0550213	7403 E RIVERSIDE DR 8, TX 78741	$9,089	$0
MOBILE HOME ALONG WITH MH PARK DEMOLISHED IN 2020. 4/4/2024 RCJ						
881084	2023	SUN HOME SERVICES INC.	RIVER RANCH MH PARK, SPACE 546, SN1 PHH320TX1525429A; SN2 PHH320TX1525429B; HUD# PFS1159014; HUD#2 PFS1159015	13021 DESSAU RD 546, TX 78754	$53,968	$0
NEW OWNER OF MOHO ON 2023 ROLL. 2/6/2024 RCJ						
886501	2023	SUN HOME SERVICES, INC.	RIVER RANCH MH PARK, SPACE 693, SN1 PHH320TX1525468A; SN2 PHH320TX1525468B; HUD# PFS1159075; HUD#2 PFS1159076	13021 DESSAU RD 693, AUSTIN TX 78754	$54,575	$0
NEW OWNER FOR 2023 ROLL. REMOVING 2023. 2/1/2024 RCJ						
886670	2023	SUN HOME SERVICES	RIVER RANCH MH PARK, SPACE 424, SN1 125000HA003272A; SN2 125000HA003272B; HUD# NTA1641119; HUD#2 NTA1641120	13021 DESSAU RD 424, AUSTIN TX 78754	$99,878	$0
NEW MOHO OWNER FOR 2022, REMOVE FROM 2023 ROLL. 2/1/2024 RCJ						
886984	2023	CARILLO MARIA	HIGH MEADOWS MH PARK, SPACE 307, SN1 CLW039888TX; HUD# NTA1689995	8012 TOPANGA LN 307, TX 78724	$93,208	$0
MOHO MOVED TO BASTROP IN 2018, REMOVING VALUATIONS TO 2019. 3/29/2024 RCJ						
886984	2022	CARILLO MARIA	HIGH MEADOWS MH PARK, SPACE 307, SN1 CLW039888TX; HUD# NTA1689995	8012 TOPANGA LN 307, TX 78724	$95,351	$0
MOHO MOVED TO BASTROP IN 2018, REMOVING VALUATIONS TO 2019. 3/29/2024 RCJ						
886984	2021	CARILLO MARIA	HIGH MEADOWS MH PARK, SPACE 307, SN1 CLW039888TX; HUD# NTA1689995	8012 TOPANGA LN 307, TX 78724	$38,675	$0
MOHO MOVED TO BASTROP IN 2018, REMOVING VALUATIONS TO 2019. 3/29/2024 RCJ						
886984	2020	CARILLO MARIA	HIGH MEADOWS MH PARK, SPACE 307, SN1 CLW039888TX; HUD# NTA1689995	8012 TOPANGA LN 307, TX 78724	$38,675	$0
MOHO MOVED TO BASTROP IN 2018, REMOVING VALUATIONS TO 2019. 3/29/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
886984	2019	CARILLO MARIA	HIGH MEADOWS MH PARK, SPACE 307, SN1 CLW039888TX; HUD# NTA1689995	8012 TOPANGA LN 307, TX 78724	$38,675	$0
MOHO MOVED TO BASTROP IN 2018, REMOVING VALUATIONS TO 2019. 3/29/2024 RCJ						
887043	2023	SOTO ISMAEL &	DESSAU FOUNTAIN ESTATES, SPACE 233, SN1 EMHOK12968B; SN2 EMHOK12968F; HUD# TRA0221988; HUD#2 TRA0221989	508 E HOWARD LN 233, TX 78753	$17,002	$0
OWNER MOVED OUT IN 2021. REMOVING 2022-2024. 3/1/2024 RCJ						
887043	2022	SOTO ISMAEL &	DESSAU FOUNTAIN ESTATES, SPACE 233, SN1 EMHOK12968B; SN2 EMHOK12968F; HUD# TRA0221988; HUD#2 TRA0221989	508 E HOWARD LN 233, TX 78753	$19,219	$0
OWNER MOVED OUT IN 2021. REMOVING 2022-2024. 3/1/2024 RCJ						
887103	2023	ALBARRAN JOSE	OAKCREST COMMUNITY MH PARK, SPACE 383, SN1 TXFLY12A59203FD11; HUD# RAD1270885	7601 DAFFAN LN 383, TX 78724	$36,346	$0
MOBILE HOME MOVED IN 2022, REMOVING 2023 FROM VALUATION. 3/7/2024 RCJ						
887486	2024	PREJEAN STEVEN RODRICK	PERSONAL PROPERTY MH S#CLW038747TX L#NTA1663726	7715 OLD BEE CAVES RD, AUSTIN TX 78735	$104,394	$0
MOBILE HOME MOVED TO BASTROP COUNTY IN 2022, REMOVING FROM 2023 AND 2024 ROLLS. 4/24/2024 RCJ						
887486	2023	PREJEAN STEVEN RODRICK	PERSONAL PROPERTY MH S#CLW038747TX L#NTA1663726	7715 OLD BEE CAVES RD, AUSTIN TX 78735	$70,881	$0
MOBILE HOME MOVED TO BASTROP COUNTY IN 2022, REMOVING FROM 2023 AND 2024 ROLLS. 4/24/2024 RCJ						
891289	2023	DAILEY MELVIN	PERSONAL PROPERTY MH S#12328175 L#PFS0528293	8235 LINDEN RD, DEL VALLE TX 78617	$17,292	$0
MOBILE HOME MOVED TO BASTROP, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
902741	2023	WRIGHT RANDY J JR	BOULDER RIDGE ESTATES, SPACE 272, SN1 9T530915LB; SN2 9T530915LA; HUD# LOU0057098; HUD#2 LOU0057099	3300 KILLINGSWORTH LN 272, TX 78660	$52,246	$0
MOHO REPOSESSED IN 2022. REMOVING 2023 VALUATION. 3/29/2024 RCJ						
903630	2022	TORRES JOSE	RIVER RANCH MH PARK, SPACE 602, SN1 11500269IB; SN2 11500269IA; HUD# PFS1165476; HUD#2 PFS1165477	13021 DESSAU RD 602, TX 78754	$104,009	$0
MOBILE HOME WAS DUPLICATED ON ANOTHER PID(963175). REMOVING THIS COPY FOR 2022. 2/15/2024 RCJ						
917006	2023	VU ANDY &	BRANCH CREEK ESTATES MH PARK, SPACE 107, SN1 FLE240TX1130082A; HUD# PFS1090387	12609 DESSAU RD 107, TX 78754	$82,696	$0
MOBILE HOME WAS SOLD IN 2022, NEED TO REMOVE 2023 VALUATION. 1/16/2024 RCJ						
917153	2023	ESCAMILLA LUIS A &	BOULDER RIDGE ESTATES, SPACE 437, SN1 CSS011566TXA; SN2 CSS011566TXB; HUD# HWC0412811; HUD#2 HWC0412812	3351 KILLINGSWORTH LN 437, TX 78660	$91,164	$0
MOBILE HOME MOVED OFF LOT IN 2022, REMOVING VALUATION FOR 2023. 2/23/2024 RCJ						
917323	2023	JARRETT TANYA DM	BOULDER RIDGE ESTATES, SPACE 499, SN1 CY510161E; HUD# PFS1087430	3351 KILLINGSWORTH LN 499, TX 78660	$63,548	$0
OWNER SOLD MOHO IN 2022, REMOVING 2023 OF VALUATION. 2/26/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
917997	2024	TORRES JAIME	OAKCREST COMMUNITY MH PARK, SPACE 86, SN1 CW2011454TXA; SN2 CW2011454TXB; HUD# HWC0385611; HUD#2 HWC0385612	7601 DAFFAN LN 86, TX 78724	$93,213	$0
MOBILE HOME MOVED TO ELGIN IN 2022. 1/29/2024 RCJ						
918279	2023	GALICIA ACEVEDO, ALEJANDRO	RIVER RANCH MH PARK, SPACE 712, SN1 59500195IB; SN2 59500195IA; HUD# PFS1158532; HUD#2 PFS1158533	13021 DESSAU RD 712, TX 78754	$58,309	$0
OWNER SOLD PROPERTY IN 2022 AND SHOULD BE REMOVED FROM 2023 ROLLS. 1/22/2024 RCJ						
921307	2023	SALDIVAR ANGELA MARIE & ANTONIO	HIDDEN VALLEY SEC 1 MH COMM, SPACE 741, SN1 CLW043822TX; HUD# NTA1780029	6201 MARR CV 741, TX 78724	$49,620	$0
MOBILE HOME MOVED TO TENNESSEE IN 2022. REMOVING 2023 VALUATION. 3/8/2024 RCJ						
921310	2023	ZUMALACARREGUI MIRSSA	PERSONAL PROPERTY MH S#PHH330TX1822159A/B L#PFS1218573/74	8528 COULVER RD, AUSTIN TX 78747	$105,127	$0
MOBILE HOME MOVED OFF PROPERTY IN 2021. REMOVINGFOR 2022 AND 2023 TAX ROLLS. 3/4/2024 RCJ						
921310	2022	ZUMALACARREGUI MIRSSA	PERSONAL PROPERTY MH S#PHH330TX1822159A/B L#PFS1218573/74	8528 COULVER RD, AUSTIN TX 78747	$107,388	$0
MOBILE HOME MOVED OFF PROPERTY IN 2021. REMOVING FOR 2022 AND 2023 TAX ROLLS. 3/4/2024 RCJ						
927843	2023	MCCLAIN KRISTOPHER	PERSONAL PROPERTY MH S#PH2214692 LABEL# PFS1070212	21500 QUAIL VALLEY CV, TX 78641	$54,583	$0
PERSONAL PROPERTY MOBILE HOME ACCOUNT WAS CREATED IN ERROR ALONG WITH REAL PROPERTY ACCOUNT(187244). DELETING PP ACCT TO REMOVE DOUBLE BILLING. 3/1/2024 RCJ						
927843	2022	MCCLAIN KRISTOPHER	PERSONAL PROPERTY MH S#PH2214692 LABEL# PFS1070212	21500 QUAIL VALLEY CV, TX 78641	$56,020	$0
PERSONAL PROPERTY MOBILE HOME ACCOUNT WAS CREATED IN ERROR ALONG WITH REAL PROPERTY ACCOUNT(187244). DELETING PP ACCT TO REMOVE DOUBLE BILLING. 3/1/2024 RCJ						
927843	2021	MCCLAIN KRISTOPHER	PERSONAL PROPERTY MH S#PH2214692 LABEL# PFS1070212	21500 QUAIL VALLEY CV, TX 78641	$32,443	$0
PERSONAL PROPERTY MOBILE HOME ACCOUNT WAS CREATED IN ERROR ALONG WITH REAL PROPERTY ACCOUNT(187244). DELETING PP ACCT TO REMOVE DOUBLE BILLING. 3/1/2024 RCJ						
927843	2020	MCCLAIN KRISTOPHER	PERSONAL PROPERTY MH S#PH2214692 LABEL# PFS1070212	21500 QUAIL VALLEY CV, TX 78641	$32,443	$0
PERSONAL PROPERTY MOBILE HOME ACCOUNT WAS CREATED IN ERROR ALONG WITH REAL PROPERTY ACCOUNT(187244). DELETING PP ACCT TO REMOVE DOUBLE BILLING. 3/1/2024 RCJ						
928678	2023	MAJEED MAJEED H	BOULDER RIDGE ESTATES, SPACE 324, SN1 CLW045462TX; HUD# NTA1822559	3300 KILLINGSWORTH LN 324, TX 78660	$70,751	$0
MOBILE HOME NEW OWNER IN 2022, REMOVE 2023 VALUATION. 1/31/2024 RCJ						
936279	2023	SUN HOME SERVICES INC	BOULDER RIDGE ESTATES, SPACE 649, SN1 125000HA007722A ; SN2 125000HA007722B; HUD# NTA1871274; HUD#2 NTA1871275	14308 WHISPER RILL LN 649, TX 78660	$108,581	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
936300	2023	SUN HOMES SERVICES INC	BOULDER RIDGE ESTATES, SPACE 658, SN1 CW2020540TXA; SN2 CW2020540TXB	3306 WINDY SHELF BND 658, TX 78660	$115,710	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
936452	2023	SUN HOMES SERVICES INC	BOULDER RIDGE ESTATES, SPACE 697, SN1 FLE240TX1943121A ; SN2 FLE240TX1943121B; HUD# PFS1228760; HUD#2 PFS1228761	14400 WHISPER RILL LN 697, TX 78660	$108,581	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
936636	2023	SUN HOMES SERVICES INC	BOULDER RIDGE ESTATES, SPACE 754,SN1 FLE240TX1943277A SN2 E240TX1943277B; HUD# PFS1232506; HUD#2 PFS1232507	14405 SHIN ST 754, TX 78660	$108,581	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
936752	2023	SUN HOMES SERVICES INC	BOULDER RIDGE ESTATES, SPACE 787, SN# CW2020226TXA/B, HUD# NTA1877628/629	3207 GOLDEN ASPEN LOOP 787, TX 78660	$115,710	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
943315	2023	3903 CLAWSON ROAD LLC	PINNACLE ON CLAWSON ROAD CONDOMINIUMS AMENDED (FUTURE LAND)	CLAWSON RD, 78704	$2,072,311	$2,072,311
CONDO BUILT OUT DELE FOR 2022-2023						
943315	2022	3903 CLAWSON ROAD LLC	PINNACLE ON CLAWSON ROAD CONDOMINIUMS AMENDED (FUTURE LAND)	CLAWSON RD, 78704	$783,969	$783,969
CONDO BUILT OUT DELE FOR 2022-2023						
947779	2022	IDIL SPRINGBROOK 2 LP	LOT 6 BLK A SPRINGBROOK CORPORATE CENTER RSB LT 1 BLK A OF RSB LT 1 BLKA	1121 NEW MEISTER LN, TX 78660	$13,739,618	$11,400,000
CORRECT TAXING UNIT PERCENTAGE FOR IMPROVEMENT FOR 2021 - 2022						
947779	2021	IDIL SPRINGBROOK 2 LP	LOT 6 BLK A SPRINGBROOK CORPORATE CENTER RSB LT 1 BLK A OF RSB LT 1 BLKA	1121 NEW MEISTER LN, TX 78660	$1,567,372	$1,567,372
CORRECT TAXING UNIT PERCENTAGE FOR IMPROVEMENT FOR 2021 - 2022						
951344	2022	ORNELAS MICHAEL R	BOULDER RIDGE ESTATES, SN1 BEL011906TXA; SN2 BEL011906TXB; HUD# NTA1882951; HUD#2 NTA1882952	14323 WHISPER RILL LN, PFLUGERVILLE TX 78660	$109,724	$0
MOHO DUPLICATED FOR 2022. REMOVING FOR OWNER PER TAX OFFICE. 1/10/2024 RCJ						
963604	2023	GONZALEZ ROCHA HOMERO &	OACES MOBILE HOME PARK, SPACE 10802 G, SN1 ALCA0896270S30720; HUD# NTA0589488	10802 SAN JOSE AVE G, TX 78617	$11,674	$0
REMOVING DUPLICATE ENTRY TO 974483 FOR 2023. 3/7/2024 RCJ						
964007	2023	SUN HOME SERVICES INC	BOULDER RIDGE ESTATES, SPACE 957; S# PHH330TX1923062A/B; HUD# PFS1245576/577	2516 MABLO RIDGE DR #957, TX 78660	$121,306	$0
MOBILE HOME MOVED TO NEW OWNER, REMOVE FROM 2023 TAX ROLL. 2/7/2024 RCJ						
968116	2023	MARTIN CORY L &	PERSONAL PROPERTY MH S#CAV150TX1813290A L#NTA1851734	13300 ELM GROVE RD, BUDA TX 78610	$36,158	$0
NEW OWNER MOVED MOHO TO BASTROP COUNTY IN 2022, REMOVE 2023. 1/8/2024 RCJ						
968120	2023	MARTIN CORY L &	PERSONAL PROPERTY MH S# CLW045221TX L#NTA1815687	13300 ELM GROVE RD #2, BUDA TX 78610	$106,541	$0
NEW OWNER MOVED MOHO TO BASTROP COUNTY IN 2022, REMOVE 2023. 1/8/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
973562	2022	CURRY JR STEVE R & JOOHEE	OAK RANCH MH COMMUNITY, SPACE 108, SN1 CLW045247TX; HUD# NTA1815713	12523 CLAREMONT CIR 108, TX 78617	$108,832	$0
SHOULD NOT BE APPRAISED FOR 2021 & 2022, MOVED INTO MOHO MAY 2022. 1/23/2024 RCJ						
973562	2021	CURRY JR STEVE R & JOOHEE	OAK RANCH MH COMMUNITY, SPACE 108, SN1 CLW045247TX; HUD# NTA1815713	12523 CLAREMONT CIR 108, TX 78617	$109,978	$0
SHOULD NOT BE APPRAISED FOR 2021 & 2022, MOVED INTO MOHO MAY 2022. 1/23/2024 RCJ						
975106	2023	DIAZ AMANCIO H	PERSONAL PROPERTY MH 2014 28x72, SN#125000HB001083A/B, HUD#NTA1638725/6	8416 RIVERSTONE DR, AUSTIN TX 78724	$109,670	$0
MOBILE HOME MOVED TO WILLIAMSON COUNTY IN 2021. 3/1/2024 RCJ						
975419	2023	SILVA JOSE HUMBERTO RIVERA	PERSONAL PROPERTY MH 2017 26x56, SN#BL2002103TXA/B, HUD#NTA1779084/5	10309 HIBBS LN, MANOR TX 78653	$71,334	$0
MOBILE HOME WAS DUPLICATE OF PID# 910335. REMOVING 2023 OFF ROLLS. 3/4/2024 RCJ						
975571	2024	SERENITY HILLS PARTNERS LLC	PERSONAL PROPERTY MH 1996 28X56, SN#HOTX10AO1692A/B, HUD#NTA0616623/4	13309 CANDIDE LN, KYLE TX 78640	$149,054	$0
MOBILE HOME SOLD TO NEW OWNER AND MOVED PER 2022 SALES AGREEMENT. REMOVING 2023 AND 2024 FROM ROLLS FOR CUSTOMER. 4/24/2024 RCJ						
975571	2023	SERENITY HILLS PARTNERS LLC	PERSONAL PROPERTY MH 1996 28x56, SN#HOTX10AO1692A/B, HUD#NTA0616623/4	13309 CANDIDE LN, KYLE TX 78640	$117,553	$0
MOBILE HOME SOLD TO NEW OWNER AND MOVED PER 2022 SALES AGREEMENT. REMOVING 2023 AND 2024 FROM ROLLS FOR CUSTOMER. 4/24/2024 RCJ						
975715	2023	SCHEEN FREDRICK G	ABS 378 SUR 57 HOLTON W S 5.777 AC	11405 RIM ROCK TRL, AUSTIN TX 78737	$384,011	$0
MOBILE HOME CREATED AS NEW REAL PROPERTY INSTEAD OF PLACING MOHO IN REAL PROPERTY VALUATION. 3/4/2024 RCJ						
975813	2023	PHUMTIM TIDA & SUPPARERK YAOHAREE	PERSONAL PROPERTY M/H; SN# BL2009924TXA/B; HUD# NTA2149753/4	8001 HAYRIDE RD, DEL VALLE TX 78617	$132,517	$0
STATEMENT OF OWNERSHIP RELEASED EARLY AND MOBILE HOME NOT SOLD OR PLACED ON LAND. 3/19/2024 RCJ						
975903	2023	BARRAGAN EZEQUIEL ROSAS	PERSONAL PROPERTY MH 2022 28X72 SN# BL2008536TXA/B HUD# NTA2098228/229	250 STORK RD, DEL VALLE TX 78617	$126,444	$0
MOBILE HOME IS IN BASTROP COUNTY, REMOVING 2023 VALUATION. 3/11/2024 RCJ						
977681	2024	RODRIGUEZ ESMERALDA	PERSONAL PROPERTY MOBILE HOME S# 125000HB001156A L# NTA1641162	21981 SILVIA DR, ELGIN TX 78621	$78,830	$0
MOBILE HOME IS LOCATED IN BASTROP, REMOVING 2022-2024. 5/9/2024 RCJ						
977681	2023	RODRIGUEZ ESMERALDA	PERSONAL PROPERTY MOBILE HOME S# 125000HB001156A L# NTA1641162	10616 CREEK VIEW DR, AUSTIN TX 78748	$59,024	$0
MOBILE HOME IS LOCATED IN BASTROP, REMOVING 2022-2024. 5/9/2024 RCJ						
977681	2022	RODRIGUEZ ESMERALDA	PERSONAL PROPERTY MOBILE HOME S# 125000HB001156A L# NTA1641162	10616 CREEK VIEW DR, AUSTIN TX 78748	$60,413	$0
MOBILE HOME IS LOCATED IN BASTROP COUNTY, REMOVING 2022-2024. 5/9/2024 RCJ						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
977748	2022	SALAS MISAEL	PERSONAL PROPERTY MOHO 2021 28x76, SN #BL2007880TXA/B, HUD #NTA2069614/15	15941 GIESE LN, MANOR TX 78653	$138,682	$0
MOHO WAS NOT ON PROPERTY UNTIL 2022, REMOVE 2022 FROM ROLL. 1/8/2024 RCJ						
977844	2023	VARGAS JOSE	RIVER RANCH MH PARK, SPACE 400, SN1 PH177662A; SN2 PH177662B; HUD# PFS0737157; HUD#2 PFS0737158		$64,480	$0
2023 VALUATION DUPLICATED WITH #977854, REMOVING DUPLICATE. 3/28/2024 RCJ						
977932	2023	KELSO RONNIE	PERSONAL PROPERTY MH 14X66, SN #BEL013168TX, HUD #NTA1938241	21414 COYOTE TRL, LAGO VISTA TX 78645	$60,762	$0
REMOVING SINCE VALUED WITH APPEAL VALUATION IN 2023. 1/23/2024 RCJ						
988623	2024	JONES STEVEN W & SANDRA G	PERSONAL PROPERTY M/H S#PH1710162A/B HUD#PFS0942226/227	7807 OLD LOCKHART RD, BUDA TX 78610	$70,762	$0
MOBILE HOME SOLD TO NEW OWNER IN 2023, REMOVING 2024 VALUATION. 4/16/2024 RCJ						

4D

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

BOARD MEMBERS
TOM BUCKLE
DR. OSEZUA EHIYAMEN
BRUCE ELFANT
VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

LEANA MANN
CHIEF APPRAISER

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana Mann
Chief Appraiser

SUBJECT: April 2024 Unaudited Financial Statements

The unaudited financial statements for April 2024 are enclosed. Financial highlights for the month are as follows:

- The District's ending fund balance was $4,813,090. Of that, $292,179 was nonspendable in the form of prepaid expenditures, $1,109,700 was held in reserves as committed fund balance, and $3,411,211 was unassigned fund balance.

- *The net change in fund balance for the fiscal year to date is $1,532,026.*

- The reserve balances total $1,109,700. Detail account balances for each reserve account are as follows:

	Current Balance
Reserve for Computer Equipment	$ 89,594
Reserve for Network Infrastructure	$ 350,000
Reserve for Technology Enhancements	$ 154,192
Reserve for Litigation	$ 365,914
Reserve for Building Repair & Replacement	$ -
Reserve for ARB Operations	$ -
Reserve for Market Data Purchases	$ 150,000
	$ 1,109,700

- ***The District ended the month with a budget surplus of $1,423,026.***

- 850 EAL Holding Corp. is considered a blended component unit of the District. This component unit is reported in the financial statements as a Special Revenue Fund on the Governmental Funds Balance Sheet and Statement of Revenue, Expenditures and Changes in Fund Balance.

Travis Central Appraisal District

Budget to Actual- Governmental Funds

For the month ended April 30, 2024

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Amended	YTD		
REVENUE:					
Appraisal assessments	29,884,516	29,884,516	9,961,505	9,961,506	0
Refund of appraisal assessments	-	-	-	-	-
Net appraisal assessments	**$ 29,884,516**	**$ 29,884,516**	**$ 9,961,505**	**$ 9,961,506**	**$ 0**
Investment earnings	150,000	150,000	50,000	133,627	83,627
Charges for services	9,000	9,000	3,000	40	(8,960)
Miscellaneous revenue	50,000	50,000	16,667	52,045	2,045
TOTAL REVENUE	**$ 30,093,516**	**$ 30,093,516**	**$ 10,031,172**	**$ 10,147,217**	**$ 76,712**
EXPENDITURES:					
Personnel Cost	12,892,155	12,892,155	4,297,385	4,341,213	(43,828)
Benefit Cost	4,817,439	4,817,439	1,605,813	1,457,987	147,826
Printing and mailing services	809,700	809,700	269,900	410,349	(140,449)
Operating supplies	226,800	226,800	75,600	60,615	14,985
Subscriptions and data purchases	352,310	352,310	117,437	244,215	(126,778)
Training and education	151,790	151,790	50,597	31,636	18,961
Travel expenditures	26,450	26,450	8,817	23,000	(14,184)
Utilities	555,860	555,860	185,287	166,350	18,937
Legal expenditures	2,042,500	2,042,500	680,833	343,323	337,510
Professional services	5,111,986	5,111,986	1,703,995	521,683	1,182,313
Insurance	86,678	86,678	28,893	20,082	8,811
Aerial photography	579,260	579,260	193,087	370,191	(177,105)
Rentals	153,320	153,320	51,107	44,343	6,764
Building and Equipment maintenance	444,290	444,290	148,097	153,853	(5,757)
Software maintenance	350,467	350,467	116,822	166,926	(50,103)
Other services	411,697	411,697	137,232	109,051	28,182
Capital Outlay	122,976	122,976	40,992	(36,836)	77,828
Debt Service- Principal	654,742	654,742	218,247	161,058	57,189
Debt Service- Interest	94,096	94,096	31,365	26,151	5,214
TOTAL EXPENDITURES	**29,884,516**	**29,884,516**	**9,961,505**	**8,615,191**	**1,346,314**
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	***209,000***	***209,000***	***69,667***	***1,532,026***	***1,423,026***
OTHER FINANCING SOURCES (USES):					
Transfers In	-	-	-	187,209	(187,209)
Transfers out	-	-	-	(187,209)	187,209
TOTAL OTHER FINANCING SOURCES (USES)	**-**	**-**	**-**	**-**	**-**
NET CHANGE IN FUND BALANCE	209,000	209,000	69,667	1,532,026	1,423,026
Beginning Fund Balance	3,281,064	3,281,064	3,281,064	3,281,064	
Ending Fund Balance	***$ 3,490,064***	***$ 3,490,064***	***$ 3,350,731***	***$ 4,813,090***	***$ 1,423,026***

Travis Central Appraisal District

Governmental Fund Balance Sheet

April 30, 2024

	General Fund	Special Revenue Fund	Total Governmental Funds
ASSETS			
Cash and cash equivalents	5,876,708	-	5,876,708
Short-term investments	4,142,858	-	4,142,858
Receivables	79,414	-	79,414
Prepaid items	292,179	-	292,179
TOTAL ASSETS	$ 10,391,159	$ -	$ 10,391,159
LIABILITIES			
Accounts payable and accrued expenditures	597,316	-	597,316
Unearned revenue	4,980,753	-	4,980,753
TOTAL LIABILITIES	5,578,069	-	5,578,069
FUND BALANCES			
Fund balance, committed	1,109,700	-	1,109,700
Fund Balance, restricted	-	-	-
Fund balance, nonspendable	292,179	-	292,179
Fund balance, unassigned	3,411,211	-	3,411,211
TOTAL FUND BALANCES	4,813,090	-	4,813,090
TOTAL LIABILITIES AND FUND BALANCE	$ 10,391,159	$ -	$ 10,391,159

Travis Central Appraisal District

Statement of Revenues, Expenditures and Changes in Fund Balance
For the month ended April 30, 2024

	General Fund	Special Revenue Fund	Total Governmental Funds
REVENUES			
Appraisal assessments	$ 9,961,506	$ -	$ 9,961,506
Refund of appraisal assessments	-	-	-
Net appraisal assessments	9,961,506	-	9,961,506
Investment earnings	133,627	-	133,627
Charges for services	40	-	40
Miscellaneous revenue	52,045	-	52,045
TOTAL REVENUE	10,147,217	-	10,147,217
EXPENDITURES			
Appraisal services			
Payroll and related expenditures	5,799,200	-	5,799,200
Data processing	166,926	-	166,926
Transportation	23,000	-	23,000
Operating supplies	60,615	-	60,615
Rentals	44,343	-	44,343
Legal and professional	865,006	-	865,006
Utilities and telephone	166,350	-	166,350
Building and equipment maintenance	153,853	-	153,853
Insurance	20,082	-	20,082
Other services	1,165,441	-	1,165,441
Capital outlay	(36,836)	-	(36,836)
Debt Service- Principal	-	161,058	161,058
Debt Service- Interest	-	26,151	26,151
TOTAL EXPENDITURES	8,427,981	187,209	8,615,191
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	1,719,236	(187,209)	1,532,026
OTHER FINANCING SOURCES (USES):			
Transfers in	-	187,209	187,209
Transfers out	(187,209)	-	(187,209)
TOTAL OTHER FINANCING SOURCES (USES)	(187,209)	187,209	-
NET CHANGE IN FUND BALANCE	1,532,026	-	1,532,026
FUND BALANCE, beginning of year	3,281,064	-	3,281,064
FUND BALANCE, end of year	$ 4,813,090	$ -	$ 4,813,090

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

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JIE LI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

LEANA MANN
CHIEF APPRAISER

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana Mann
Chief Appraiser

SUBJECT: March 2024 Unaudited Financial Statements

The unaudited financial statements for March 2024 are enclosed. Financial highlights for the month are as follows:

- The District's ending fund balance was $4,112,774. Of that, $330,733 was nonspendable in the form of prepaid expenditures, $1,109,700 was held in reserves as committed fund balance, and $2,672,341 was unassigned fund balance.

- *The net change in fund balance for the fiscal year to date is $831,710.*

- The reserve balances total $1,109,700. Detail account balances for each reserve account are as follows:

	Current Balance
Reserve for Computer Equipment	$ 89,594
Reserve for Network Infrastructure	$ 350,000
Reserve for Technology Enhancements	$ 154,192
Reserve for Litigation	$ 365,914
Reserve for Building Repair & Replacement	$ -
Reserve for ARB Operations	$ -
Reserve for Market Data Purchases	$ 150,000
	$ 1,109,700

- ***The District ended the month with a budget surplus of $735,210.***

- 850 EAL Holding Corp. is considered a blended component unit of the District. This component unit is reported in the financial statements as a Special Revenue Fund on the Governmental Funds Balance Sheet and Statement of Revenue, Expenditures and Changes in Fund Balance.

Travis Central Appraisal District

Budget to Actual- Governmental Funds

For the month ended March 31, 2024

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Amended	YTD		
REVENUE:					
Appraisal assessments	29,884,516	29,884,516	7,471,129	7,471,129	0
Refund of appraisal assessments	-	-	-	-	-
Net appraisal assessments	**$ 29,884,516**	**$ 29,884,516**	**$ 7,471,129**	**$ 7,471,129**	**$ 0**
Investment earnings	150,000	150,000	37,500	95,285	57,785
Charges for services	9,000	9,000	2,250	40	(8,960)
Miscellaneous revenue	50,000	50,000	12,500	49,553	(447)
TOTAL REVENUE	**$ 30,093,516**	**$ 30,093,516**	**$ 7,523,379**	**$ 7,616,007**	**$ 48,378**
EXPENDITURES:					
Personnel Cost	12,892,155	12,892,155	3,223,039	3,349,589	(126,550)
Benefit Cost	4,817,439	4,817,439	1,204,360	1,107,329	97,031
Printing and mailing services	809,700	809,700	202,425	271,796	(69,371)
Operating supplies	226,800	226,800	56,700	54,346	2,354
Subscriptions and data purchases	352,310	352,310	88,078	216,640	(128,562)
Training and education	151,790	151,790	37,948	30,380	7,568
Travel expenditures	26,450	26,450	6,613	21,829	(15,216)
Utilities	555,860	555,860	138,965	131,338	7,627
Legal expenditures	2,042,500	2,042,500	510,625	264,049	246,576
Professional services	5,111,986	5,111,986	1,277,997	417,493	860,504
Insurance	86,678	86,678	21,670	13,490	8,179
Aerial photography	579,260	579,260	144,815	370,191	(225,376)
Rentals	153,320	153,320	38,330	34,081	4,249
Building and Equipment maintenance	444,290	444,290	111,073	121,203	(10,131)
Software maintenance	350,467	350,467	87,617	142,354	(54,738)
Other services	411,697	411,697	102,924	87,815	15,109
Capital Outlay	122,976	122,976	30,744	(36,836)	67,580
Debt Service- Principal	654,742	654,742	163,686	161,058	2,627
Debt Service- Interest	94,096	94,096	23,524	26,151	(2,627)
TOTAL EXPENDITURES	**29,884,516**	**29,884,516**	**7,471,129**	**6,784,297**	**686,832**
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	***209,000***	***209,000***	***52,250***	***831,710***	***735,210***
OTHER FINANCING SOURCES (USES):					
Transfers In	-	-	-	187,209	(187,209)
Transfers out	-	-	-	(187,209)	187,209
TOTAL OTHER FINANCING SOURCES (USES)	**-**	**-**	**-**	**-**	**-**
NET CHANGE IN FUND BALANCE	209,000	209,000	52,250	831,710	735,210
Beginning Fund Balance	3,281,064	3,281,064	3,281,064	3,281,064	
Ending Fund Balance	***$ 3,490,064***	***$ 3,490,064***	***$ 3,333,314***	***$ 4,112,774***	***$ 735,210***

Travis Central Appraisal District

Governmental Fund Balance Sheet

March 31, 2024

	General Fund	Special Revenue Fund	Total Governmental Funds
ASSETS			
Cash and cash equivalents	5,208,737	-	5,208,737
Short-term investments	4,124,492	-	4,124,492
Receivables	2,551,061	-	2,551,061
Prepaid items	330,733	-	330,733
TOTAL ASSETS	$ 12,215,023	$ -	$ 12,215,023
LIABILITIES			
Accounts payable and accrued expenditures	631,120	-	631,120
Unearned revenue	7,471,129	-	7,471,129
TOTAL LIABILITIES	8,102,249	-	8,102,249
FUND BALANCES			
Fund balance, committed	1,109,700	-	1,109,700
Fund Balance, restricted	-	-	-
Fund balance, nonspendable	330,733	-	330,733
Fund balance, unassigned	2,672,341	-	2,672,341
TOTAL FUND BALANCES	4,112,774	-	4,112,774
TOTAL LIABILITIES AND FUND BALANCE	$ 12,215,023	$ -	$ 12,215,023

Travis Central Appraisal District

Statement of Revenues, Expenditures and Changes in Fund Balance
For the month ended March 31, 2024

	General Fund	Special Revenue Fund	Total Governmental Funds
REVENUES			
Appraisal assessments	$ 7,471,129	$ -	$ 7,471,129
Refund of appraisal assessments	-	-	-
Net appraisal assessments	7,471,129	-	7,471,129
Investment earnings	95,285	-	95,285
Charges for services	40	-	40
Miscellaneous revenue	49,553	-	49,553
TOTAL REVENUE	7,616,007	-	7,616,007
EXPENDITURES			
Appraisal services			
Payroll and related expenditures	4,456,917	-	4,456,917
Data processing	142,354	-	142,354
Transportation	21,829	-	21,829
Operating supplies	54,346	-	54,346
Rentals	34,081	-	34,081
Legal and professional	681,542	-	681,542
Utilities and telephone	131,338	-	131,338
Building and equipment maintenance	121,203	-	121,203
Insurance	13,490	-	13,490
Other services	976,822	-	976,822
Capital outlay	(36,836)	-	(36,836)
Debt Service- Principal	-	161,058	161,058
Debt Service- Interest	-	26,151	26,151
TOTAL EXPENDITURES	6,597,087	187,209	6,784,297
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	1,018,920	(187,209)	831,710
OTHER FINANCING SOURCES (USES):			
Transfers in	-	187,209	187,209
Transfers out	(187,209)	-	(187,209)
TOTAL OTHER FINANCING SOURCES (USES)	(187,209)	187,209	-
NET CHANGE IN FUND BALANCE	831,710	-	831,710
FUND BALANCE, beginning of year	3,281,064	-	3,281,064
FUND BALANCE, end of year	$ 4,112,774	$ -	$ 4,112,774

Travis Central Appraisal District
Budget to Actual- Appraisal Review Board
From 1/1/2024 Through 6/10/2024

01 - ARB

	Total Budget Amended	YTD Budget	Actual	Budget Variance	Percent of Total Budget Remaining
Expenditures					
Per Diem Expenditures					
Per Diem Payments	1,173,125.00	586,562.50	155,387.50	431,175.02	86.75%
Total Per Diem Expenditures	1,173,125.00	586,562.52	155,387.50	431,175.02	86.75%
Supplies					
Operating Supplies	5,000.00	2,500.02	2,124.60	375.42	57.50%
Furniture & Equipment- Under $1000	0.00	0.00	379.00	(379.00)	0.00%
Total Supplies	5,000.00	2,500.02	2,503.60	(3.58)	49.93%
Services					
Training & Education	10,000.00	4,999.98	0.00	4,999.98	100.00%
Attorney & Court Costs	35,000.00	17,500.02	5,300.00	12,200.02	84.85%
Total Services	45,000.00	22,500.00	5,300.00	17,200.00	88.22%
Total Expenditures	1,223,125.00	611,562.54	163,191.10	448,371.44	86.66%
Budget Surplus (Deficit)	1,223,125.00	611,562.54	163,191.10	448,371.44	86.65%

Travis Central Appraisal District

Standard General Ledger

100 - General Fund

01 - ARB

From 1/1/2024 Through 6/10/2024

Account Code	Effective ...	Session ID	Session Description	Document Description	Debit	Credit	Name
40101				Opening Balance	0.00		
	3/1/2024	APINV2592	ARB Per Diem Payments PPE 02.23.24	ARB Per Diem Payments PPE 02.23.24 (1.5 days @ $150/day)	225.00		Denita J. Thompson Diggs
	3/15/2024	APINV2612	ARB Per Diem Payments PPE 03.08.24	ARB Per Diem Payments PPE 03.08.24 (3.5 days @ $170/day)	595.00		Street, Hall
	3/29/2024	APINV2619	ARB Per Diem Payments PPE 03.22.24	ARB Per Diem Payments PPE 03.22.24 (1 days @ $170/day)	170.00		Street, Hall
	4/12/2024	APINV2636	ARB Per Diem Payments PPE 04.05.24	ARB Per Diem Payments PPE 04.05.24 (0.5 days @ $180/day)	90.00		Spradling, Cherri
	4/26/2024	APINV2649	ARB Per Diem Payments PPE 04.19.24	ARB Per Diem Payments PPE 04.19.24 (1 days @ $150/day)	150.00		Irving Tregerman
	5/10/2024	APINV2658	ARB Per Diem Payments PPE 05.03.24	ARB Per Diem Payments PPE 05.03.24 (0.5 days @ $170/day)	125.00		Street, Hall
	5/10/2024	APINV2658	ARB Per Diem Payments PPE 05.03.24	ARB Per Diem Payments PPE 05.03.24 (1 days @ $150/day)	150.00		Kimberly Atkins
	5/10/2024	APINV2658	ARB Per Diem Payments PPE 05.03.24	ARB Per Diem Payments PPE 05.03.24 (1.5 days @ $150/day)	265.00		Sherry R. Kennerley
				Transaction Total	1,770.00	0.00	
Balance 40101					1,770.00		
40220				Opening Balance	0.00		
	1/24/2024	APINV2584	Credit Card Receipts- January 2024	ARB & Admin Supplies	765.60		Staples Advantage
	2/9/2024	APINV2605	Credit Card Receipts- February 2024	ARB Supplies	71.36		Staples Advantage
	2/13/2024	APINV2605	Credit Card Receipts- February 2024	ARB Brochure Holders & Date Stamps	352.40		Staples Advantage

Travis Central Appraisal District

Standard General Ledger

100 - General Fund

01 - ARB

From 1/1/2024 Through 6/10/2024

Account Code	Effective ...	Session ID	Session Description	Document Description	Debit	Credit	Name
	2/21/2024	APINV2626	Credit Card Receipts- February 2024	ARB Supplies	364.01		Staples Advantage
	2/21/2024	APINV2626	Credit Card Receipts- February 2024	ARB Supplies 1/2' 3-Ring View Binder Black (qty:120 @ $4.65ea)	558.00		Staples Advantage
	2/22/2024	APINV2599	Credit Card Receipts- February 2024	RTN: 2in 3-Ring View Binder D-Ring Black (qty:120 @ $3.63ea)		435.60	Staples Advantage
	3/1/2024	APINV2635	Credit Card Receipts- March 2024	Avery Printable Self-Adhesive Plastic Tabs 1-3/4in 80/pk (qty:4 @ $10.47ea)	41.88		Staples Advantage
	3/19/2024	APINV2639	Credit Card Receipts- March 2024	ARB Headsets & Wall Clocks	202.49		Amazon, Inc.
	4/8/2024	APINV2656	Credit Card Receipts- April 2024	Wall Mount Racks for ARB Area	84.97		Amazon, Inc.
	4/24/2024	APINV2665	Credit Card Receipts- April 2024	ARB Wifi Replacement Items	119.49		Amazon, Inc.
				Transaction Total	2,560.20	435.60	
Balance 40220					2,124.60		
40224				Opening Balance	0.00		
	5/10/2024	APINV2674	Credit Card Receipts- May 2024	Beautification & ARB	379.00		Home Depot
				Transaction Total	379.00	0.00	
Balance 40224					379.00		
40510				Opening Balance	0.00		
	4/14/2024	APINV2650	AP 04.24.24	ARB Attorney Fees- Februay & March 2024	5,300.00		Armstrong & Armstrong, Attorneys & Counselors, P.C.
				Transaction Total	5,300.00	0.00	
Balance 40510					5,300.00		

Travis Central Appraisal District
Standard General Ledger
100 - General Fund
01 - ARB
From 1/1/2024 Through 6/10/2024

Account Code	Effective ...	Session ID	Session Description	Document Description	Debit	Credit	Name
				Balance 01 - ARB	9,573.60		
Report Opening/Current Balance					0.00	0.00	
Report Transaction Totals					10,009.20	435.60	
Report Current Balances					10,009.20	435.60	
Report Difference					9,573.60		

Travis Central Appraisal District
Past Due Jurisdictions
As of June 10, 2024

Customer ID	Customer Name	Due Date	Invoice Number	Invoice Date	Invoice Description
10A	Bella Fortuna PID	4/13/2024	8546	3/14/2024	2024 PID
10L	Turners Crossing PID	4/13/2024	8554	3/14/2024	2024 PID
10T	Tessera on Lake Travis Public Improvement District	4/13/2024	8556	3/14/2024	2024 PID
10U	Manor Heights PID (IMP AREA #3)	4/13/2024	8557	3/14/2024	2024 PID
11C	City of Mustang Ridge PID	4/13/2024	8558	3/14/2024	2024 PID
1P	Travis Co. Improvement Dist No. 1	4/13/2024	8559	3/14/2024	2024 PID
WH	Wildhourse PID (Imp Area #1)	4/13/2024	8571	3/14/2024	2024 PID

Travis Central Appraisal District

FY 2024 Capital Expenditures

As of March 31, 2024

Date	Asset Description	Amount	Vendor
Total		**-**	

4F

CONSENT AGENDA

Personnel Status Report
6/10/2024

Personnel Changes:

Name	Action	Date	Job Title	Division
Traveler Surley	Transfer	05/03/2024	Commercial Appriaser	Commercial
Janet Jennings-Doyle	New Hire	05/20/2024	Deputy Chief of Operations	Admin
Lydia Tsaganelia	Separated	05/10/2024	Commercial Appriaser	Commercial
Casey Toungate	Separated	05/21/2024	Maintenance Technician	Admin
Diana Arnold	New Hire	06/03/2024	Deputy Taxpayer Liaison	BOD
Cameron Tunnell	Transfer	06/05/2024	Maintenance Technician	Admin

Current Openings:

Job Posting#	Posting Date	Position	Division	# of Positions
2024145300	Apr-2024	Residential Appraiser	Residential	2
2024132200	Jun-2024	Help Desk Technician	IT	2

REGULAR AGENDA

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REGULAR AGENDA

2024 Taxpayer Liaison Activity Log

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
1	4/20/2024	Property Owner	Email	271968	TCAD	General Inquiries	PO sent a Change in Address.	Provided PO with Change of Address Form to be completed and returned according to the instructions on the form.	4/22/2024
2	4/20/2024	Property Owner	Email	897943	TCAD	Exemptions	PO requested an update to the mailing address and inquired why the 2024 HS Exemption was removed.	Sent Change of Mailing Address to PO. The PO re-deeded the property in early 2023 to an LLC. The deed was immediately reverted to individual ownership. The PO will be required to apply for a HS Exemption for 2023 and 2024.	4/24/2024
3	4/20/2024	Property Owner	Email		TCAD	Market Values	PO inquires about how to have the mailing address corrected and update property characteristics.	Provided PO with Change of Address Form and Characteristic Review Request.	4/22/2024
4	4/21/2024	Other	Email	164152	TCAD	Exemptions	An attorney has assisted the client with the "Lady Bird" deed, and the Appraised Value cap has been lost.	An ownership correction was made, and the Appraised Value cap bridged correctly from the prior year. Sent the Attorney Tax Office Brochure *Understanding Your Property Tax Refund* .	4/30/2024
5	4/22/2024	Property Owner	Email	364175	TCAD	Market Values	PO has not received the NOV and inquires if the Notices have been mailed in batches.	PO's NOV went to Unauthorized Agent. PO provided copy of NOV.	4/22/2024
6	4/22/2024	Property Owner	Email	772284	TCAD	Exemptions	PO's mortgage payment was increased. Inquires if Lender was made aware of the reduced value rec'd due to an ARB Hearing.	PO rec'd a reduction in the 2023 Market Value from the July Formal Hearing. The 2023 Tax Bill was prepared and paid by the PO's Lender based on the reduction. The PO was advised to discuss an increase in the monthly payment with their Lender.	4/24/2024
7	4/22/2024	Property Owner	Email	190675	TCAD	Exemptions	PO had a FH in Oct for a Correction Motion. The PO was advised the situation presented could be corrected administratively.	The Residential Appraisal Section reviewed the PO's request for correction. In 2023 the PO's property description was corrected, leading to an understanding that her HS Exemption would be moved from one home to another on the property. No further corrections are to be made. The PO was referred to the Cust Svc Mgr for further review/discussion.	4/24/2024
8	4/23/2024	Other	Email	502164	TCAD	Exemptions	Neighbor sends rental listing for property owned by an out-of-state resident receiving a HS Exemption.	Thanked neighbor for reporting the suspected fraudulent use of the HS Exemption. Referred to Exemptions for review.	4/23/2024
9	4/23/2024	Property Owner	Email	748078	TCAD	Exemptions	PO requests understanding of the Val Limited Adj from 2023 to 2024. PO is afraid credit is not being given the exemptions.	The Val Limited Adj is a calculated value of value not taxed for the property due to exemptions or more simply the difference in the Market Value minus the Appraised Value. The PO had not lost the application of either exemption.	4/23/2024
10	4/23/2024	Property Owner	Email	462446	TCAD	Market Values	PO inquires what is behind the Market Value appraisal from year to year.	Sales in the same market segment for the generally the preceding twelve months are utilized to value properties annually. Suggested PO view the CAD's webinar: *Understanding Your Notice of Appraised Value.*	4/23/2024
11	4/23/2024	Property Owner	Email	304372	TCAD	Exemptions	PO believes the HS Exemption for 2022 and 2023 has not be rec'd.	PO purchased in 2022, a year when the seller had a HS Exemption in place at Jan 1st. The PO's Qualifying Year for their HS Exemption was 2023, a year when the Market Value and Appraised Value were equal. The 2023 and 2024 Appraised Value are correct.	4/24/2024

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12	4/23/2024	Other	Email	140993	TCAD	General Inquiries	Spectrum seeks address verification of utility company to update 911 location.	Physical address provided by utility is deeded to a LP company with the same mailing address as the utility company. Suggested contacting the utilities' business office in Houston for review of physical address.	4/24/2024
13	4/24/2024	Other	Email		TCAD	BPP Issues	Agent requests extension of filing for business.	The Rendition deadline is April 15th, also the deadline to request a filing extension. Referred to the BPP Section for review and response.	4/25/2024
14	4/24/2024	Property Owner	Email	818643	TCAD	Property Taxes	PO was denied a HS Exemption at the time of purchase, not having an ID with the address. Now approved. PO inquires how to review the overpayment in 2022, the yr of purchase, and 2023.	The 2022 Tax Bill had the seller's exemptions applied to their Appraised Value. The 2023 Tax Bill did not capture the buyer's approved HS Exemption. The PO was directed to the Tax Office to discuss the payment made in 2023 without the approved exemption. Sent PO Tax Office Brochure *Understanding Your Property Tax Refund* .	4/25/2024
15	4/24/2024	Other	Email		TCAD	Market Values	PO is not sure the appraised Market Value is correct.	PO will be req'd to file a protest to discuss the 2024 appraisal. Proved on-line filing instructions and suggested the PO attend an Informal Meeting to review the appraisal.	4/25/2024
16	4/24/2024	Property Owner	Email		TCAD	Exemptions	PO inquires how the Net Appraised Value is calculated.	The Net Appraised Value is the taxable value based upon a capped increase of no more than 10% annually plus the market value of new construction in the year post-approval.	4/25/2024
17	4/24/2024	Agent	Email		TCAD	Exemptions	PO requests clarification from Agent related to the processing time for exemption applications.	PO has deeded property under a trust. The PO mentions applying on-line with only the spouse's TDL. No mention was made if the Trust Doc was submitted for review nor if the Applicant is the Trustee. Suggested this info be submitted now to the Exemptions Section.	4/25/2024
18	4/24/2024	Property Owner	Email	978509	TCAD	Market Values	PO would like to discuss property transition.	Property record was assigned a different PID prior to 2024. The prior values did not populate to the 2024 NOV which is the reason for inquiry. The values may be found under the previously assigned PID.	4/30/2024
19	4/26/2024	Property Owner	Email		TCAD	Market Values	PO lost NOV and protest info.	Provided PO with Protest Form.	4/30/2024
20	4/26/2024	Other	Email		TCAD	Property Taxes	Request to educate PO regarding prior year tax liability.	PO was credited in 2022 and 2023 for two Homestead Exemptions for separate properties. Provided PO billing proof of dual credit and explanation that a PO may receive only one HS Exemption annually. The HS Exemption was retained on the home residence and removed from the second property. This change created a tax liability.	4/30/2024
21	4/26/2024	Property Owner	Email	748905	TCAD	Market Values	PO attended a IH, rejected Settlement Offer. The Market Value has reset to the NOV. Is this normal?	The rejection of an offer made means the value was not changed from the Noticed Market Value. Should the PO proceed to a FH, the value under review will be the Noticed Market Value, not any other value discussed informally. Advised PO if reconsidering acceptance of the Settlement Offer to advise, so the offer may be extended again.	4/30/2024

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22	4/26/2024	Property Owner	Email		TCAD	Market Values	Agent filed a 25.25 (c) Late Motion that was approved during an ARB Hearing. The Final Order did not have a change in the Market Value.	The ARB corrected the sq ft of the improvement. No change in value was made.	5/1/2024
23	4/26/2024	Other	Email	895380	TCAD	BPP Issues	Company Comptroller presents employees' failures that led to an inflated valuation of BPP in 2022. Request add'l opportunity to correct.	A 2022 Late Motion 25.25 (c) Protest was denied due to the failure to pay taxes. Due process was served with no recourse through the Appraisal District to correct the company's reporting error.	5/1/2024
24	4/27/2024	Property Owner	Email	947442	TCAD	Market Values	PO rec'd NOV and found the posted info on the website was lower. The PO inquires when will he be advised?	The Appraisal District will prepare and send a Corrected Notice of Value only when the tax liability is increased. As Cust Svc indicated the PO should not expect to be re-noticed.	4/30/2024
25	4/28/2024	Property Owner	Email	356037	TCAD	Informal Meetings	PO requests the definition of abbreviations found in evidence documents and land adjustments made on waterfront properties.	The definitions requested were related to protest status. Provided PO with abbreviations definitions and referred PO to request waterfront land adjustment schedule via a Public Info Request.	4/30/2024
26	4/29/2024	Property Owner	Email	123851	TCAD	Property Taxes	PO purchased mid-April. The seller removed the HS Exemption leaving a tax liability for the buyer. The PO would like to protest the 2023 Market Value.	The PO has been approved for their partial 2023 HS Exemption not included on the tax billing. PO was directed to the Tax Office to discuss any refund due. The PO was advised the purchase date is in the window of sales to value 2024 and a protest will be req'd to submit the Settlement Statement as proof of value. Sent PO Tax Office Brochure *Understanding Your Property Tax Refund.*	4/30/2024
27	4/29/2024	Property Owner	Email	154049	TCAD	Market Values	The PO wants a second review of the evidence post the Informal Meeting. Sq ft is the area of discrepancy. Requests explanation of gross bldg sq ft listed on property record.	The PO's bldg plan depicts interior sq ft while the CAD uses exterior wall measurements for equitable appraisal of all properties. The Gross Bldg sq ft is a simple check digit calculation for the individual line items listed by sq ft and has no bearing on the property valuation.	4/30/2024
28	4/29/2024	Property Owner	Email	326919	TCAD	Exemptions	PO has never had an Appraiser visit to appraise her property. The PO would like to understand why there is a loss of value shown for her exemption and why if her Market Value went down her Appraised Value went up.	Properties are appraised based upon sales in the neighborhood. A property's value might increase even though no new additions were made. Provided PO an explanation of the Value Limitation Adj presented within the property record. The PO was provided the brochure explaining *How the Market Value Might Go Down and the Appraised Value Go Up* .	4/30/2024
29	4/29/2024	Property Owner	Email	935064	TCAD	Exemptions	PO has a second contiguous parcel that they would like to receive the benefit of their HS Exemption.	Currently, the land-only parcel is not deeded the same. PO advised that once the two parcels are deeded to the same trust, this can be accomplished.	4/30/2024

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30	4/29/2024	Property Owner	Email		TCAD	General Inquiries	PO inquires how remove their name as owner of three properties deeded to a Trust.	One of the properties cited is in Williamson County. The other two properties do not have a deed change to a Trust. PO was advised to contact Williamson Co.	4/30/2024
31	4/29/2024	Other	Email		TCAD	Exemptions	Attorney's client has submitted a new HS Exemption post the CAD's review of the account. Agent inquires should a protest be submitted in case it is not approved.	Should an Exemption be denied a property owner receives a Denial Letter with a 30-day period to protest that determination. Therefore, submitting a protest for an action that has not occurred is not necessary, If approved, the Appraised Value cap will be bridged from the prior year.	4/30/2024
32	4/29/2024	Property Owner	Email		TCAD	Exemptions	PO is interested in discussing the feasibility of receiving a Bee Exemption of newly acquired property.	Provided the applicable publications related to beekeeping and wildlife management and the general info email address for the AG Section.	5/1/2024
33	4/30/2024	Property Owner	Email	974093	TCAD	Exemptions	PO was advised by other Affordable Housing residents that her home should have been included in the program from the date of purchase. PO also questions why the Tax Bill did not include the $100k school tax exemption amount.	The property purchased in June of 2023 was appraised as builder's inventory. The PO rec'd a pro-rated HS Exemption for 2023 and should not expect to see the full annual school tax exemption applied to the tax bill. The property in 2024 is included in the Affordable Housing Program with a Market Value equal to the purchase price. Suggested the PO remove the prior owner's assigned Agent and provided PO with appropriate form.	4/30/2024
34	4/30/2024	Property Owner	Email		TCAD	BPP Issues	PO believed a 2015 start-up business was closed out in 2017. At the direction of the court, the PO has contacted the Appraisal District to resolve closure of the account.	The PO did not provide enough info to identify the account. The PO may file a Late Motion 25.25 (c) Protest for only the preceding five years. Taxes billed prior to those five years will remain due. Correspondence was copied to the BPP Section to further assist the PO.	5/1/2024
35	4/30/2024	Property Owner	Email		TCAD	General Inquiries	PO requests schedule for Class and Condition codes plus shape and slope schedules.	The Class and Condition Guidelines are available via the web. Suggested the Size and Grade Factors be sought through a PIR.	5/1/2024
36	4/30/2024	Property Owner	Email	102124	TCAD	Market Values	PO presents reasons for disagreement of the Noticed Value.	Advised PO that the method to present a property owner's opinion of value challenging the CAD's appraised value if through the Protest process. Suggested PO view the CAD webinar related to the *Protest Process* and the Comptroller's Video *How to Present Your Case for an ARB Hearing* .	5/1/2024
37	4/30/2024	Property Owner	Email	159385	TCAD	Market Values	PO has a structure to be removed from the Market Value and would like to do so w/o filing a protest.	A protest will be required since the 2024 Market Value has been Noticed. Suggested PO file on-line and meet Informally with an Appraiser.	5/1/2024
38	4/30/2024	Property Owner	Email		TCAD	Exemptions	PO experiencing problems filing AG Exemption on-line.	Forwarded Exemption Form to the appropriate CAD section.	5/1/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
39	5/1/2024	Property Owner	Email	919829	TCAD	Exemptions	PO's NOV Market and Appraised Value are equal. PO believes the exemptions have been removed.	The 2024 Market Value decreased and the Appraised Value rose less than 10% to meet the Market Value. The PO's multiple exemptions are in place and can be verified in the fall on the Tax Bill.	5/2/2024
40	5/1/2024	Property Owner	Email	889013	TCAD	Market Values	PO would like to know where the MMA is derived and the Indicated Value.	Indicated Value = Median Value of the Sales or Equity Comps. The MMA is the factor applied to the depreciated cost to build to achieve a value equal to Market Segment sales.	5/2/2024
41	5/1/2024	Property Owner	Email	485139	TCAD	Exemptions	PO does not believe the HS Exemption was applied in 2023.	PO made a deed change which prompted the removal of the prior exemption. The PO reapplied and was approved for a HS exemption. The Appraised Value was adjusted. The 2023 taxes were billed without the newly approved exemption at the corrected Appraised Value. Referred PO to Tax Office.	5/2/2024
42	5/1/2024	Other	Email	797795	TCAD	Market Values	**Multiple Recipients**: PO did not receive NOV.	Property Record has a different address than the NOV. Cust Svc to respond to PO how to receive a duplicate copy of the NOV.	5/1/2024
43	5/1/2024	Property Owner	Email	804375	TCAD	Market Values	PO post IH seeks tables related to the values presented as adjustments in the grids.	The PO may review the cost adjustments by comparing each property's Field/Appraisal Cards. For example, if a sale property is valued at 80% good, the PO's 70% expected would be a downward adjustment to the sale property.	5/1/2024
44	5/1/2024	Property Owner	Email	386031	TCAD	BPP Issues	PO closed business in 2020. No longer receives mail. Has no inventory and would like help to correct account.	Provided PO Change of Address Form and Late Motion 25.25 (c) Protest Form to report business closure through the protest process.	5/2/2024
45	5/3/2024	Other	Email		TCAD	Market Values	Property Mgr for HOA has three parcels not valued as HOA property.	Property deed has not been updated. Advised Mgr to not miss protest deadline for review of Market Value.	5/6/2024
46	5/3/2024	Property Owner	Email		TCAD	Market Values	PO requests PIN for efile.	Forwarded request to Cust Svc for identity verification.	5/3/2024
47	5/5/2024	Property Owner	Email	974092	TCAD	Exemptions	PO's exemption on property purchased in 2023 as part of the Affordable Housing Program has been removed. PO request sale price from the date of possession.	PO claims HS Exemption on another home. PO purchased property post the Jan 1 valuation date for 2023. The sale is in the window of time used to value 2024.	5/8/2024
48	5/6/2024	Property Owner	In Person		TCAD	Market Values	Request review of 2023 for removal of Unauthorized Agent's Settlement Agreement.	ARB approved revocation of Agent Settlement Agreement and opened Late Motion 41.411 Protest scheduled for June 3 at 9a.m.	5/6/2024
49	5/6/2024	Property Owner	In Person	550451	TCAD	Market Values	Review of 2023 ARB determination in relationship to 2024 Noticed Market Value which appears too high.	Suggested PO is familiar with the protest process and if disagreement with the 2024 Notice Value a protest is the only method to challenge the Noticed Market Value.	5/9/2024

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50	5/6/2024	Property Owner	Email	939293	TCAD	Market Values	**To ARB and TLO** PO realized that 2023 Market Value differed from 2024 due to failure to incl the property in the Affordable Housing Program for AISD. PO seeks assistance in correcting the problem so the monthly payment to the lender will decrease.	The 51 East Condominium was granted affordable housing eligibility in 2023. Like very other affordable housing owner they will not be granted the affordable value until the following year. The agreements were signed and finalized after the mandated 01/01/23 date of appraisal.	5/7/2024
51	5/6/2024	Property Owner	Email	481022	TCAD	Informal Meetings	Before the PO could upload an opinion of value and supporting evidence, a Settlement Offer was made. PO requests consideration of owner evidence.	A review of the protest evidence by an Appraiser did not change the Settlement Offer made at the purchase price.	5/9/2024
52	5/7/2024	Property Owner	Email		TCAD	Market Values	PO requests to file a 2023 Protest citing failure to correctly appraise as the reason.	Provided PO with ARB Late Protest brochure for review.	5/9/2024
53	5/7/2024	Other	Email		TCAD	General Inquiries	Request for GIS info.	Referred requester to make a Public Info Request to receive a GIS shapefile.	5/9/2024
54	5/8/2024	Property Owner	Email	833932	TCAD	Market Values	PO filed for a 2023 FH and has not heard anything. Request what to do about 2024 valuation.	PO has a 2023 Late Motion FH pending scheduling. If PO disagrees with the 2024 Market Value a protest should be filed. Each appraisal year is independent.	5/8/2024
55	5/8/2024	Property Owner	Email	711677	TCAD	Market Values	PO requests a review of land value for 2021-2023, believing a mistake must have been made.	PO rec'd a change in value for 2021-2023 through an Agent Settlement Agreement. Due process has been served. Suggested PO request a Field/Appraisal Card for comments related to factors of valuation in 2024 and to contact the Authorized Agent to discuss valuation concerns.	5/8/2024
56	5/8/2024	Property Owner	Email		TCAD	Informal Meetings	Due to illness PO sends notice of inability to attend the Informal Meeting.	Forwarded notification that PO was unable to attend the Informal Meeting scheduled. PO did not indicate any intent to reschedule.	5/9/2024
57	5/8/2024	Property Owner	Email		TCAD	Informal Meetings	PO offers narrative of the lack of full disclosure of property valuation as the scheduled Informal Meeting approaches.	The PO was directed to their portal account to review the evidence post on 4/28 and the Informal Settlement Offer made.	5/9/2024
58	5/8/2024	Property Owner	Email		TCAD	Market Values	PO has just purchased property and intends to deed the parcel to an LLC. Questions if he should immediately file the deed or will it confuse the ownership issue.	The PO has not filed the deed with the County Clerk's Office. The buyer will need to prove ownership to recognize the authority to represent the property during a protest. The important pending matter is the approaching filing deadline.	5/9/2024

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59	5/8/2024	Property Owner	Email		TCAD	BPP Issues	PO cannot find Rendition Form via the web and wants direction on completing.	Directed PO to Forms Library on the website and suggested the webinar *Business Personal Property Explained* would provide the info sought.	5/9/2024
60	5/8/2024	Property Owner	Email	374546	TCAD	Informal Meetings	PO had no confirmation that his opinion of value and supporting evidence has been rec'd.	PO did not provide enough info to identify the property. Indicated evidence submitted would be reviewed at the stated upcoming Informal Meeting.	5/9/2024
61	5/9/2024	Property Owner	Phone	149296	TCAD	Informal Meetings	How is an Informal Meeting rescheduled?	Forwarded instructions to reschedule.	5/9/2024
62	5/9/2024	Property Owner	Email	156834	TCAD	Exemptions	PO had an IH and was referred to the TLO to review the HS Exemption which currently does not include the contiguous land approved in 2020 as part of my homesteaded property.	The Exemption Section reviewed and corrected the Appraised/Taxable Value. PO was provided the Tax Office brochure related to the refund process.	5/17/2024
63	5/10/2024	Property Owner	Email		TCAD	Market Values	New PO submits Revocation of AOA.	TLO copied on submission. No response sent.	5/13/2024
64	5/10/2024	Other	Email		TCAD	Market Values	Agent submits AOA Form.	Forwarded AOA to appropriate section with direction to Agent where to send this info in the future.	5/13/2024
65	5/10/2024	Property Owner	Email	224241	TCAD	Market Values	PO has not rec'd NOV for one property desiring to protest. Sends AOA for another property.	Referred PO to Customer Service for identity verification to receive PIN. Provide paper version of protest as deadline approaches. Forwarded AOA Form to appropriate section.	5/13/2024
66	5/11/2024	Other	Email		TCAD	General Inquiries	Request for the Industrial Income Calculation Worksheet.	The 2024 Income Worksheet for subject property will be provided in the appeal evidence, if protested. If not, the request would need to be made as a PIR.	5/13/2024
67	5/12/2024	Property Owner	Email		TCAD	Market Values	PO attempting to efile had difficulty filing. Mailed protest via USPS. PO provided copies of the mailed protest. Would like to see the portal more user friendly.	Thanked PO for their comments.	5/13/2024
68	5/12/2024	Property Owner	Email	156553	TCAD	Exemptions	PO inquires how to secure a disability exemption and >65 on property.	PO claims an >65 Exemption for all Taxing Units. AISD's local option for a Disabled Person's Exemption is lower than the local option for an >65 exemption. PO is claiming the exemptions that affords the best tax savings.	5/13/2024
69	5/13/2024	Property Owner	Email	759403	TCAD	Exemptions	PO has deeded home to an LLC making it ineligible for a HS Exemption. The PO is submitting a Trust Doc to re-deeding the property. PO requests the HS Exemption be granted back to 2022.	Until the Trust Deed is filed with the County Clerk's Office the property will remain deeded to an LLC ineligible for a HS Exemption. The Appraisal District will receive the deed filing electronically and the PO may complete an on-line HS Exemption. The 2024 HS Exemption will be pro-rated.	5/14/2024
70	5/13/2024	Property Owner	Email		TCAD	Market Values	PO is in urgent need prior to the filing deadline for PIN info for five properties.	Directed PO to Customer Service for identity verification. Provided PO a paper copy of the Protest Form.	5/14/2024

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71	5/13/2024	Property Owner	Email	330924	TCAD	Market Values	PO does not know how to connect to schedule a IH.	Protest was filed in the portal. Instructed PO an Settlement Offer was pending review. An IH may be scheduled via the portal. Provided web address for tutorial for *Managing Your Protest On-line.*	5/13/2024
72	5/13/2024	Property Owner	Email	119111	TCAD	Market Values	PO did not receive Notice of Value and could not file on-line without PIN.	Referred PO to Customer Service for identity verification to receive PIN. Provide paper version of protest as deadline approaches.	5/14/2024
73	5/13/2024	Property Owner	Email	892770	TCAD	Market Values	PO has called multiple times to Cust Svc and not gotten an answer. Requests NOV for recently purchased property.	The purchase is so recent that the deed change has not been rec'd from the County Clerk's Office. The seller has an assigned Agent that has filed a protest and has a Settlement Offer pending review. Sent PO Revocation of Agent Form and Protest Form.	5/14/2024
74	5/13/2024	Property Owner	Email	848398	TCAD	Market Values	PO purchased In March 2023 and did not protest the higher Market Value. Would like guidance.	The PO was provided the ARB Late Protest Brochure explaining the options available for 2023. Advised with a quickly approaching Protest deadline to consider is the sale price is evidence of lower than the 2024 Noticed Market Value a protest should be filed. Suggested the PO could review the Protest tutorial to file on-line and viewing several webinars related to home ownership: *Homestead Exemptions, Understanding Your Notice of Appraised Value and the 2024 Protest Process.*	5/14/2024
75	5/13/2024	Property Owner	Email	161159	TCAD	Exemptions	PO has experienced an increase in their mortgage payment. Applied for HS Exemption in 2023. Seeking understanding of why the increase.	PO rec'd a tax benefit in 2022 of the seller's HS Exemption and a lower Appraised Value. The PO was approved a HS Exemption for 2023 and the taxes were billed correctly based upon the buyer's Appraised Value.	5/14/2024
76	5/13/2024	Property Owner	Email	907598	TCAD	Market Values	Post a current year IH, the PO was advised to reach out to review filing for a refund related to incorrect recording of sq ft back to 2019.	Provided PO the Late Motion 25.25 (c) Protest filing form and ARB brochure related to Late Motion Protests.	5/14/2024
77	5/13/2024	Property Owner	Email	5223042	TCAD	Market Values	PO cites the unjust land value increase of 400% in a condo regime.	In 2023 the CAD valued the land based on a specific review of land sales in the assigned market segment. The increase in value is based on what a buyer has historically paid.	5/14/2024
78	5/13/2024	Property Owner	Email		TCAD	Market Values	PO requests a PIN to file an on-line protest.	PO has utilized the TLO auto-reply instructions and provided identity info to Cust Svc.	5/14/2024
79	5/14/2024	Property Owner	Email	820509	TCAD	Informal Meetings	PO had IH scheduled and was not been able to connect with an Appraiser.	A Residential Appraiser has made a second call with no answer. Successfully reached PO on a subsequent call.	5/14/2024
80	5/14/2024	Property Owner	Email	302009	TCAD	Market Values	PO inquires how the Market Value of his property continues to increase when his parcel has less buildable area and heritage trees.	The Market Values are based upon market segment sales. The recent Legislation created a taxable value cap of 20% for non-homesteaded properties. PO's taxable value has only increased that amount while the Market Value has risen significantly.	5/15/2024

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81	5/14/2024	Property Owner	Email		TCAD	Narrative	PO settled his protest early and now finds that others in his area rec'd larger reductions in value. Doesn't pay to go early.	Received as narrative with no response.	5/14/2024
82	5/14/2024	Property Owner	Email	102608	TCAD	Market Values	PO has scheduled an IH and requests confirmation the protest has been filed.	The system would not have allowed the scheduling of an IH if the protest had not been filed. PO may verify filing on the property record page via the web. Encouraged PO to upload to through the portal any evidence that supports their opinion of value.	5/15/2024
83	5/14/2024	Property Owner	Email	962920	TCAD	Market Values	PO has reinstated their D-1-D Exemption and finds the value of their home has increased. Why? Have hired an Agent to represent their protest.	The PO has had a downward adjustment for the condition of the home that has been removed in 2023. The improvement has now been appraised at Market Value. Suggested PO have further discussion with their Agent.	5/15/2024
84	5/14/2024	Property Owner	Email	752781	TCAD	Exemptions	On 4/11/2024 PO sent to the Exemptions Section an email with the Trust document indicating no change in ownership was made to have their HS Exemption reinstated. This email has never been opened or read.	Requested a review by the Exemption Section. The Trust doc was scanned on 4/24 and was reviewed with a continuation of the HS Exemption and correct Appraised Value.	5/16/2024
85	5/14/2024	Property Owner	Email		TCAD	Exemptions	PO claims multiple attempts have been made to resolve prior year removal of D-1-D appraisal due to replatting of property.	PO must place the property under protest for consideration of a change in the certified roll. The correction due to the replatting of the land will be corrected in 2025. Provided PO Protest Form and instructions to file.	5/15/2024
86	5/15/2024	Property Owner	Email		TCAD	Informal Meetings	PO inquires what is the period of time to accept a Settlement Offer. The PO has searched the FAQs and finds the process terribly opaque, and the instructions ambiguous and vague.	Provided PO info that the Settlement Offer should be available up until the time of the FH. Should the PO desire to accept the offer and find inability to do so, advise PO to reconnect for assistance.	5/15/2024
87	5/15/2024	Property Owner	Email		TCAD	Market Values	PO needs PIN to file several protests.	PO has made request to Cust Svc. Provided PO with Protest Form should the identity verification not be completed prior to COB.	5/15/2024
88	5/15/2024	Property Owner	Email		TCAD	Market Values	PO advises that she has released Agent and asserts owner will represent protests filed by Agent.	Suggested PO file an owner protest. Often an Agent Contract cancelled results in the Agent's withdrawal of the protest filed after the close of the filing date. The owner then has no protest filed.	5/15/2024
89	5/15/2024	Property Owner	Email		TCAD	Market Values	PO advises that he has released Agent and asserts owner will represent protests filed by Agent.	Suggested PO file an owner protest. Often an Agent Contract cancelled results in the Agent's withdrawal of the protest filed after the close of the filing date. The owner then has no protest filed.	5/15/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
90	5/15/2024	Property Owner	Email		TCAD	Market Values	PO is traveling for work and is currently on hold with Cust Svc to receive a PIN to efile the protests for two properties that the NOV was not rec'd.	Provided PO Protest Form and filing instructions.	5/15/2024
91	5/15/2024	Property Owner	Email		TCAD	Market Values	PO at 12:42PM has been on hold with Cust Svc multiple times over the last two days. Have attempted to use the Chat function. PO needs PIN.	Provided PO Protest Form and filing instructions.	5/15/2024
92	5/15/2024	Property Owner	Email		TCAD	Market Values	PO inquires at 2:53PM seeks confirmation that protest does not have to be sent certified mail and that an electronic copy is acceptable. Has spent three days of back/forth emails with Cust Svc providing identity info to receive PIN.	Provided PO Protest Form and filing instructions.	5/15/2024
93	5/15/2024	Property Owner	Email		TCAD	Market Values	PO at 4:04PM while on hold with Cust Svc for more than an hour, PO inquires why the current PIN is not working in the portal.	Provided PO Protest Form and filing instructions.	5/15/2024
94	5/15/2024	Property Owner	Email		TCAD	Market Values	PO inquires at 5:01PM how to secure PIN for filing.	Post close of Cust Svc sent PO paper version and instructions to submit.	5/15/2024
95	5/15/2024	Property Owner	Email		TCAD	Market Values	PO inquires at 8:32PM submits two protests indicating no NOV with the PIN was rec'd.	Forwarded protests to appropriate CAD section.	5/16/2024
96	5/15/2024	Property Owner	Email		TCAD	Market Values	PO expresses intent to file a protest, but does not have PIN. PO provides address for property desiring to protest.	Protest was filed.	5/17/2024
97	5/15/2024	Property Owner	Email	240548	TCAD	Market Values	PO submits 2022 and 2023 Protest with justification for late filing. The filing is a follow-up to communication with the ARB that the filing deadline has expired.	Informed the PO the ARB has advised the filing of these protests is beyond the expiration date and the ARB does not have the authority to extend the deadline. The TLO does not have any authority to accept the filing. Advised the PO if they intend to pursue the filings the protests must be submitted to the ARB.	5/16/2024
98	5/15/2024	Property Owner	Email	168722	TCAD	General Inquiries	PO indicates an unrecognized Agent has been added to the property.	The Agent is an "Unauthorized" meaning there is no owner authority to represent.	5/15/2024
99	5/15/2024	Property Owner	Email		TCAD	General Inquiries	PO has a recent survey that differs from the land area recorded by the CAD. What is my next step?	Suggested that the PO send the survey to the GIS Section for review.	5/17/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
100	5/15/2024	Other	Email	762046	TCAD	Exemptions	PO has record of applying for HS Exemption in 2021, but none has been granted.	PO rec'd a HS Exemption in 2022. Recommended PO apply for 2023-2024 to reinstate exemption if due.	5/16/2024
101	5/16/2024	Property Owner	Email	321302	TCAD	Exemptions	PO has multiple questions related to HS Exemptions for state and local options, Affordable Housing determination of Market Value and inquires if a website failure occurred which prevented the PO from filing a protest through the portal as opposed to mailing it certified USPS.	Provided PO AISD approved local tax option from chart available on the web. Affordable Housing Market Values are calculated based on the signed Agreement between the taxing unit and the CAD. To review the determination of value would be property specific. There was no known website failure on 5/15, perhaps busy use. The PO chose to file using certified USPS mail to ensure the recording of a mailing/delivery date.	5/17/2024
102	5/17/2024	Property Owner	Email	315827	TCAD	Market Values	PO referred by Appraiser. PO inquires what tax impact would be had if the Settlement Offer were accepted.	The PO would realize a savings from the 2024 Noticed Appraised Value, but anything other than an estimate of savings is not possible prior to the setting of the tax rates by each taxing unit. The Settlement Offer represents in increase in value from 2023.	5/20/2024
103	5/17/2024	Property Owner	Email	963482	TCAD	BPP Issues	PO has filed protest. Would like resolution of double assessment resolved informally if possible.	Referred to BPP Section for review and resolution through Informal Meeting.	5/20/2024
104	5/18/2024	Property Owner	Email	474904	TCAD	Market Values	PO has attended an Informal Meeting and expects an updated Settlement Offer. Request assistance in reviewing if the offer has been revised.	Reviewed by Residential Section. PO's submission of Sales Price exceeds the current 2024 Market Value. No Settlement Offer was made.	5/20/2024
105	5/18/2024	Property Owner	Email		TCAD	Market Values	PO was told by Cust Svc a filing extension for a protest was not possible.	Confirmed to PO that no one has the authority to extend the protest filing deadline set by state law. Provided PO Late Motion Protest brochure.	5/20/2024
106	5/20/2024	Property Owner	Email	907667	TCAD	Exemptions	PO requests a copy of 100% Disability Letter.	Provided requested info.	5/21/2024
107	5/20/2024	Property Owner	Email	111357	TCAD	Exemptions	PO requested a meeting to discuss the notice of exemption denial/removal.	The PO has had an HS Exemption on one of three properties owned for multiple years. Only one HS Exemption is allowed per owner. No Exemption denial/removal Letter was found. The requested PO provided specific info related to the inquiry.	5/21/2024
108	5/20/2024	Property Owner	Email		TCAD	Market Values	PO missed IH due death in family. Spoke to an Appraiser who was not prepared to review the evidence with the PO. PO seeks clarification of specific adjustment made in comp grid.	Post review of the property the Residential Appraisal Section revised the Settlement Offer. The property owner's new offer may be found in the portal.	5/22/2024

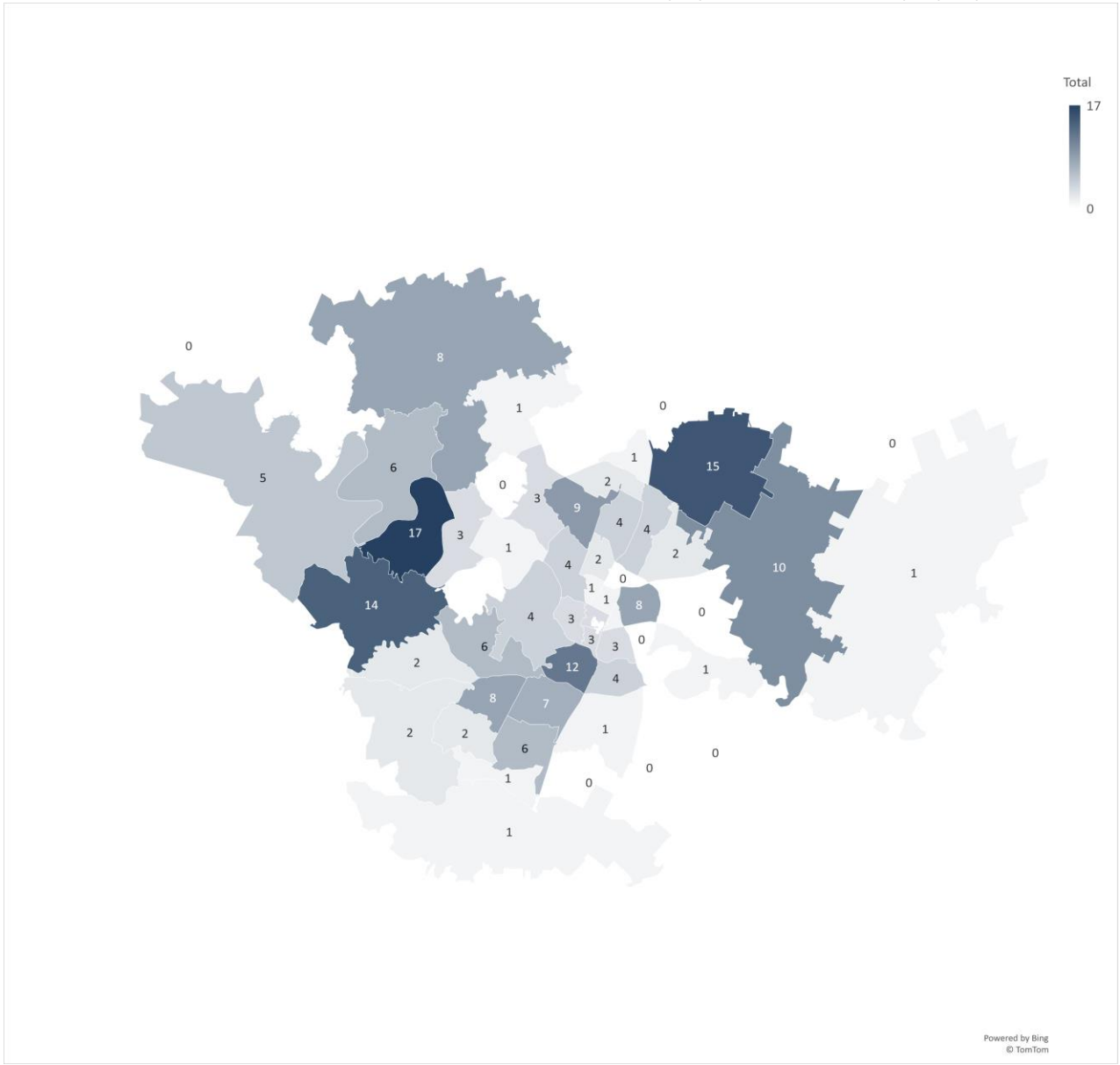
Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
109	5/20/2024	Other	Email	147532	TCAD	Exemptions	Area citizen reports suspected abuse of Exemption having not removed the HS and >65 Exemptions for owner deceased for over a decade.	Referred to the Exemption Section for investigation. Exemption was removed.	5/21/2024
110	5/21/2024	Property Owner	Email	324524	TCAD	Market Values	TLO auto-response does not address PO's issue. PO has had an IH. Characteristics were updated and a Settlement Offer made. The Appraised Value is an increase greater than 10% from prior yr.	The Appraiser's IH notes on the Field/Appraisal Card indicated that a light utility bldg was added to the property in 2024 as new construction. This would increase the Appraised Value by the appraised market value of the new construction plus 10%.	5/22/2024
111	5/20/2024	Other	Email		ARB	Formal Hearings	Agent submits evidence of hearing date conflict in another county.	Provided Agent with email address of the ARB for review of the request.	5/22/2024
112	5/21/2024	Property Owner	Email	902037	TCAD	BPP Issues	PO requests info related to a BPP rendition.	Requested more detail from PO. No further communication rec'd.	5/22/2024
113	5/21/2024	Property Owner	Email	755554	TCAD	General Inquiries	PO sends mailing address change.	Provided PO with Change of Mailing Address form and filing instructions.	5/22/2024
114	5/21/2024	Other	Email		TCAD	Exemptions	**From Office of Council District 10 to Chief Appraiser and TLO.** Info is sought as to whom is allowed to file the Exemption and the deficiencies to be corrected.	Chief Appraiser responded.	5/23/2024
115	5/22/2024	Property Owner	Email		TCAD	Market Values	PO states the desire to file a protest.	Provided PO with ARB Late Motion brochure.	5/23/2024
116	5/22/2024	Property Owner	Email	830749	TCAD	Market Values	PO does not see protest filing on his property record.	PO submitted Late Motion filings which have not been processed for scheduling.	
117	5/22/2024	Property Owner	Email	564138	TCAD	Market Values	PO seeks an explanation of why the Value Limitation Adj differs significantly from yr to yr. Suggests the delayed approval of HS Exemption may be the cause.	PO's DV Exemption was approved for 2022 and subsequent yrs. The 2022 Tax Bill did not include the Exemption. Referred the PO to the Tax Office for further discussion. The Limitation Value Adjustment is a simple calculation of value not taxed, the Market Value minus the Appraised Value. A Taxing Units approved exemption amounts are applied to the Appraised Value on the Tax Bill.	5/23/2024
118	5/22/2024	Property Owner	Email	199802	TCAD	Exemptions	PO filed a Historic Exemption in March and has had no response. Ownership should be transferred from Joint Venture.	No deed change has been rec'd by the Appraisal District that would permit the update requested. The Exemption Application was not submitted in the deeded owner's name.	5/23/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
119	5/22/2024	Property Owner	Email	902037	TCAD	BPP Issues	**Referred by the County Attorney's Office.** PO has never filed a rendition and noticed of delinquent taxes. PO has no BPP for use in an AirB&B.	PO provided info to file a Late Motion 25.25 (c) Protest for 2019-2023 to challenge the taxation of property that does not exist. The 2018 valuation taxed is outside the period available to protest.	5/23/2024
120	5/22/2024	Property Owner	Email		TCAD	Market Values	PO requests phone call.	PO believes the comparable properties are inappropriate due to his property's terrain and deferred maintenance. Explained that his opinion of value due to these issues must be supported by documentation just as the CAD submits evidence to support their opinion of value. Suggested evidence might include the cost to cure maintenance deficits.	5/23/2024
121	5/23/2024	Property Owner	Email	382763	TCAD	Market Values	PO seeks verification large evidence packet has been received through the portal. PO reached maximum download limits.	Provided PO page count by Exhibit of evidence uploaded. Suggested that Supplemental Evidence be submitted to the appropriate CAD Section.	5/24/2024
122	5/23/2024	Property Owner	Email	845366	TCAD	Market Values	PO requests explanation of specific line items in Comp Grids.	Post review of the Residential Section provided PO explanation of line item adjustments.	6/3/2024
123	5/23/2024	Other	Email		TCAD	Market Values	PO provides explanation of confused mail delivery of NOV for multiple properties. The PO requests consideration to submit protests post the deadline.	The TPTC does not extend authority to anyone to extend the deadline for a protest filing. The CAD met the responsibility assigned under the TPTC to mail the PO the NOV timely. The CAD makes the current year's appraised Market Value available on the web. Receipt of the NOV is a requirement to file a protest. Provided PO ARB Brochure describing Late Motion Protest filings.	5/24/2024
124	5/23/2024	Property Owner	Email		TCAD	Informal Meetings	PO describes disappointing IH experience that felt like a cattle call. As opposed to prior years this Appraiser appeared to be inattentive. The call ended abruptly without even a bye from the Appraiser.	Expressed appreciation for the PO's comments of their experience. Referred comments to CAD.	5/24/2024
125	5/23/2024	Property Owner	Email	136947	TCAD	Market Values	PO attended a IH and was told the Settlement Offer would be valid until the end of the month. PO would like to combine this year with a prior year pending Hearing in early June.	PO's Hearing is set for a specific year under review. The addition of the current year will be determined by those conducting the upcoming Hearing. PO advised if accepting the Settlement Offer up until the time of the FH becomes problematic, to request assistance.	5/24/2024
126	5/23/2024			940310	TCAD	Informal Meetings	PO was unable to connect with an Appraiser when calling for the IH. Request assist to reschedule.	Requested PO contact Customer Service to request to be added to the cue for a hearing based on your previous failure to connect. Requested PO ensure they have the time to participate in the meeting when you make the call.	5/24/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
127	5/23/2024	Property Owner	Email	894864	TCAD	BPP Issues	The PO received the Final Order with the ARB's denial of the Late Motion Protest. The PO now has taxes due on a business that has been closed for years.	The denial of the Late Motion Protest by the Appraisal Review Board is not an appealable order. Should the PO desire to continue an appeal, it would require a District Court action.	5/24/2024
128	5/23/2024	Property Owner	Email		TCAD	Property Taxes	PO purchased a new home in 2022 which retained the HS Exemption of the Seller. In 2023 the Tax Bill was calculated with the Seller's Appraised Value and Exemptions. When corrected the Buyer had a Tax Liability. The same scenario occurred with their previously owned home retained as rental property.	A tax liability occurred due to the timing of the approval and removal of the HS Exemption to the new property from the old property. The Accessed Value on each property increased creating a bill for taxes due. Advised the PO the Tax Office should be contacted if a payment plan was necessary.	5/24/2024
129	5/24/2024	Other	Email		TCAD	Exemptions	**From Brenda Shea, Commissioner Pcnt 2:** PO expressed concern related to the level of Cust Svc received by the CAD.	Investigated and responded to by CAD Chief Strategy Officer.	5/28/2024
130	5/24/2024	Property Owner	Email	211885	TCAD	Market Values	PO requests direction to change the Appointed Agent.	Provided PO Revocation and Appointment of Agent forms.	5/24/2024
131	5/26/2024	Other	Email	217025	TCAD	Market Values	PO seeks 1986 Market Value of home of deceased owner. Has made a PIR without success.	The response to the PIR advised the PO that this information was unavailable. The TLO has no records in response. The home has had an HS and >65 Exemptions claimed since the owner's death in 1986. The information was referred to the Exemptions Section for review.	5/28/2024
132	5/26/2024	Property Owner	Email		TCAD	General Inquiries	PO requests a definition for acronyms associated with a protest filing.	Provided requested info.	5/28/2024
133	5/28/2024	Property Owner	Email		TCAD	Informal Meetings	PO had scheduled IH but had not heard from the CAD. Now what?	PO was referred to website instructions for attending an IH. PO met with an Appraiser the next day.	5/29/2024
134	5/28/2024	Property Owner	Email	108527	TCAD	Informal Meetings	PO complains that the IH was scheduled so quickly after the filing date. The PO was out of town and now finds that IH cannot be rescheduled. The FH process needs to provide a PO sufficient time to present their opinion of value.	The time constraints on both the ARB and CAD to certify the Appraisal Rolls does not allow for rescheduled IH. The next step will be to appear at a FH. Recommended PO complete a Comptroller's Survey if dis-satisfied with the hearing length of time.	5/29/2024

Line #	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date
135	5/29/2024	Property Owner	Email	208444	TCAD	General Inquiries	PO submits a Change of Mailing Address Form and copy of recently filed Deed yet to be recorded by the CAD. Requests assistance in updating info.	Referred to Cust Svc for update of mailing address and GIS Section for processing the recorded deed.	5/30/2024
136	5/29/2024	Property Owner	Email		TCAD	Exemptions	PO recently purchased home and inquires if best to wait until 2025 to apply for HS.	PO needed to provide more info to identify property record. Provided general info and referred PO to applicable webinar-*Homestead Exemptions.*	5/30/2024
137	5/29/2024	Property Owner	Email	291092	TCAD	Property Taxes	PO's Escrow payments have increased due to an overcharge in taxes billed in 2023.	PO qualified for an HS Exemption in 2023, which reset the Appraised Value from the seller's much lower taxable value. The PO was not charged undue taxes, and no refund is due. The PO could seek a review with their lender of the increased monthly payment based on 2023 taxes paid, considering the current 2024 Market Value is lower.	5/30/2024
138	5/31/2024	Property Owner	Email	921867	TCAD	Exemptions	PO does not believe the correct amount for his >65 and school taxes were ported to his new home.	PO submitted the wrong Tax Ceiling Cert and followed up via email with the current Cert. The correct Cert has not been applied. The Exemption Section is reviewing the status for an update.	
139	5/31/2024	Property Owner	Email	10853	TCAD	Market Values	PO requests direction to locate the property classification and condition.	PO's Evidence Pckt includes an Appraisal Card which contains both pieces of data. The PO may review this info through their portal account.	5/31/2024

2024 Taxpayer Liaison Activity by Zip Code



Activity by Area ISD	
Austin ISD: 78652, 78701, 78702, 78703, 78704, 78705, 78722, 78723, 78731, 78735, 78736, 78737, 78739, 78741, 78745, 78748, 78749, 78751, 78753, 78756, 78757, 78758, 78759	101
Del Valle ISD: 78610, 78725, 78742	3
Eanes: 78733, 78746	7
Elgin ISD: 78653	10
Lake Travis ISD: 78734, 78738, 78669	36
Leander ISD: 78613, 78730, 78732, 78641, 78645	15
Manor ISD: 78621, 78744, 78754	3
Pflugerville ISD: 78660	15
Round Rock: 78727, 78728, 78750	6

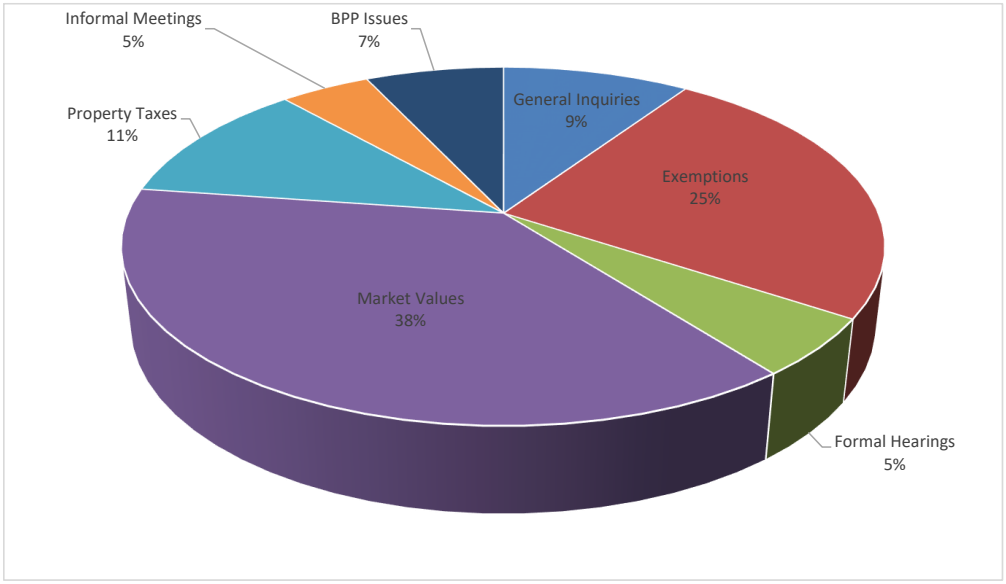
2024 Taxpayer Liaison Monthly Report

Month	General Inquiries	Narratives	Formal Hearings	Informal Meetings	Exemptions	BPP Issues	Open Records	Property Taxes	Market Values	TOTALS
January	9	0	2	1	7	1	0	12	2	**34**
February	1	0	8	0	17	1	0	7	11	**45**
March	2	0	3	0	0	4	0	7	9	**25**
April	8	0	1	1	28	8	0	4	32	**82**
May	7	0	1	11	19	6	0	2	54	**100**
June	0	0	0	0	0	0	0	0	0	**0**
July	0	0	0	0	0	0	0	0	0	**0**
August	0	0	0	0	0	0	0	0	0	**0**
September	0	0	0	0	0	0	0	0	0	**0**
October	0	0	0	0	0	0	0	0	0	**0**
November	0	0	0	0	0	0	0	0	0	**0**
December	0	0	0	0	0	0	0	0	0	**0**
TOTALS	**27**	**0**	**15**	**13**	**71**	**20**	**0**	**32**	**108**	**286**

2024 YTD	2023 by Month
34	50
45	19
25	43
82	72
100	68
286	**252**

Yr. Over Yr, Comparison

2024 Inquiries by Category



Activity Through 05/31/2024

Prepared by: Betty Thompson

Taxpayer Liaison Automatic Email Response

Thank you for your email.

As the Taxpayer Liaison Officer, I want to make sure that you get fast and effective assistance for your inquiry. It may take up to 3 business days for me to investigate and respond to your issue. If you have not already, please consider contacting TCAD's customer service department for immediate assistance. They can be reached by phone at 512-834-9317, by email at csinfo@tcadcentral.org, or by online chat at traviscad.org.

The TCAD website may also provide helpful information. The pages below may be able to answer your inquiry:

- If you need assistance finding your PIN number or getting an update on the status of your exemption application, please contact customer service
- If you have questions about the protest process, including viewing your evidence, scheduling an informal meeting, attending your meetings and hearings, or navigating the online portal, visit traviscad.org/protests
- If you have questions about applying for a homestead exemption and the different types of exemptions available, visit traviscad.org/homesteadexemptions
- If you need to file a public information request, you may do so at traviscad.org/publicinformation
- Videos on understanding your property tax bill, filing renditions, homestead exemptions, understanding your notice of appraised value, and navigating the protest process are available at traviscad.org/videos
- Additional frequently asked questions can be reviewed at traviscad.org/faqs

If you've already explored these options and haven't found a solution to your inquiry or if your inquiry requires further assistance, please reply to this email with more information, including your previous interactions with other TCAD departments. This will help me look into the status of your inquiry more effectively.

Betty Thompson
Taxpayer Liaison

TAXPAYER RESOLUTION MAP

5

STEP 5: TAXPAYER LIAISON OFFICER

The issue is elevated to the Taxpayer Liaison. This is the highest level of customer service support available.
The TLO will characterize all customer service issues at this level as:
Tier 1: General Inquiry/Education Only
Tier 2: Complaint found to have been resolved appropriately by the CAD+Property owner education provided
Tier 3: Complaint escalated to CAD senior leadership and resolved appropriately by the CAD+Property owner education provided
Tier 4: Complaint indicative of larger issues needing attention from the Board of Directors

4

STEP 4: DEPUTY CHIEF APPRAISER

The issue is elevated to the Deputy Chief Appraiser.
The Deputy Chief addresses and resolves the issue as best as possible. If an internal training or systemic issue is identified, the Deputy Chief reports the issue to the Chief Appraiser and oversees training, reporting, and new policy implementation.

3

STEP 3: CUSTOMER SERVICE DEPARTMENT LEAD

The issue is elevated to the department lead.
The department lead addresses and resolves the issue as best as possible.
If an internal training opportunity is identified, the department lead works with the Deputy Chief Appraiser to oversee training and reporting.
If a larger systemic issue is identified, the department lead brings the issue to the attention of the Deputy Chief Appraiser.

2

STEP 2: CUSTOMER SERVICE TEAM LEAD

The issue is elevated to a department team lead.
The team lead addresses and resolves the issue as best as possible.
If an internal training opportunity is identified, the team lead reports the issue to the department lead. The department lead oversees the internal training and reporting.

1

STEP 1: CUSTOMER SERVICE REPRESENTATIVE

The taxpayer initiates contact with the customer service department and is assisted by a representative. The employee gathers information and tries to resolve the issue.

5C

REGULAR AGENDA

EideBailly

CPAs & BUSINESS ADVISORS

Independent Auditor's Report

To the Board of Directors
Travis Central Appraisal District
Austin, Texas

Report on the Audit of the Financial Statements

Opinions

We have audited the financial statements of the governmental activities and each major fund of the Travis Central Appraisal District (the District) as of and for the year ended December 31, 2023, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities and each major fund of the District, as of December 31, 2023, and the respective changes in financial position thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, pension schedules, OPEB schedules, and budgetary comparison information on pages 7 through 28 and 77 through 88 be presented to supplement the basic financial statements. Such information is the responsibility of management and although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Management is responsible for the other information included in the annual report. The other information comprises the introductory and statistical sections but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

Eide Bailly LLP

Abilene, Texas
June 11, 2024

EideBailly

CPAs & BUSINESS ADVISORS

June 11, 2024

To the Board of Directors
Travis Central Appraisal District
Austin, Texas

We have audited the financial statements of Travis Central Appraisal District (the District) as of and for the year ended December 31, 2023, and have issued our report thereon dated June 11, 2024. Professional standards require that we advise you of the following matters relating to our audit.

Our Responsibility in Relation to the Financial Statement Audit

As communicated in our letter dated February 1, 2024, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of your respective responsibilities.

Our responsibility, as prescribed by professional standards, is to plan and perform our audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement. An audit of financial statements includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control over financial reporting. Accordingly, as part of our audit, we considered the internal control of the District solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

Planned Scope and Timing of the Audit

We conducted our audit consistent with the planned scope and timing we previously communicated to you.

Compliance with All Ethics Requirements Regarding Independence

The engagement team, others in our firm, as appropriate, our firm, and other firms utilized in the engagement, if applicable, have complied with all relevant ethical requirements regarding independence.

400 Pine St., Ste. 600 | Abilene, TX 79601-5190 | T 325.672.4000 | TF 800.588.2525 | F 325.672.7049 | EOE

Qualitative Aspects of the Entity's Significant Accounting Practices

Significant Accounting Policies

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the District is included in Note 1 to the financial statements. There have been no initial selection of accounting policies and no changes in significant accounting policies or their application during 2023. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Accounting Estimates

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments. The most sensitive accounting estimates affecting the financial statements are:

> Management's estimate of its net pension asset is based on reports received from the Texas County and District Retirement System (TCDRS). The net pension asset reported by TCDRS is based on actuarial valuations that utilize various assumptions including the remaining amortization period, discount rate, expected rates of investment return, salary increases, payroll growth rates and mortality rates. The financial statements of the TCDRS plan were audited and received an unmodified opinion. We evaluated the audited financial statements, census data submitted by the District to TCDRS and the District's controls over the census submission process that were used to develop the estimate of its net pension asset to determine that the estimate is reasonable in relation to the financial statements taken as a whole.
>
> Management's estimate of its other post-employment benefit liability is based on reports received from management's third-party actuary, Milliman. We evaluated the census data submitted by the District to Milliman and the District's controls over the census submission process that were used to develop the estimate of its other post-employment benefit liability to determine that the estimate is reasonable in relation to the financial statements taken as a whole.

Financial Statement Disclosures

Certain financial statement disclosures involve significant judgment and are particularly sensitive because of their significance to financial statement users The most sensitive disclosures affecting the District's financial statements relate to the net pension asset, other post-employment benefit liability and fund balance commitments.

Significant Difficulties Encountered during the Audit

We encountered no significant difficulties in dealing with management relating to the performance of the audit.

Uncorrected and Corrected Misstatements

For purposes of this communication, professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that we believe are trivial, and communicate them to the appropriate level of management. Further, professional standards require us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances or disclosures, and the financial statements as a whole.Uncorrected misstatements or matters underlying those uncorrected misstatements could potentially cause future-period financial statements to be materially misstated, even though the uncorrected misstatements are immaterial to the financial statements currently under audit. There were no uncorrected or corrected missstatements identified as a result of our audit procedures.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the District's financial statements or the auditor's report. No such disagreements arose during the course of the audit.

Circumstances that Affect the Form and Content of the Auditor's Report

For purposes of this letter, professional standards require that we communicate any circumstances that affect the form and content of our auditor's report. We did not identify any circumstances that affect the form and content of the auditor's report.

Representations Requested from Management

We have requested certain written representations from management which are included in the management representation letter dated June 11, 2024

Management's Consultations with Other Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

Other Significant Matters, Findings, or Issues

In the normal course of our professional association with the District, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, significant events or transactions that occurred during the year, operating and regulatory conditions affecting the entity, and operational plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as the District's auditors.

Other Information Included in Annual Reports

Pursuant to professional standards, our responsibility as auditors for other information, whether financial or nonfinancial, included in the District's annual reports, does not extend beyond the financial information identified in the audit report, and we are not required to perform any procedures to corroborate such other information. However, in accordance with such standards, we have read the information and considered whether such information, or the manner of its presentation, was materially inconsistent with its presentation in the financial statements. We noted no inconsistencies.:

Our responsibility also includes communicating to you any information which we believe is a material misstatement of fact. Nothing came to our attention that caused us to believe that such information, or its manner of presentation, is materially inconsistent with the information, or manner of its presentation, appearing in the financial statements.

This report is intended solely for the information and use of the Board of Directors and management of the District and is not intended to be, and should not be, used by anyone other than these specified parties.

Eide Bailly LLP

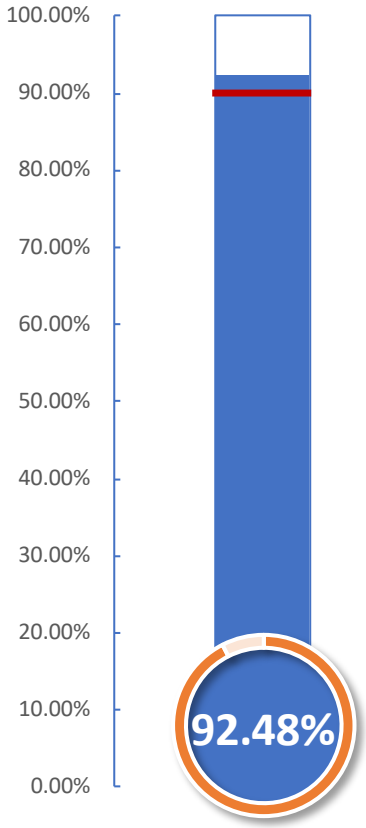
Abilene, Texas

5D

REGULAR AGENDA

2024 Protest Season Stats
As of June 10, 2024

TRAVIS COUNTY	Current Status	Est 7/20 Status
Grand Total Market Value	$ 483,958,803,641	$ 483,958,803,641
Value required for Certification	$ 435,562,923,277	$ 435,562,923,277
Number Protest Filed	181,509	181,509
Number of Open Protest	162,107	162,107
Value Protested Under Review	$ 246,965,655,434	$ 246,965,655,434
Scheduled		$ 156,646,348,906
Pending Scheduling		
Affidavits		$ 83,439,873
Joint Motions		$ 53,021,874,709
Pending Data Entry		$ 65,243,005
Pending Data Entry - ARB review		$ 3,270,546
Unfinished Docket		$ 771,760,359
Value Reduction Adjustment		
Value Protested Remaining	$ 246,965,655,434	$ 36,373,718,036
Value **not** Under Review	$ 236,993,148,207	$ 447,585,085,605
Value needed	**$ 198,569,775,070**	**$ (12,022,162,328)**
Certification Percentage	**48.97%**	**92.48%**



2024 Protest Season Stats
As of June 10, 2024

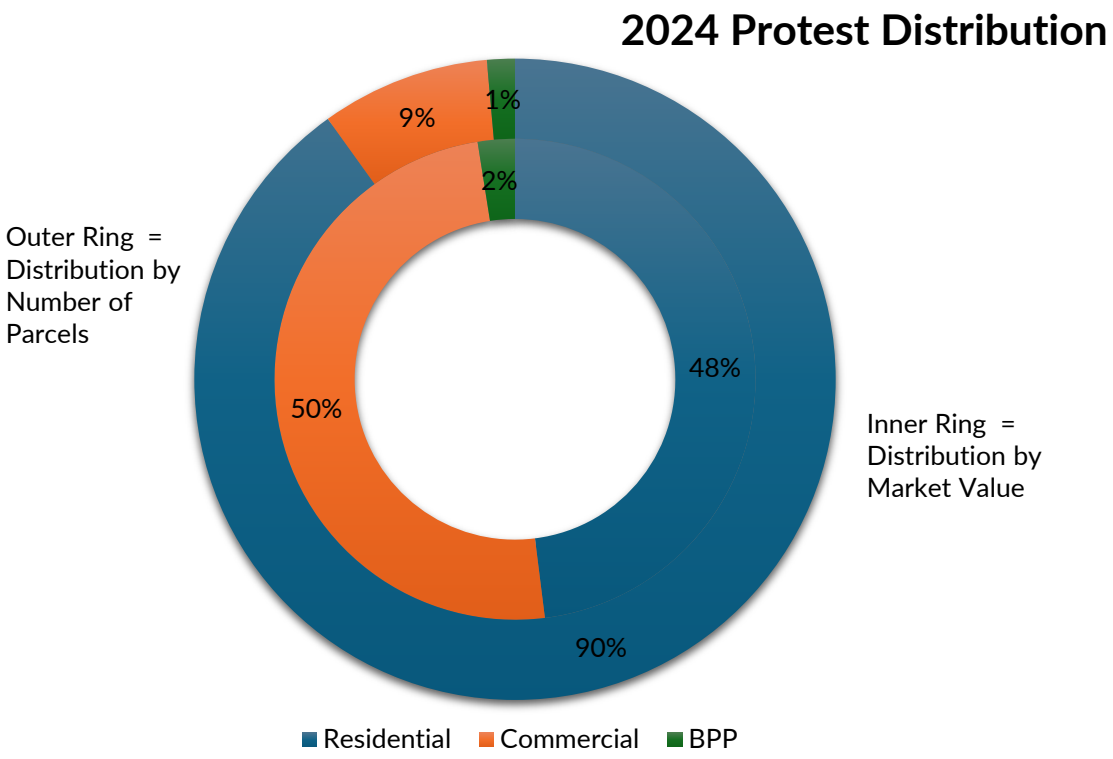
Appeals Stats			
Task	2022	2023	2024
Total Protests Filed	172,367	180,956	181,509
Increase (Decrease) YoY	21.9%	5.0%	0.3%

Protest by Filing Type:

Agent Protests	130,015	145,108	153,995
Owner Protests	42,352	35,848	27,514

Protest Filing Type:

Electronically Filed	137,557	149,891	144,710
Paper Filed	43,399	31,065	36,799



TRAVIS CENTRAL
APPRAISAL DISTRICT

COMMUNITY OUTREACH

COMMUNITY OUTREACH CALENDAR

JANUARY 2024

4 **Webinar: Your Property Tax Bill**
TCAD & Travis County Tax Office

20/27 **Property Tax Townhall (2)**
Del Valle Community Coalition

FEBRUARY 2024

5 **Renditions & Personal Property**
Economic Growth Business Inc (EGBI)

13 **Community Conversations**
Councilmember Vanessa Fuentes

15 **Webinar: Homestead Exemptions**
TCAD

17 **Homestead Exemptions**
City of Pflugerville

28 **Webinar: Personal Property Explained**
TCAD

MARCH 2024

6 **TCAD 101 for Real Estate Professionals (4)**
Austin Title

9 **Property Tax Townhall**
Circle C HOA

16 **Homestead Exemption Clinic**
Anderson Community Development Corp.

APRIL 2024

6 **Property Tax Townhall**
Constable George Morales

13 **Homestead Exemptions**
Del Valle Community Coalition

16 **Homestead Exemption Clinic**
Del Valle Community Coalition

17 **Webinar: Understanding Your Notice**
TCAD

20 **Notices & The Protest Process**
Anderson Community Development Corp.

22 **TCAD 101 for Real Estate Professionals**
Austin Black Real Estate Professionals

25 **Colony Park Affordability Fair**
City of Austin

27 **Notices & The Protest Process**
Del Valle Community Coalition

Property Tax Town Hall
Austin Revitalization Authority

MAY 2024

1 **Webinar: The 2024 Protest Process**
TCAD

8 **TCAD 101 For Real Estate Professionals**
Austin Title

AS OF JUNE 10, 2024

TRAVIS CENTRAL
APPRAISAL DISTRICT

COMMUNITY OUTREACH

COMMUNITY OUTREACH CALENDAR

JUNE 2024

2 **Del Valle Day**
Del Valle Community Coalition

12 **Monthly Benefits Clinic: Homeownership**
Austin VA Clinic/City of Austin

JULY 2024

No events scheduled/Protest Season

AUGUST 2024

24 **Budgets, Tax Rates, & Property Tax Bills**
Anderson Community Development Corp.

SEPTEMBER 2024

TBD **Homestead Exemptions**
Anderson Community Development Corp.

TBD **Budgets, Tax Rates, & Property Tax Bills**
Del Valle Community Coalition

OCTOBER 2024

No events scheduled

NOVEMBER 2024

16 **Understanding Your Property Tax Bill**
Anderson Community Development Corp.

TBD **Budgets, Tax Rates, & Property Tax Bills**
Del Valle Community Coalition

DECEMBER 2024

TBD **Your Property Tax Bill**
Del Valle Community Coalition

TO BE SCHEDULED

TBD **Homestead Exemption Clinic**
Pflugerville Public Library

TBD **TCAD 101 for Real Estate Professionals (3)**
Austin Title Company



AS OF JUNE 10, 2024

TRAVIS CENTRAL APPRAISAL DISTRICT

TAXPAYER EXPERIENCE SNAPSHOT

CUSTOMER SERVICE

Average In-Person Wait Time	4:45 minutes
Average Phone Wait Time	9:52 minutes
Average Exemption Processing Time	1 week
Yes, my inquiry was resolved.	67.02%
I am satisfied with the time it took to resolve my issue.	77.61%
My TCAD representative was professional and courteous.	89.59%



4.34/5

TAXPAYER SATISFACTION RATING

PROTESTS

Protests Filed	181,607
Residential protests that have scheduled or had an informal hearing	9%
It was easy to schedule my informal meeting.	90.14%
My appraiser was professional and courteous.	92.1%
My appraiser answered my questions about my property and its value.	86.85%
It was easy to accept my settlement offer.	82.43%



4.41/5

TAXPAYER SATISFACTION RATING

A CLOSER LOOK

Earlier this year, TCAD mailed out **23,174 homestead exemption eligibility letters** in English and Spanish to property owners in Travis County who met the following criteria:

- The owner was not claiming a homestead exemption on the property
- The mailing address and physical address of the property were identical

As of June 1, 2024, TCAD has granted **exemptions for 3,687 properties** targeted by this mailout.

15.9%

RETURN RATE SO FAR THIS YEAR

DATA COMPILED FROM JANUARY 1 - MAY 31, 2024

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

BOARD MEMBERS
TOM BUCKLE
DR. OSEZUA EHIYAMEN
BRUCE ELFANT
VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

LEANA MANN
CHIEF APPRAISER

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana Mann
Chief Appraiser

DATE: June 10, 2024

RE: Item No. 5D- Final Board of Director Election Cost

The District contracted with Travis County Elections Division to conduct the first election for the appraisal district. The initial cost estimate received from the Elections Division was $1,000,000 per election. The District budgeted $2,000,000 in the 2024 budget to cover the cost of the initial election plus a potential run-off election.

Estimated May 4th Election Cost (2024 Budget)	$ 2,000,000.00
Actual Election Costs	$ 682,888.82
Budget Surplus	***$ 1,317,111.18***

I would recommend creating a Reserve for Election Costs and moving the surplus funds to the newly created reserve.

Respectfully submitted,

Leana H. Mann

Leana Mann, RPA, CCA, CGFO
Chief Appraiser
Travis Central Appraisal District

5F

REGULAR AGENDA

REAPPRAISAL PLAN SUMMARY

TAX YEARS 2025 & 2026

TRAVIS

CENTRAL APPRAISAL DISTRICT

Please see the detailed Reappraisal Plan for more specific information concerning the 2025 & 2026 reappraisal efforts.

REAPPRAISAL PLAN DEVELOPMENT

The reappraisal plan is developed in compliance with the International Association of Assessing Officers (IAAO) manual Property Appraisal and Assessment Administration (Chapter 13 Mass Appraisal). Additional directions are provided in the IAAO Standard on Mass Appraisal of Real Property-2017.

REVALUATION POLICY

Section 25.18 of the Texas Property Tax Code requires each appraisal district to implement a plan biennially to conduct reappraisal activities for all real and personal property at least once every three years.

PERFORMANCE ANALYSIS

The certified values from the previous tax year will be analyzed with ratio studies to determine the appraisal accuracy and appraisal uniformity county-wide and by market area within property reporting categories. Ratio studies will be conducted in compliance with current *Standards on Ratio Studies* of the International Association of Assessing Officers (IAAO).

ANALYSIS OF AVAILABLE RESOURCES

Staffing and budget requirements for tax year 2025 are detailed in the 2025 budget, as adopted by the Board of Directors. A copy of the 2025 budget can be found online at traviscad.org/publicinformation. Staffing requirements for each operation and production activity will be identified and allocated accordingly to meet mandatory timelines. Aerial and oblique images and map layers will be updated according to available funding and contract specifications. Staffing and budget requirements for the 2026 tax year will be handled in a similar manner and detailed in the 2026 budget, as adopted by the Board of Directors no later than September 15, 2025.

PLANNING AND ORGANIZATION

A calendar of key events with critical completion dates will be prepared for each major production activity and recurring project. Production standards for field activities are calculated and incorporated in the planning and scheduling process to reach goals and mandates set by both the District management, the Board of Directors, and the Texas Property Tax Code.

MASS APPRAISAL SYSTEM

Computer Assisted Mass Appraisal (CAMA) system revisions required are specified and scheduled with the Information Technology division and the District's software vendor. All computer forms and IT procedures are reviewed and revised as required.

DATA COLLECTION

Field and office procedures will be reviewed and revised as required for data collection. Activities scheduled for each tax year include discovery and listing of new construction, demolition, and remodeling; re-inspection of problematic market areas and the universe of properties on a three-year cycle, as feasible; and verification of sales data and property characteristics. Re-inspection of properties will be completed on a three-year cycle by physical inspection or by other reliable means of identification, including deeds or other legal documentation, aerial and oblique imagery, street-level photographs, surveys, maps, and property sketches. These reliable means comply with generally accepted appraisal methods and techniques.

PILOT STUDY BY YEAR

Analysis of current market data will provide guidelines for the revision of mass appraisal models. These revised models will be tested using ratio studies conducted by property type and market areas. Ratio studies will be conducted in accordance with IAAO standards. The ratio studies determine the accuracy, uniformity, and reliability of estimated values. This analysis will be used to recalibrate the mass appraisal models at least every three years.

VALUATION BY PROPERTY TYPE

Using market analysis of comparable sales and locally tested cost data, valuation models are specified and calibrated in compliance with supplemental standards from IAAO and the Uniform Standards of Professional Appraisal Practices (USPAP). Calculated values are tested for accuracy and uniformity using ratio studies.

MASS APPRAISAL REPORT

Each tax year, the Texas Property Tax Code requires a mass appraisal report to be prepared and certified by the Chief Appraiser at the conclusion of the appraisal phase of the ad valorem tax calendar (on or about May 15th). The mass appraisal report will be completed in compliance with USPAP Standard 6.

FINAL PERFORMANCE ANALYSIS

Value defense evidence to be used by the district to meet its burden of proof for market value and appraisal equity in both informal meetings and formal hearings before the Travis County Appraisal Review Board is specified and tested as applicable. In addition, Section 5.10 of the Texas Property Tax Code and provisions of the Texas Government Code require the Texas Comptroller's Property Tax Assistance Division to conduct a property value study of each school district within the state at least once every two years and a ratio study of each appraisal district. This study utilizes statistical analysis of sold properties and appraisals of unsold properties as a basis for assessment ratio reporting.

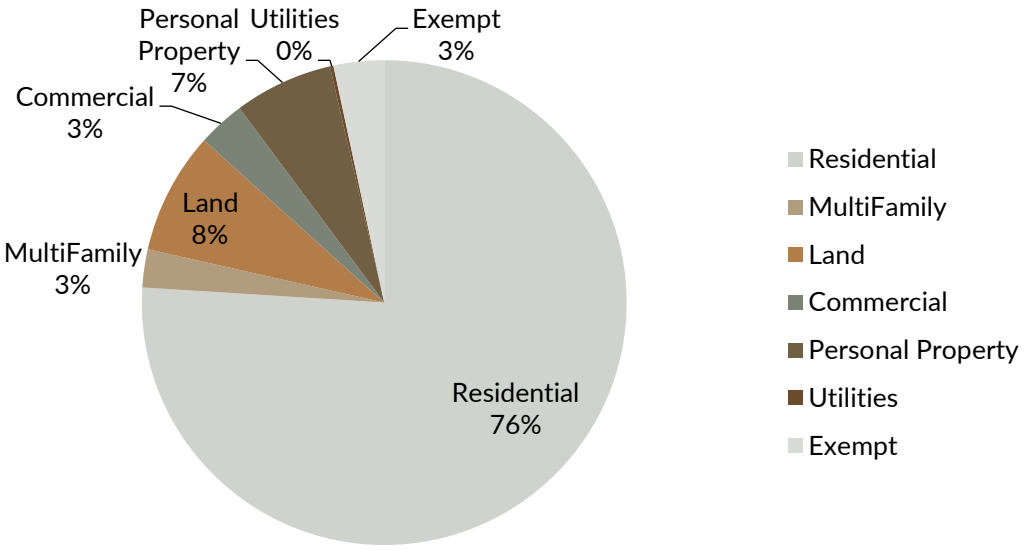
REVALUATION POLICY

SCOPE OF RESPONSIBILITIES

For 2024, the district was responsible for establishing and maintaining approximately 442,701 real property accounts and 40,708 business personal property accounts covering approximately 1,100 square miles within Travis Central Appraisal District's jurisdiction. The following chart contains the projected numbers of parcels for years 2025 & 2026:

	2020	2021	2022	2023	2024	2025 **	2026 **
Real Estate	**413,961**	**421,149**	**429,424**	**436,283**	**442,701**	**451,339**	**459,346**
BPP Accts	**43,354**	**42,348**	**41,818**	**41,624**	**40,708**	**40,395**	**39,841**
Total Accts	**457,315**	**463,497**	**471,242**	**477,907**	**483,409**	**491,734**	**499,186**
Total # Added	**8,245**	**6,182**	**7,745**	**6,665**	**5,502**	**8,325**	**7,453**
Total % Increase	**1.80%**	**1.33%**	**1.64%**	**1.39%**	**1.14%**	**1.69%**	**1.49%**

** *Projected number of accounts 2025 and 2026*



2024 Percentage by Property Type Value

REAPPRAISAL PLAN ASSUMPTIONS AND LIMITING CONDITIONS

The 2025 & 2026 Reappraisal Plan adopted by the Travis Central Appraisal District Board of Directors will occur no later than September 15, 2024. The assessment dates for the 2025 & 2026 Reappraisal Plan are January 1, 2025, and January 1, 2026, respectively.

Travis CAD's goal is to appraise all properties within its boundaries at their fair market values as of January 1 of each year by reflecting the market value based on available market data. Travis CAD recognizes that the goal can be reached without reappraising all property within its boundaries annually. It recognizes that market values vary geographically within the boundaries

of the Travis CAD. It also recognizes that the law only requires reappraisal of all property within the boundaries of appraisal districts every three years. The TCAD Reappraisal Plan incorporates 2025 and 2026 building permit and reappraisal account projections that are based on historical data and estimates about the number of properties to be reappraised. At the time of approval for the 2025 & 2026 Reappraisal Plan, a complete listing of the actual properties to be targeted for reappraisal cannot be specifically identified. Travis CAD will undertake a targeted reappraisal approach, as opposed to a geographical reappraisal approach, to better achieve the goal of appraising all property at fair market value as of January 1 while recognizing that reappraisal is not required to be conducted annually. This targeted approach will identify market areas where values are changing at statistically significant levels and complete reappraisal activities in those areas.

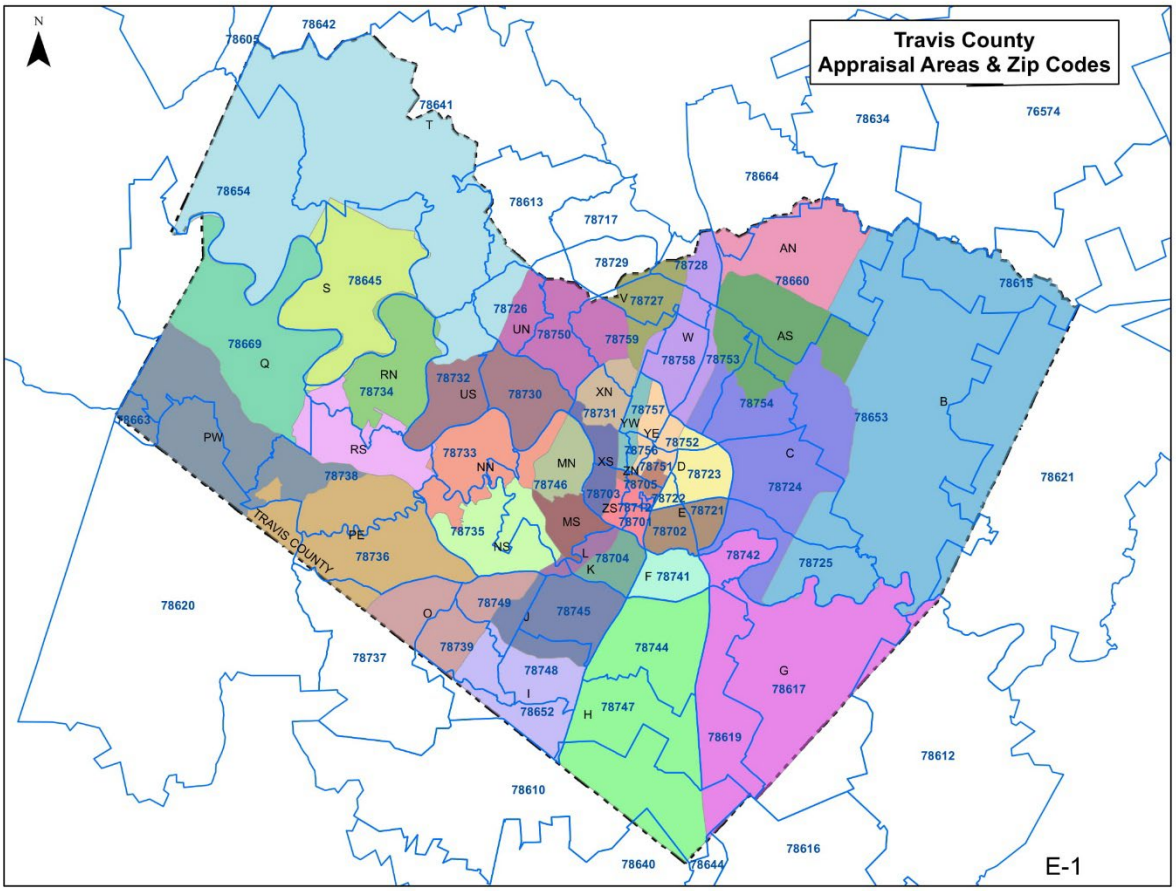
Travis CAD Reappraisal Plan will target the properties that meet the following criteria during the appraisal year cycle (September 1 – May 1):

1. Any Residential or Commercial account that has a “25” or “26” re-inspection code.
2. Any Residential or Commercial account that had a partially completed improvement.
3. Any Residential or Commercial account that had a significant building permit issued from one of the twenty-one cities in Travis County from January 1 to December 31 and construction began prior to the assessment date.
4. Any Residential or Commercial new land accounts created by subdivision, condominium declaration, or by split/merge activity.
5. Any Residential or Commercial account where data or inquiry has been provided to Travis CAD that indicates the property had a condition change that is not currently reflected on the record as of January 1.
6. Any Residential account that falls within a Residential Neighborhood that has been targeted for reappraisal based on a neighborhood sales ratio analysis for the current appraisal year. Neighborhood sales ratio analysis occurs in October, January and March of every appraisal year and is based on current market values and the market data available at the time of the analysis. Typically, neighborhoods with overall sales ratios less than 95% or greater than 105% will be targeted for reappraisal.
7. Any Residential account qualifying for residential inventory valuation.
8. Any Commercial account that falls within a Commercial Market Area that has been targeted for reappraisal based on current market analysis. Annual Commercial Market analysis occurs between January and March of each year and consists of sales, cost, and income and expense analysis for the major Commercial portfolios (Apartments, Office, Industrial, Retail, multi-family, hospitality, healthcare) and market areas.
9. Any qualifying Category D1 properties are reappraised annually as to their productivity values, as well as qualifying Category O properties’ inventory values.
10. All business personal property accounts.
11. Any real property account in 2025 and 2026 that was last reappraised in 2022 and 2023 respectively.
12. Any account in the reappraisal year in which a rendition has been filed.

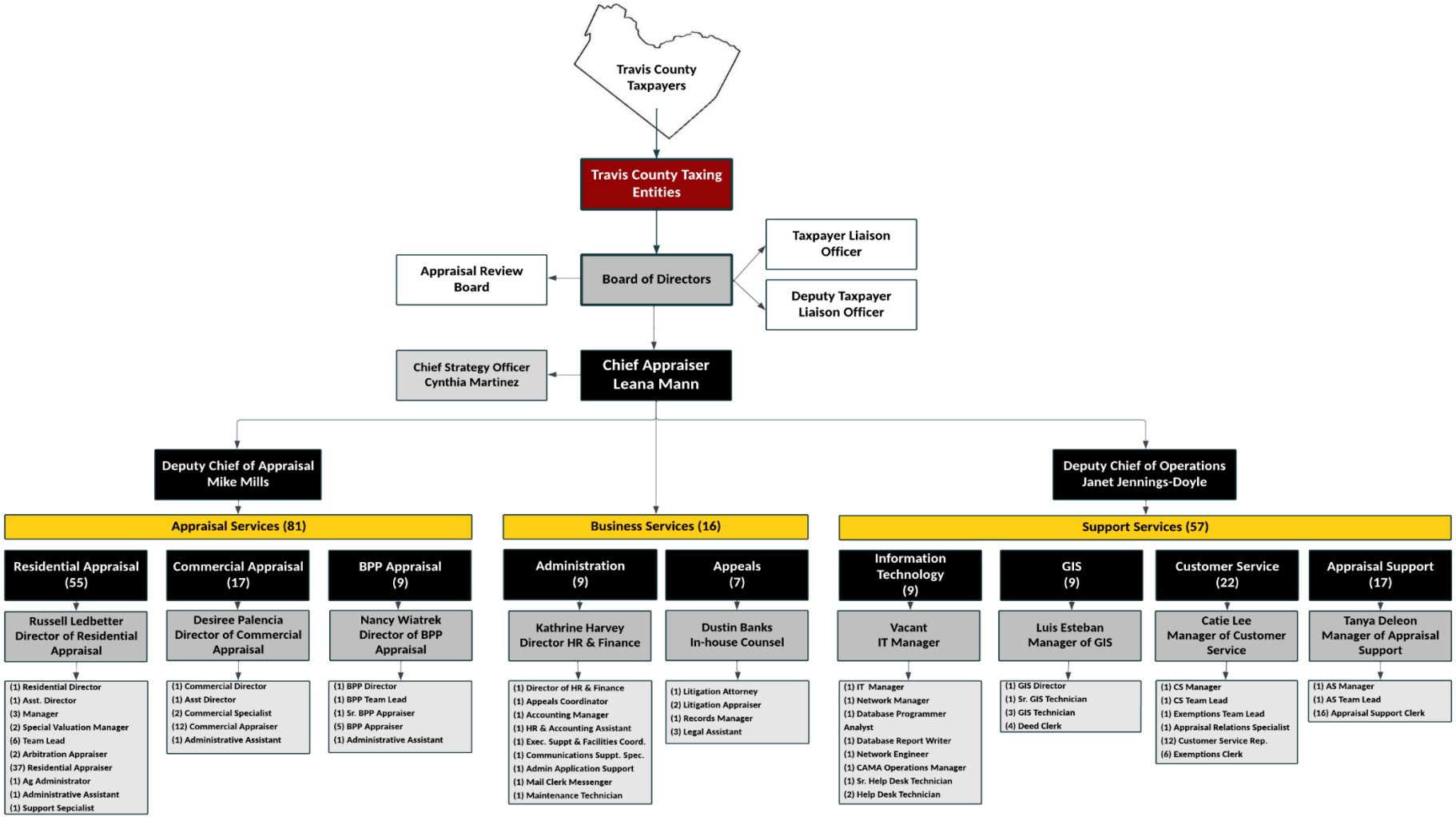
Identifying the actual accounts and proposed market value that were targeted for reappraisal based on the criteria for a given appraisal year can be made available to the public after May 1 of any given appraisal year. Please see the detailed Reappraisal Plans below for more specific information concerning the 2025 & 2026 reappraisal efforts.

	Residential	Commercial	Personal Property
2025	Reinspection of all residential parcels in Alpha Areas B,D,I,K, and Q (68,316 properties) with images from field inspections, street, or aerial photographs.** Review all residential high-class residential properties (R1 and R2) to ensure accuracy. Land analysis using multiple methods to ensure accuracy of land values. Complete conversion of all residential neighborhoods to market reflective land tables specifically for lot size to ensure accurate and equitable valuation among geographic areas. Perform ratio studies to ascertain the impact (if any) of the "Home Initiative" land development code within the city of Austin and adjust as needed for the 2025 valuation. Review cost analysis and adjustment of pools across all neighborhoods in the County. Update Residential cost schedules.	Review appraiser portfolios and land regions to maximize productivity, staff knowledge and continued development. Implement sales grids within CAMA system for properties valued using cost approach. Land analysis using multiple methods to ensure accuracy of land values. Create comp sets to define benchmark properties to analyze market trends. Define and implement strategic re-inspection cycle for verification of CAMA data. Transition Hospitality portfolio into income module of CAMA system. Update Commercial cost schedules. Analyze and move Exempt Land parcels to appropriate land regions.	Drive all regions for new existing, moved and/or closed accounts. Inspection required for all field card displaying BPP_F/W REVIEW, BPP_INCREASE 30%, +% UNREND_2024, LD and BPP_DECREASE 50% Onsite inspection of non-rendered accounts that have not rendered in past three years with a value of over $150,000. Inspect all businesses that have an issued sales tax permit after 11/01/2024. Implementation of field device to complete field work.
2026	Reinspection of all residential parcels in Alpha Areas A,V,L and X (70,053 properties) with images from field inspections, street, or aerial photographs.** Develop map with CAMA vendor comprised of vacant land sales for additional support within residential evidence packets. Enhance comparable selection scoring with CAMA vendor that will assign more weight to sales with the same number of floors, leading to more accurate market and equity grids. Collaborate with the commercial division to review all land in transitional (rural) areas of the county, ensuring equitable and accurate market values. Simplify residential neighborhood naming conventions. Update residential cost schedules.	Review appraiser portfolios and land regions to maximize productivity, staff knowledge and continued development. Land analysis using multiple methods to ensure accuracy of land values. Enhance sale analysis within CAMA system for commercial consistencies in reporting. Transition of Multi-family Portfolio into income module of CAMA system. Update all commercial cost tables. Further development of enhancements within CAMA system income module. Development of mobile CAMA application for commercial field inspections. Analyze and move Exempt Improved properties to appropriate Commercial Portfolios.	Drive all regions for new existing, moved and/or closed accounts and identify properties appraised through physical inspection. Onsite inspection of non-rendered accounts that have not rendered in past three years with a value of over $150,000. Review values greater than 50% decrease in value due to acceptance of 2025 rendition or appeal. (Exclude certain SIC codes and accounts under $150,000) Inspect properties with 30% increase or greater due to unreceived rendition (exclude certain SIC codes and accounts under $150,000) Create online format for taxpayers to submit rendition extension requests, SIT statements/declarations and report BPP account updates (Ownership, sale, relocation of a business or other)

** *In addition to properties identified by building permits, sales, protests, and administrative review*


Travis County
Appraisal Areas & Zip Codes
N
78642
78605
78641
T
78654
78613
78717
78729
78728
78634
76574
78664
AN
78660
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78753
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E-1

2024 ORGANIZATIONAL CHART



5G

REGULAR AGENDA

Plan Assessment for Plan Year 2025
Travis Central Appraisal District – 601
Participation Date – 4/1/1991

It's that time of year again — time to look at your TCDRS retirement plan and decide whether or not your benefits are adequate and affordable. This plan assessment will give you an overview of the benefits you provide as well as how much it will cost to provide these benefits in the upcoming plan year.

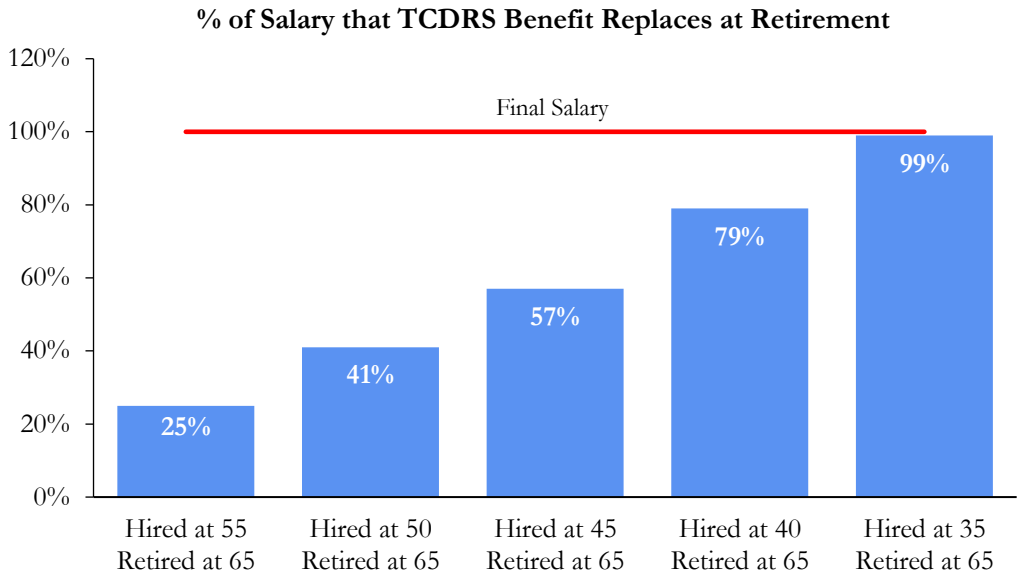
	2025 Plan
Basic Plan Options	
Employee Deposit Rate	7%
Employer Matching	250%
Prior Service Credit	100%
Retirement Eligibility	
Age 60 (Vesting)	10 years of service
Rule of	75 years total age + service
At Any Age	30 years of service
Optional Benefits	
Partial Lump Sum	No
Group Term Life	None
Retirement Plan Funding	
Total Normal Cost Rate	16.39%
Employee Deposit Rate	-7.00%
Employer-Paid Normal Cost Rate	9.39%
UAAL / (OAAL) Rate	1.37%
Required Rate	10.76%
Elected Rate	10.39%
Contribution Rates	
Retirement Plan Rate (greater of required and elected rate)	10.76%
Group Term Life Rate	N/A
Valuation Results (Dec. 31, 2023)	
Actuarial Accrued Liability	$59,053,100
Actuarial Value of Assets	$57,323,667
Unfunded / (Overfunded) AAL	$1,729,433
Funded Ratio	97.1%

Notes:

Last COLA: 2023

What You Are Providing

The TCDRS benefit is based on employee deposits, which earn 7% compound interest each year, and employer matching at retirement. The following chart shows the estimated TCDRS benefit as a percentage of final salary prior to retirement for a new hire:

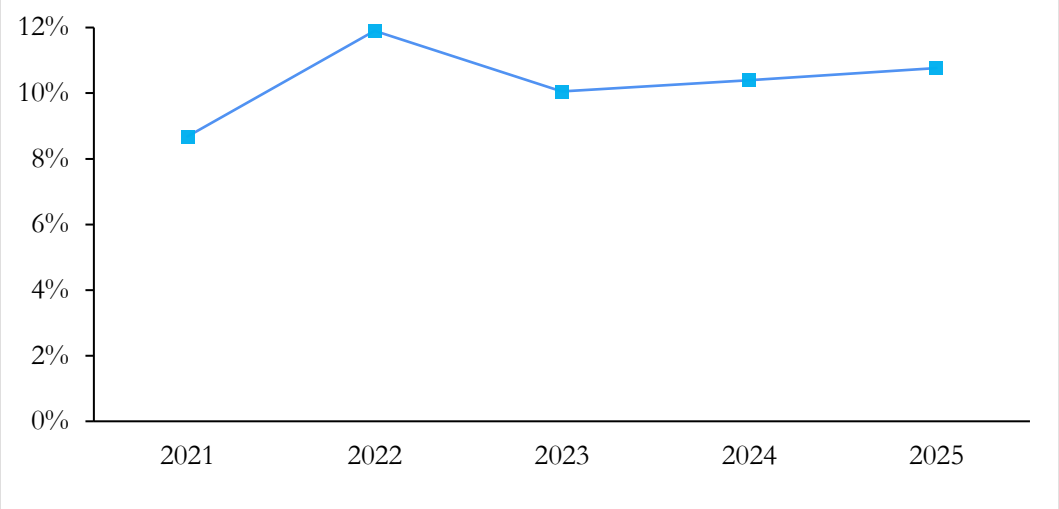


Assumptions

- Employees are new hires and will work for you until retirement.
- Your current plan provisions will remain in effect through an employee's retirement.
- Current laws governing TCDRS will continue as they are.
- Graded salary scales give bigger raises early in careers, with smaller raises later in careers (see Summary Valuation Report at TCDRS.org/Employer).
- Based on Single Life benefit.

Reasons for Rate Change

Below is a record of your required rate history for your retirement plan over the last five years.



Reasons for Rate Change	2021-2022	2022-2023	2023-2024	2024-2025
Beginning Rate	**8.68%**	**11.90%**	**10.05%**	**10.39%**
Plan Changes Adopted	0.00%	1.90%	0.00%	N/A
Investment Return	0.00%	-0.33%	0.29%	-0.03%
Elected Rate/Lump Sum	0.00%	-1.90%	0.00%	0.00%
Demographic/Other Changes	-0.35%	-0.28%	0.05%	0.42%
Assumptions/Methods	3.57%	-1.24%	0.00%	-0.02%
Ending Rate	**11.90%**	**10.05%**	**10.39%**	**10.76%**
Valuation Year	2020	2021	2022	2023
Funded Ratio	98.1%	98.7%	97.9%	97.1%

Full details on the valuation calculations are included in the Dec. 31, 2023 Summary Valuation Report which will be available mid-May at TCDRS.org/Employer.

Next Steps

If you are interested in making plan changes, please contact your Employer Services Representative at 800-651-3848. Your benefit selections are due by Dec. 16, 2024.

5H

REGULAR AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
THERESA BASTIAN
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

BOARD MEMBERS
TOM BUCKLE
DEBORAH CARTWRIGHT
OSEZUA EHIYAMEN
BRUCE ELFANT
VIVEK KULKARNI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

MARYA CRIGLER
CHIEF APPRAISER

TO: Travis Central Appraisal District
Board of Directors

FROM: Kat Harvey
Director of Finance & HR

DATE: June 6, 2024

RE: Item No. 5H- Proposed Personnel Policy Revisions

The TCAD Personnel Policy states:

> These policies may be unilaterally changed by the Travis Central Appraisal District (TCAD) Board of Directors upon the recommendation of the Chief Appraiser at a regular meeting of the Board of Directors. Proposed changes to these policies must be made available to all TCAD employees fifteen (15) days prior to the Board of Directors' consideration and action on such changes.
>
> Changes in these policies will be distributed immediately to each employee and will be periodically incorporated into the Personnel Policy Manual. Each new employee shall be provided with a copy of the Personnel Policy Manual and all amendments.

The District has prepared changes to the Personnel Policy. A summary of the proposed changes is provided below:

- **Section 1.3** – Equal Opportunity Employment
  - Added new language regarding hairstyles.
- **Section 2.7** – Other Employment
  - Added the location of the Secondary Employment Form and instructions.
- **Section 4.4** – Interaction with Board Members and Others *(New Policy)*
- **Section 4.7.4** – Social Media
  - Added language related to external comments online.
- **Section 4.14** – Volunteer Opportunities/Outreach Events *(New Policy)*
- **Section 4.16** – Photography/Videography *(New Policy)*
- **Section 5.3** – Payroll
  - Added language related to who can make time adjustments in ADP.
- **Section 5.8.1** – Reporting Absences from Work
  - Added clarification on excused absences and provided additional methods for reporting an absence.
- **Section 8.12** – Bereavement Leave

    - Added significant individuals to the list covered by the policy.
- **Section 9.2** – Paid Leave for Military Service
    - Added language based on recent rule changes for Military Leave.
- **Section 11** – Pregnant Workers Fairness Act *(New Policy)*
- **Section 12** – Access, Security and Emergency Evacuation
    - Clarified how notification will be given in the event of an emergency.
    - Updated the policy to reflect current process on hours paid for delayed opening or early release.

The District sent the proposed changes to all staff for review and comment on May 9, 2024. A copy of the proposed Personnel Policy with the proposed changes has been provided for your review. We received no comments or feedback from the staff on the proposed changes.

Respectfully submitted,

Kat Harvey

Kat Harvey, SHRM-CP
Director of HR & Finance
Travis Central Appraisal District

EMPLOYEE PERSONNEL POLICY

TRAVIS CENTRAL APPRAISAL DISTRICT

PROPOSED JUNE 2024

PROPOSED 2024

TRAVIS
CENTRAL APPRAISAL DISTRICT

To ensure this manual continues to meet the needs of the District and their employees while complying with applicable laws, the Chief Appraiser and human resources staff will regularly review its contents, seeking input from staff. Recommendations for revisions, additions, or clarifications will be submitted to the Board of Directors for approval and implementation.

TABLE OF CONTENTS

1 GENERAL PROVISIONS 5
1.2 Employee Status 5
1.3 Equal Opportunity Employment 5
2 RECRUITMENT AND STAFFING 6
2.1 Recruitment and Staffing 6
2.2 Job Description 6
2.3 Posting 6
2.4 Application Process 6
2.5 Pre-Employment Investigation 6
2.6 Pre-Adverse Letter 6
2.7 Other Employment 6
2.8 Nepotism 7
2.9 Career Development 7
2.10 Internal Application Process 7
2.11 Reduction in Force 7
2.12 Resignation 7
2.13 Discharge 8
3 REQUIREMENTS OF EMPLOYMENT 9
3.1 Certification Requirements 9
3.2 Professional Ethics 9
3.3 Financial Disclosure 9
3.4 Vehicle Usage 9
4 ADMINISTRATIVE POLICIES 10
4.1 Work Attire 10
4.2 Workplace Conduct 10
4.3 Harassment Prohibited 10
4.4 Interaction with Board Members & Others 11
4.5 No Fraternization 11
4.6 Tobacco Use 12
4.7 Electronic Resource Use Policy and Privacy Notification 12
4.8 Fax Machines 14
4.9 Personal Use of TCAD Phones 14
4.10 Personal Cell Phone 14
4.11 Personal Email 14
4.12 Solicitation 14
4.13 Political Involvement 14
4.14 Volunteer Opportunities/Outreach Events 15
4.15 Travel Reimbursement 15
4.16 Photography/Videography 15
4.17 Working Out Problems with TCAD 16
5 TIME AND ATTENDANCE 17
5.1 Work Week 17
5.2 Full-time Status 17
5.3 Payroll 17
5.4 Good Work Habits for Non-Exempt Employees 19
5.5 Overtime 19
5.6 Exempt Employees 20
5.7 Flexible or Compressed Work Schedules 20
5.8 Attendance 21
6 COMPENSATION 20
6.1 The Position Classification and Pay Plan 20
6.2 Market Analysis 20
6.3 Position Classification 20
6.4 New Employee Evaluation 20
6.5 Performance Evaluation & Salary Adjustments . 20
6.6 Merit Increases 20
6.7 Longevity Pay 20
7 TRAINING AND EDUCATION 21
7.1 Registered Professional Appraisers 21
7.2 State Licensed and Certified Appraisers 21
7.3 International Association of Assessing Officers (IAAO) Certification 21
7.4 Tuition Reimbursement 21
8 EMPLOYEE BENEFITS 23
8.1 Benefit Coverage and Premium Deductions 23
8.2 Employee Assistance Program (EAP) 23
8.3 Work Related Injuries 23
8.4 Retirement 24
8.5 Optional Deferred Retirement 24
8.6 Medicare 24
8.7 Vacation Leave 24
8.8 Sick Leave 25
8.9 Scheduled Holidays 25
8.10 Discretionary Holiday 25
8.11 Court Leave 26
8.12 Bereavement Leave 26
9 LEAVE OF ABSENCE 28
9.1 Family Medical Leave Act 28
9.2 Paid Leave for Military Service 32
9.3 General Leave of Absence 33
10 AMERICANS WITH DISABILITIES ACT 34
10.1 Disability 34
10.2 Reasonable Accommodation 34
10.3 Essential Job Functions 34
10.4 Requesting a Reasonable Accommodation ... 34
10.5 Safety 34
10.6 Confidentiality 35
11 PREGNANT WORKERS FAIRNESS ACT 36
11.1 Reasonable Accommodations 36
11.2 Essential Job Functions 36
11.3 Requesting Reasonable Accommodations 36
11.4 Safety 37
12 ACCESS, SECURITY & EMER. EVAC. 38
12.1 Responsibility 38
12.2 Facility Hours and Closings 38
12.3 Entry Access Control 38
12.4 Identification Badges 38
12.5 Surveillance 38
12.6 Evacuation 38
12.7 Emer. Closure/Modified Hours of Operation 38
12.8 Medical Emergencies 39
13 HEALTH AND SAFETY 40
13.1 Personal Work Areas 40
13.2 First Aid 40
13.3 Medication 40
13.4 Drug Free Workplace 40
13.5 Firearms - Weapons 41
14 REDRESS OF GRIEVANCES 42
14.1 Immunity from Reprisal 42
14.2 Grievance Process Steps and Time Limits 42
14.3 Grievances against the Chief Appraiser 42
14.4 Grievance Submission Content 42
14.5 Right to Address the Board of Directors 43
15 SEPARATION PROCESS 44
15.1 Calculation of Accrued Pay 44
15.2 Settlement 44
15.3 Continuation of Insurance Coverage 44
15.4 Insurance Coverage at Retirement 44
15.5 Release of Information 45

PROPOSED 2024

MISSION STATEMENT

To provide accurate appraisal of all property in Travis County at one hundred percent market value, equally and uniformly, in a professional, ethical, economical, and courteous manner, working to ensure that each taxpayer pays only their fair share of the property tax burden.



1 GENERAL PROVISIONS

Policies and procedures of the Travis Central Appraisal District (TCAD) are impacted by the available revenues sufficient to maintain the current operating demand for appraisal services by the taxing units that fund these services.

These policies may be unilaterally changed by the Board of Directors of the Travis Central Appraisal District (TCAD) upon the recommendation of the Chief Appraiser at a regular meeting of the Board of Directors. Proposed changes to these policies must be made available to all TCAD employees fifteen (15) days prior to the Board of Directors' consideration and action on such changes.

Changes in these policies will be distributed immediately to each employee and will be periodically incorporated into the Personnel Policy Manual. Each new employee shall be provided with a copy of the Personnel Policy Manual and all amendments.

1.2 Employee Status

TCAD is an "at will" employer. The contents of this manual do not alter an employee's employment status. The Personnel Policy Manual does not constitute a contract or a promise of employment. Employees remain free to resign employment at any time for any or no reason without notice; and TCAD retains the right to terminate the employment of any employee at any time for any reason or no reason without notice.

1.3 Equal Opportunity Employment

As an Equal Opportunity Employer, TCAD will afford equal opportunity for employment to all individuals regardless of race (including hair texture or protective hairstyle commonly or historically associated with race), color, sex (including pregnancy, sexual orientation, gender identity, gender expression, gender change, gender stereotyping, or transgender status), religion, disability, age, genetic information, military service, parental status, marital status, political affiliation, AIDS or HIV status, ancestry, national or ethnic origin, and in compliance with Americans with Disabilities Act, as amended, and the Pregnant Workers Fairness Act.

PROPOSED 2024

Management recruits, hires, trains, promotes, demotes and terminates employment of persons in all job titles without regard to race, color, sex, (including pregnancy, sexual orientation, gender identity, gender expression, gender change, gender stereotyping, or transgender status), religion, disability, age, genetic information, military service, parental status, marital status, political affiliation, AIDS or HIV status, ancestry, national or ethnic origin, and in compliance with Americans with Disabilities Act, as amended. The Travis Central Appraisal District is an equal opportunity employer.

Compensation plans, benefits, transfers, layoffs, recalls, TCAD-sponsored training, education, social and recreational programs are administered without regard to race, sex (including pregnancy, sexual orientation, gender identity, gender expression, gender change, gender stereotyping, or transgender status), religion, age, national origin, color, disability, military or veteran's status, parental status, marital status, political affiliation, genetic information, HIV/AIDS status, and in compliance with the American Disabilities Act, as amended.

2 RECRUITMENT AND STAFFING

2.1 Recruitment and Staffing

Final selection of new employees shall be the responsibility of the hiring manager, director, and Chief Appraiser. It is the responsibility of human resources to ensure established procedures are followed.

2.2 Job Description

A job description for each employment position should be maintained by the Human Resources Division.

2.3 Posting

Open positions may be posted on the TCAD website, employee bulletin board, and/or announced to TCAD employees via email. Assignment of a closing date is at the prerogative of the Chief Appraiser.

2.4 Application Process

Interested applicants may submit a resume and/or application for consideration. Applicants that do not meet minimum posted requirements will not be interviewed. Prior to the employment interview applicants must complete the TCAD employment application. Applicants will be interviewed by management as appropriate.

2.5 Pre-Employment Investigation

A background investigation, including criminal history, references and social security number verification will be completed after candidates are selected for final consideration. The applicant must have a signed FCRA Notification Letter and Texas Department of Public Safety Form prior to the background investigation.

PROPOSED 2024

2.6 Pre-Adverse Letter

An applicant refused for employment because of a background investigation must be mailed a Pre- Adverse Action Letter.

2.7 Other Employment

TCAD employees are free to pursue outside interests and activities but must be careful not to present the appearance of a conflict of interest. For full-time employees, TCAD considers the employee's first obligation to be with TCAD. Schedules cannot be rearranged to accommodate second jobs or outside interests beyond the scope of employment.

Employees intending to engage in secondary employment are required to submit the "Secondary Employment Form" available here P:\EMPLOYEE DATA\HR Information\Forms. The approval process for secondary employment is guided by TCAD's ethics policy. Employees are encouraged to review the ethics policy, which is available here P:\EMPLOYEE DATA\HR Information\Policies.

Upon completion of the Secondary Employment Form, employees must submit it to their supervisor. The supervisor will make a recommendation and forward it to HR. The request will be reviewed in consideration of potential conflicts of interest and alignment with TCAD's ethics standards. The Chief Appraiser will make a final determination.

Employees will be notified of the approval status within two weeks of form submission. If approval is granted, employees may proceed with their secondary employment activities. If approval is denied, employees must decide between the two jobs or otherwise resolve the conflict to TCAD's satisfaction. Failure to adhere to the procedures outlined in this section may result in disciplinary action in accordance with TCAD's policies.

Employees working for another employer participating in TCDRS must adhere to TCDRS policy regarding retirement contributions. For specific questions about the plan, visit the website at www.tcdrs.org or call (512) 328-8889.

2.8 Nepotism

TCAD may not employ or contract with an individual or the spouse of an individual who is related to the chief appraiser within the first degree by consanguinity or affinity,

TCAD may not employ any individual related to a member of the TCAD Board of Directors within the second degree by affinity or the third degree by consanguinity.

A prohibited relationship described above that arises as the result of a marriage will require the immediate resignation of the Board member or the employee; if neither chooses to resign the employee will be terminated.

In addition, the Chief Appraiser shall not approve the hiring of any person who is related within the second degree by affinity or the third degree by consanguinity to the employee's immediate supervisor, nor shall the Chief Appraiser approve the appointment of any member of the immediate family of any employee with supervisory responsibilities for positions elsewhere in TCAD.

2.9 Career Development

Management supports the advancement and development of employees. However, promotions, demotions and employee reassignment will be made on the basis of TCAD's needs and the assessment of skills, abilities and demonstrated performance of employees.

2.10 Internal Application Process

It is TCAD's practice to encourage employee development by reviewing internal candidates for positions on a regular basis. Qualified employees are encouraged to apply for internal openings within TCAD. To be eligible to do so, the employee must have satisfactorily completed ninety (90) days of employment, meet the minimum posted requirements for the position, have good attendance, and have had no disciplinary actions within the previous six (6) months. At the discretion of TCAD management, interviews will be conducted as deemed appropriate. TCAD reserves the right to promote or reassign employees based on organizational needs.

PROPOSED 2024

2.11 Reduction in Force

A reduction in force may occur when dictated by TCAD's operating needs. Should a reduction in the size of the workforce become necessary, in determining the order of layoff, consideration will be given to past work performance and skills. Length of service will be considered if employee performance and skills are equal. An employee affected by a reduction in force may elect to terminate employment with TCAD with all the rights of an employee resigning in good standing. An employee may elect to be placed on a recall list. If authorized, recall shall be in reverse order of the reduction in force, subject to the current operating needs of TCAD and the qualifications of the affected employees. An employee may remove his or her name from the recall list at any time by notifying Human Resources in writing; such former employees will still be considered to have resigned in good standing. A recalled employee shall be reinstated with full-service credit accrued up to the time of the reduction in force providing that the employee accepts the first offer of reinstatement to a position of at least equivalent status. Recall rights are automatically terminated if an employee refuses such an offer of reinstatement.

2.12 Resignation

An employee resigning from TCAD may remain in good standing by giving a written notice of two (2) weeks prior to the anticipated departure date. An employee failing to give appropriate notice or failing to satisfactorily complete the notice period is not eligible for rehire and forfeits terminal pay.

2.13 Discharge

Although TCAD generally uses a system of progressive discipline, certain violations of policy are considered gross misconduct and are grounds for immediate discharge without prior notice from the employer. Grounds for immediate discharge include, but are not limited to, the following:

1. Failure to complete and return any of the following:
    i. TCAD Personnel Policy Manual Acknowledgement
    ii. Federal I-9 Form
    iii. Code of Ethics Acknowledgement
    iv. Annual Financial Disclosure
    v. Proof of Vehicle Insurance when required as part of job description
    vi. Interview Procedures Acknowledgement (Supervisors)
2. Failure to maintain credentials required to execute duties; including any position which requires registration with the Texas Department of Licensing and Regulation.
3. Insubordination, including but not limited to, refusal to perform work, or refusal to work overtime, as directed by an authorized member of TCAD management.
4. Non-exempt employee working "off the clock". Non-exempt employees must be clocked in to work.
5. Acts of a dangerous, reckless or destructive nature including intentional damage to persons and/or property.
6. Failure to treat members of the staff or the public respectfully.
7. Harassment or failure to report harassment including sexual harassment.
8. Theft of TCAD time or property.
9. Unauthorized use of public property
10. Tampering with timekeeping or reporting.
11. Willful release of confidential or other sensitive information.
12. An appraiser, appraising, brokering property or referring property to another agent or broker to list or sell in Travis County.
13. Failing to report accidents, incidents or injuries as required by TCAD policy.
14. Misrepresentation of a work-related injury
15. Failing to report a citation for a DWI or DUI when driving is a condition of employment.
16. Failing to report a suspension of driver's license when driving is a condition of employment.
17. Being under the influence of any drug in violation of TCAD policy as stated in this Manual.
18. Refusal to consent to a lawfully requested drug or alcohol screening.
19. A confirmed positive result to a lawfully administered drug or alcohol test.
20. Compromising TCAD integrity as defined by the Code of Ethics.
21. Violation of the No Fraternization policy.
22. Violation of the Electronic Resources Use policy.
23. Violation of Social Media policy.
24. Violation of Weapons policy.
25. Destruction of documents without proper documentation.
26. Failure to comply with the Public Information Act.
27. Gross or repeated neglect of duty.

TCAD works with a set of rules and procedures to ensure work is done efficiently. It is not possible to anticipate and list all rule violations that will lead to termination of employment. TCAD employees are employed at the will of TCAD. Continuation of employment is at the sole discretion of TCAD.

PROPOSED 2024

3 REQUIREMENTS OF EMPLOYMENT

TCAD has specific requirements that must be met to be employed in designated positions. It is the responsibility of the employee to ensure that the employee is in compliance with the current employment requirements.

3.1 Certification Requirements

An employee who is required to be registered or certified under the provisions of the Property Taxation Professional Certification Act (Tex. Occ. Code Ann. § 1151.001 *et seq.*) with the Texas Department of Licensing and Regulation (TDLR) and refuses to register, fails to reach the Level II, III or IV within the prescribed time by TDLR, or has his or her registration revoked or suspended will be terminated.

3.2 Professional Ethics

All Appraisers must abide by TDLR regulations. In addition, all employees are required to abide by the Code of Ethics adopted by the Board of Directors, as well as applicable laws and State regulations. The Code of Ethics is an addendum to this Personnel Policy Manual.

Appraisers are prohibited from appraising property, brokering real estate, or referring real estate sales to other agents or brokers, inside Travis County. Appraisers shall not conduct an informal or a formal hearing for friends, relatives, or as prohibited by the Code of Ethics.

3.3 Financial Disclosure

All employees are required to complete a Financial Disclosure Statement by January 31, of each year of employment. Financial Disclosure Statements are kept on file for two (2) years. Refusal to truthfully complete the required Financial Disclosure Statement is tantamount to resignation of employment.

3.4 Vehicle Usage

PROPOSED 2024

An employee, who receives a vehicle allowance, is reimbursed for mileage, or who drives a TCAD owned vehicle in the course of employment must comply with the following requirements. Employees from out of state will be provided 90 days to adhere to the requirements listed in section 3.4.1 & 3.4.2.

3.4.1 License and Vehicle Safety

Employees using a vehicle for TCAD business must be licensed in the State of Texas to drive. Employees are charged with the responsibility for following all State laws, regulations, and reasonable safety precautions.

3.4.2 Maintain Vehicle Insurance

Employees receiving a vehicle allowance must provide proof of liability coverage meeting State of Texas standards. If the employee cannot fulfill the position requirements without driving his or her vehicle, then failure to maintain insurance is grounds for termination.

3.4.3 Accidents

An employee involved in an accident that occurs during the course of conducting TCAD business must report the incident to the supervisor or Human Resources within one (1) hour of the accident, unless the employee is physically unable to do so.

4 ADMINISTRATIVE POLICIES

4.1 Work Attire

Employees are urged to use good judgment in the manner of their appearance. Appropriate clothing is essential in presenting a professional image and should be neat and business-like in appearance. As representatives of TCAD, employees should always convey a professional image to the public. This policy is in effect during the normal operating hours of the appraisal district, which are typically 7:45 a.m. to 4:45 p.m. Monday through Friday.

The following are prohibited: shorts, backless or halter style attire, T-shirts, bare midriffs, tube tops, skirts shorter than four inches from the bend of the knee at the back of the leg, tank tops, spaghetti straps, leggings, see-through attire, graphic slogans, flip-flops, sweatpants, tight, revealing or otherwise inappropriate clothing, clothing that is ripped, frayed, stained or messy, or facial piercings. In addition, visible piercings and body art that TCAD management reasonably believes will be offensive to co-workers or the public are prohibited. At no time should undergarments be exposed. There are some job duties that are either permanently or occasionally labor intensive. In order to promote the safety of the employee and to prevent damage to clothing, anyone engaged in such duties may wear jeans or approved shorts as determined by the management.

All employees are expected to comply with this dress code in a manner consistent with their gender identity and expression. An employee reporting to work in attire that is unacceptable will be sent home to change clothes. An employee who must leave work to change clothes will not be paid for the time needed to comply nor will they be allowed to use leave time. Repeated violations of the dress code will result in disciplinary action up-to-and including termination of employment. Questions of appropriate dress should be addressed to Human Resources.

4.1.1 Review Board and Protest Season Attire

Beginning at the time notices go out through the conclusion of taxpayer protests, staff shall wear business casual attire or TCAD issued logo shirts.

4.1.2 Non-Protest Season Attire

Non-protest season attire shall be business casual. Dress jeans are allowed after the conclusion of taxpayer protests and prior to sending out notices; they must be clean, without stains, tears or frays.

PROPOSED 2024

4.2 Workplace Conduct

Employees must treat each other and the public with respect. Employees must maintain a cordial attitude when speaking with each other and with the public. Blatantly rude behavior, outbursts of temper, shouting, or the use of foul or offensive language are all grounds for disciplinary action up-to-and including termination.

4.3 Harassment Prohibited

TCAD is committed to promoting a work environment that is free of harassment and strictly prohibits any conduct which constitutes harassment. Harassment includes, but is not limited to slurs, jokes, and other verbal, graphic or physical conduct relating to an individual's race, color, sex (including pregnancy, sexual orientation, gender identity, gender expression, gender change, gender stereotyping, or transgender status), HIV/AIDS status, religion, national origin, age, or disability, parental status, marital status, reprisal, or other non -merit factors, political affiliation, military or veteran status, or genetic information. All District employees are expected to conduct themselves in a manner consistent with their obligation to maintain a work environment free from discrimination, including discrimination on the basis of gender identity or perceived gender non - conformity.

Sexual harassment is defined as unwelcomed sexual advances, request for sexual favors and any other conduct of a sexual nature (including sexually explicit language, jokes, etc.) when:

- The employee must submit to the offensive conduct as an explicit or implicit condition of employment.
- Submission to or rejection of such conduct by an individual is used as a basis for making employment decisions affecting such individuals; or
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment.

While on duty or on appraisal district premises, employees shall not use obscene or abusive language or offensive gestures in communicating with coworkers or members of the public; employees shall not by oral, written, electronic or other means of communication threaten or intimidate coworkers or members of the public; employees shall not physically endanger, intimidate, or injure coworkers or members of the public.

Employees who experience any form of harassment or who become aware of a threatening situation as described in this policy, are required to immediately report the facts to his or her Manager, Director, or Human Resources for investigation and corrective action. TCAD understands the sensitive nature of this type of complaint, and the employee may contact Human Resources without going through the normal chain-of-command. TCAD will act promptly to investigate alleged harassment claims thoroughly and discipline any employee who is found to have committed such conduct. During the investigation, confidentiality will be maintained to the extent possible, while conducting a thorough investigation. At the conclusion of the investigation, Human Resources will report appropriate findings and/or conclusions to the employee making the complaint and the subject of the complaint. Appropriate corrective action will be taken. Call 911 for imminent threats of physical harm and notify a member of management immediately.

No employee shall be discriminated against, harassed, intimidated, nor suffer any reprisal as a result of reporting violations of this policy in good faith. The employment status of the person reporting the matter will not be jeopardized as a result of filing a complaint in good faith. All allegations of sexual harassment will be investigated by Human Resources who will report the findings of the investigation to the employee filing the complaint. Employees violating this policy will be subject to disciplinary action up-to-and including termination of employment.

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4.4 Interaction with Board Members and Others

Employees may interact with District board members or representatives of local taxing entities during the course of their work. Neither board members nor taxing entity representatives have the authority to circumvent the role and authority of the Chief Appraiser by attempting to persuade employees to take a particular action, direct employees, elicit a position from employees, or obtain information from employees without the Chief Appraiser's knowledge. If an employee believes that a communication is inappropriate, they should report it to their manager.

4.5 No Fraternization

TCAD prohibits dating between subordinates and superiors. Romantic relationships between individuals with the power to affect the other's status or position with TCAD in any way shall be avoided. Employees spreading rumors regarding potential policy-violating romances or relationships will not be tolerated. Spreading rumors of any kind can damage an innocent employee's reputation. Employees suspecting an inappropriate relationship should use proper channels to report concerns.

Potential violations of this policy should be reported to management or Human Resources for investigation and corrective action. TCAD will act promptly to investigate alleged violations thoroughly and confidentially, to the extent possible. The employment status of the person reporting the matter will not be jeopardized as a result of filing a complaint in good faith. Employees violating this policy will be subject to disciplinary action up-to-and-including termination of employment.

4.6 Tobacco Use

TCAD employees may use tobacco products outside the building. The use of all tobacco products is prohibited in the building and within fifteen (15) feet of the entrance to the building. There are receptacles provided for the appropriate disposal of cigarette butts.

4.7 Electronic Resource Use Policy and Privacy Notification

TCAD computer systems including hardware, software, accessories, electronic files and passwords are the sole property of TCAD. This policy is intended to notify all TCAD employees that no reasonable expectation of privacy exists in connection with the employee's use of TCAD systems, property, equipment, or supplies. TCAD employees are prohibited from withholding information maintained within company-supplied equipment, including but not limited to, computer files, computer databases, desks, lockers, and cabinets.

4.7.1 TCAD Right to Access Information

While TCAD employees have individual passwords to e-mail, voice mail and computer network systems, these systems are at all times accessible to and by TCAD and may be subject to unannounced, periodic inspections by TCAD for business purposes. This policy applies to all telephone, electronic and computer network systems that are accessed on or from TCAD's premises, used in a manner which identifies the employee as employed by or representing TCAD, or accessed using TCAD equipment and/or via TCAD paid access methods.

4.7.2 Restricted to TCAD Business

TCAD employees are expected to use e-mail, voice mail and computer network systems for TCAD business not for personal reasons. Personal reasons include, but are not limited to, non-TCAD-related communications, research or solicitations, or soliciting for political or religious causes, outside organizations or commercial ventures. Brief and occasional personal use of the electronic mail system or the Internet is acceptable, as long as such usage is not excessive or inappropriate, occurs during personal time (lunch or other breaks, or before or after regular working hours), and results in minimal expense to TCAD.

PROPOSED 2024

4.7.3 Prohibited Content

TCAD employees are prohibited from using TCAD's telephone, electronic, or computer network systems in any manner that may be offensive or disruptive to others. This includes, but is not limited to, the transmission of racial or ethnic slurs, gender-specific comments, sexually explicit images or messages, any remarks that would offend others on the basis of his or her age, political or religious beliefs, disability, national origin or sexual orientation, or any messages that may be interpreted to disparage or harass others.

Please do not send non-work-related mass emails either while at work or while working remotely. Mass emails should go through Human Resources. No telephone, electronic or computer network communications may be sent that represent the sender as from another company or as someone else, or that try to hide the sender's identity. Inappropriate or excessive personal use of TCAD's property, including telephone, electronic or computer network systems, may result in disciplinary action, up-to-and-including immediate termination of employment.

The following rules also apply to the use of TCAD property:

- Always Log Out or Lock the system when unattended so others may not gain unauthorized access to TCAD data.
- Do not attempt to access another employee's account.
- Do not attempt to access resources without authorization, whether property of TCAD or not.

- Do not install, uninstall, or disable any software on any computer without first getting approval from the systems administrator.
- Do not bring personal equipment to use at work as TCAD cannot differentiate between TCAD property and employee equipment.
- Do not deliberately damage, disable, vandalize, or remove any hardware or software.
- Report damage, malfunction or otherwise unusable hardware or software immediately via the help desk or to a manager or systems administrator.
- Do not relocate or remove any hardware or software.
- Do not let a vendor bring equipment into our facility and access the network without the approval of the systems administrator.
- TCAD cannot be held responsible for damages, loss, or suffering personally incurred due to electronic resources. This includes, but is not limited to, identity theft, scams, spy-ware, viruses or otherwise malicious software, loss of service, loss of data, and hardware or software malfunctions or imperfections.
- The systems administrator can terminate access to TCAD electronic resources at any time, without reason or notice.

Any violation of the "Electronic Resource Use Policy" will be subject to disciplinary action up- to-and-including termination.

4.7.4 Social Media

As designated by the Public Relations Policy, the Chief Appraiser is the official spokesperson for TCAD. All media communication is conducted by the Chief Appraiser or the Chief Appraiser's designee.

All TCAD employees are required to observe high ethical standards as set by the Code of Ethics and personnel policies. The principles established by the Code of Ethics and personnel policies must be observed when engaging in any public relations practice including social media interactions.

PROPOSED 2024

TCAD does not authorize employees to use any social media outlets on TCAD computers during working hours. Although access to these services and features may be blocked on office computers, TCAD cannot block access through personal hand-held electronic devices. As a result, all employees are urged to use caution when posting information or blogging concerning TCAD work activities or situations. In online social networks, the lines between public and private, personal and professional are blurred. Identifying yourself as a TCAD employee creates perceptions about your expertise and any statements you make may be attributed to your knowledge of TCAD.

The following rules must be followed by all TCAD employees posting to any social media website:

- Do not provide advice or insight regarding the work conducted by the TCAD organization.
- Do not use TCAD logos or website references on blogs, web pages, or other social media outlets.
- Do not post pictures or documents stored on the TCAD system to social media outlets.
- If an employee references TCAD or its organization on a social media outlet, he or she must clearly state that the views and opinions expressed are solely those of the employee and do not represent the TCAD organization.
- Employees shall state that the TCAD organization shall not be held liable for any misinformation he or she publishes; and

Employees will be subject to disciplinary action, which may include termination of employment, if the comments they make on a social media outlet impair TCAD's delivery of required services, interfere with the efficient and effective operation of TCAD, or adversely impact the effectiveness, efficiency, or safety of other employees in the workplace.

If an employee comes across positive or negative remarks about the TCAD online that they believe are important, employees should share those remarks with TCAD's communications department. Unless employees are designated online spokespersons, they should not engage with these comments themselves.

4.8 Fax Machines

Limited use of fax machines is permitted with the approval of management. Employees shall practice good office manners when using the fax machines. It is inappropriate to throw away confirmations as these documents are important TCAD records of business communications.

4.9 Personal Use of TCAD Phones

Much of TCAD's business is conducted by telephone, and the phone lines should not be tied up with personal phone calls. The use of TCAD phones for brief personal calls is permitted, but the calls should be brief and limited to break and lunch. Employees violating this policy will be subject to disciplinary action.

4.10 Personal Cell Phone

Employees may be allowed to keep personal cell phones with them during work hours at the discretion of management; however, the phone must be on silent or vibrate. Cell phone use must not interfere with work. Employees should limit the use of cell phones to break and lunch. Employees violating this policy will be subject to disciplinary action.

4.11 Personal Email

Employees are prohibited from using personal email accounts when conducting TCAD business. This includes communication with other employees and supervisors regarding work-related matters.

PROPOSED 2024

4.12 Solicitation

TCAD employees shall not be permitted to solicit funds for any purpose on the job without approval and coordination of Human Resources. Solicitation of employees may only occur outside the building. Collection for such reasons as employee retirement recognition and other TCAD approved programs and activities will require the review of Human Resources. Announcements of sales of school supported activities or charities may be made on behalf of employees by Human Resources. Persons who are not employed by TCAD may not solicit or distribute literature on the premises for any reason at any time.

4.13 Political Involvement

Employees are encouraged to vote on Election Day before the workday commences, on his or her lunch hour, or after the workday is completed. The Chief Appraiser will grant a reasonable amount of time with pay for employees to vote during working hours if the polls are not available for two hours outside the employee's normal working hours. Employees are not allowed to perform political campaigning or related activities during established working hours or while on official duty. Employees may not utilize equipment owned by TCAD for political purposes. An employee engaging in political campaigning or related activities should not identify themself as a representative of TCAD during the course of that activity, but is not required to conceal their title or position.

4.14 Volunteer Opportunities/Outreach Events

Periodically, TCAD will host or assist with outreach events after hours or on weekends at which employees may wish to volunteer. Nonexempt employees attending these events will clock in and out and will be paid by the hour for their time. Exempt employees attending these events will be paid a $100 per diem stipend for their time. Exempt employees must attend in order to receive the stipend.

4.15 Travel Reimbursement

Employees who travel on approved official business, outside of Travis County, will be reimbursed for reasonable expenses incurred as a result of such travel. All expenses must be documented by receipts and an expense report, approved by the Division Director, and submitted for reimbursement within ninety (90) days of the date the expense was incurred. Actual incidental expenses such as official telephone calls and taxi fare, etc., will be reimbursed with receipts.

4.15.1 Meal Expense

Employees traveling outside Travis County on official business shall be reimbursed for the employee's actual meal expenses with receipts not to exceed the Texas Comptroller Standard per diem per day.

4.15.2 Mileage

Mileage - The calculation of eligible mileage reimbursement will be based on the rate used by the Internal Revenue Service. TCAD will not pay mileage expenses for employees that receive a vehicle allowance for travel inside of Travis County.

4.16 Photography/Videography

By acknowledging receipt of the TCAD Personnel Manual, employees voluntarily and without compensation grant permission to TCAD for full use, without restriction of any kind, of their likeness and/or any photographic/video image(s) taken of them, or of anyone for whom they have legal responsibility, during the course of their employment with TCAD, for any official publication, presentation, exhibit, video, or other print or digital format. Employees further grant TCAD full rights to republish, without time restriction, their likeness and/or any photographic/video image(s) taken of them in official TCAD publications, social media marketing, and other public print or digital format. Employees further extend their permission to TCAD to provide any photographic/video image(s) taken of them to the media as part of any official TCAD business or other affairs.

Employees understand that their image may be edited, copied, exhibited, published, or distributed and waive the right to inspect or approve the finished product wherein their likeness appears. Additionally, employees waive any right to royalties or other compensation arising or related to the use of their likeness and/or any photographic/video image(s) taken of them.

There is no time limit on the validity of this release, nor is there any geographic limitation on where these materials may be distributed. This release applies to employees' likeness and/or any photographic/video image(s) taken of them and/or collected as part of their employment with TCAD.

Employees hereby release any and all claims against any person or organization utilizing this material for the furtherance of any official TCAD business or other affairs.

4.16.1 Right of the Public to Record or Photograph

The public has the right to record or photograph TCAD employees while employees are engaged in public duties in a public place. If a member of the public is recording or photographing staff in a private area of the building or in a manner that interferes with TCAD's daily operations, staff should avoid confronting the individual directly and report the incident to their manager.

PROPOSED 2024

4.17 Working Out Problems with TCAD

TCAD believes that reasonable rules of conduct are necessary for a safe and efficient operation. Employees shall be notified of rules and changes in rules and are expected to follow them. If an employee has problems or questions relating to work, the employee must speak with his or her supervisor immediately. Delaying discussions will only complicate matters and make progress more difficult.

TCAD generally uses a system of "progressive discipline" designed to correct and change behavior rather than to penalize employees. The course of action under the progressive disciplinary system is as follows:

1. Written Reminder
2. Decision Day – Final Warning
3. Termination

Written Reminder – is initiated when performance coaching has not corrected the problem. If the problem or action is of a serious nature, the Written Reminder may be used immediately without prior coaching. The employee must respond to the Written Reminder with a written action plan returned by the date specified on the form. The plan must be reviewed by management and either accepted or rejected. If the action plan is refused by management, the employee will have the opportunity to revise the action plan and must do so within one (1) business day. Refusal to write an acceptable action plan is tantamount to a resignation.

Decision Day – is generally initiated when a Written Reminder has failed to yield positive results; however, it may be used as the first step in the process when the issue is egregious. The employee must respond to the Decision Day with a written action plan returned by the specified day on the form. If a prior Written Reminder action plan was in place it must be addressed. The Decision Day action plan must be reviewed and accepted or rejected by management before the employee may return to work. If the action plan is refused by management, the employee will have the opportunity to revise the action plan and must do so within one (1) business day. Refusal to write and submit an acceptable action plan within the prescribed time frame is tantamount to a resignation.

While TCAD generally uses a progressive disciplinary system, the process outlined above does not prohibit TCAD from taking any action deemed necessary and appropriate in maintaining an orderly, efficient, safe work environment, including immediate dismissal without prior warning. The use of a progressive discipline system does not change the "at will" status of TCAD employees.

PROPOSED 2024

5 TIME AND ATTENDANCE

5.1 Work Week

The hours during which TCAD offices are open for business shall be determined by the Chief Appraiser. Regular working hours are 7:45 a.m. to 4:45 p.m., Monday through Friday. Management shall implement schedules to meet specific requirements of the division. Individual employees may be directed to work special hours or shifts as necessary. Employees may be granted the opportunity to work a flexible schedule by the Division Director after satisfactorily completing ninety (90) days of employment with good attendance.

5.1.1 Telecommuting

Employees may occasionally work remotely; however, the ability to work remotely does not replace the need for employees to be in the office at the discretion of the department director.

5.1.2 Remote Workers

Staff who are designated as remote do not have to work in the office; however, the remote status does not replace the need for employees to be available for work at their designated schedule and mandatory in-office workdays.

5.2 Full-time Status

Employees must work a minimum of thirty (30) hours per week to be considered full-time and qualify for benefits. Exempt employees are expected to work a minimum of 80 hours during their biweekly pay period, and hourly employees are expected to work 40 hours per week. Any employee unable to meet this hourly requirement is directed to use available sick, vacation, or personal time to make up the unworked hours.

5.3 Payroll

PROPOSED 2024

The biweekly payroll period begins on Friday at noon and ends fourteen (14) days later, Friday at noon. Paychecks are distributed alternating Fridays. There are twenty-six (26) pay periods in a year. Accrual of leave, deductions for insurance, flex plan, and vehicle allowance are based on twenty-four (24) pay periods per year.

Reviewing time prior to payroll is the employee's responsibility. Payroll cannot be delayed due to unapproved timecards. Timecards that are not approved prior to payroll processing will be assumed to be correct. Any errors resulting in an incorrect payroll check will be amended on the next regularly scheduled payroll.

Time corrections in ADP are only processed by Human Resources, Finance, the Chief Appraiser, or Deputy Chief Appraiser. Employees or managers who tamper with time records will be subject to immediate termination of employment.

5.3.1 Non-Exempt Time Records

Clocking in and out at the proper time helps ensure that payroll checks correctly reflect the actual hours worked. Any violation of policy will be subject to disciplinary action up-to and including termination of employment.

Employees must clock in not more than seven (7) minutes prior to the assigned start time; the calculation of time will begin at the scheduled start time. Employees must clock-out at the end of the workday not more than seven (7) minutes past his or her scheduled end time. The calculation of time ends at the scheduled end time unless the employee works more than seven (7) minutes past the end time.

Clocking in more than seven (7) minutes prior to the schedule or seven (7) minutes after

the end of the schedule must be approved by management. Employees cannot make up time or work overtime without management approval.

Employees working off the clock will be subject to disciplinary action-up-to-and including termination.

An employee failing to clock in or out should report the time to his or her supervisor immediately. Employees that clock-in six (6) minutes or more after the scheduled start time are tardy. Exceeding the allotted time for lunch without prior approval is considered tardy.

Employees must clock-out at the beginning of lunch and clock-in at the end of all lunch periods. Employees may not work through lunch to make up time unless approved by management in advance. Nonexempt employees are required to take at least thirty minutes for lunch even when making up time. Employees with a thirty (30) minute lunch are required to take a minimum of thirty (30) minutes from the time clocked-out. A one-hour lunch is a minimum of sixty (60) minutes from the time clocked out. Any deviation from the standard assigned lunch schedule must be approved by management.

Management may allow an employee who is late for work or late coming back from lunch to make up the time by working longer during the day. Errors in calculating pay, due to employee error, will be corrected on the next regularly scheduled payroll.

5.3.2 Appraisers Clocking When in the Field

When conducting field inspections in a work area other than one in which the appraiser resides:

- Employees shall clock in for work after reaching the area of work and beginning work-related activities.
- Employees shall clock out for the day upon completion of work-related activities, prior to leaving the field to go home.

When conducting field inspections in an area in which the appraiser resides:

- Employees shall clock in for work upon beginning inspections in the area.
- Employees shall clock out for work upon completion of work-related activities before driving home.

When the workday is split between field and office, do not clock out for travel time. If a break or lunch is taken during travel time, normal clocking procedures in 5.3.1 must be followed.

PROPOSED 2024

5.3.3 Paid Work Breaks

Breaks, other than mealtimes, are granted to non-exempt employees as work permits at the discretion of management. Non-exempt employees may be permitted one (1) paid work break per day, in the morning or afternoon as assigned by management. The duration of the break shall not exceed twenty (20) minutes, including time going to and returning from break. Employees late for work, late returning from lunch or who work less than an eight (8) hour day will not be eligible to take a paid break that day. Employees shall clock out and in for break; if the assigned break period is exceeded, the employee forfeits the paid break and will not be paid for the time.. Employees who forfeit break pay cannot make the time up or use vacation to make-up the time. Failure to clock out and in at break may lead to disciplinary action up-to-and-including termination.

5.3.4 Lunch Break

Lunch breaks will be scheduled by management to accommodate workload and must be scheduled for a minimum of thirty (30) minutes to one (1) hour. Non-exempt employees are required to take a lunch break.

5.3.5 Lactation/Breastfeeding Breaks Policy

As part of our family-friendly policies and benefits, TCAD supports breastfeeding employees by accommodating an employee who needs to express breast milk during the workday.

For up to one year after the child's birth, any employee who is breastfeeding will be provided reasonable break times to express breast milk. TCAD has designated the room located on the 3rd floor (adjacent to Appraisal Support) for this purpose. Employees must reserve the room by contacting HR.

A small refrigerator reserved for the specific storage of breast milk is available. Any breast milk stored in the refrigerator must be labeled with the name of the employee and the date of expressing the breast milk. Any nonconforming products stored in the refrigerator may be disposed of. Employees storing milk in the refrigerator assume all responsibility for the safety of the milk and the risk of harm for any reason, including improper storage, refrigeration, and tampering.

For nonexempt employees breaks of more than 20 minutes in length will be unpaid and recorded on timesheets where appropriate.

5.4 Good Work Habits for Non-Exempt Employees

Clock-in on time whether reporting to work or back from lunch. Employees are prohibited from working unless clocked in. After clocking in employees are expected to report to the workstation and begin work. Personal needs, including visiting the restroom, getting water, ice, coffee, or snacks should be addressed before clocking in. Visiting the restroom, getting drinks or snacks, should be limited to lunch and break unless it is an emergency. Employees clocking out for lunch or leaving for the day should address personal needs after clocking out.

Each morning employees should review time entries for the previous day and alert his or her supervisor if there are any issues.

PROPOSED 2024

5.5 Overtime

Non-exempt employees who work more than forty (40) hours in the work week, Friday noon until the following Friday noon, will be paid at the rate of one-and-one half (1 ½) times his or her regular hourly pay rate for the time worked in excess of forty (40) hours. Vacation leave, medical leave, personal holiday, or bereavement leave are not hours worked and are not included for overtime calculation. Scheduled holidays and court leave are included as hours worked for the calculation of overtime. As an example, if an employee worked thirty-five (35) hours and used eight (8) hours vacation, he or she would have a total of forty-three (43) hours. That employee will be paid at the regular hourly rate for all forty-three (43) hours; overtime is calculated on hours worked over forty (40). If an employee worked 48 hours in four days and took eight (8) hours vacation for a total of fifty-six (56) hours. That employee will be paid eight (8) hours of overtime. Employees required to work on a scheduled holiday will be paid at two times the normal rate if they have worked a minimum of thirty-two (32) hours in the work week.

5.5.1 Prior Approval of Overtime

The Chief Appraiser must approve all overtime prior to the hours being worked. Only in rare, emergency circumstances may a Division Director approve overtime without the prior approval of the Chief Appraiser.

5.5.2 Working Mandatory Extended Hours for Non-Exempt and Exempt Employees

TCAD may require mandatory extended work hours at the discretion of management. Mandatory hours apply to exempt and non-exempt employees. Refusal to work additional hours when given notice of at least forty-eight (48) hours is insubordination and will lead to disciplinary action up-to-and-including termination of employment.

5.6 Exempt Employees

Exempt employees who are not subject to the overtime provisions of the Fair Labor Standards Act (FLSA) are expected to accomplish work assignments in concert with the goals of TCAD. During certain times of the year, these expectations may require more than eight (8) hours of work per day and possibly more than forty (40) hours of work per week.

Consistent with the principles of public accountability, which indicate that paying employees for time not worked is contrary to the public interest and runs counter to the efficient use of public funds, TCAD has determined that, when an exempt employee is absent from work for less than one full workday, and the employee does not use accrued leave for such absence, the employee's salary will be reduced. In each such case, a salary deduction will be made for the period of time that is equal to the employee's absence from the employee's regularly scheduled hours of work on that day. The amount of the deduction will be calculated by determining an hourly rate based on the employee's annualized salary, multiplied by the number of deficit hours at the end of the pay period. It has always been TCAD's practice to make salary deductions for absences of a full day if the time is not made up during the pay period.

A director may award administrative/exempt time to an exempt employee who has consistently worked more than eighty (80) hours per pay period. Awarding administrative/exempt time should be reserved for those employees with outstanding performance and work ethic.

5.6.1 Exempt Time Records

Although exempt employees are exempt from overtime, it is important that TCAD have accurate records of hours worked and leave time used. Exempt employees are required to clock in and out.

PROPOSED 2024

5.7 Flexible or Compressed Work Schedules

TCAD offers flexible time and compressed schedules at the discretion of the Chief Appraiser and the Division Director. Managers will inform employees regarding their options for scheduling. Flexible scheduling can be amended or suspended at any time at the discretion of the Division Director, Human Resources, or Chief Appraiser. Employees may not work a flexible schedule during the first ninety (90) days of employment without the approval of Human Resources.

Employees who have acceptable attendance and have completed ninety (90) days of employment may be given approval by the Division Director to work a non-standard schedule with the following stipulations:

1. Standard Schedule - 7:45 a.m. 4:45 pm with 1 hour lunch. A non-standard start time may be approved by the director but must fall within the range of 6:45 am to 8:45 am. The lunch schedule may be modified but shall be no less than 30 minutes.

2. Compressed Schedule - 9/80 schedules may start work between the hours of 6:45 am and 8:45 am with a lunch break of 30, 45, or 60 minutes.

5.8 Attendance

Employment is a matter of mutual agreement. TCAD is entitled to reliable and consistent job performance from employees. An employer has a right to expect employees to be present and ready for work, when and where they are assigned. Employees are expected to be at TCAD or on official duty during TCAD business hours or to be officially excused by his or her supervisor.

TCAD shall take all necessary steps to terminate the employment of any employee who has exhausted all available leave under TCAD policy if the employee is subsequently absent from duty for two weeks. Before making a final decision to terminate employment based on absences after all leave is exhausted, TCAD shall consider the employee's eligibility for reasonable accommodation of a disability under the Americans with Disabilities Act, see chapter 10 of this manual.

5.8.1 Reporting Absences from Work

An excused absence is when the employee provides to their supervisor sufficient notice at least 48 hours in advance of the absence, the absence request is approved in advance by the employee's supervisor, and the employee has sufficient accrued paid time off (PTO) to cover the absence. An absence protected by the Family and Medical Leave Act, Americans with Disabilities Act, or the Pregnant Workers Fairness Act is also considered an excused absence.

An unexcused absence occurs when any of the above conditions are not met. If it is necessary for an employee to be absent or late for work because of an illness or an emergency, the employee must notify his or her supervisor no later than (1) hour before the employee's scheduled starting time on that same day. Employees can report an absence by sending an email to their manager from their work email. Voicemail, Teams chat, or text are unacceptable forms of communication for reporting an absence.

Excessive absenteeism is defined as three or more occurrences of unexcused absence in a 30-day period and will result in disciplinary action. Eight occurrences of unexcused absence in a 12-month period are considered grounds for termination. Tardiness and early departures are each one-half an occurrence for the purpose of discipline under this policy.

5.8.2 Job Abandonment

An employee failing to report an absence to a member of management for two consecutive days has abandoned his or her position and automatically resigns. An employee who resigns his or her position in this manner fails to resign in good standing and will lose accrued benefits and be ineligible for rehire. The Chief Appraiser may make an exception to this policy should verifiable proof of incapacity be provided.

PROPOSED 2024

6 COMPENSATION

It is the policy of TCAD to provide its employees equitable compensation in the form of pay and fringe benefits in order to attract and retain qualified individuals for all positions.

6.1 The Position Classification and Pay Plan

The Position Classification and Pay Plan is the basis for administering compensation for TCAD. Employment policies and procedures are impacted by the presence or absence of revenues sufficient to maintain the current operating demand for appraisal service by the taxing units which fund these services. Accordingly, TCAD maintains a policy of flexible allocation of employee resources to carry out agency responsibilities within the current economic environment.

6.2 Market Analysis

As deemed necessary by the Chief Appraiser, salary surveys will be conducted taking into consideration cost-of-living factors, budget effect of various alternative pay plans, and other factors which may be pertinent in recommending changes in the plan for all positions at TCAD.

6.3 Position Classification

All positions are classified by title. The title is determined by the responsibility and the skills necessary to perform the functions germane to the position. No position will carry a title that has not been approved by the Chief Appraiser. All positions are located on a rate scale maintained by TCAD in accordance with title and commensurate responsibility. A position may be reclassified on the rate scale without a change in title, as dictated by changes in responsibility of the position.

6.4 New Employee Evaluation

Employees new to TCAD or TCAD employees who move to a new position within the organization will receive a review of his or her performance to determine if it meets the requirements and expectations for the position. Employees may be evaluated near the end of ninety (90) days of employment. The evaluation does not prevent TCAD from releasing an employee prior to the end of the evaluation period.

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6.5 Performance Evaluation and Salary Adjustments

Evaluations will be conducted periodically based on the department's goals, deadlines, and cyclic seasons. Pay adjustments, if applicable, will take effect on the first full pay period in January. Salary increases are at the sole discretion of TCAD; a performance evaluation is not a promise of a salary increase.

6.6 Merit Increases

Merit increases are awarded for consistently outstanding performance. All merit increases must be approved by the Chief Appraiser and be supported by the budget. For more information on the Merit Increase program, policy, and procedure, please contact Human Resources.

6.7 Longevity Pay

Effective January 1, 2024: Longevity pay for regular employees at TCAD is contingent on their extended tenure and dedicated service to the organization. The Chief Appraiser is excluded from Longevity Pay. This pay is granted annually, starting after three years of uninterrupted employment from the employee's hire date. On each successive anniversary thereafter, employees are rewarded with a lump sum payment for the preceding year. However, if an employee resigns or is terminated before their anniversary date, they forfeit the longevity pay for that year.

Longevity pay is paid out at five dollars per month for each year of service.

7 TRAINING AND EDUCATION

In order to meet organizational needs, TCAD provides training opportunities to encourage high-quality performance.

7.1 Registered Professional Appraisers

All educational courses and tests required to obtain and maintain the Level IV RPA designation will be paid by TCAD. All courses must be requested in advance and approved by management. TCAD will not pay for repeated courses or tests. If an employee fails to pass a test and must retake the course or test, it will be at his or her own expense. If an employee is fully apprised of enrollment in a course and does not attend, he or she will be responsible for paying for the course in the future. If an employee takes a course through a provider that is not recognized by TDLR, he or she will not be reimbursed for the cost of the course.

Employees who are required by the Tax Code or the Chief Appraiser to take a course will be paid while in attendance. Should a course be less than a day, or be dismissed before the end of the day, the employee is expected to return to work or to use vacation time for the rest of the day. TCAD does not pay for time spent studying.

7.2 State Licensed and Certified Appraisers

State Licensed and Certified Appraisers will receive a payment in December for maintaining their credentials with the Texas Appraiser Licensing and Certification Board as follows:

State Licensed Appraiser	$400.00
State Certified Residential Appraiser	$450.00
State Certified General Appraiser	$500.00

7.3 International Association of Assessing Officers (IAAO) Certification

Appraisers with the following IAAO designations will receive a payment in December for maintaining one of the following credentials with the IAAO as follows:

PROPOSED 2024

Cadastral Mapping Specialist (CMS)	$500.00
Personal Property Specialist (PPS)	$750.00
Assessment Administration Specialist (AAS)	$750.00
Mass Appraisal Specialist (MAS)	$1,000.00
Residential Evaluation Specialist (RES)	$1,000.00
Certified Assessment Evaluator (CAE)	$1,250.00

7.4 Tuition Reimbursement

All regular full-time TCAD employees are eligible for consideration for tuition reimbursement.

7.4.1 Conditions of Reimbursement

TCAD may participate in the cost of courses directly related to the duties of the position currently held by the employee that enhance job effectiveness. Courses must be taken from an accredited college, university, or technical school. Courses may be taken on an undergraduate, graduate, or vocational level.

Course work that fits a degree plan that will result in a degree with a major in the primary field of employment may be approved except those elective hours will not be considered until sixty (60) hours and/or an associate degree have been completed.

An employee must receive a grade of "C" or higher for full reimbursement. No reimbursement will be made for grades lower than a "C". In the event the course is not graded, a certificate of completion will be required for full reimbursement.

TCAD will not pay the cost of tuition and fees for any individual who receives assistance from other sources such as scholarships, grants, or other subsidies, e.g., the G.I. Bill.

7.4.2 Procedures

Written requests to participate in the Tuition Refund Program must be completed prior to the beginning of the course. A copy of the course description from the school catalog must be attached to each application and submitted to Human Resources. Applications will be reviewed, and applicants will be selected to participate in the program by the Chief Appraiser.

Approval will be granted only for specific courses for a particular semester, and no blanket approval of a program shall be granted. Any course changes must be submitted to the Human Resources Department within ten (10) days of the registration date for consideration of approval.

If an employee resigns or employment is terminated for any reason prior to receiving reimbursement, there shall be no obligation on the part of TCAD to reimburse any part of the expense. A maximum of two courses or seven credit hours per semester may be taken for reimbursement under this program. The total amount of refund will not exceed one thousand dollars ($1,000) per semester. In the event of limited or restricted funds, approval will be granted on a competitive basis as determined by the Chief Appraiser.

TCAD is under no obligation to allow employees to take courses during regular work hours. Employees are encouraged to attend courses after regular work hours. TCAD is under no obligation to compensate employees with straight time pay, overtime pay, compensatory time, or flexible work hours resulting from participation in this program. Appropriate work schedules must be arranged and specifically approved in advance by the Division Director when course work is taken during regular work hours. The completion of a course of study does not obligate TCAD to advance the employee to a higher pay range or position.

PROPOSED 2024

8 EMPLOYEE BENEFITS

It is the policy of TCAD to offer group insurance coverage to full-time TCAD employees. The type of coverage may include, but is not limited to, health, dental, life, and long-term disability insurance. Optional coverage, including dependent coverage, FSA, Dependent FSA, and Pet insurance, may be offered as well.

8.1 Benefit Coverage and Premium Deductions

New employee coverage is effective the first (1st) day of the month immediately following the completion of sixty (60) days of employment. Any premiums an employee is required to pay for benefit coverage will be deducted from the biweekly check, twenty-four (24) times per year. An employee on leave without pay that is not covered by the Family Medical Leave Act must pay the full premium monthly by cashier's check or money order.

8.2 Employee Assistance Program (EAP)

Recognizing that personal problems of employees or family members can affect job performance, it shall be the policy of TCAD to provide employees and their immediate family members the opportunity to resolve these problems through access to an EAP. Long-term treatment or in-patient care may be covered by the employee's insurance program.

All regular employees and their household members will have access to the program. An EAP Coordinator appointed by the Chief Appraiser will make referrals to appropriate professionals. No information on program participation will be included in an employee's personnel record. The program will be managed with the strictest confidentiality.

8.3 Work Related Injuries

TCAD provides workers' compensation insurance for employees. Workers' compensation insurance provides coverage for employees in the event of certain occupational injuries or illnesses. Workers' compensation is provided in accordance with the Workers' Compensation Laws of the State of Texas, and this law regulates the benefits for which employees may be eligible. For this reason, it is extremely important the employee notify his or her supervisor immediately in the event of a work-related illness, accident, or injury, no matter how small. Failure to report these matters to the supervisor immediately could affect benefit eligibility and subject the employee to disciplinary action. An employee unable to work and eligible for benefits under workers' compensation may also be covered by the Family Medical Leave Act (FMLA), in which case, the FMLA time will run concurrently with the workers' compensation absence.

PROPOSED 2024

8.3.1 Medical Treatment

If medical attention is requested by the employee or required by TCAD, the employee must see a physician participating in the Political Subdivision Workers Comp Alliance. The physician will be required to complete a medical narrative outlining the treatment provided and any work restrictions or limitations that will be in effect for the employee. If physically able, the employee is required to return the medical narrative to Human Resources by the next business day.

8.3.2 Release to Work

An injured employee is required to report back to work on the date that the treating physician lists on the release form. The employee is required to submit the physician's release form to Human Resources before resuming active-duty status.

8.3.3 Fraud

Fraud or misrepresentation of information concerning a workers' compensation claim is grounds for termination of employment.

8.4 Retirement

TCAD does not participate in the Federal Insurance Contributions Act (FICA). TCAD does participate in the Texas County and District Retirement System (TCDRS). Participation in TCDRS is mandatory for all full-time employees. Employees contribute seven (7) percent of all earnings into the tax deferred plan; and TCAD matches those contributions at a rate that is determined by TCDRS and approved by TCAD's Board of Directors annually. For specific questions about the plan visit the website at www.tcdrs.org or call (512) 328-8889.

8.5 Optional Deferred Retirement

TCAD offers the opportunity to participate in a retirement plan in addition to TCDRS. The program is provided through VALIC. Participation in the plan may be started or stopped at any time. Contributions to the plan may be made pretax or post tax.

8.6 Medicare

TCAD does participate in Medicare; and that tax will be deducted from all pay as required by law for everyone hired after 1986.

8.7 Vacation Leave

Vacation leave is offered to full-time regular employees who are encouraged to use the benefit according to the provisions of this policy. All full-time regular employees shall accrue eight (8) hours of vacation leave per month for the first five (5) years of employment. Vacation accruals shall increase based on the following schedule:

PROPOSED 2024

Employment Service	Accrual per Month
Less than 5 years	8 hours
5 years but less than 10 years	9 hours
10 years but less than 15 years	10 hours
15 years but less than 20 years	11 hours
20 years or more	12 hours

8.7.1 Prorated Vacation

If the full month is not worked or not paid through vacation or other leave, the leave benefit accrual will be prorated by the number of weeks worked. In such cases one week equals one quarter of the full monthly accrual.

8.7.2 Scheduling Vacation

Vacations are scheduled at the discretion of TCAD and must have the approval of the management. Employees may not use vacation leave prior to completing ninety (90) days of employment. TCAD reserves the right to decline vacation requests due to business considerations. If a request is denied and the employee takes the time-off without approval, the time will not be paid. Should a holiday fall within the vacation period, the employee will be compensated for the holiday pay. Vacation shall be scheduled in quarter hour increments beginning with a minimum of one (1) hour.

8.7.3 Vacation Scheduling Restrictions

TCAD reserves the right to restrict the times of the year when vacations can be scheduled. Vacation cannot be scheduled from May 1st through Certification. Management may modify these restrictions with approval of the Chief Appraiser.

8.7.4 Continuous Vacation

No more than two (2) weeks of continuous vacation may be scheduled without the prior approval of the Chief Appraiser. Employees requesting 2 weeks or more will be required to complete the Employee Time off Request Form. Please use the Employee Time off Request form located P:\EMPLOYEE DATA\HR Information\Forms.

8.7.5 Vacation Calendar Year Carry-Over

Vacation time has no carryover limit and can be paid out at any time, with the approval of the Chief Appraiser.

8.7.6 Vacation Paid Upon Leaving TCAD

Employees who leave in good standing, with six-months or more of service, will be paid for all unused vacation leave. Beneficiaries of employees who die while in the service of TCAD or die while on Military Leave from TCAD shall be paid for all unused vacation leave.

8.8 Sick Leave

All full-time regular employees shall earn eight (8) hours of sick leave per month with no accrual limit and no carry-over limit. Employees can use sick leave after their first pay period. Sick leave is scheduled in quarter hour increments. An employee absent for three (3) days or more may be requested to provide a release from a health care provider upon returning to work.

8.9 Scheduled Holidays

PROPOSED 2024

The following paid holidays are declared official holidays for TCAD employees. A holiday falling on Saturday will be observed the preceding Friday and a holiday falling on Sunday will be observed the following Monday.

New Year's Day	January 1
Dr. Martin Luther King's Birthday observed	Third Monday in Jan
President's Day	Third Monday in Feb
Memorial Day	Last Monday in May
Juneteenth	Third Monday in June
Independence Day	July 4
Labor Day	First Monday in September
Columbus Day	Discretion of the Chief Appraiser
Veteran's Day	November 11th
Thanksgiving Day	Fourth Thursday in November
Day After Thanksgiving	Fourth Friday in November
Christmas Eve	December 24th
Christmas Day	December 25th
Two Personal Holidays	Employee request

8.10 Discretionary Holiday

Solely at the discretion of the Chief Appraiser an additional holiday or holidays may be designated as official paid holidays. The determination to award an additional holiday(s) will be made annually by the Chief Appraiser.

8.10.1 Part time Holiday Benefit

Part-time employees considered as regular employees working at least 20 hours per week shall receive holiday pay on a prorated basis.

8.10.2 Absence Affecting Holiday Pay

An employee absent without prior authorization the day before or after the holiday will not receive holiday pay.

8.10.3 Personal Holiday

The personal holiday is an eight (8) hour day off that may be scheduled at a time of the employee's choosing with the approval of the Manager. A personal holiday cannot be used for less than a full eight (8) hour day. The personal holidays are earned the first pay period of the year and must be used by the close of the last pay period of the year or the time is forfeited. An employee with a hire date equal to the first scheduled workday in January will be entitled to the personal holidays in the year hired. Employees starting work after the first scheduled workday in January will not earn personal holidays until January of the following year. Personal holidays are subject to the same scheduling requirements as vacation. Employees may not use personal holidays prior to completing ninety (90) days of employment. Personal holidays will not be paid at separation.

8.11 Court Leave

If the employee is not a party to the proceedings, court leave will be granted for the purpose of appearing as a juror, witness, or other official participant in the proceedings of a legally recognized court or other body having the power of subpoena. The employee must provide a copy of the document requiring attendance in court with the leave request. Upon returning the employee must furnish from the court the date and time of dismissal. Should jury duty require a leave of absence, it will be paid leave, approved for the duration of the trial. Court Leave hours will be counted as hours worked for overtime calculation. Please use the Employee Time off Request form located P:\EMPLOYEE DATA\HR Information\Forms.

PROPOSED 2024

8.12 Bereavement Leave

To support employees during times of personal loss, TCAD offers bereavement leave to allow time off to grieve and manage affairs related to the passing of a loved one. All full-time and part-time employees are eligible for bereavement leave upon the start of their employment. Employees may request and be granted up to three (3) days or twenty-four (24) hours of paid bereavement leave in the event of the death of an immediate family member or significant individual in their life. Bereavement pay is provided at the employee's regular rate of pay but does not qualify as hours worked for the calculation of overtime.

For the purposes of this policy, immediate family members and significant individuals include:

- Spouse
- Child, including biological, adopted, step, and foster children;
- Parent, including biological, adoptive, step, and foster parents;
- Sibling, including biological, adoptive, step, and half-siblings;
- Grandparent;
- Corresponding in-laws; and
- Other individuals who have played a significant role in the employee's life, subject to approval.

Employees should notify their supervisor as soon as possible of their need to take bereavement leave. Documentation or explanation regarding the relationship of the deceased to the employee is required to support the leave request, particularly in cases involving non-traditional family roles or significant individuals. The organization requires verification of death (e.g., a death certificate or obituary) to process the leave request. Please use the Employee Time off Request form located P:\EMPLOYEE DATA\HR Information\Forms. Employees are expected to return to work following the conclusion of their bereavement leave. If additional time off is needed, or the decedent does not qualify for bereavement leave, employees may request to use available paid time off, vacation, sick, or personal leave, subject to approval by their supervisor.

The organization recognizes the profound impact of loss and offers additional support services, including employee assistance programs (EAP), to help employees during their time of grief.

PROPOSED 2024

9 LEAVE OF ABSENCE

9.1 Family Medical Leave Act

TCAD will comply with the Family and Medical Leave Act (FMLA), as amended, and its' implementing regulations. TCAD posts the mandatory FMLA Notice and upon hire provides all new employees with notices required by the U.S. Department of Labor (DOL) on Employee Rights and Responsibilities under the Family and Medical Act as posted on Employee Bulletin Boards.

The function of this policy is to provide employees with a general description of rights under the FMLA. In the event of any conflict between this policy and the applicable law, employees will be afforded all rights required by law.

If you have any questions, concerns, or disputes with this policy, you must contact Human Resources in writing.

9.1.1 General Provisions

Under this policy, TCAD will grant up to 12 weeks (or up to 26 weeks of military caregiver leave to care for a covered service member with a serious injury or illness) during a 12-month period to eligible employees. The leave may be paid, unpaid or a combination of paid and unpaid leave, depending on the circumstances of the leave and as specified in this policy.

9.1.2 Eligibility

To qualify to take family or medical leave under this policy, the employee must meet the following conditions:

1. The employee must have worked for TCAD for 12 months, which need not have been consecutive. Separate periods of employment will be counted, provided that the break in service does not exceed seven years. Separate periods of employment will be counted if the break in service exceeds seven years due to National Guard or Reserve military service obligation.
2. The employee must have worked at least 1,250 hours during the immediately preceding 12-month period before the date when the leave is requested to commence. The principles established under the FLSA determine the number of hours worked by an employee. The FLSA does not include time spent on paid or unpaid leave as hours worked. Consequently, these hours of leave should not be counted in determining the 1,250 hours eligibility test for an employee under FMLA.

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9.1.3 Type of Leave Covered

To qualify as FMLA leave under this policy, the employee must be taking leave for one of the reasons listed below:

1. For the birth of a son or daughter, and to care for the newborn child;
2. For placement with the employee of a son or daughter for adoption or foster care;
3. To care for the employee's spouse, son or daughter, or parent with a serious health condition;
4. Because of a serious health condition that makes the employee unable to perform the functions of the employee's job;
5. Because of any qualifying exigency arising out of the fact that the employee's spouse, son, daughter, or parent is on (or has been notified of an impending call to) "covered active duty" in the Armed Forces; and
6. To care for a covered service member with a serious injury or illness if the employee is the spouse, son, daughter, parent, or next of kin of the service member.

9.1.4 Amount of Leave

An eligible employee can take up to 12 weeks for the FMLA circumstances (1) through (5) above under this policy during the applicable 12-month period. TCAD will measure the 12-month period as a rolling 12-month period measured backward from the date an employee uses any leave under this policy. Each time an employee takes leave, TCAD will compute the amount of leave the employee has taken under this policy in the last 12 months and subtract it from the 12 weeks of available leave, and the balance remaining is the amount the employee is entitled to take at that time.

An eligible employee can take up to 26 weeks for the FMLA circumstance (6) above (military caregiver leave) during a single 12-month period. For this military caregiver leave, TCAD will measure the 12-month period as a rolling 12-month period measured forward. FMLA leave already taken for other FMLA circumstances will be deducted from the total of 26 weeks available.

If a husband and wife both work for TCAD and each wish to take leave for the birth of a child, adoption or placement of a child in foster care, or to care for a parent (but not a parent "in-law") with a serious health condition, the husband and wife may take only a combined total of 12 weeks of leave. If a husband and wife both work for TCAD and each wish to take leave to care for a covered injured or ill service member, the husband and wife may only take a combined total of 26 weeks of leave.

9.1.5 Employee Status and Benefits During FMLA Leave

While an employee is on FMLA leave, TCAD will continue the employee's health benefits during the leave period at the same level and under the same conditions as if the employee had continued to work.

If the employee chooses not to return to work for reasons other than retirement, a continued serious health condition of the employee or the employee's family member or a circumstance beyond the employee's control, TCAD will require the employee to reimburse TCAD the amount it paid for the employee's health insurance premiums during the leave period.

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Under current TCAD policy, the employee pays a portion of the health care premium. While on paid leave, TCAD will continue to make payroll deductions to collect the employee's share of the premium. While on unpaid FMLA leave, the employee must continue to make this payment, either in person or by mail. The payment must be received by Human Resources by the 5th day of each month. If the payment is more than 30 days late, the employee's health care coverage may be dropped for the duration of the leave. TCAD will provide 15 days' notification prior to the employee's loss of coverage.

If the employee contributes to a life insurance or disability plan, TCAD will continue making payroll deductions while the employee is on paid leave. While the employee is on unpaid leave, the employee may request continuation of such benefits and pay his or her portion of the premiums, or TCAD may elect to maintain such benefits during the leave and pay the employee's share of the premium payments. If the employee does not continue these payments, TCAD may discontinue coverage during the leave. If TCAD maintains coverage, TCAD may recover the costs incurred for paying the employee's share of any premiums, whether or not the employee returns to work.

9.1.6 Employee Status After FMLA Leave

An employee who takes leave under this policy may be asked to provide a fitness for duty (FFD) clearance from the health care provider before returning to work. This requirement will be included in TCAD's response to the FMLA request. Generally, an employee who takes FMLA leave will be able to return to the same position or a position with equivalent status, pay, benefits and other employment terms. The position will be the same or one which is virtually identical in terms of pay, benefits and working conditions. TCAD may choose to exempt certain key employees from this requirement and not return them to the same or similar position.

9.1.7 Use of Paid and Unpaid Leave

Generally, FMLA leave is unpaid leave. However, TCAD requires employees to substitute applicable accrued paid leave for unpaid leave so that the paid leave will run concurrently with the employee's entitlement to FMLA leave. In other words, TCAD requires an employee to use all applicable paid leave before the employee's leave will be converted to unpaid leave. For leave taken for the serious health condition of the employee or the employee's family member, accrued sick leave is substituted for unpaid leave followed by vacation leave. For any other FMLA qualifying reason, vacation leave will be substituted for unpaid leave.

9.1.8 Intermittent Leave or a Reduced Work Schedule

The employee may take FMLA leave in consecutive weeks, may use the leave intermittently (take a day periodically when needed over the year) or, under certain circumstances, may use the leave to reduce the workweek or workday, resulting in a reduced hour schedule. In all cases, the leave may not exceed a total of 12 workweeks (or 26 workweeks to care for an injured or ill service member over a 12-month period).

TCAD may temporarily transfer an employee to an available alternative position with equivalent pay and benefits if the alternative position would better accommodate the intermittent or reduced schedule, in instances of when leave for the employee or employee's family member is foreseeable and for planned medical treatment, including recovery from a serious health condition or to care for a child after birth, or placement for adoption or foster care.

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For the birth, adoption, or foster care of a child, TCAD and the employee must mutually agree to the schedule before the employee may take the leave intermittently or work a reduced hour schedule. Leave for birth, adoption, or foster care of a child must be taken within one year of the birth or placement of the child.

If the employee is taking leave for a serious health condition or because of the serious health condition of a family member, the employee should try to reach agreement with TCAD before taking intermittent leave or working a reduced hour schedule. If this is not possible, then the employee must prove that the use of the leave is medically necessary.

9.1.9 Certification for the Employee's Serious Health Condition

TCAD will require certification for the employee's serious health condition. The employee must respond to such a request within 15 days of the request or provide a reasonable explanation for the delay. Failure to provide certification may result in a denial of continuation of leave. Medical certification will be provided using the DOL Certification of Health Care Provider for Employee's Serious Health Condition.

TCAD may directly contact the employee's health care provider for verification or clarification purposes using a health care professional, an HR professional, leave administrator or management official. TCAD will not use the employee's direct supervisor for this contact. Before TCAD makes this direct contact with the health care provider, the employee will be given an opportunity to resolve any deficiencies in the medical certification. In compliance with HIPAA

Medical Privacy Rules, TCAD will obtain the employee's permission for clarification of individually identifiable health information.

TCAD has the right to ask for a second opinion if it has reason to doubt the certification. TCAD will pay for the employee to get a certification from a second health care provider, which TCAD will select. TCAD may deny FMLA leave to an employee who refuses to release relevant medical records to the health care provider designated to provide a second or third opinion. If necessary to resolve a conflict between the original certification and the second opinion, TCAD will require the opinion of a third health care provider. TCAD and the employee will mutually select the third health care provider, and TCAD will pay for the opinion. This third opinion will be considered final. The employee will be provisionally entitled to leave and benefits under the FMLA pending the second and/or third opinion.

9.1.10 Certification for Family Member's Serious Health Condition

TCAD will require certification for the family member's serious health condition. The employee must respond to such a request within fifteen (15) days of the request or provide a reasonable explanation for the delay. Failure to provide certification may result in a denial of continuation of leave. Medical certification will be provided using the DOL Certification of Health Care Provider for Family Member's Serious Health Condition.

TCAD may directly contact the employee's family member's health care provider for verification or clarification purposes using a health care professional, an HR professional, leave administrator or management official. TCAD will not use the employee's direct supervisor for this contact. Before TCAD makes this direct contact with the health care provider, the employee will be given an opportunity to resolve any deficiencies in the medical certification. In compliance with HIPAA Medical Privacy Rules, TCAD will obtain the employee's family member's permission for clarification of individually identifiable health information.

TCAD has the right to ask for a second opinion if it has reason to doubt the certification. TCAD will pay for the employee's family member to get a certification from a second health care provider, which TCAD will select. TCAD may deny FMLA leave to an employee whose family member refuses to release relevant medical records to the health care provider designated to provide a second or third opinion. If necessary to resolve a conflict between the original certification and the second opinion, TCAD will require the opinion of a third health care provider. TCAD and the employee will mutually select the third health care provider, and TCAD will pay for the opinion. This third opinion will be considered final. The employee will be provisionally entitled to leave and benefits under the FMLA pending the second and/or third opinion.

PROPOSED 2024

9.1.11 Certification of Qualifying Exigency for Military Family Leave

TCAD will require certification of the qualifying exigency for military family leave. The employee must respond to such a request within fifteen (15) days of the request or provide a reasonable explanation for the delay. Failure to provide certification may result in a denial of continuation of leave. This certification will be provided using the DOL Certification of Qualifying Exigency for Military Family Leave.

9.1.12 Certification for Serious Injury or Illness of Covered Service member for Military Family Leave

TCAD will require certification for the serious injury or illness of the covered service member. The employee must respond to such a request within fifteen (15) days of the request or provide a reasonable explanation for the delay. Failure to provide certification may result in a denial of continuation of leave. This certification will be provided using the DOL Certification for Serious Injury or Illness of Covered Service member.

9.1.13 Recertification

TCAD may request recertification for the serious health condition of the employee or the employee's family member no more frequently than every thirty (30) days and only when circumstances have changed significantly, or if TCAD receives information casting doubt on the reason given for the absence, or if the employee seeks an extension of their leave. For open-ended certifications, TCAD may request recertification for the serious health condition of the employee or the employee's family member every six months in connection with an FMLA absence. TCAD may provide the employee's health care provider with the employee's attendance records and ask whether the need for leave is consistent with the employee's serious health condition.

9.1.14 Procedure for Requesting FMLA Leave

All employees requesting FMLA leave must provide verbal or written notice of the need for the leave to Human Resources. Within five business days after the employee has provided this notice, Human Resources will complete and provide the employee with the DOL Notice of Eligibility and Rights.

When the need for the leave is foreseeable, the employee must provide TCAD with at least 30 days' notice. When an employee becomes aware of a need for FMLA leave less than 30 days in advance, the employee must provide notice of the need for the leave either the same day or the next business day. When the need for FMLA leave is not foreseeable, the employee must comply with TCAD's usual and customary notice and procedural requirements for requesting leave, absent unusual circumstances.

9.1.15 Designation of FMLA Leave Type

Within five business days after the employee has submitted the appropriate certification form, Human Resources will complete and provide the employee with a written response to the employee's request for FMLA leave using the DOL Designation Notice.

9.1.16 Intent to Return to Work from FMLA Leave

On a basis that does not discriminate against employees on FMLA leave, TCAD may require an employee on FMLA leave to report periodically on the employee's status and intent to return to work.

PROPOSED 2024

9.2 Paid Leave for Military Service

Any employee who is a member of the Texas National Guard, Texas State Guard, reserve component of the United States Armed Forces, or a member of a state or federally authorized Urban Search and Rescue Team is entitled to 15 days of paid leave per fiscal year when engaged in authorized training or duty orders by proper authority. An additional seven days of leave per fiscal year are available if called to state active duty in response to a disaster. In addition, an employee is entitled to use available state and local personal or sick leave during a time of active military service.

In order to obtain a military leave of absence, the employee must give their supervisor notice of the dates of annual duty and provide a copy of the military orders. Please use the Employee Time off Request form located P:\EMPLOYEE DATA\HR Information\Forms

An employee, whose employment is interrupted in order to serve with the United States Armed Forces, whether on active or reserve duty training, will be eligible for military leave with all rights of re-employment established under the Uniformed Services Employment and Reemployment Rights Act of 1994. Human Resources should be consulted for details concerning current re-employment rights of veterans returning to work. An employee on leave of absence is responsible for keeping TCAD informed of the expected date of return to work. It is the responsibility of the employee to pay insurance premiums during unpaid leave. If an employee is absent two weeks or less, the premiums will

be deducted from the biweekly paycheck upon the return to work. In the case of an absence of more than two weeks, the employee must pay the premiums monthly with a cashier's check or money order.

9.3 General Leave of Absence

In special cases and at the discretion of the Chief Appraiser, a general leave of absence may be granted without pay or benefits. Taking unpaid time off requires the explicit approval of the Chief Appraiser. Please use the Employee Time off Request form located P:\EMPLOYEE DATA\HR Information\Forms.

An employee granted a a leave of absence without pay may be eligible for COBRA continuation coverage.

A general leave of absence under this provision without pay cannot exceed thirty (30) days. If an employee is unable to return to work after thirty (30) days, they may request an extension. A request for an extension must be presented in writing prior to the expiration of the current leave of absence. In no case will a leave be extended for longer than six (6) months.

PROPOSED 2024

10 AMERICANS WITH DISABILITIES ACT

TCAD is committed to the fair and equal employment of individuals with disabilities under the Americans with Disabilities Act, as amended (ADA). It is TCAD's policy to provide, as outlined below, reasonable accommodation to qualified individuals with disabilities to enable them to perform the essential functions of their job or to enjoy the equal benefits and privileges of employment, unless the accommodation would impose an undue hardship on the organization or pose a direct threat to the health or safety of the employee or others. TCAD prohibits any harassment of, or discriminatory treatment of, employees on the basis of a disability or because an employee has requested a reasonable accommodation. This policy applies to all applicants for employment and all employees.

10.1 Disability

"Disability" refers to a physical or mental impairment that substantially limits one or more of the major life activities of an individual. A "qualified person with a disability" means an individual with a disability who, with or without reasonable accommodation, can perform the essential functions of the job.

10.2 Reasonable Accommodation

TCAD will seek to provide reasonable accommodation for a known disability or at the request of an individual with a disability. Many individuals with disabilities can apply for jobs and perform the essential functions of the job without any reasonable accommodation.

However, there are situations in which a workplace barrier may interfere. A "reasonable accommodation" is any change or adjustment to the job application process, work environment, or work processes that would make it possible for the individual with a disability to perform the essential functions of the job.

10.3 Essential Job Functions

For each position, the job description typically will identify essential job functions. Human Resources generally will review job descriptions on a periodic basis to evaluate job functions designated as essential. An employee's questions about job requirements should be directed to their supervisor.

PROPOSED 2024

10.4 Requesting a Reasonable Accommodation

An employee with a disability is responsible for requesting an accommodation from Human Resources, or their supervisor, and engaging in an informal process to clarify what the employee needs and to identify possible accommodations. If requested, the employee is responsible for providing medical documentation regarding the disability. The employee should describe the problem created by a workplace barrier so that an appropriate accommodation may be considered. Typically, Human Resources will work with the employee to identify possible reasonable accommodations and to assess the effectiveness of each in allowing the employee to perform the essential functions of the job. In determining an appropriate reasonable accommodation through this interactive process, while an individual's preference will be considered, TCAD is free to choose between equally effective accommodations with consideration toward expense and impact on the rest of the organization. A request for reasonable accommodation may be denied if it would create an undue hardship for TCAD or pose a direct threat to the health or safety of the employee or others.

10.5 Safety

All employees are expected to comply with all safety procedures. TCAD will not place qualified individuals with disabilities in positions in which they will pose a direct threat to the health or safety of others or themselves. A "direct threat" means a significant risk to the health or safety of oneself or others that cannot be eliminated by reasonable accommodation.

10.6 Confidentiality

All information obtained concerning the medical condition or history of an applicant or employee will be treated as confidential information, maintained in separate medical files, and disclosed only as permitted by law.

PROPOSED 2024

11 PREGNANT WORKERS FAIRNESS ACT (PWFA)

TCAD complies with the Pregnant Workers Fairness Act (PWFA), and its' implementing regulations and is committed to providing equal employment opportunities to qualified pregnant individuals. Consistent with this commitment, TCAD provides reasonable accommodations to qualified applicants and employees with known limitations related to pregnancy, childbirth, or related medical conditions. Reasonable accommodation will be provided unless they impose an undue hardship on the organization. TCAD prohibits discrimination or harassment against employees based on pregnancy, childbirth, or related medical conditions, including retaliation for requesting accommodations. If you have any questions, concerns, or disputes with this policy, you must contact Human Resources in writing.

11.1 Reasonable Accommodations

A "reasonable accommodation" is any adjustment or modification to the application process, work environment, job duties, or work process that allows a qualified applicant or employee with a known limitation under the PWFA to perform their essential job functions or the temporary suspension of essential functions. These may include additional breaks, job restructuring, light-duty assignments, or other modifications.

11.2 Essential Job Functions

The job description will generally outline the essential functions for each position. Human Resources will review job descriptions periodically to ensure accurate identification of essential functions. Employees should direct questions regarding essential job functions to their supervisor.

11.3 Requesting Reasonable Accommodations

If you believe you need accommodation because of your limitations related to pregnancy, childbirth, or related medical conditions, you are responsible for requesting reasonable accommodation from Human Resources or your supervisor. You may make the request orally or in writing. TCAD encourages employees to make their request in writing on TCAD's reasonable accommodation request form and to include relevant information, such as:

- Your limitation related to pregnancy, childbirth, or a related medical condition.
- A description of the accommodation you are seeking.

PROPOSED 2024

After receiving your oral or written request, TCAD will engage in an interactive process with you to determine the precise limitations related to your pregnancy, childbirth, or related medical conditions and explore potential reasonable accommodations that could overcome those limitations. TCAD encourages you to suggest specific reasonable accommodation that you believe would allow you to perform your job. However, TCAD is not required to make the specific accommodation you request and may provide an alternative effective accommodation after engaging in an interactive process, to the extent any reasonable accommodation can be made without imposing an undue hardship on TCAD.

11.3.1 Medical Documentation

If your limitation or need for accommodation is not obvious, TCAD may ask you to provide reasonable supporting documents showing that you have a limitation within the meaning of the PWFA and that your limitation necessitates reasonable accommodation.

TCAD will keep confidential any medical information obtained in connection with your request for reasonable accommodation.

11.3.2 Determinations

TCAD makes determinations about reasonable accommodations on a case-by-case basis considering various factors and based on an individualized assessment in each situation.

TCAD strives to make determinations on reasonable accommodation requests expeditiously and will inform the individual once it has made a determination. If you have any questions about a reasonable accommodation request you made, please contact Human Resources.

11.3.3 Interplay with FMLA and other Laws

Pregnant employees may also have rights under Title VII, the ADA, the FMLA, the Rehabilitation Act, and the PUMP Act. The PWFA does not limit these rights in any way. In particular, pregnant employees may also qualify for FMLA leave. In such cases, TCAD will coordinate the employees' rights under both laws to ensure the most appropriate leave or accommodation is provided. For instance, if the employee's condition requires time off exceeding 12 weeks or involves intermittent leave, it will be integrated with FMLA leave to ensure proper coordination of benefits.

TCAD will not require a qualified employee to take leave, whether paid or unpaid, if another reasonable accommodation can be provided to the known limitations related to the pregnancy, childbirth, or related medical conditions of the qualified employee that does not result in an undue hardship.

11.3.4 Status After Leave or Accommodation

Following PWFA accommodations, employees generally will return to their original position if the employee is still qualified and there was no undue hardship in holding the position open.

11.4 Safety

Employees are expected to follow all safety procedures. TCAD will not place qualified employees affected by pregnancy-related conditions in positions where they pose a direct threat to their health or safety or that of others.

PROPOSED 2024

12 ACCESS, SECURITY & EMERGENCY EVACUATION

TCAD controls building access to ensure safety for employees and the public. This is a shared responsibility with employees as it is incumbent upon employees to alert the proper personnel when there is a problem, safety issue, suspicious activity, threat, or emergency.

12.1 Responsibility

The Deputy Chief is charged with the responsibility of coordinating access, control, and building security policies for TCAD. Each Division Director is responsible for ensuring that proper building security policies are observed by employees in their division. Each employee is responsible for monitoring the security of their work area, computer equipment documentation files.

12.2 Facility Hours and Closings

The building is open to the public at 7:45 am and closes at 4:45 pm, Monday through Friday, unless otherwise scheduled for a public meeting or event. The facility is closed on holidays as cited in chapter six (6) of this manual.

12.3 Entry Access Control

Employees of TCAD shall be issued a key card and appropriate building keys. There is a charge of $7.00 to replace a lost key card or key fob. An employee must use his or her card when entering the building. With the exception of the front door, all doors are locked. The front door of the building is open at 7:45 am and locks at 4:45 pm, Monday through Friday. In the event of a power outage the doors will continue to operate. All visitors to TCAD must enter through the front door and sign in and out at the receptionist desk.

12.4 Identification Badges

Employees of TCAD shall be issued an identification badge to wear while at work and while working as a representative of TCAD.

PROPOSED 2024

12.5 Surveillance

Cameras are installed throughout the building. The cameras are not security cameras and are not routinely monitored.

12.6 Evacuation

Means of Egress shall be posted on the main hallways and in the divisions. If the fire alarm sounds, all employees and visitors must evacuate the building immediately. Evacuated employees shall meet at the assigned area outside the building. Fire alarm tests will be conducted annually to determine readiness of response and practicality.

12.7 Emergency Closure or Modified Hours of Operation

The Chief Appraiser will determine the hours of operation during delayed openings, early releases, or emergencies. If the Chief Appraiser decides that modified hours or closure are prudent, notification will be given as necessary to managers in person or sent to all staff via TCAD Text or all-staff email. Closures will be posted on the TCAD website at www.traviscad.org.

Employees must exercise good judgment when determining if it is safe to drive during emergency conditions, whether caused by weather or other factors, as each person is responsible for their own safe conduct to and from work.

TCAD employees scheduled to work will be paid when TCAD is closed due to delayed openings, early releases, and emergency conditions. Pay will be determined by each employee's regular work hours. The calculation of time to be paid due to a delayed opening will be measured from each employee's start time to the time of opening. The calculation of time to be paid due to an

early release will be measured from each employee's last clock-out time to their standard clock-out time.

Employees who do not report to work for a delayed opening or early release day will not receive pay for the delayed opening or early release. Employees scheduled to be off will not receive ADMIN pay due to delayed openings, early releases, and emergency conditions.

In case of an emergency during office hours, the Deputy Chief or Human Resources will communicate with the Managers and Directors and determine how to best address the situation. Employees directed to seek shelter shall cease working, shut down computers and move to the inner hallway downstairs.

12.8 Medical Emergencies

Call 911 for medical emergencies. Do not take on the responsibility for transporting someone severely ill or injured to the hospital in a personal vehicle. Human Resources will be responsible for contacting the employee's emergency contact.

PROPOSED 2024

13 HEALTH AND SAFETY

Safety in the workplace and while conducting business on behalf of TCAD is a critical component of employment. All TCAD employees are charged with the responsibility of working safely, as well as making sure coworkers work safely. Violations of safety policy will lead to disciplinary action up-to-and- including termination of employment.

13.1 Personal Work Areas

It is important to maintain a safe personal work area free of hazards. Employees should make sure electrical outlets are not overloaded and cords are in good working condition, report loose carpeting, and keep exits free of clutter. If food is kept in the office or desk, make sure it is kept in an appropriate container.

13.2 First Aid

Employees should familiarize themselves with the location of the first aid stations. The first-floor station is on the wall in the office opposite the freight elevator. The second-floor station is located on the wall in the break room. A third first aid station is located on the fourth floor. Employees must treat blood and other bodily fluids as poison. Do not allow bodily fluids to come into contact with unprotected skin. Use chlorine bleach solution provided in the response kit to disinfect the area. Do not throw material soiled with blood in the general trash receptacles. Contact maintenance for disposal of soiled materials.

13.3 Medication

TCAD requires employees to use discretion when taking over the counter or prescription medications. Medication side effects may include drowsiness affecting productivity and ability to conduct business. Employees driving a vehicle during work must not take medication causing drowsiness.

13.4 Drug Free Workplace

The district recognizes that alcohol and drug abuse in the general population has become a concern. The object of this drug abuse policy is to provide a safe and healthy workplace for all employees and prevent accidents.

13.4.1 Alcohol

TCAD recognizes that alcohol is a powerful drug. Employees should not consume alcohol at work or on TCAD premises; further no employee conducting business on behalf of TCAD should drink alcohol during his or her workday.

PROPOSED 2024

13.4.2 Definition of Illegal Drug

An illegal drug is any drug or derivative thereof, the use, possession, sale, transfer, attempted sale or transfer, manufacture or storage of is illegal or regulated under any federal, state, or local law or regulation and any other drug, including (but not limited to) a prescription drug, used for any reason other than a legitimate medical reason, as well as inhalants used illegally. Included is marijuana or cannabis in all forms.

13.4.3 Violation of Policy

Being under the influence of alcohol or illegal drugs on appraisal district property is prohibited. Any of the following actions constitutes a violation of the Policy and may subject an employee to disciplinary action up-to-and including immediate termination of employment:

- Using, selling, purchasing, transferring, possessing, manufacturing, or storing an illegal drug or drug paraphernalia, or attempting to assist another to do so, while in the course of employment or engaged in an appraisal district sponsored activity, on premises, or on business.
- Working or reporting to work, conducting appraisal district business, or being on premises or in an appraisal district-owned vehicle while under the influence of an illegal drug, alcohol or in an impaired condition.

13.4.4 Drug and Alcohol Testing

TCAD does not require drug testing as a condition of employment. TCAD will require a drug test and alcohol test for all employees involved in a work-related accident. TCAD may require an employee exhibiting suspicious behavior that could be reasonably interpreted as signs of impairment due to the use of drugs or alcohol to be tested. A positive result will be confirmed, and a second positive result of the original sample will be grounds for immediate termination of employment.

13.4.5 Education and Training Programs

TCAD does not offer, nor require participation in, drug and alcohol abuse education and training programs. However, various public and private facilities in our area offer such programs and affected employees are encouraged to seek assistance.

13.5 Firearms - Weapons

TCAD Employees are prohibited from carrying in the building a handgun, firearm, knife with a blade longer than three (3) inches, or other weapon of any kind regardless of whether the person is licensed to carry the weapon. Any employee violating this policy will be subject to disciplinary action-up-to-and including termination.

PROPOSED 2024

14 REDRESS OF GRIEVANCES

Any employee or former employee who has an employment complaint has the right to file a grievance according to the procedures outlined in this policy. This grievance procedure does not apply to complaints regarding discrimination or harassment. The procedures for resolving discrimination or harassment complaints are described in section 4.3. Failure to timely grieve a complaint may affect the employee's ability to seek redress outside the district.

14.1 Immunity from Reprisal

No employee shall ever be discriminated against, harassed, intimidated, nor suffer any reprisal as a result of filing a grievance or complaint or participating in the investigation of a grievance in good faith. If an employee feels that they are being subjected to any of the above, the employee shall have the right to appeal directly to the Chief Appraiser.

14.2 Grievance Process Steps and Time Limits

1. TCAD encourages employees to work out problems at the lowest possible level and follow the chain-of-command in pursuit of a resolution. Grievances or complaints should first be informally brought to the attention of the employee's immediate supervisor. This should occur within five (5) workdays of the event or incident which gave rise to the grievance or complaint. If the grievance or complaint is not resolved to the employee's satisfaction, the employee should proceed to bring the matter informally to the attention of the manager or director, if applicable. If the grievance or complaint is not resolved informally, the employee should proceed to Step #2.
2. At this juncture, the employee must commit the grievance or complaint to writing and submit it to the employee's division director within seven (7) workdays of the alleged incident. The division director will review the statement, meet, and discuss the complaint or grievance with the employee, and render a written decision to the employee within five (5) workdays. If the employee is not satisfied with the resolution, the employee should proceed to Step #3.
3. If the division director is unable to resolve the grievance or complaint to the employee's satisfaction, the employee may submit the complaint within five (5) workdays of receipt of the director's response to Human Resources for review and final disposition by the Chief Appraiser or their designee. The Chief Appraiser will have ten (10) workdays to make final disposition. In the event that an extension of the time limits becomes necessary in any of the four levels, such an extension will be acceptable only upon agreement by all parties involved.

PROPOSED 2024

14.3 Grievances against the Chief Appraiser

For employees or former employees whose immediate supervisor is the Chief Appraiser, or for grievances that directly relate to the actions of the Chief Appraiser, grievances must be filed with the Secretary of the Board of Directors of the District within five (5) workdays of the date of the conduct giving rise to the grievance. The Board Secretary shall provide a copy of the grievance (including any supporting documentation submitted with the grievance) to the Board and to the Chief Appraiser within ten (10) workdays of receipt. The Chief Appraiser shall have ten (10) workdays to provide a written response to the grievance to the Board Secretary. As soon as practicable, the Board will review the issues raised and accompanying documentation, giving it proper consideration, consistent with its legislative authority to act. The decision of the Board of Directors is final.

14.4 Grievance Submission Content

All grievances must include:

1. Employee's name, division and position;
2. The date of the event or action or failure to act that gave rise to the issues outlined in the grievance;
3. A detailed description of the situation or dispute, the alleged harm done; and
4. The relief sought.

14.5 Right to Address the Board of Directors

All current and former employees of the District have the right to address the Board of Directors of the District during public meetings. The Chairman of the Board will allow such comments during the agenda item "Citizen Communication" (or a similarly described item allowing for public comment on subjects whether or not otherwise posted on the agenda). Except with regard to employees who are hired or appointed by, and report directly to, the Board of Directors (e.g., the Chief Appraiser), addressing the Board of Directors at a public meeting is not part of the grievance process or any appeal process, but is designed to provide an opportunity to bring general information to the attention of the Board of Directors concerning wages, benefits, hours of work, or any other conditions affecting employment with the District.

PROPOSED 2024

15 SEPARATION PROCESS

15.1 Calculation of Accrued Pay

15.1.1 Vacation Leave Paid Upon Leaving TCAD

Regular employees separating from TCAD in good standing and completing six months of service shall be paid for all unused vacation leave accumulated.

15.1.2 Sick Leave Paid Upon Leaving TCAD

Regular employees separating from TCAD in good standing and completing six months of service shall be paid at the following schedule for unused sick leave:

- 50% for the first 500 hours or a total of 250 hours
- 75% for 501 to 1000 hours or a total of 375 hours
- 100% for hours exceeding 1000 hours.

An employee shall not be considered to have left in good standing if the employee is dismissed or leaves employment of TCAD because of any pending investigation which subsequently reveals that a recommendation for dismissal of the employee would have resulted.

Beneficiaries of employees who die while in the service of TCAD, or who are granted military leave and die while in the armed forces on such leave shall be paid for all unused vacation and sick leave.

Upon determination by the Chief Appraiser, a resignation may be accepted effective immediately if in the best interest of TCAD, provided the employee is paid notice pay.

Regular employees who give less than a two (2) week written notice of resignation shall forfeit his or her accrued leave unless mutual agreement is reached between the Chief Appraiser and the employee.

The separation date for all employees shall be the last day of the actual work or approved leave. Terminal pay received by an employee shall not be construed to extend the employment date beyond the last day worked but may be paid beyond that date.

Failure to return equipment, material or other items issued by TCAD may result in a delay in terminal pay disbursement. Terminal pay may also be delayed due to any pending investigation of an employee.

PROPOSED 2024

15.2 Settlement

TCAD will reduce the final pay by any reimbursement owed TCAD at separation. The amount of the final pay will not reduce the net pay below the hours worked times the current minimum wage. If the reduction causes net pay to fall below the minimum wage calculation, the employee will be required, before separation, to make arrangements to pay the balance owed to TCAD.

15.3 Continuation of Insurance Coverage

Under the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA), an employee covered by TCAD group health, dental plan, or voluntary medical savings plan may have the right to choose to continue coverage if separation occurs under certain conditions. Employees will be notified by mail at the time of separation what those conditions are.

Dependents have specific rights under COBRA and employees are charged with notifying Human Resources of changes in status for a covered dependent. The dependent will then be notified of his or her rights under COBRA. Examples of changes in status are divorce of a covered spouse, or a covered child that marries or reaches age 19 and is not a full-time student.

15.4 Insurance Coverage at Retirement

Since January 1, 2010, retirees have had the option to continue group health coverage as defined by Texas Local Government Code Section 175.001 until eligible for Medicare. Retirees may choose to continue health coverage with the TCAD group plan at his or her expense until they are eligible for coverage through another group plan or Medicare.

Effective January 1, 2019 – Retiree health benefits prior to Medicare eligibility: Active TCAD employees with a minimum of 10 years of service at TCAD, who either retire, or qualify for TCDRS retirement and leave the funds in TCDRS after separation, may be eligible to remain on the TCAD health plan. If eligible, TCAD will pay 50% of the premium for their TCAD health care plan coverage until eligible for Medicare.

Active TCAD employees with a minimum of 20 years of service, who either retire, or qualify for TCDRS retirement and leave the funds in TCDRS after separation, may be eligible to remain on the TCAD health plan. If eligible, TCAD will pay 100% of the premium for his or her TCAD PPO health care plan coverage until eligible for Medicare.

Retiree health benefits after Medicare eligible: Current and former employees with a minimum of 10 years of service at TCAD, who either retire from TCAD, or qualify for TCDRS retirement and leave the funds in TCDRS after separation, may be eligible to purchase a Medicare Advantage Plan after enrolled in Medicare Part A and B. If eligible, TCAD will pay 80% of the premium for his or her TCAD Medicare Advantage Plan.

This is a one-time offering. There is no future opportunity to enroll if the coverage is not taken when initially eligible. These benefits cannot be transferred and are only available if TCAD plans exist. The plans may be altered or discontinued as deemed appropriate.

15.5 Release of Information

Employment information on past or present employees will not be released to an outside party (someone not employed by or acting as an agent of TCAD) without the employee's written permission, except for the following:

1. Employment dates, position, and confirmation of salary.
2. Information provided to protect the legal interests of TCAD, when TCAD believes the actions of an employee, former employee, or applicant, violate conditions of employment or threatens physical harm to other employees, the employer, or company property.
3. Information released to law enforcement officials in the conduct of an official investigation and at the discretion of TCAD.
4. Information provided in response to a lawfully issued administrative summons or judicial order, including a search warrant or a subpoena.
5. Information provided in response to a valid Texas Public Information Act request.

An employee who receives a request for information should never make any "off-the-record" statements regarding a current or former employee. Direct all requests for information to Human Resources.

PROPOSED 2024

Travis Central Appraisal District
Personnel Policy Manual Acknowledgement

I_____ *(print name)* have read and understand the Personnel Policy Manual for the Travis Central Appraisal District, approved by the Travis Central Appraisal District Board of Directors on XXXX, 2024 to be effective XXXX, 2024.

_____ _____

Employee Signature Date

PROPOSED 2024

5I

REGULAR AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
NICOLE CONLEY
SECRETARY/TREASURER

BOARD MEMBERS
TOM BUCKLE
DR. OSEZUA EHIYAMEN
BRUCE ELFANT
VIVEK KULKARNI
JIE LI
ELIZABETH MONTOYA
BLANCA ZAMORA-GARCIA

LEANA MANN
CHIEF APPRAISER

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana Mann
Chief Appraiser

DATE: June 10, 2024

RE: Item No. 5I- Purchase of Dell Servers for Virtual Desktop Environment

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The District currently runs a virtual environment in which all staff workstations are managed through VMWare virtual desktop environments. The current Dell R730 servers in the virtual desktop environment were purchased in 2016 and are approaching end of life. In the 2024 budget, the District outlined a purchase of three (3) Dell R750 servers to allow for load balancing of the virtual desktop environments. The 2024 budget outlined a purchase amount of $47,106. However, during the 18 months since the initial preparation of the 2024 budget, the price of the Dell R750 servers has increased. This purchase would be made using the State Purchasing Contract through the Department of Information Resources and will not require a request for proposal (RFP) to be issued.

The District requests board approval on the purchase of 3 Dell R750 Servers for a total purchase price of $68,359.65

Description	Qty	Unit Price	Extended Price
PowerEdge R750 Server	3	$ 22,786.55	$ 68,359.65
Total			**$ 68,359.65**

Respectfully submitted,

Leana H. Mann

Leana Mann, RPA, CCA, CGFO
Chief Appraiser
Travis Central Appraisal District

Your quote is ready for purchase.

Complete the purchase of your personalized quote through our secure online checkout before the quote expires on **Jul. 03, 2024**.

You can download a copy of this quote during checkout.

Place your order

Quote Name:	**TCAD - R750**
Quote No.	**3000177453252.1**
Total	**$68,359.65**
Customer #	2213603
Quoted On	Jun. 03, 2024
Expires by	Jul. 03, 2024
Contract Name	Texas Department of Information Resources (TX DIR)
Contract Code	C000000006841
Customer Agreement #	TX DIR-TSO-3763
Solution ID	19178025.1
Deal ID	27321023

Sales Rep	Juan Molina
Phone	(800) 456-3355, 6180102
Email	Juan_Molina@DELL.com
Billing To	LEANA MANN TRAVIS CENTRAL APPRAISAL DISTR PO BOX 149012 AUSTIN, TX 78714-9012

Message from your Sales Rep

Please use the Order button to securely place the order with your preferred payment method online. You may contact your Dell sales team if you have any questions. Thank you for shopping with Dell.

Regards,
Juan Molina

Shipping Group

Shipping To

TAWNYA BLAYLOCK
TRAVIS CENTRAL APPRAISAL DISTR
8314 CROSS PARK DR
AUSTIN, TX 78754-5195
(512) 834-9317

Shipping Method

Standard Delivery

Product	Unit Price	Quantity	Subtotal
PowerEdge R750 Tailor Made Instant Saving - [PE_R750_TM]	**$22,786.55**	**3**	**$68,359.65**

Dell Marketing LP. U.S. only. Dell Marketing LP. is located at One Dell Way, Mail Stop 8129, Round Rock, TX 78682

Subtotal:	**$68,359.65**
Shipping:	**$0.00**
Non-Taxable Amount:	**$68,359.65**
Taxable Amount:	**$0.00**
Estimated Tax:	**$0.00**
Total:	**$68,359.65**

License Subtotal for Commitment Term: $0.00
*Excludes Taxes



Dell Marketing LP. U.S. only. Dell Marketing LP. is located at One Dell Way, Mail Stop 8129, Round Rock, TX 78682

Shipping Group Details

Shipping To

TAWNYA BLAYLOCK
TRAVIS CENTRAL APPRAISAL DISTR
8314 CROSS PARK DR
AUSTIN, TX 78754-5195
(512) 834-9317

Shipping Method

Standard Delivery

	Unit Price	Quantity	Subtotal
PowerEdge R750 Tailor Made Instant Saving - [PE_R750_TM]	**$22,786.55**	**3**	**$68,359.65**

Estimated delivery if purchased today:
Jun. 27, 2024
Contract # C000000006841
Customer Agreement # TX DIR-TSO-3763

Description	SKU	Unit Price	Quantity	Subtotal
PowerEdge R750 Server	210-AYCG	-	3	-
2.5 Chassis	379-BDTF	-	3	-
SAS/SATA Backplane	379-BDSS	-	3	-
No Rear Storage	379-BDTE	-	3	-
No GPU Enablement	379-BDSR	-	3	-
Trusted Platform Module 2.0 V3	461-AAIG	-	3	-
2.5" Chassis with up to 16 SAS/SATA Drives	321-BGEZ	-	3	-
Intel Xeon Gold 6326 2.9G, 16C/32T, 11.2GT/s, 24M Cache, Turbo, HT (185W) DDR4-3200	338-CBXJ	-	3	-
Intel Xeon Gold 6326 2.9G, 16C/32T, 11.2GT/s, 24M Cache, Turbo, HT (185W) DDR4-3200	338-CBXJ	-	3	-
Additional Processor Selected	379-BDCO	-	3	-
Heatsink for 2 CPU with GPU configuration	412-AAVC	-	3	-
Performance Optimized	370-AAIP	-	3	-
3200MT/s RDIMMs	370-AEVR	-	3	-
RAID 1	780-BCDN	-	3	-
PERC H755 SAS Front	405-AAZB	-	3	-
Front PERC Mechanical Parts, rear load	750-ACFQ	-	3	-
Power Saving Dell Active Power Controller	750-AABF	-	3	-
UEFI BIOS Boot Mode with GPT Partition	800-BBDM	-	3	-
No Energy Star	387-BBEY	-	3	-
Standard Fan x6	750-ADGK	-	3	-
Dual, Hot-Plug,Power Supply Redundant (1+1), 1400W, Mixed Mode	450-AJHG	-	3	-
Riser Config 1, 6x8, 2x16 slots	330-BBRV	-	3	-
R750 Motherboard with Broadcom 5720 Dual Port 1Gb On-Board LOM	329-BFGT	-	3	-
Broadcom 57504 Quad Port 10/25GbE,SFP28, OCP NIC 3.0	540-BCRX	-	3	-
No Cables Required	470-AEYU	-	3	-
PowerEdge 2U Standard Bezel	325-BCHU	-	3	-
Dell EMC Luggage Tag	350-BCED	-	3	-

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Assembly BOSS Blank	329-BERC	-	3	-
No Operating System	611-BBBF	-	3	-
No Media Required	605-BBFN	-	3	-
OpenManage Enterprise Advanced	528-BIYY	-	3	-
iDRAC9 Datacenter 15G	528-CRVW	-	3	-
No Quick Sync	350-BBYX	-	3	-
iDRAC,Factory Generated Password	379-BCSF	-	3	-
iDRAC Service Module (ISM), NOT Installed	379-BCQX	-	3	-
iDRAC Group Manager, Disabled	379-BCQY	-	3	-
ReadyRails Sliding Rails	770-BBBQ	-	3	-
Cable Management Arm, 2U	770-BDRQ	-	3	-
No Systems Documentation, No OpenManage DVD Kit	631-AACK	-	3	-
PowerEdge R750 Shipping	340-CULS	-	3	-
PowerEdge R750 Shipping Material	481-BBFG	-	3	-
PE R750 No CCC or CE Marking	389-DYHD	-	3	-
Dell/EMC label (BIS) for 2.5" Chassis	389-DYHF	-	3	-
Custom Configuration	817-BBBB	-	3	-
Dell Hardware Limited Warranty Plus Onsite Service	852-7274	-	3	-
ProSupport Plus Mission Critical 4-Hour 7x24 Onsite Service with Emergency Dispatch 3 Years	852-7316	-	3	-
ProSupport Plus Mission Critical 4-Hour 7x24 Onsite Service with Emergency Dispatch 2 Years Extended	852-7342	-	3	-
ProSupport Plus Mission Critical 7x24 Technical Support and Assistance 5 Years	852-7343	-	3	-
Thank you for choosing Dell ProSupport Plus. For tech support, visit //www.dell.com/contactdell	951-2015	-	3	-
Dell Limited Hardware Warranty Plus Service, Extended Year(s)	975-3462	-	3	-
On-Site Installation Declined	900-9997	-	3	-
64GB RDIMM, 3200MT/s, Dual Rank, 16Gb	370-AEVP	-	48	-
480GB SSD SATA Mix Use 6Gbps 5 12 2.5in Hot-plug AG Drive, 3 DWPD	400-AZUT	-	6	-
C13 to C14, PDU Style, 12 AMP, 6.5 Feet (2m) Power Cord, North America	492-BBDI	-	6	-
Dell EMC PowerEdge SFP+ SR Optic 10GbE 850nm	407-BCBE	-	6	-

Subtotal:	**$68,359.65**
Shipping:	**$0.00**
Estimated Tax:	**$0.00**
Total:	**$68,359.65**

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Important Notes

Terms of Sale

This Quote will, if Customer issues a purchase order for the quoted items that is accepted by Supplier, constitute a contract between the entity issuing this Quote ("Supplier") and the entity to whom this Quote was issued ("Customer"). Unless otherwise stated herein, pricing is valid for thirty days from the date of this Quote. All product, pricing and other information is based on the latest information available and is subject to change. Supplier reserves the right to cancel this Quote and Customer purchase orders arising from pricing errors. Taxes and/or freight charges listed on this Quote are only estimates. The final amounts shall be stated on the relevant invoice. Additional freight charges will be applied if Customer requests expedited shipping. Please indicate any tax exemption status on your purchase order and send your tax exemption certificate to Tax_Department@dell.com or ARSalesTax@emc.com, as applicable.

Governing Terms: This Quote is subject to: (a) a separate written agreement between Customer or Customer's affiliate and Supplier or a Supplier´s affiliate to the extent that it expressly applies to the products and/or services in this Quote or, to the extent there is no such agreement, to the applicable set of Dell's Terms of Sale (available at www.dell.com/terms or www.dell.com/oemterms), or for cloud/as-a-Service offerings, the applicable cloud terms of service (identified on the Offer Specific Terms referenced below); and (b) the terms referenced herein (collectively, the "Governing Terms"). Different Governing Terms may apply to different products and services on this Quote. The Governing Terms apply to the exclusion of all terms and conditions incorporated in or referred to in any documentation submitted by Customer to Supplier.

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Offer-Specific, Third Party and Program Specific Terms: Customer's use of third-party software is subject to the license terms that accompany the software. Certain Supplier-branded and third-party products and services listed on this Quote are subject to additional, specific terms stated on www.dell.com/offeringspecificterms ("Offer Specific Terms").

In case of Resale only: Should Customer procure any products or services for resale, whether on standalone basis or as part of a solution, Customer shall include the applicable software license terms, services terms, and/or offer-specific terms in a written agreement with the end-user and provide written evidence of doing so upon receipt of request from Supplier.

In case of Financing only: If Customer intends to enter into a financing arrangement ("Financing Agreement") for the products and/or services on this Quote with Dell Financial Services LLC or other funding source pre-approved by Supplier ("FS"), Customer may issue its purchase order to Supplier or to FS. If issued to FS, Supplier will fulfill and invoice FS upon confirmation that: (a) FS intends to enter into a Financing Agreement with Customer for this order; and (b) FS agrees to procure these items from Supplier. Notwithstanding the Financing Agreement, Customer's use (and Customer's resale of and the end-user's use) of these items in the order is subject to the applicable governing agreement between Customer and Supplier, except that title shall transfer from Supplier to FS instead of to Customer. If FS notifies Supplier after shipment that Customer is no longer pursuing a Financing Agreement for these items, or if Customer fails to enter into such Financing Agreement within 120 days after shipment by Supplier, Customer shall promptly pay the Supplier invoice amounts directly to Supplier.

Customer represents that this transaction does not involve: (a) use of U.S. Government funds; (b) use by or resale to the U.S. Government; or (c) maintenance and support of the product(s) listed in this document within classified spaces. Customer further represents that this transaction does not require Supplier's compliance with any statute, regulation or information technology standard applicable to a U.S. Government procurement.

For certain products shipped to end users in California, a State Environmental Fee will be applied to Customer's invoice. Supplier encourages customers to dispose of electronic equipment properly.

Electronically linked terms and descriptions are available in hard copy upon request.

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