

Travis Central Appraisal District



Board of Director's Meeting
December 13, 2023
11:30 a.m.

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

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



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

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

850 EAST ANDERSON LANE and VIA VIDEOCONFERENCE

The public may hear and view this meeting while in progress online at
www.traviscad.org/boardmeetings

AGENDA

REGULAR MEETING – WEDNESDAY, DECEMBER 13, 2023 – 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. CONSENT AGENDA
 - a. APPROVAL OF THE MINUTES OF THE NOVEMBER 6, 2023, MEETING
 - b. APPROVAL OF THE MINUTES OF THE NOVEMBER 10, 2023, 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 FISCAL YEAR 2023 BUDGET AMENDMENT
 - d. DISCUSSION AND POSSIBLE ACTION ON CHIEF APPRAISER REPORT TO INCLUDE: 2024 CALENDAR, 2024 FIELD WORK, TAXPAYER OUTREACH PROGRAMS
 - e. DISCUSSION AND POSSIBLE ACTION ON RENEWAL OF CONTRACT FOR THIRD PARTY APPRAISAL SERVICES THROUGH CAPITOL APPRAISAL GROUP, INC.
 - f. DISCUSSION AND POSSIBLE ACTION ON REPORT FROM CHIEF APPRAISER SEARCH SUBCOMMITTEE
 - g. DISCUSSION AND POSSIBLE ACTION ON APPOINTMENT, EMPLOYMENT, CONTRACT, AND DUTIES RELATED TO THE POSITION OF CHIEF APPRAISER
 - h. DISCUSSION AND POSSIBLE ACTION ON PERFORMANCE REVIEW, COMPENSATION, AND CONTRACT FOR CURRENT CHIEF APPRAISER DURING TRANSITION
 - i. DISCUSSION AND POSSIBLE ACTION ON LITIGATION AND APPEALS RELATED TO PENDING AND ANTICIPATED LAWSUITS
 - j. DISCUSSION AND POSSIBLE ACTION REGARDING THE ATTORNEY'S FEES ORDERED TO BE PAID BY THE APPRAISAL REVIEW BOARD IN CAUSE D-1-GN-18-007116- LAKE HILLS CHURCH V. TCAD
 - k. DISCUSSION AND POSSIBLE ACTION TO ADD ITEMS TO FUTURE AGENDAS
 - l. 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:

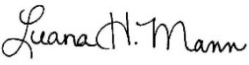
SEC. 551.071; Consultation with attorney regarding pending or contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas.

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 meeting.

CERTIFICATE OF POSTING

I, Leana Mann, Deputy Chief Appraiser of the Travis Central Appraisal District, do hereby certify that on the 7th day of December 2023, 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: 

Printed Name: Leana Mann

Title: Deputy Chief Appraiser

CONSENT AGENDA

4A

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

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



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

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

TCAD - BOARD OF DIRECTORS MINUTES OF THE NOVEMBER 6, 2023 MEETING

1. Call to order

Meeting called to order by James Valadez at 11:30 a.m. on November 6, 2023.

2. Establishment of Quorum

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

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

3. Citizens Communication

4. Consent Agenda

- APPROVAL OF THE MINUTES OF THE AUGUST 24, 2023, MEETING
- APPROVAL OF THE MINUTES OF THE AUGUST 24, 2023, PUBLIC HEARING
- SECTION 25.25B REPORT
- ACCOUNTING STATEMENTS
- BUDGET LINE-ITEM TRANSFERS
- PERSONNEL REPORT
- TAXPAYER LIAISON REPORT

MOTION: Approve the Consent Agenda
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Dr. Osezua Ehiyamen

SECONDER: Elizabeth Montoya

AYES: James Valadez, Theresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Tom Buckle, Vivek Kulkarni

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

RESULT: DISCUSSED

5B. Discussion and possible action on report from Board Operating Policies Subcommittee.

RESULT: DISCUSSED

5C. Discussion and possible action on report from Chief Appraiser Search Subcommittee.

RESULT: DISCUSSED IN EXECUTIVE SESSION

5D. Discussion and possible action on the number of Appraisal Review Board Members for 2023.

Members of the board heard from Leana Mann, Deputy Chief Appraiser

MOTION: Approval to appoint 100 ARB members for 2024

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Elizabeth Montoya

SECONDER: Theresa Bastian

AYES: James Valadez, Teresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen,

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Tom Buckle, Vivek Kulkarni

At 11:42 AM the Board moved to executive session; TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 et sec [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 of Texas.

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.

MOTION: Begin Board of Directors Executive Session

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Dr. Osezua Ehiyamen

SECONDER: Elizabeth Montoya

AYES: James Valadez, Theresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Vivek Kulkarni

At 12:24 PM, the Board resumed the public session and returned to Item 5E.

5E. Discussion and possible action on litigation and appeals related to pending and anticipated lawsuits to include approval of the filing of counterclaims by TCAD for tax year 2023.

MOTION: Approve the filing of counterclaims by TCAD for tax year 2023

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Elizabeth Montoya

SECONDER: Theresa Bastian

AYES: James Valadez, Theresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Vivek Kulkarni

5F. Discussion and possible action regarding the attorney's fees ordered to be paid by the Appraisal Review Board in Cause D-1-GN-18-007116-Lake Hills Church V. TCAD.

MOTION: Approval for the staff to draft a letter for attorney's fees to be paid by the Appraisal Review Board.

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Nicole Conley

SECONDER: Theresa Bastian

AYES: James Valadez, Theresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Vivek Kulkarni

5G. Discussion and possible action to add items to future agendas.

Note: The following items were noted as items for upcoming board meetings or items requested by a board member be added to the next agenda:

- *Reports from all the Board of Director's Sub-Committees added to the Regular Agenda.*
- *The Board of Director's would like to hear from the Taxpayer Liaison.*
- *The Board of Director's would like to review the end of the year budget.*

5K. Adjournment

MOTION: Approve to adjourn meeting at 12:27 PM

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Dr. Osezua Ehiyamen

SECONDER: Theresa Bastian

AYES: James Valadez, Theresa Bastian, Nicole Conley, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Blanca Zamora-Garcia, Debbie Cartwright, Vivek Kulkarni

Respectfully submitted,

Nicole Conley, Secretary

Approved:

James Valadez, Chairperson

4B

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

JAMES VALADEZ
CHAIRPERSON
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SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

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

TCAD - BOARD OF DIRECTORS MINUTES OF THE NOVEMBER 10, 2023 MEETING

1. Call to order

Meeting called to order by James Valadez at 1:00 p.m. on November 10, 2023.

2. Establishment of Quorum

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

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

3. Citizens Communication

Members of the Board heard from Bill Barrows.

At 1:06 PM the Board moved to executive session; TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 et sec [THE TEXAS OPEN MEETING ACT] INCLUDING:

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.

MOTION: Begin Board of Directors Executive Session

RESULT: **APPROVED [UNANIMOUS]**

MOVER: Dr. Osezua Ehiyamen

SECONDER: Elizabeth Montoya

AYES: James Valadez, Nicole Conley, Bruce Elfant, Debbie Cartwright, Elizabeth Montoya, Dr. Osezua Ehiyamen

ABSENT: Blanca Zamora-Garcia, Tom Buckle, Vivek Kulkarni, Theresa Bastian

At 2:03 PM, the Board resumed the public session and returned to Item 4A.

4A. Discussion and possible action on appointment, employment, and duties related to the position of Chief Appraiser

MOTION: Recommendation to appoint Leana Mann as the new Chief Appraiser subject to new contract and negotiations.
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Dr. Osezua Ehiyamen **SECONDER:** Tom Buckle

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Bruce Elfant, Debbie Cartwright, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Vivek Kulkarni, Theresa Bastian

4B. Discussion and possible action to add items to future agendas.

RESULT: **DISCUSSED**

4C. Adjournment

MOTION: Approve to adjourn meeting at 2:06 PM
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Dr. Osezua Ehiyamen **SECONDER:** Nicole Conley

AYES: James Valadez, Nicole Conley, Blanca Zamora-Garcia, Debbie Cartwright, Bruce Elfant, Elizabeth Montoya, Dr. Osezua Ehiyamen, Tom Buckle

ABSENT: Vivek Kulkarni, Theresa Bastian

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
185393	2020	MCCORMICK DAVID M &	LOT 561 BLK C JONESTOWN HILLS UNIT 5	18209 LAKE OAKS DR, TX 78645	\$21,000	\$21,000
Reinstate HS & DP exemptions per timely filed application. 11/20/23 CML						
768079	2023	SODEXO SERVICES OF TEXAS LTD	PERSONAL PROPERTY COMMERCIAL SODEXO SERVICES OF TEXAS LTD	3345 BEE CAVE RD 208, AUSTIN TX 78746	\$17,592	\$0
OOB 2022 PER 23 REND - RECOMMEND INACTIVATING AND VALUING TO \$0 - SXE 10/24/23						
826777	2023	GARCIA OSCAR	PERSONAL PROPERTY COMMERCIAL P & G LANDSCAPING	508 E HOWARD LN 531, TX 78753	\$14,056	\$0
BUSINESS CLOSED 07/30/2014 PER TAXPAYER AFFADAVID - DELETE 2022. CHANGE VALUE TO \$0 - 10/25/23 SXE						
829291	2023	HUMANA MARKETPOINT INC	PERSONAL PROPERTY COMMERCIAL HUMANA MARKETPOINT INC	10710 RESEARCH BLVD 120, TX 78759	\$35,994	\$0
PER 23 REND - ACCT IS INACTIVE AS OF 2023 - RECOMMEND INACTIVATING AND VALUING TO \$0 - SXE 10/24/23						
850519	2023	TAEKWONDO AND SPORTS CONDITIONING ACADEMY LLC	PERSONAL PROPERTY COMMERCIAL JOURNEY MARTIAL ARTS	7032 WOOD HOLLOW DR 105, AUSTIN TX 78731	\$11,513	\$0
OOB JAN 1 2023 - SOLD ASSETS TO LPJ MANAGEMENT LLC - RECOMMEND INACTIVATING AND VALUING TO \$0 - SXE 10/25/23						
871743	2023	GARAY NANCY & ROJO R	ELROY MH PARK, SPACE 9, SN #WB7TS5491, HUD #TXS0557075	8988 ELROY RD 9, DEL VALLE TX 78617	\$8,054	\$0
CORRECTING OWNERSHIP FOR 2023 FOR PROCESSING STATEMENT OF OWNERSHIP. 11/6/2023 RCJ						
889017	2023	WANSLEY SUSAN & JAMES JR	PERSONAL PROPERTY MH S#BL2000355TXA/B L#NTA1691146/1147	17409 CAMERON RD, PFLUGERVILLE TX 78660	\$99,438	\$0
Changing Ownership of mobile home to new owner. 10/30/2023 RCJ						
889017	2022	WANSLEY SUSAN & JAMES JR	PERSONAL PROPERTY MH S#BL2000355TXA/B L#NTA1691146/1147	17409 CAMERON RD, PFLUGERVILLE TX 78660	\$101,723	\$0
Changing Ownership of mobile home to new owner. 10/30/2023 RCJ						
951748	2023	NYLUND BRIAN CHRISTOPHER &	PERSONAL PROPERTY M/H LABEL# PFS1258647/648 SERIAL# PHH330TX2023447A/B	11632 LINDEMAN LOOP, TX 78641	\$115,154	\$0
MOBILE HOME WAS MOVED TO REAL PROPERTY AND NEEDS TO BE REMOVED FROM PERSONAL PROPERTY. 10/20/2023 RCJ						
965147	2023	LW PEARL LLC	PERSONAL PROPERTY COMMERCIAL WOODYS PIZZA	6301 W PARMER LN 502, AUSTIN TX 78729	\$42,828	\$0
OOB 2022 PER 2023 REND - RECOMMEND INACTIVATING AND VALUING TO \$0 - SXE 10/23/23						
977325	2023	INGEVITY CORPORATION	PERSONAL PROPERTY COMMERCIAL INGEVITY CORPORATION	713 LINGER LN, AUSTIN TX 78721	\$11,064	\$0
DOUBLE ASSESSED W/ PID 974023 - RECOMMEND INACTINVATING AND VALUING TO \$0 - SXE 10/12/23						

Emailed TARB on 12/7/2023

4D

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

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BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Deputy Chief Appraiser

SUBJECT: October 2023 Unaudited Financial Statements

The unaudited financial statements for October 2023 are enclosed. Financial highlights for the month are as follows:

- The District's ending fund balance was \$3,899,241. Of that, \$577,699 was nonspendable in the form of prepaid expenditures, \$1,700,700 was held in reserves as committed fund balance, and \$1,620,841 was unassigned fund balance.
- *The net change in fund balance for the fiscal year to date is \$209,694.*
- The reserve balances total \$1,700,700. Detail account balances for each reserve account are as follows:

	<u>Current Balance</u>
Reserve for Computer Equipment	\$ 89,594
Reserve for Network Infrastructure	\$ 350,000
Reserve for Technology Enhancements	\$ 154,192
Reserve for Litigation	\$ 956,914
Reserve for Building Repair & Replacement	\$ -
Reserve for ARB Operations	\$ -
Reserve for Market Data Purchases	\$ 150,000
	<u>\$ 1,700,700</u>

- ***The District ended the month with a budget surplus of \$169,410.***
- 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 October 31, 2023

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Amended	YTD		
REVENUE:					
Appraisal assessments	25,683,866	25,683,866	21,403,222	21,403,222	(0)
Refund of appraisal assessments	-	-	-	-	-
Net appraisal assessments	\$ 25,683,866	\$ 25,683,866	\$ 21,403,222	\$ 21,403,222	\$ (0)
Investment earnings	51,000	51,000	42,500	301,400	258,900
Charges for services	26,500	26,500	22,083	4,816	(21,684)
Miscellaneous revenue	105,000	105,000	87,500	100,754	(4,246)
TOTAL REVENUE	\$ 25,866,366	\$ 25,866,366	\$ 21,555,305	\$ 21,810,192	\$ 232,970
EXPENDITURES:					
Personnel Cost	12,561,356	12,421,006	10,350,838	9,844,298	506,540
Benefit Cost	4,493,676	3,926,026	3,271,688	2,739,353	532,335
Printing and mailing services	665,819	664,819	554,016	655,881	(101,865)
Operating supplies	195,500	243,500	202,917	222,592	(19,675)
Subscriptions and data purchases	286,560	376,560	313,800	298,160	15,640
Training and education	120,790	115,040	95,867	103,252	(7,386)
Travel expenditures	16,950	22,700	18,917	29,842	(10,925)
Utilities	607,797	546,797	455,664	382,077	73,587
Legal expenditures	1,715,000	1,715,000	1,429,167	2,379,916	(950,749)
Professional services	1,821,189	2,399,439	1,999,533	2,068,081	(68,549)
Insurance	74,000	97,460	81,216	97,460	(16,243)
Aerial photography	802,297	784,297	784,297	783,657	641
Rentals	150,870	127,410	106,175	112,809	(6,634)
Building and Equipment maintenance	379,418	340,016	283,347	323,128	(39,781)
Software maintenance	462,100	449,100	374,250	437,436	(63,186)
Other services	407,775	411,525	342,938	262,269	80,669
Capital Outlay	173,931	294,333	245,278	298,660	(53,383)
Debt Service- Principal	374,611	627,211	522,676	467,873	54,803
Debt Service- Interest	374,227	121,627	101,356	93,755	7,601
TOTAL EXPENDITURES	25,683,866	25,683,866	21,533,938	21,600,498	(66,560)
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	182,500	182,500	21,367	209,694	166,410
OTHER FINANCING SOURCES (USES):					
Transfers In	-	-	-	561,628	(561,628)
Transfers out	-	-	-	(561,628)	561,628
TOTAL OTHER FINANCING SOURCES (USES)	-	-	-	-	-
NET CHANGE IN FUND BALANCE	182,500	182,500	21,367	209,694	166,410
Beginning Fund Balance	3,689,547	3,689,547	3,689,547	3,689,547	
Ending Fund Balance	\$ 3,872,047	\$ 3,872,047	\$ 3,710,914	\$ 3,899,241	\$ 166,410

Travis Central Appraisal District

Governmental Fund Balance Sheet

October 31, 2023

		Special	Total
	General Fund	Revenue Fund	Governmental
			Funds
ASSETS			
Cash and cash equivalents	4,294,163	-	4,294,163
Short-term investments	4,031,706	-	4,031,706
Receivables	81,297	-	81,297
Prepaid items	577,699	-	577,699
TOTAL ASSETS	<u>\$ 8,984,865</u>	<u>\$ -</u>	<u>\$ 8,984,865</u>
LIABILITIES			
Accounts payable and accrued expenditures	804,980	-	804,980
Unearned revenue	4,280,644	-	4,280,644
TOTAL LIABILITIES	5,085,624	-	5,085,624
FUND BALANCES			
Fund balance, committed	1,700,700	-	1,700,700
Fund Balance, restricted	-	-	-
Fund balance, nonspendable	577,699	-	577,699
Fund balance, unassigned	1,620,841	-	1,620,841
TOTAL FUND BALANCES	<u>3,899,241</u>	<u>-</u>	<u>3,899,241</u>
TOTAL LIABILITIES AND FUND BALANCE	<u>\$ 8,984,865</u>	<u>\$ -</u>	<u>\$ 8,984,865</u>

Travis Central Appraisal District

Statement of Revenues, Expenditures and Changes in Fund Balance

For the month ended October 31, 2023

		Special	Total
	General Fund	Revenue Fund	Governmental
			Funds
REVENUES			
Appraisal assessments	\$ 21,403,222	\$ -	\$ 21,403,222
Refund of appraisal assessments	-	-	-
Net appraisal assessments	21,403,222	-	21,403,222
Investment earnings	301,400	-	301,400
Charges for services	4,816	-	4,816
Miscellaneous revenue	100,754	-	100,754
TOTAL REVENUE	21,810,192	-	21,810,192
EXPENDITURES			
Appraisal services			
Payroll and related expenditures	12,583,651	-	12,583,651
Data processing	437,436	-	437,436
Transportation	29,842	-	29,842
Operating supplies	222,592	-	222,592
Rentals	112,809	-	112,809
Legal and professional	4,447,997	-	4,447,997
Utilities and telephone	382,077	-	382,077
Building and equipment maintenance	323,128	-	323,128
Insurance	97,460	-	97,460
Other services	2,103,218	-	2,103,218
Capital outlay	298,660	-	298,660
Debt Service- Principal	-	467,873	467,873
Debt Service- Interest	-	93,755	93,755
TOTAL EXPENDITURES	21,038,870	561,628	21,600,498
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	771,322	(561,628)	209,694
OTHER FINANCING SOURCES (USES):			
Transfers in	-	561,628	561,628
Transfers out	(561,628)	-	(561,628)
TOTAL OTHER FINANCING SOURCES (USES)	(561,628)	561,628	-
NET CHANGE IN FUND BALANCE	209,694	-	209,694
FUND BALANCE, beginning of year	3,689,547	-	3,689,547
FUND BALANCE, end of year	\$ 3,899,241	\$ -	\$ 3,899,241



MONTHLY INVESTMENT REPORT

Travis Central Appraisal District

OCTOBER 31, 2023



MEEDER
PUBLIC FUNDS



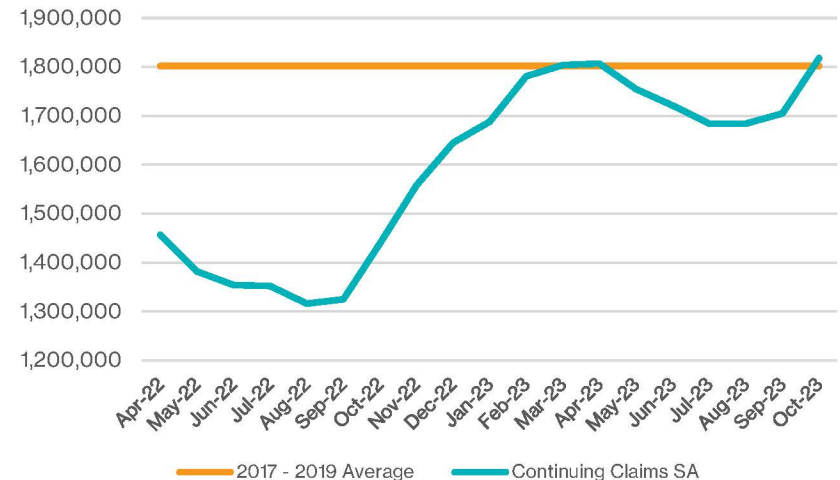
Loosening Labor Market & Inflation Rate Trending Lower

In October, on the back of strong economic data and increased treasury supply, the treasury curve bear steepened, and yields reached cycle highs. The first look at third-quarter growth showed Gross Domestic Product (GDP) increased at an annualized pace of 4.9%, following a gain of 2.1% in the second quarter. The figure was the fastest pace of growth since the fourth quarter of 2021 and was led higher by strong consumer spending, specifically on spending for goods. The labor market remained strong, and inflation is still above the Federal Reserve's target, pushing market participants to price in higher interest rates for longer. Likewise, increasing budget deficits have led the Treasury to issue more debt than ever.

The September US Employment report was stronger than expected, showing that the US economy added 336,000 jobs during the month. Additionally, revisions to prior months added another 119,000 jobs. While the headline number was well above estimates, the report did still point to some continued labor market softening. Year-over-year wage increases continue to slow, now down to 4.2%, the lowest reading since June 2021. And even though the labor force continues to grow, average hours worked have stalled and are back to pre-pandemic levels. Jobless claims continue to grind higher as well. Altogether, one strong headline report is unlikely to sway the Federal Reserve as the evidence still points to a weakening labor market.

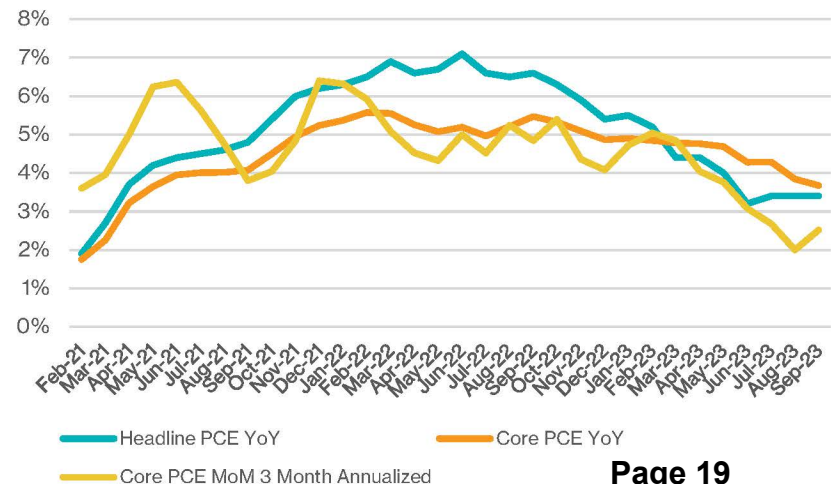
The core Personal Consumption Expenditures (PCE) Index, the Federal Reserve's preferred measure of price inflation, continues to moderate. Data from September showed that inflation slowed to an annual pace of 3.7%, the lowest level since June 2021. And while the month-over-month reading of 0.30% was the highest monthly reading since May, annualizing the last three months shows inflation today is closer to 2.5%. Services continue to be the largest driver of price increases, with services increasing 0.5% in the month and 4.7% over the last year.

Jobless Claims Increasing



SOURCE: BLOOMBERG

Inflation Trending Lower



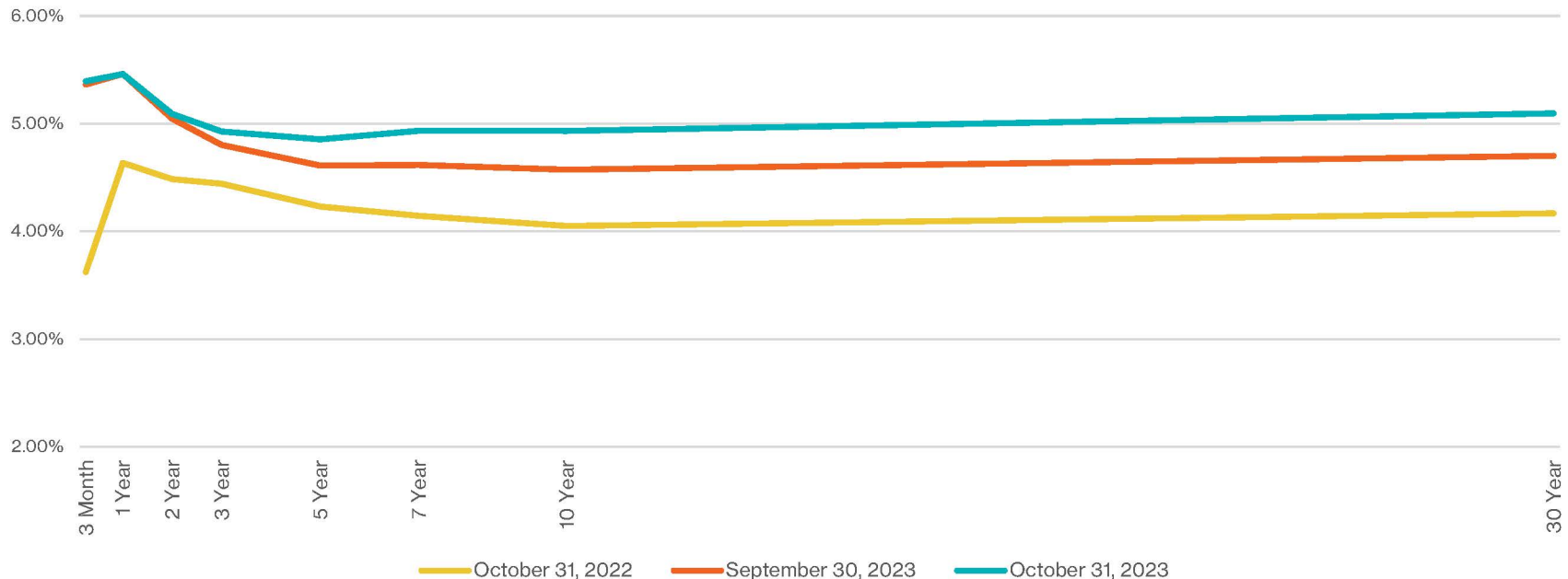
SOURCE: BLOOMBERG

Rates Move Higher

We are nearing the end of the Federal Reserve's historic rate hiking cycle. Market pricing for rate hikes and cuts ended October in the same place they began, with no additional hikes priced in and approximately 0.75% of cuts in 2024. This steadiness in market expectations for monetary policy kept the 2-year treasury yield generally steady, increasing by 0.05% to 5.09%. However, a plethora of economic data that shows the economy is still expanding, combined with higher expectations for Treasury issuance, moved long-term rates higher. The 10-year treasury increased by 0.36% to 4.93%. Through October, the spread between the 2-year and 10-year treasury yield increased to -0.16%. This is the closest the curve has been since July 2022.

Credit product spreads remained contained in October. The steady dose of data showing the economy is still growing combined with lower corporate and municipal bond issuance continues to keep a lid on spreads. Spreads on agency bonds remained steady in October and continue to be near their long-term averages. We will continue to look to add value by picking up incremental yield on high-quality bonds. Rates are still at historic levels not seen since 2007, making this a very attractive time to buy duration and lock in yields.

US Treasury Yield Curve



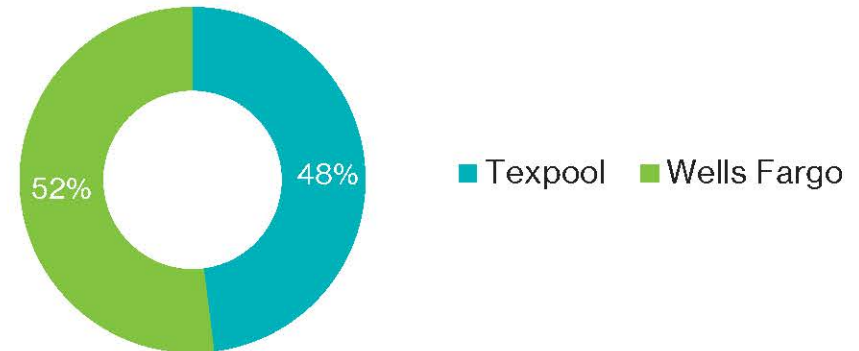
Your Portfolio

As of October 31, 2023

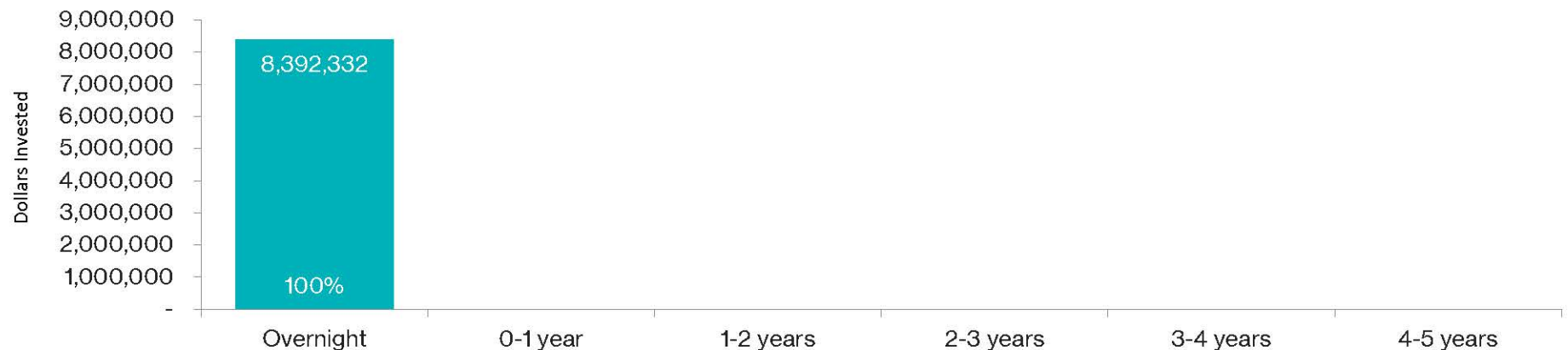
Your Portfolio Statistics

Weighted Average Maturity 1 day
Weighted Average Yield (All Funds) 5.20%

Your Asset Allocation



Your Maturity Distribution



Allocation Percentage Per Year



Travis Central Appraisal Dist.
Portfolio Management
Portfolio Summary
October 31, 2023

Meeder Public Funds
901 S. MoPac
Suite 300
Austin, TX 78746
-

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 365 Equiv.
Texpool/Texpool Prime	4,031,705.63	4,031,705.63	4,031,705.63	48.04	1	1	5.504
Wells Fargo Bank	4,360,626.16	4,360,626.16	4,360,626.16	51.96	1	1	4.914
	8,392,331.79	8,392,331.79	8,392,331.79	100.00%	1	1	5.198
Investments							

Total Earnings	October 31	Month Ending	Fiscal Year To Date
Current Year		43,047.78	301,399.86

The following reports are submitted in accordance with the Public Funds Investment Act (Texas Gov't Code 2256). The reports also offer supplemental information not required by the Act in order to fully inform the governing body of the Travis Central Appraisal District of the position and activity within the District's portfolio of investment. The reports include a management summary overview, a detailed inventory report for the end of the period, a transaction report, as well as graphic representations of the portfolio to provide full disclosure to the governing body.

Leana H. Mann 12/8/2023
Leana Mann, Deputy Chief Appraiser



Travis Central Appraisal Dist.
Summary by Type
October 31, 2023
Grouped by Fund

Security Type	Number of Investments	Par Value	Book Value	% of Portfolio	Average YTM 365	Average Days to Maturity
Fund: General Fund						
Texpool/Texpool Prime	2	4,031,705.63	4,031,705.63	48.04	5.504	1
Wells Fargo Bank	4	4,360,626.16	4,360,626.16	51.96	4.914	1
Subtotal	6	8,392,331.79	8,392,331.79	100.00	5.198	1
Total and Average	6	8,392,331.79	8,392,331.79	100.00	5.198	1



Travis Central Appraisal Dist.
Fund GEN - General Fund
Investments by Fund
October 31, 2023

Meeder Public Funds
901 S. MoPac
Suite 300
Austin, TX 78746
-

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Texpool/Texpool Prime										
900001	10000	Texpool	10/01/2019	1,458,311.21	1,458,311.21	1,458,311.21	5.359	5.285	5.358	1
900001A	10001	Texpool Prime	10/01/2019	2,573,394.42	2,573,394.42	2,573,394.42	5.586	5.509	5.586	1
Subtotal and Average				4,031,705.63	4,031,705.63	4,031,705.63		5.429	5.504	1
Wells Fargo Bank										
90401	10003	Wells Fargo Analyzed Bus Chkg+	10/01/2019	321,096.57	321,096.57	321,096.57	1.090	1.075	1.090	1
88469	10004	Wells Fargo Analyzed Bus Chkg+	10/01/2019	655.90	655.90	655.90	1.090	1.075	1.090	1
88477	10005	Wells Fargo Commercial Chkg PF	10/01/2019	1,824.00	1,824.00	1,824.00				1
8477	10002	Wells Fargo Stagecoach Sweep	10/01/2019	4,037,049.69	4,037,049.69	4,037,049.69	5.221	5.149	5.221	1
Subtotal and Average				4,360,626.16	4,360,626.16	4,360,626.16		4.847	4.914	1
Total Investments and Average				8,392,331.79	8,392,331.79	8,392,331.79		5.126	5.198	1



Travis Central Appraisal Dist.
Interest Earnings
Sorted by Fund - Fund
October 1, 2023 - October 31, 2023
Yield on Beginning Book Value

Meeder Public Funds
901 S. MoPac
Suite 300
Austin, TX 78746
-

										Adjusted Interest Earnings		
CUSIP	Investment #	Fund	Security Type	Ending Par Value	Beginning Book Value	Ending Book Value	Maturity Date	Current Rate	Annualized Yield	Interest Earned	Amortization/ Accretion	Adjusted Interest Earnings
Fund: General Fund												
900001	10000	GEN	RRP	1,458,311.21	1,451,703.97	1,458,311.21		5.359	5.359	6,607.24	0.00	6,607.24
900001A	10001	GEN	RRP	2,573,394.42	2,561,242.37	2,573,394.42		5.586	5.586	12,152.05	0.00	12,152.05
8477	10002	GEN	RR2	4,037,049.69	5,712,677.47	4,037,049.69		5.221	4.945	23,990.32	0.00	23,990.32
88469	10004	GEN	RR2	655.90	331.89	655.90		1.090	14.226	4.01	0.00	4.01
90401	10003	GEN	RR2	321,096.57	319,096.67	321,096.57		1.090	1.085	294.16	0.00	294.16
88477	10005	GEN	RR2	1,824.00	16,808.00	1,824.00				0.00	0.00	0.00
Subtotal				8,392,331.79	10,061,860.37	8,392,331.79			5.037	43,047.78	0.00	43,047.78
Total				8,392,331.79	10,061,860.37	8,392,331.79			5.037	43,047.78	0.00	43,047.78

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Statements may include positions from unmanaged accounts provided for reporting purposes. Unmanaged accounts are managed directly by the client and are not included in the accounts managed by the investment adviser. This information is provided as a client convenience and the investment adviser assumes no responsibility for performance of these accounts or the accuracy of the data reported.

Investing involves risk. Past performance is no guarantee of future results. Debt and fixed income securities are subject to credit and interest rate risk. The investment return and principal value of an investment will fluctuate so that an investors shares, when redeemed, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data quoted.

Investment advisory services are provided through Meeder Public Funds, Inc. Please contact us if you would like to receive a copy of our current ADV disclosure brochure or privacy policy.

Meeder Public Funds

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78746

866.633.3371

Travis Central Appraisal District
Statement of Revenues and Expenditures
01 - ARB
From 1/1/2023 Through 12/08/2023

	Total Budget Amended	YTD Budget	Actual	Budget Variance	Percent of Total Budget Final
Expenditures					
Per Diem Expenditures					
Per Diem Payments	1,071,994.50	1,071,994.50	920,765.00	151,229.50	14.10%
Total Per Diem Expenditures	1,071,994.50	1,071,994.50	920,765.00	151,229.50	14.11%
Supplies					
Operating Supplies	5,000.00	5,000.00	4,524.09	475.91	9.51%
Total Supplies	5,000.00	5,000.00	4,524.09	475.91	9.52%
Services					
Training & Education	4,250.00	10,000.00	820.00	9,180.00	80.70%
Attorney & Court Costs	35,000.00	35,000.00	6,700.00	28,300.00	80.85%
Total Services	39,250.00	45,000.00	7,520.00	37,480.00	80.84%
Total Expenditures	1,116,244.50	1,121,994.50	932,809.09	189,185.41	16.43%
Excess (Deficiency) of Revenues over (Under) Expenditures	<u>(1,116,244.50)</u>	<u>(1,121,994.50)</u>	<u>(932,809.09)</u>	<u>(189,185.41)</u>	<u>16.43%</u>

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

Account Code	Account Title	Effective Date	Document Description	Transaction Description	Debit	Credit
10110	General-Chase Bank			Current Balance	1,550.00	
30110	Fund Balance-Unassigned			Current Balance	8,766,333.06	
40100	Per Diem Payments			Opening Balance	790,860.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (10 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (10 days @ \$200/day)	2,000.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (10 days @ \$225/day)	ARB Per Diem Payments PPE 10.06.23 (10 days @ \$225/day)	2,250.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (2 days @ \$150/day)	ARB Per Diem Payments PPE 10.06.23 (2 days @ \$150/day)	600.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$150/day)	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$150/day)	450.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$170/day)	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$170/day)	510.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$190/day)	ARB Per Diem Payments PPE 10.06.23 (3 days @ \$190/day)	570.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$160/day)	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$160/day)	640.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$170/day)	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$170/day)	2,040.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$180/day)	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$180/day)	720.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (4 days @ \$200/day)	1,600.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (5 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (5 days @ \$200/day)	2,000.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$160/day)	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$160/day)	2,880.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$190/day)	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$190/day)	1,140.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (6 days @ \$200/day)	1,200.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (6.5 days @ \$150/day)	ARB Per Diem Payments PPE 10.06.23 (6.5 days @ \$150/day)	975.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$150/day)	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$150/day)	1,050.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$160/day)	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$160/day)	4,480.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$170/day)	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$170/day)	2,380.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$180/day)	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$180/day)	1,260.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$190/day)	ARB Per Diem Payments PPE 10.06.23 (7 days @ \$190/day)	3,990.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (7.5 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (7.5 days @ \$200/day)	1,500.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$150/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$150/day)	2,400.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$160/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$160/day)	7,680.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$170/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$170/day)	5,440.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$180/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$180/day)	5,760.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$190/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$190/day)	10,640.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$200/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$200/day)	8,000.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$225/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$225/day)	1,800.00	
		10/6/2023	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$275/day)	ARB Per Diem Payments PPE 10.06.23 (8 days @ \$275/day)	2,200.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$150/day)	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$150/day)	40.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$160/day)	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$160/day)	80.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$180/day)	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$180/day)	40.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$190/day)	80.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$200/day)	ARB Per Diem Payments PPE 10.20.23 (0 days @ \$200/day)	80.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$150/day)	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$150/day)	190.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$160/day)	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$160/day)	400.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$170/day)	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$170/day)	210.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (1 days @ \$190/day)	230.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$160/day)	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$160/day)	1,760.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$170/day)	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$170/day)	1,860.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$180/day)	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$180/day)	1,560.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$190/day)	2,100.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$200/day)	ARB Per Diem Payments PPE 10.20.23 (2 days @ \$200/day)	1,280.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (3 days @ \$170/day)	ARB Per Diem Payments PPE 10.20.23 (3 days @ \$170/day)	550.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (3 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (3 days @ \$190/day)	610.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (4 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (4 days @ \$190/day)	760.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (4 days @ \$200/day)	ARB Per Diem Payments PPE 10.20.23 (4 days @ \$200/day)	800.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$160/day)	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$160/day)	1,960.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$180/day)	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$180/day)	1,120.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (6 days @ \$190/day)	1,140.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$150/day)	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$150/day)	3,190.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$160/day)	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$160/day)	3,440.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$170/day)	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$170/day)	4,920.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$190/day)	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$190/day)	1,370.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$200/day)	ARB Per Diem Payments PPE 10.20.23 (7 days @ \$200/day)	7,160.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (8 days @ \$200/day)	ARB Per Diem Payments PPE 10.20.23 (8 days @ \$200/day)	1,600.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (8 days @ \$275/day)	ARB Per Diem Payments PPE 10.20.23 (8 days @ \$275/day)	2,200.00	
		10/20/2023	ARB Per Diem Payments PPE 10.20.23 (9 days @ \$225/day)	ARB Per Diem Payments PPE 10.20.23 (9 days @ \$225/day)	4,050.00	
		10/20/2023	Credit- E. Leight Paid In error	Credit- E. Leight Paid In error		320.00
		11/3/2023	ARB Over Payment Error- PPE 10.20.23	ARB Over Payment Error- PPE 10.20.23		15,705.00
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$160/day)	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$160/day)	240.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$170/day)	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$170/day)	400.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$180/day)	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$180/day)	200.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$190/day)	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$190/day)	440.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$200/day)	ARB Per Diem Payments PPE 11.03.23 (0 days @ \$200/day)	280.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (0.5 days @ \$200/day)	ARB Per Diem Payments PPE 11.03.23 (0.5 days @ \$200/day)	280.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (10 days @ \$225/day)	ARB Per Diem Payments PPE 11.03.23 (10 days @ \$225/day)	2,250.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (6.5 days @ \$275/day)	ARB Per Diem Payments PPE 11.03.23 (6.5 days @ \$275/day)	1,787.50	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (7 days @ \$225/day)	ARB Per Diem Payments PPE 11.03.23 (7 days @ \$225/day)	1,575.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (9 days @ \$170/day)	ARB Per Diem Payments PPE 11.03.23 (9 days @ \$170/day)	1,530.00	
		11/3/2023	ARB Per Diem Payments PPE 11.03.23 (9 days @ \$200/day)	ARB Per Diem Payments PPE 11.03.23 (9 days @ \$200/day)	1,800.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (0.5 days @ \$160/day)	ARB Per Diem Payments PPE 11.17.23 (0.5 days @ \$160/day)	80.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (0.5 days @ \$170/day)	ARB Per Diem Payments PPE 11.17.23 (0.5 days @ \$170/day)	170.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (1 days @ \$160/day)	ARB Per Diem Payments PPE 11.17.23 (1 days @ \$160/day)	160.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (1 days @ \$170/day)	ARB Per Diem Payments PPE 11.17.23 (1 days @ \$170/day)	170.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (1.5 days @ \$190/day)	ARB Per Diem Payments PPE 11.17.23 (1.5 days @ \$190/day)	285.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (2 days @ \$170/day)	ARB Per Diem Payments PPE 11.17.23 (2 days @ \$170/day)	340.00	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

<u>Account Code</u>	<u>Account Title</u>	<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (4 days @ \$160/day)	ARB Per Diem Payments PPE 11.17.23 (4 days @ \$160/day)	640.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (5 days @ \$225/day)	ARB Per Diem Payments PPE 11.17.23 (5 days @ \$225/day)	1,125.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (6 days @ \$275/day)	ARB Per Diem Payments PPE 11.17.23 (6 days @ \$275/day)	1,650.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (7 days @ \$225/day)	ARB Per Diem Payments PPE 11.17.23 (7 days @ \$225/day)	1,575.00	
		11/17/2023	ARB Per Diem Payments PPE 11.17.23 (8 days @ \$200/day)	ARB Per Diem Payments PPE 11.17.23 (8 days @ \$200/day)	1,600.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (.50 days @ \$170/day)	ARB Per Diem Payments PPE 12.01.23 (.50 days @ \$170/day)	85.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$160 /day)	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$160 /day)	160.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$200/day)	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$200/day)	400.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (1.50 days @ \$160 /day)	ARB Per Diem Payments PPE 12.01.23 (1.50 days @ \$160 /day)	240.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (1.50 days @ \$200/day)	ARB Per Diem Payments PPE 12.01.23 (1.50 days @ \$200/day)	300.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (2 days @ \$170 /day)	ARB Per Diem Payments PPE 12.01.23 (2 days @ \$170 /day)	340.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (2 days @ \$190/day)	ARB Per Diem Payments PPE 12.01.23 (2 days @ \$190/day)	380.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (2.50 days @ \$275 /day)	ARB Per Diem Payments PPE 12.01.23 (2.50 days @ \$275 /day)	687.50	

Travis Central Appraisal District
Standard General Ledger
From 10/1/2023 Through 12/31/2023

Account Code	Account Title	Effective Date	Document Description	Transaction Description	Debit	Credit
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (3.5 days @ \$200/day)	ARB Per Diem Payments PPE 12.01.23 (3.5 days @ \$200/day)	700.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (5 days @ \$225 /day)	ARB Per Diem Payments PPE 12.01.23 (5 days @ \$225 /day)	1,125.00	
				Transaction Total	145,930.00	16,025.00
Balance 40100	Per Diem Payments				920,765.00	
40101	Salaries			Opening Balance	0.00	
		12/1/2023	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$225/day)	ARB Per Diem Payments PPE 12.01.23 (1 days @ \$225/day)	225.00	
				Transaction Total	225.00	0.00
Balance 40101	Salaries				225.00	
40220	Operating Supplies			Current Balance	4,524.09	
40330	Education & Training			Current Balance	820.00	
40510	Legal & Attorney			Current Balance	6,700.00	
Report Opening/Current Balance					9,570,787.15	0.00
Report Transaction Totals					146,155.00	16,025.00
Report Current Balances					9,716,942.15	16,025.00
Report Difference					9,700,917.15	

Travis Appraisal Review Board Cost per Hearing- 2023

ARB Expenditures through 12/08/2023	\$ 920,765.00
Number of ARB Hearings 1/1/2023-12/08/2023 <i>(excludes topline agreements)</i>	31,959
<i>Cost per Hearing</i>	\$ 28.81

Travis Central Appraisal District

FY 2023 Capital Expenditures

As of December 8, 2023

Date	Asset Description	Amount	Vendor
1/9/2023	AC Compressor Replacement	3,225.68	ACIS Inc.
2/10/2023	Cisco Firepower 2130 Firewall with Threat Defense	48,627.00	CDW-Government, LLC
2/8/2023	Customer Service Window Intercoms	22,577.42	Chameleon Security Integrations, LLC
2/10/2023	PowerEdge R750 Servers (5 @ \$18,845.30 each)	94,226.50	Dell Marketing, LP
3/3/2023	VMWare Horizon on Prem Professional Service- Upgrade	36,835.63	Dell Marketing, LP
3/3/2023	Stand Alone PC for HR (2 @ \$1544.46 each)	3,088.92	Dell Marketing, LP
5/4/2023	APC Battery Replacement (4 Batteries @ \$2,305 each)	9,220.00	Comp-Utility Corp.
7/10/2023	Dell PowerEdge R740XD Server	2,180.00	eBay, Inc.
7/20/2023	Training Room Equipment Move for BPP Relocation	11,589.46	Creative Office Environments
7/24/2023	IT Servers (QTY:2) For Failing Servers	8,799.98	eBay, Inc.
7/24/2023	Virtual Load Balancer Appliance with Maintenance (07.20.23-07.1	2,354.50	SHI Government Solutions
9/14/2023	BPP Cubicles & Office Furniture for 3rd Floor	50,875.98	Indoff Commercial Interiors
10/1/2023	Keypad Readers for 4th Floor Breakroom	5,059.08	Knight Security
11/1/2023	1st Floor Conference Room Teleconferencing Equipment	3,124.04	Amazon
Total		301,784.19	

**Travis Central Appraisal District
Jurisdiction A/R Past Due Report
As of 12/08/2023**

		Invoice				
ID	Jurisdiction Name	Number	Invoice Date	Due Date	Invoice Description	Amount
10U	Manor Heights Public Improvement	8469	7/3/2023	8/2/2023	2023 Pub Imp District Set Up Fee	1,000.00
Total						1,000.00

4E

CONSENT AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

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



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

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

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Deputy Chief Appraiser

DATE: December 13, 2023

RE: Item No. 4E- Budget Line-Item Transfers

I request that the Board of Directors make the following line-item transfers to the 2023 budget as presented below. The line-item transfers do not require any additional funds from the taxing jurisdictions as the transfers do not affect the overall dollar amount of the budget.

Transfers From			Transfers To		
GL Code	GL Description	Decreases	GL Code	GL Description	Increases
40101	Salaries	\$ (51,300.00)	40107	Overtime	\$ 1,300.00
40127	Deferred Compensation	(30,550.00)	40110	Medicare Contribution	257.00
40128	Retirement Contribution (401(a) Plan)	(75,000.00)	40111	Retirement Contribution	29,450.00
40129	Retiree Healthcare	(29,450.00)	40112	Health Insurance	101,800.00
40130	Norton Security Benefit	(257.00)	40115	Disability Insurance	2,350.00
40212	Postage & Freight - In House	(500.00)	40124	Long Term Care (LTC)	1,400.00
40220	Operating Supplies	(3,500.00)	40213	Postage & Freight - Special Services	50,000.00
	Books, Publications, Subscriptions &				
40231	Databases	(8,000.00)	40214	Postage & Freight- Shipping Charges	500.00
40420	Telephone	(50,000.00)	40222	Operating Supplies - Equipment	1,500.00
				Furniture & Equipment-	
40510	Legal & Attorney	(27,000.00)	40224	Noncapitalized	2,000.00
40730	Security Services	(40,000.00)	40241	Records Management	500.00
			40320	Travel, Meals & Lodging	8,000.00
			40410	Utilities	25,000.00
			40511	Legal & Attorney- Personnel	12,000.00
			40513	Arbitration Refunds	15,000.00
			40540	Professional Services	15,000.00
			40542	Professional Services- Payroll	10,000.00
			40630	Building Maintenance	8,000.00
			40640	Software Maintenance	11,500.00
			40910	Capital Equipment	20,000.00
		\$ (315,557.00)			\$ 315,557.00

4F

CONSENT AGENDA

Personnel Changes:				
Name	Action	Date	Job Title	Division
McGaughy, Michael	New Hire	12/11/2023	BPP Appraiser	BPP

Current Openings:

Job Posting#	Posting Date	Position	Division	# of Positions

REGULAR AGENDA

5A

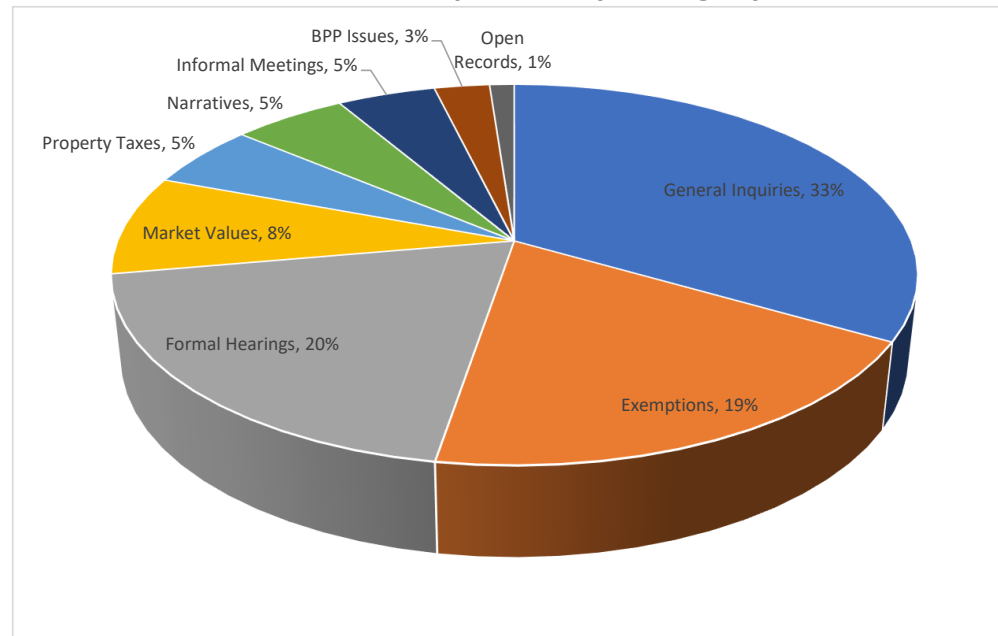
REGULAR AGENDA

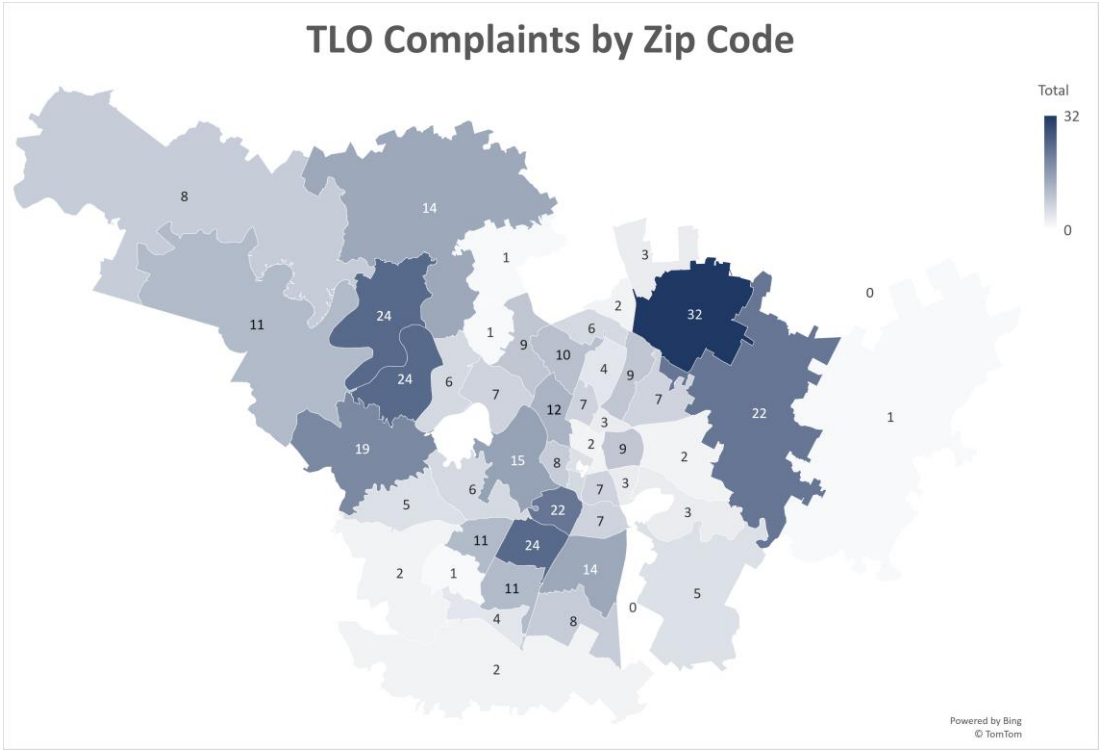
2023 Taxpayer Liaison Monthly Report

Month	General Inquiries	Narratives	Formal Hearings	Informal Meetings	Exemptions	BPP Issues	Open Records	Property Taxes	Market Values	TOTALS
January	5	1	13	0	20	1	0	0	5	50
February	5	0	7	0	2	0	0	0	2	19
March	7	4	5	1	11	2	1	1	6	43
April	19	5	9	3	15	0	1	7	13	72
May	33	1	8	4	9	1	0	1	11	68
June	27	2	3	7	15	0	0	2	3	59
July	11	1	6	7	9	1	0	0	5	40
August	33	7	14	6	12	6	3	3	6	90
September	33	9	26	2	15	1	2	4	3	95
October	35	7	31	2	12	6	1	3	2	99
November	20	0	11	0	8	0	0	2	1	42
December	0	0	1	0	4	0	0	2	0	7
TOTALS	228	37	134	32	132	18	8	37	58	684

Note: Categories of data reported before 8/16/2023 may have changed. Monthly totals have not changed.

2023 Complaints by Category





x

Activity Over 20 by Zip Code and School District		
Pflugerville ISD		
78660		32
Lake Travis ISD		
78734		24
Lago Vista ISD		
78645		24
Austin ISD		
78745		24
78704		22
Manor ISD		
78653		22

Line #	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed (C)
											Pending (P)
											Open (O)
1	10/27/2023	Property Owner	Email				TCAD	General Inquiries	PO is interested in filing a protest for 2022, a year when she did not receive NOV. Also, has another property which would like to make application for solar. Would like more info related to educating owners about the process.	The deadline to file a Late Motion for Failure to Send Notice has passed. The PO was not granted the HS Exemption until post the generation of the Tax Bill. PO did not receive HS Exemption credit in 2022. Suggested the Tax Office be contacted for review. The Solar Exemption may be applied for on-line. And the Appraisal District has numerous webinars on-line that a new property can view.	C
2	10/28/2023	Other	Email				ARB	Narratives	Retiring ARB Member questions new legislation relating to Failure to Send Notice. Wonders if State Comptroller's procedures will change.	No Response.	C
3	10/30/2023	Other	Email				ARB	Formal Hearings	Would like a return phone call. PO does not have business presence in Travis yet an acct was established and taxes are being billed.	PO followed-up with email as labor and employment legal counsel for Whole Foods. The PO is inquiring regarding the presentation of "good cause" for her husband's missed appearance at a hearing. The ARB has previously corresponded indicating the contact was outside the deadline to present "good cause". Provided reference to Sec 41.45 (e-1) of TPTC as the supporting reference.	C
4	10/31/2023	Property Owner	Email				TCAD	BPP Issues		All years appraised have been corrected to remove the value, 2022, 2023 [25.25 (b) Correction] and 2024.	C
5	11/1/2023	Property Owner	Email	223576	78723	Austin	ARB	General Inquiries	PO purchased in July of 2022 and did not have a chance to protest.	The seller/buyer have the right to protest the Market Value; that right comes with the applicable deadlines. The July 2022 purchase price would be evidence of value at Jan 1, 2023 not Jan 1, 2022. The only protest motion available at this time if a 25.25 (c). Should this motion be applicable the protest should be filed with the ARB.	C
6	11/1/2023	Other	Email				TCAD	Exemptions	Assn is a tax exempt organization and believes this status applies to property taxes.	PO presented a letter from the State Comptroller's Office granting exemption from franchise and sales tax, not property tax.	C
7	11/1/2023	Property Owner	Email	306892	78736	Austin	TCAD	Property Taxes	PO purchased property in 2022 but did not move in as a couple till married in 2023. Property taxes will now make this house unaffordable.	PO benefited in 2022 from the seller's Appraised [taxable] Value much lower than the buyer's Appraised Value in the qualifying year of the HS. A 41.411 Late Motion was denied by the ARB. Only late motion left for appeal of value would be a 25.25 (d), overvalued by 25%.	C
8	11/1/2023	Property Owner	Email				ARB	General Inquiries	PO seeks deadline and mailing info related to Arbitration. Seeks clarification of info sought through PIR and notation of Field Card.	Referred to the Comptroller's Office Property Tax Division. PIR responded by Records Mgr is correct, the prior year protest evidence does not exist if no protest were filed. Notes on the Field Card indicate the CAD's recording of deed change without verification of sales price.	C

Line #											Closed (C) Pending (P) Open (O)
	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	
9	11/2/2023	Property Owner	Email	950968	78704	Austin	TCAD	Exemptions	PO rec'd 2022 reduction in Market Value as a result of an Arbitration Hearing. PO has been unsuccessful in having the 2023 Appraised Value adjusted to the maximum increase of 10%.	PO purchased the property in May of 2022 and qualified for a HS for only a portion of the yr. The qualifying year of the HS Exemption would be 2023 when the Market and Appraised Value would be equal. 2023 values have been stated correctly.	C
10	11/4/2023	Property Owner	Email	958891	78641	Leander	TCAD	General Inquiries	In FH panel dismissed the 25.25 (c) Late Motion to correct the surveyed land size as outside their jurisdiction.	Ask PO to review the developer's plat map for accuracy compared to the survey presented and reach out to the survey company for next steps.	C
11	11/6/2023	Property Owner	Email	136047	78731	Austin	ARB	General Inquiries	PO seeking info on how to protest 2022 to adjust the value to the same value for 2023 just recently set by an ARB determination.	The deadline to appeal the 2022 Market Value of a property expired mid-May of 2022. Only a Late Motion to correct a clerical error may be filed at this time. The 25.25 (c) Late Motion section of the TPTC is appended for your review if applicable.	C
12	11/6/2023	Property Owner	Phone	320327	78749	Austin	TCAD	Property Taxes	PO concerned with impact of SB2 and SB12.	Returned call. PO made inquiry of his taxation before the elections. PO had discussed matter with Tax Assessor and State Representative and had rec'd the info sought.	C
13	11/7/2023	Property Owner	Email	819222	78738	Lake Travis	ARB	Formal Hearings	PO Email dated 10/19 forwarded from Cust Svc: PO claims not to have rec'd Notice of the Hearing date/time. Requesting the hearing be reponed.	Property Corrected Notice at \$1,190,706, post ARB FTA value changed to \$1,153,672 Requested explanation of how the value was lowered through protest.	P
14	11/8/2023	Other	Email				ARB	General Inquiries	ARB dismissed 25.25 (c) Late Motion Protest due to late payment of taxes. Inventory was listed in that year not belonging to the section of business in TX. What next?	Gen Counsel admits that payment of any taxes was post the delinquency date, grounds for automatic dismissal of the protest under TPTC.	C
15	11/8/2023	Property Owner	Email	925493	78744	del Valle	ARB	General Inquiries	PO rec'd Final Order. Seeking clarification of next steps to challenge value.	Binding Arbitration filed per the instructions along with the appropriate fees would be the next level to challenge the 2023 Market Value of a property.	C
16	11/9/2023	Property Owner	Email	540748	78704	Austin	TCAD	Exemptions	PO has not applied for HS Exemption since 2020 purchase. Was advised that this could be done retroactively.	Advised PO that the deadline to apply for 2021 was quickly approaching 12/31/2023 and provided instructions on the process to apply.	C
17	11/9/2023	Property Owner	Email				ARB	Formal Hearings	ARB Final Order presents conflict of the determination: \$0 taxes due, but a sustained value. PO requests clarification.	ARB reviewed and responded that the Hearing docs had a data entry error which would be corrected by the CAD's filing of a 25.25 (c).	C
18	11/13/2023	Property Owner	Email				ARB	Formal Hearings	PO missed 10/3 FH due to inability to connect virtually with panel. Phone contact info was not available via the portal.	Referred to ARB to educate the PO where the info was posted on the Notice of Hearing.	C
19	11/13/2023	Property Owner	Email	876729	78641	Leander	ARB	General Inquiries	PO has not rec'd Final Order and desires to know the ARB determination to forecast the taxes due.	The ARB Panel determination has been approved by the full ARB and the Final Order will be arriving via certified mail. The PO was given the ARB determination and directed to the Tax Transparency website for current tax info.	C

Line #											Closed (C) Pending (P) Open (O)
	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	
20	11/13/2023	Property Owner	Email	495129	78733	Eanes	ARB	Formal Hearings	PO would like to relay feelings of being rushed, intimidated and forced to walk away during his recent hearing. PO requests assistance in resolving his concerns of value.	No one is given the authority under the Tease Property Tax Code to review an ARB decision with intent to change. Binding Arbitration will be the next step to challenge the value for 2023. The Comptroller's Office Property Tax Division is responsible to establish model hearing procedures for ARBs across the state. Those Hearing Procedures are modeled around a fifteen-minute total allotted time for each Formal Hearing. Your comments of feeling rushed should be made via their survey.	C
21	11/13/2023	Property Owner	Email	360089	78731	Austin	ARB	General Inquiries	PO requests assistance in determining the best path to appeal an ARB determination. Revoked Agent representation only to discover the value being discussed was less than the ARB determination.	There is no obligation for the CAD to present values reviewed prior to the Formal Hearing. The PO had reviewed and rejected a Settlement Offer made via the portal six weeks before the Formal Hearing. The ARB determination was greater than the Settlement Offer. The PO will have to decide which path to appeal: Binding Arbitration or District Court.	C
22	11/13/2023	Other	Email	511569	78745	Austin	TCAD	General Inquiries	Estate Executor was advised in a FH that to value structures on the property as uninhabitable a field check would be necessary. Was advised post the field check the TLO could assist in reducing the 2023 value based upon the review.	No one is given the authority under the Texas Property Tax Code to review with intent to influence or change an ARB determination. The decision is appealable through Binding Arbitration. A Characteristic Review Form was provided to request the site visit beyond the hearing notes requesting same.	C
23	11/14/2023	Property Owner	Email	939308	78723	Austin	TCAD	General Inquiries	PO purchased property believing it to be a part of an Affordable Housing Program. Questions why others rec'd reductions and he did not.	Property does not qualify as Affordable Housing. The CAD does not have a agreement with AISD for this condo regime and the property does not meet the legal standards to be appraised as Affordable Housing. Requested CAD verification since other properties were cited to have rec'd appraisals based upon Affordable Housing.	C
24	11/14/2023	Property Owner	Email	30807	72736	Austin	ARB	Formal Hearings	PO was advised by ARB panel to submit add'l evidence for review to support the PO's request of a lower Market Value.	Advised PO that the ARB determination would not subject to further review. Appeal of the decision may be made through Binding Arbitration. The email info was forwarded to the ARB Chair for review of the panel's recommendation.	C
25	11/14/2023	Property Owner	Email				TCAD	Market Values	PO post a FH requests his land be valued going forward at the ARB's determination for the last two years. Requests the TLO's assistance.	Advised the PO this is outside the jurisdiction of the TLO and that his submission would be forwarded to the Residential Appraisal Group for review and consideration.	C
26	11/16/2023	Property Owner	Email	704551	78641	Leander	ARB	General Inquiries	PO inquiries of the threshold for a 25.25 (d) Late Motion Protest. PO attended FH to reinstate 2022 D-1-D Exemption. Was advised that owner would receive application for 2024. Has not happened.	The property in the PO's Homestead and would require proof the 2023 Market Value is overstated by 1/4 under a 25.25 (d) Late Motion.	C
27	11/16/2023	Property Owner	Email				TCAD	General Inquiries		Provided PO deadlines for mailing and submitting applications for D-1-D. First mailing calling for applications will not occur until December.	C

Line #											Closed (C)
	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Pending (P) Open (O)
28	11/17/2023	Property Owner	Email	364438	78749	Austin	TCAD	Exemptions	PO is lost to status of 2023 Protest for denial of Exemption. FH for Value did not incl Exemption. PO told no need to pursue, yet Exemption has not been approved.	PO has open Protest. PO should work to present ID with proof of residency. The deed change has occurred. If PO was spouse of former owner add'l docs will be necessary to continue Appraised Value with HS and >65 Exemptions.	C
29	11/17/2023	Property Owner	Phone	756160	78653	Manor	TCAD	Exemptions	PO had not applied for 2021 HS Exemption. Requests how to proceed.	Advised PO of the approaching deadline of 12/31/2023 for a 2021 HS Application and directed to the website for submission.	C
30	11/20/2023	Property Owner	Email	555158	78744	Austin	TCAD	General Inquiries	PO asks why property taxes are so high. Moved to property in June and English is second language. Went to Appraisal District and was referred.	PO purchased property in 2022 with the seller's HS and >65 Exemptions impacting the 2022 taxes. The property has no exemptions claimed. Late Motion Protests available for filing are for Clerical Error or Overvalued by 1/3.	C
31	11/20/2023	Property Owner	Email	924666	78701	Austin	ARB	Formal Hearings	PO's protest was represented by the seller's agent. PO does not agree with the outcome. Final Order was sent to the Agent.	The August sale of the property is not indicative of the Market Value of the property as noticed at Jan 1st 2023. The ARB determination is appealable through Binding Arbitration.	C
32	11/21/2023	Other	Email	284897	78741	Austin	TCAD	Exemptions	Rep for PO requests verification 2023 HS has been applied. Requests aid to apply for the exemption for the two years prior. Would like PO called.	Provided Rep the form to file along with the info related to the approaching deadline to file for 2021. Provided web links to submit the application on-line. PO has no email or internet. Called and mailed Application Form to PO. Forwarded complaint regarding the level of customer service rec'd to the Cust Svc Mgr.	C
33	11/21/2023	Property Owner	Email				ARB	Formal Hearings	PO did not receive Notice of Hearing for multiple properties. Requests Market Value adjustment equal to the one like property to have had a FH. Attached Agent Authorization form for 18 properties.	Forwarded AOA Forms to appropriate section of CAD. Provided PO with applicable Late Motion Protest options and filing forms.	C
34	11/21/2023	Property Owner	Email				TCAD	General Inquiries	PO has filed correction deed not recorded by Appraisal District. Has short time frame to correct.	Forwarded to GIS for review.	P
35	11/22/2023	Property Owner	Email	289874	78741	Austin	TCAD	General Inquiries	PO was not able to sign for certified mailing of Final Order before it was returned to sender. Requesting info how to proceed with Binding Arbitration with copy of Final Order.	Responded to by Arbitration Section, also copied in email. Final Order and Binding Arbitration filing form was sent.	C
36	11/24/2023	Property Owner	Email				TCAD	General Inquiries	TO BOD: PO visited the Office Wed prior to Holiday and found the bldg closed contrary to the website hours posted.	Responded to PO that the info had been communicated to the appropriate authority.	C

Line #											Closed (C)
	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Pending (P) Open (O)
37	11/25/2023	Property Owner	Email	446414	78735	Austin	TCAD	Formal Hearings	PO was unable to remain on the phone call waiting for FH, needing to care for ill spouse. PO presents "good cause" and request reopening the protest dismissed as an FTA.	The law provides a PO four days to present "good cause" for missing that hearing. The FH was 9/27. Requested if PO made contact in that four-day window to submit that info for review by the ARB. Provided PO with Late Motion Protest options.	C
38	11/26/2023	Property Owner	Email				TCAD	General Inquiries	PO has a question re bee keeping.	Referred to AG group via email.	C
39	11/27/2023	Property Owner	Email	160617	78759	Austin	TCAD	Exemptions	Filed and was denied for partial year exemption for 2021. Still do not have any Exemptions on the property.	PO admits did not live in the property at Jan 1, 2021 as req'd for approval in 2021. Provided PO with website link to make application for 2022 and 2023.	C
40	11/28/2023	Property Owner	Phone	164760	78750	Round Rock	TCAD	General Inquiries	PO requests detail regarding how 2023 Appraisal was developed.	Left phone msg to email question of concern.	P
41	11/28/2023	Property Owner	Email				TCAD	General Inquiries	PO seeking info related to the missed filing deadline for Binding Arbitration.	Referred to Comptroller's Property Tax Division	C
42	11/29/2023	Property Owner	Email	121143	78746	Eanes	TCAD	Exemptions	PO inquires why 2023 Appraised Value Exceeds the 10% limitation.	2022 Market Value was based upon <100% complete. 2023 Appraised Value represents the add'l % completion and sets the Qualifying Year for the Exemption.	C
43	11/30/2023	Property Owner	Phone	376479	78724	Manor	ARB	Formal Hearings	PO inquires why 2022 Market Value was not changed as a result of the FH in April 2023.	In April PO was denied the 25.25 (d) Late Motion for 2022. PO purchased in 2022 from builder, has no pro-rated HS for 2022. Provided website info to apply.	C
44	11/30/2023	Other	Email				ARB	General Inquiries	Sender inquires of two persons temporarily living in one household may serve on the ARB. Friend will be moving to new home in March. Is web application closed?	In general if the two individuals are not related nor married, each may apply to serve on the ARB. The concern relates to the potential for ex-parte communication which should be resolved by March when separate residences are taken before the ARB Hearing Season begins. Filing should be made with the ARB. From previously copied email the PO informs the ARB his efforts are to secure the 2023 purchase price some \$300k less than the 2023 Market Value. Provided PO valuation thresholds for a 25.25 (d).	C
45	11/30/2023	Property Owner	Email	793720	78738	Lake Travis	ARB	Formal Hearings	PO sent 25.25 (d) Late Motion Protest filing for review.		C
46	11/30/2023	Property Owner	Email				ARB	Formal Hearings	PO attended FH and rec'd value higher than made in the IH. Wants to revert back to that value.	There is no return to the Informal Offer. This is a pre-hearing offer that was not extended at the hearing. The ARB determination is an appealable order through Binding Arbitration.	C
47	12/1/2023	Other	Email	713935	78723	Austin	TCAD	Exemptions	BOD Trustee for seeking confirmation that the granted Exemption has been appropriately allocated.	Response sent by Chief Appraiser's Office as a recipient of the communication.	C
48	12/1/2023	Property Owner	Phone	554985	78744	Austin	TCAD	Exemptions	PO indicates 2021 Exemption was applied with notarized form. Does not provide detail.	HS Exemption in place for 2021 to current. Tax Bill for prior year delinquency from 2019 forward. Left vm directing PO to the Tax Office if inquiring about taxes or to return call with more info.	C

Line #											Closed (C)
	Date	Individual Type	Type of Contact	PID	Zip Code	ISD	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Pending (P) Open (O)
49	12/5/2023	Property Owner	Email	364438	78749	Austin	TCAD	Exemptions	PO was denied HS Exemption and submits add'l info related to identification. PO requests meeting to review circumstances.	Informed PO the TLO has no jurisdiction, but will assist in understanding the determination. PO filed Temp TDL with HS Application. Now has submitted TDL and the application is in process.	C
50	12/5/2023	Property Owner	Email	161116	78759	Round Rock	TCAD	Exemptions	PO was billed for additional 2022 taxes when he purchased the property in 2023. Was advised that an opportunity would be given to present the "sale price" for a review of the Market Value.	PO purchased in May of 2023. The Settlement Statement could be submitted to the Residential Appraisal Section for consideration in setting the 2024 Market Value. The sale is post the 2023 valuation period. Reviewing with the Exemption Section the 2022 changes that caused an additional tax bill.	P
51	12/5/2023	Property Owner	Email				TCAD	Property Taxes	PO was successful in reducing 2023 Market Value based upon the May 2022 purchase of the property. PO points out that no adjustment has been made to 2022.	In protesting the Market Value of a property the Protest filed is for only the year filed and has no relationship to prior years. The sale price of a home to set the Market Value is only used once. The 2022 Market Value cannot be changed based upon the sale price.	C
52	12/6/2023	Property Owner	Email	484823	78745	Austin	ARB	Formal Hearings	PO filed protest in May, hired Agent, withdrew protest, Agent filed protest and was denied protest hearing in July due to PO's withdrawal. Request speedy resolution with taxes due soon.	Sequence of events under investigation.	P
53	12/6/2023	Property Owner	Email	460245	78745	Manor	TCAD	Property Taxes	PO purchased property in May of 2023. The partial year HS Exemption has been granted. PO inquires if responsible for the entire 2023 year of taxation. Also, would like purchase price adjustment to Market Value.	The 2023 Market Value was based upon sales of comparable properties in 2022. The PO may submit his Settlement Statement for consideration in 2024. At the time of the sale, the projected taxes due from the seller should have credited to the buyer and yes, the current owner is billed for the entire year of taxes. Exemption reviewing removal of Seller's Disabled Vet Exemption leaving a tax liability.	P



2024 PROTEST SEASON RECRUITMENT REVIEW

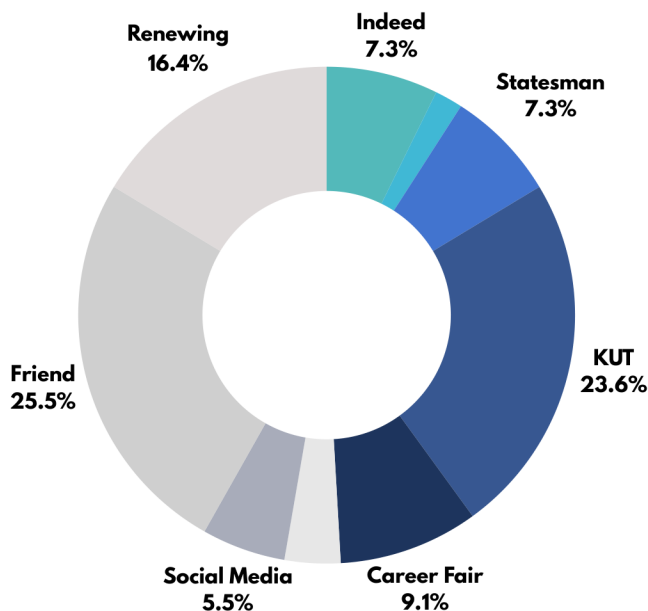
STRATEGY AND COST

TCAD placed advertisements for ARB positions on the TCAD website, Indeed, NextDoor, the Austin American Statesman, and KUT radio. TCAD also registered the Taxpayer Liaison Officer for the City of Austin Senior Career Fair and provided the TLO will recruitment materials to promote the opportunity.

The total amount spent is **\$16,393.62**.

OUTLET	TOTAL	COST PER APPLICANT
Indeed	\$0	\$0
NextDoor	\$249.12	\$249.12
Statesman	\$6,394.50	\$1,598.63
KUT	\$9,750	\$750
TOTAL	\$16,393.62	\$910.76

HOW DID YOU HEAR ABOUT THIS OPPORTUNITY?



RESULTS

Since August 1, 2023, **57 applications** have been received and submitted to the Taxpayer Liaison Officer. **32 of those applicants** are potential new ARB members.

APPLICANT DROP OFF

Interest in the opportunity is high, but is not translating into applications. There is a **50% drop** in the number of people who start but do not complete the application. There is an **86% drop** in the number of people who visit the information page to learn more about the opportunity and those who choose to apply.

57

Total applications received

32

Total applications for new members received

86%

Percentage of individuals who visit the website but do not submit an application

5C

REGULAR AGENDA

TRAVIS CENTRAL APPRAISAL DISTRICT

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



MARYA CRIGLER
CHIEF APPRAISER

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

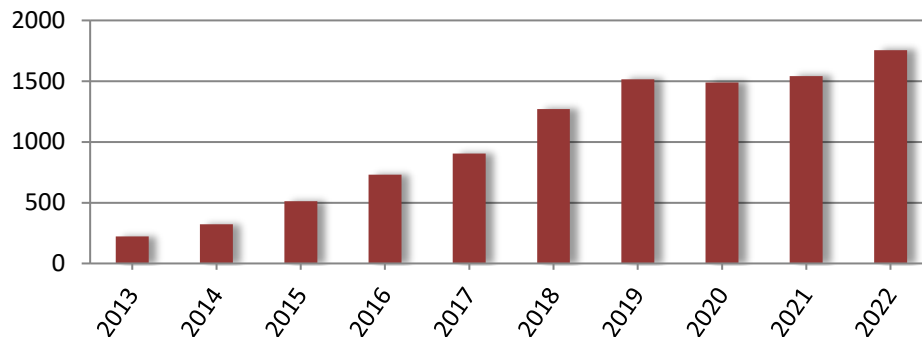
November 9, 2023

AUSTIN ISD
ARATI SINGH, PRESIDENT
4000 SOUTH INTERSTATE 35 FRONTAGE ROAD
AUSTIN, TX 78704

RE: Fiscal Year 2023 Budget Amendment

The Travis Central Appraisal District estimates a budget surplus of approximately \$500,000 for fiscal year 2023. The District requests the reallocation of any surplus budget funds to bolster its reserve dedicated to litigation. The District has weathered a staggering 691% surge in filed lawsuits over the past decade, coupled with a remarkable 1,396% increase in the value under litigation.

**10 Year History of
Property Lawsuits**



This unprecedented growth has inevitably led to escalated expenditures in litigation. In the past two to three years, we have diligently tapped into our litigation reserves to navigate these mounting costs. Now, it is not merely advisable but imperative to proactively rebuild and strengthen our litigation reserve. Transferring unused budget funds will be instrumental in fortifying our capacity to navigate the unpredictable legal landscape.

The Board of Directors will discuss and take action on this budget amendment on Wednesday, December 13, 2023, at 11:30 a.m. at the offices of the Travis Central Appraisal District, located at 850 East Anderson Lane, Austin, Texas 78752. Any taxing entity with questions or concerns about this budget amendment is encouraged to attend this meeting. The above adjustment **does not require any additional funds** from the taxing entities; however, it will impact the amount of unspent funds at the end of the year. Should you have any questions, I can be reached by phone at (512) 834-9317 Ext. 405, or by email at Lmann@tcadcentral.org.

Respectfully,

Leana H. Mann, CGFO
Deputy Chief Appraiser
Travis Central Appraisal District

5E

REGULAR AGENDA

AGREEMENT FOR APPRAISAL SERVICES

THE STATE OF TEXAS

§

§

COUNTY OF TRAVIS

§

This agreement (the "Agreement") is made this _____ day of _____, 2023, between **TRAVIS CENTRAL APPRAISAL DISTRICT**, hereinafter referred to as the "District", and **CAPITOL APPRAISAL GROUP, LLC**, of Austin, Travis County, Texas, hereinafter referred to as the "Company" (collectively referred to as the "Parties" or singularly a "Party"), acting by and through their respective representatives.

General Recitals

1. Pursuant to Section 25.01, Texas Property Tax Code, it has been represented by Company and determined by District that Company is skilled in the matter of appraisals and valuations of oil and gas leases, communication properties, public utilities, and industrial properties for tax purposes. Therefore, the Chief Appraiser, with approval of the Board of Directors of the District, desires to employ Company to perform appraisal services with respect to such properties. Company hereby agrees to appraise for District-designated utility properties and designated industrial properties listed on Exhibit A and located in District's jurisdiction. Company also agrees to appraise for District all producing oil and gas leases located in District's jurisdiction.

2. Such appraisals are to be prepared by Company for the convenience and information of the Chief Appraiser, the Board of Directors, and the Appraisal Review Board of the District, and shall be utilized for all purposes provided by law, specifically including the Texas Property Tax Code. Such appraisals shall conform to the applicable provisions of the Code, Standard 6 of the Uniform Standards of Professional Appraisal Practice, and the Texas Administrative Code, and other applicable laws.

Term

3. The term of this Agreement shall be for a period of two (2) years for the 2024 and 2025 tax years. Thereafter this Agreement shall annually renew for successive terms of one year to include the respective tax year, unless sooner terminated as provided herein. Either Party may, terminate this Agreement by providing sixty (60) days written notice to the other Party. The fees for the services provided herein for tax years subsequent to tax year 2025 shall be the amount budgeted by the District for the respective tax year and agreed to by the Company in writing, unless the District or the Company notifies the other Party in writing, before October 1 of the year preceding the contract year, of the intent by that Party to terminate this Agreement.

4. The parties agree to conduct non-binding mediation in the county in which the District is located to resolve any disputes under the Agreement. Mediation shall not be required prior to sending notice of a breach or default under the Agreement as a condition precedent to pursuing legal action.

Services

5. Company agrees to list and determine appraised values for all industrial plants, producing oil and gas wells, communication, telephone companies, gas and electric utility systems, cable television systems, pipeline systems, railroad companies, telecommunications companies and systems, and designated industrial properties listed on Exhibit A and located within the District on January 1 of each year. Company also agrees to compile, list and determine appraised values for all producing oil and gas leases located within the District on January 1 of each year. Said compilation will show the particular interest(s) of owners, including working interest(s) and royalty interest(s) and the values. If District needs additional services, Company shall attempt to accommodate such additional services at an agreed fee, without decreasing the effectiveness or timeliness of performance of services specified herein.

6. Company agrees to secure for the Chief Appraiser of District, all information possible and available for use by the Chief Appraiser and the Appraisal Review Board in determining the proper valuations to be fixed upon such properties for taxation purposes, and generally to compile such information as shall be of aid and benefit to the Chief Appraiser and the Appraisal Review Board for the purpose of equalizing and supporting the values of such properties for taxation purposes.

7. Company agrees to represent its evaluations for the District in any appeals of its appraisals, including hearings before the Appraisal Review Board, any arbitration proceedings, and any proceedings before the Comptroller of Public Accounts viz. the Texas Comptroller's Property Value Study, during the term of this Agreement. Company shall not charge any additional fee for its personnel to represent District at appraisal review board hearings or other administrative proceedings in support of its appraisals.

8. Company shall provide appraised values to District no later than May 15th of each year, or as soon thereafter as practicable, in order to allow District to comply with relevant notice requirements set forth in the Texas Property Tax Code (T.P.T.C), specifically including but not limited to Section 25.19. Company shall in good faith devote such time and resources to the performance of its duties under this Agreement throughout the tax year as reasonably necessary to ensure timely and accurate appraisals in compliance with the T.P.T.C. Company shall provide, on request, a written report to District summarizing its progress in completing such appraisals, such reports to be made available to District's Chief Appraiser on a date agreed to by the Chief Appraiser and Company each year. A compilation of the "Certified Estimate of Value" shall be provided to District on or before April 30th of each year, in accordance with Section 26.01(e) T . P . T . C .

9. (a) Company shall provide to District copies of all appraisals, together with supporting data, in the format in which they are maintained by Company or requested by District, and such records shall be considered to be public information unless otherwise specifically exempt from public disclosure pursuant to law. "Supporting data" shall not be construed to include personal notes, correspondence, working papers, thought processes, or any other matters of a privileged or proprietary nature. Such non-proprietary records shall be provided to District no later than May 30th of each year, or on a date agreed to by the Chief Appraiser and Company. Company shall not charge District for original copies of such records, but may charge for additional copies at a reasonable fee based on actual reproduction cost.

(b) All data or information voluntarily provided by the taxpayer will be held under the statutory confidentiality protection provided by Section 22.27 of the Texas Property Tax Code. The data or information obtained by Company from the taxpayer for the appraisal of property will be held as confidential and will be disclosed only as authorized in §22.27, as required under §25.195, to the appraisal review board in the event of a protest of the appraised market value, and as required to the Chief Appraiser and appraisal district employees or as otherwise required by applicable law.

10. If District determines at any time that Company is not performing services as required under this Agreement in a sufficiently accurate or timely manner, it shall notify Company in writing of such determination. If Company fails to cure such deficiency to District's satisfaction within thirty (30) days after delivery of such notice, District is entitled to withhold fees payable to Company in an amount reasonably related to the portion of Company's total fee under this Agreement that is attributable to such services, or to terminate this Agreement according to the provision of Section 3.

Fee

11. Company shall be entitled to a fee of \$163,750 (One Hundred Sixty-Three Thousand Seven Hundred Fifty Dollars) for the 2024 tax year, and \$167,025 (One Hundred Seventy-Seven Thousand Twenty-Five Dollars) for the 2025 tax year, said amounts to be paid out of the lawful funds of District. Company will be required to perform most of its services under this Agreement on or before July 15th of each year. However, District shall pay Company the above mentioned fees in four equal quarterly payments each year, beginning on January 1, and continuing on April 1, July 1, and October 1 of each year. District shall be authorized to withhold all or any part of any such fees as it determines in good faith are attributable to services not performed in an accurate or timely manner as described in Section 9. District shall in good faith take all actions necessary to facilitate the payment of all sums due to Company. Such payment shall constitute full payment to the Company for all its services under this Contract, and District shall not be obligated to Company for any salaries or expenses of any kind incurred by the Company.

Governing Law

12. The Agreement shall be governed by the laws of the State of Texas, without giving effect to any conflicts of law rule or principle that might result in the application of the laws of another jurisdiction. Proper venue for any dispute shall be in Travis County, Texas.

Amendment

13. This Agreement may be amended by the mutual agreement of the Parties hereto in writing to be attached to and incorporated into this Agreement.

Legal Construction

14. In the event any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision thereof, and this Agreement shall be construed as if such invalid, illegal, or unenforceable provisions had never been contained herein.

Entire Agreement

15. This Agreement is the entire Agreement between the Parties with respect to the subject matter covered in this Agreement. There is no other collateral oral or written Agreement between the Parties that in any manner relates to the subject matter of this Agreement, except as provided in any Exhibits attached hereto.

Exhibits

16. All exhibits to this Agreement are incorporated herein by reference for all purposes wherever reference is made to the same.

Successors and Assigns

17. This Agreement may not be assigned without the prior written consent of the District.

Recitals

18. The recitals to this Agreement are incorporated herein.

Insurance

19. (a) Company shall during the term hereof maintain in full force and effect the following insurance: (I) a comprehensive general liability policy of insurance for bodily injury, death and property damage insuring against all claims, demands or actions relating to the Company's performance of services pursuant to this Agreement with a minimum combined single limit of not less than \$1,000,000.00 per occurrence for injury to persons (including death), and for property damage and \$2,000,000.00 aggregate; (ii) policy of automobile liability insurance covering any vehicles owned and/or operated by Company, its officers, agents, and employees, and used in the performance of this Agreement with policy limits of not less than \$1,000,000.00 combined single limit and aggregate for bodily injury and property damage; and (iii) statutory Worker's Compensation Insurance at the statutory limits and Employers Liability

covering all of Company's employees involved in the provision of services under this Agreement with policy limit of not less than \$500,000.00/\$500,000.00/\$500,000.00, if applicable.

(b) All policies of insurance shall be endorsed to contain the following provisions:

(1) name the District, its officers, and employees as additional insured as to all applicable coverage with the exception of Workers Compensation Insurance; and

(2) provide for at least thirty (30) days prior written notice to the District for cancellation or non-renewal of the insurance;

(3) provide for a waiver of subrogation against the District for injuries, including death, property damage, or any other loss to the extent the same is covered by the proceeds of insurance, except for Company Liability Insurance. The Company shall provide written notice to the District of any material change of or to the insurance required herein.

(c) All insurance companies providing the required insurance shall be authorized to transact business in Texas and rated at least "A" by AM Best or other equivalent rating service.

(d) A certificate of insurance and policy endorsements evidencing the required insurance shall be submitted to the District prior to commencement of services and each anniversary date of the term of this Agreement.

(e) Section 19 of this agreement will be limited to the extent of liability attributable to the Company. Claims arising from negligence or fault by third parties or District employees shall be excluded from Company's insurance policy and coverage as additional insured.

Indemnification

20. To the fullest extent permitted by law company shall indemnify, hold harmless and defend the district, its officers, employees, agents and representatives (collectively the "district indemnitees") from and against all claims, damages, losses and expenses, including but not limited to, attorneys' fees, arising out of or resulting from bodily injury or death of a person or property damage, including the loss of use of property, arising or alleged to arise out of or in any way related to this agreement or the performance of work or services of the company, and it's sub- contractors under this agreement, or the result of any negligent act or omission or any intentional act or omission in violation of the company's standard of care by the company, it's sub-contractor or anyone directly or indirectly employed by the company or anyone for whose acts the company may be liable or due to the violation of any ordinance , regulation , statute , or other legal requirement by the company, it's sub-contactors, or any of their agents and employees, but only to the extent caused in whole or in part by any intentional or negligent act or omission of the company, it's sub-contractors or anyone directly or indirectly employed by the company, it's sub-contractors or anyone for whose acts the company or its sub-contractor may be liable.

Independent Contractor

21. It is understood and agreed by and between the parties that the Company in satisfying the conditions of this Agreement, is acting independently, and that the District assumes no responsibility or liabilities to any third party in connection with these actions. All services to be performed by Company pursuant to this Agreement shall be in the capacity of an independent contractor, and not as an agent or employee of the District. Company shall supervise the performance of its services and shall be entitled to control the manner and means by which its services are to be performed. subject to the terms of this Agreement.

Israel Compliance

22. The Company certifies it is not engaged in, and agrees for the duration of this contract not to engage in a boycott of Israel. The Company also agrees not to boycott any person or entity doing business in Israel or in an Israeli-controlled territory.

(signature page to follow)

WITNESS our hand in duplication, this _____ day of _____, 2023.

TRAVIS CENTRAL APPRAISAL DISTRICT

Chairman, Board of Directors

ATTEST:

Secretary, Board of Directors

WITNESS our hand in duplication, this 14th day of November, 2023.

CAPITOL APPRAISAL GROUP, LLC



Gregg A. Davis, Executive Vice-President