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2020 Informal Meeting Logistics and Communication Plan

This plan provides a broad overview of the key logistical elements required to implement the motion passed at the January 13, 2020 regular meeting of the Travis Central Appraisal District Board of Directors to provide in person face-to-face informal meetings to educate the taxpayers, gather information and evidence, and have potential settlement offers reviewed by management, for accuracy, consistency and fairness, prior to the settlement offer amount being offered to the property owners. Further assessment of legal, technological, and time requirements may necessitate additional modifications of the planning, coordination and implementation of the details of the informal meeting operations.

It was suggested that the face to face meetings be given a different name. For the purposes of this document the name Informal Meeting will be used: however, the following names have been proposed.

- Informal Meeting
- Informal Review
- Informal Consultation
- Information Meeting

The TCAD board voted to call these meetings "informal conferences" with the goal of lowering expectations that property values will be immediately adjusted as a result of these face-to-face meetings.

Timeline and Location

- Informal meetings will generally be held at Travis CAD main office, Monday through Friday during the month of April, and Monday through Thursday during the month of May. Hours of operation will be 7:45AM to 4:45PM.
- In an effort to provide convenient access to informal meetings for property owners, on Fridays during the month of May TCAD will operate a pilot program in conjunction with Travis County Community Centers to host offsite informal meetings at the community centers in:
 - Pflugerville
 - Del Valle
 - Oak Hill
 - Jonestown.

At the request of TCAD Board Member Blanca Zamora-Garcia, meetings should also be held at community centers in southeast (Dove Springs), northeast (Gus Garcia or Asian American), and in Manor.

- The day of the week for the pilot program is contingent upon community center availability, and will be set on day of the week availability at all four centers can be consistently coordinated.
- The final day for informal meetings will be Saturday, May 30th at Travis CAD main office from 8:00AM to 4:00PM.

Scheduling and Check-In

- Generally, informal meetings at the Travis CAD main office will not be scheduled by the appraisal district and will be held as walk-in requests served on a first come first serve basis.
- Walk-in property owners will need to check-in when they arrive.
- Property owners may check-in for up to five properties at a time.
- Evidence not previously uploaded in the eFile portal will be scanned to capture it electronically and make it available in the CAMA system software before the property owner meets with the appraiser.
- Once the property owner has checked-in and their evidence has been scanned they will be put into queue to meet with an appraiser.
- The appraisal district is exploring the purchase of a reservation system similar to those used by Texas Department of Motor Vehicles and the Travis County Tax Office.
 - These reservation systems allow property owners to reserve timeslots on-line. When property owners arrive at the location at their reserved time they are given priority in the queue so that they are processed as close to their reserved time as possible.
 - Implementation of the reservation system is dependent upon software cost, additional equipment required, installation and configuration time required.

Meeting Procedures:

- Informal meetings will be informational face-to-face meetings with a staff appraiser.
 - The appraiser may educate the property owner on the property tax system, property tax exemptions, how the appraised value was determined, the most common types of evidence presented, the formal hearing process, and answer any other questions the property owner may have.
 - The appraiser may review and discuss information and evidence presented by the property owner.
 - A property owner may have only one informal meeting with an appraiser.
- Appraisal Roll Corrections
 - The appraiser may document into the CAMA software system for consideration by the informal settlement offer reviewer:
 - the key points and issues made by the property owner (or appraiser)
 - the property owners opinion of value
 - the appraisers recommendation
 - Property characteristic corrections
 - The appraiser may make corrections directly into the CAMA software systems for quantitative items such as:

- Building square footage (based on building plans presented)
- Existence of fireplaces and swimming pool,
- Appraisal roll corrections of qualitative items or items requiring additional analysis will be done by informal settlement offer reviewers and the appraiser may add notes and recommendations. Examples of qualitative items include:
 - Construction quality and condition
 - Effective age
 - Physical, functional, and economic obsolescence

Informal Settlement Offers

- An informal settlement offer that reduces value is NOT guaranteed.
- All informal settlement offers will be based on documented evidence.
- Informal settlement offers will be reviewed for accuracy, fairness and consistency before the offer is made to the property owner.
- The team of informal settlement offer reviewers will be comprised of managers, team leads and senior appraisers.
- Reviewers will examine the property owner and CAD's evidence, and the notes and recommendations from the informal meeting. After analyzing all available data the reviewer will determine the settlement offer amount to be provided to the property owner.
- Informal settlement offers will be provided to property owners on a rolling basis as soon as possible with a goal to have all informal settlement offers for the informal meetings for the week provided by the following Friday.
 - Daily walk in volume, staffing and overtime availability may impact the informal settlement offer release cycle.
- Property owners will need to take action to accept the informal settlement offer to complete the protest.
 - It was discussed at the last Board meeting to make the recommended informal settlement offer the final value on the property without further action from the property owner; however, the CAD needs to have documented agreement from the property owner for a binding informal settlements under Tax Code section 1.111(e), particularly for the purposes of litigation, the PTAD Methods and Assistance Reviews, and Property Value Studies.
 - Multiple offer acceptance options may be provided to make the documentation of the owners acceptance of the informal settlement offer as convenient as possible:
 - eFile Portal Offer Acceptance–
 - Property owners familiar with the eFile portals may protest on-line and utilize the existing eFile portal to accept informal settlement offers.
 - Advantages of using the eFile portal:
 - Property owner evidence may be uploaded online prior to the informal meeting which will eliminate delays at the informal meeting.

- Property owner will receive the CAD evidence in advance of the informal meeting.
 - Property owner will receive immediate email notification of the informal settlement offer amount.
- Email Offer Acceptance –
 - The CAD will develop a process similar to on-line user account setup verification processes where the user is sent an email with a link to click to verify email address.
 - As a part of the check-in process the property owner will be given an opportunity to provide an email address and receive their informal settlement offer via email.
 - After the informal settlement offer reviewer has determined the appropriate settlement offer amount an email will be sent to the email address provided by the property owner with the informal settlement offer amount and a link for the property owner to click on to confirm their desire to accept the settlement offer.
 - Implementation of the email offer system is dependent upon software/development cost, additional equipment required, and installation and configuration time required.
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- Phone Offer Acceptance -
 - The CAD will develop a process similar to credit card activation processes where users call a specific phone number to activate new credit cards.
 - As part of the check-in process the property owner will be given an opportunity to provide a phone number they will call in from to receive their settlement offer by phone and given a phone number to call on Friday of the following week to receive their settlement offer amount.
 - After the informal settlement offer reviewer has determined the appropriate settlement offer amount the information will be available in the informal settlement phone system. Property owners must call from the phone number they provided, which is used for authentication purposes, and provide the property account number. The phone system will then give them the informal settlement offer amount and the opportunity to press a number to accept the offer.
 - Implementation of the phone offer system is dependent upon software cost, additional equipment required, and installation and configuration time required.
- Mail –
 - Property owners may request to have the informal settlement offer mailed to them by calling the Customer Service Department on Friday of the following week. An informal settlement offer form will be mailed and the property owner must sign and return the form to the appraisal district. They may return in via mail or drop it off at the appraisal district in person.

Communication and Media Outreach

- Outreach will be done to local media to announce:
 - That informal in-person meetings will be part of the 2020 protest process
 - When people can expect to get their Notices of Appraised Value soon and the protest process is open
 - When important deadlines are approaching
 - When the new TCAD office is open
 - When community outreach events occur
- Digital Infrastructure Development
 - The digital infrastructure surrounding the protest process will be reviewed and new infrastructure will be developed. This includes:
 - Developing an easy-to-use online system for people to get in line for their informal meetings online
 - Developing a protest reference page on the TCAD website that includes links to the online portal and get-in-line system, deadlines, current wait times (if feasible), office hours, and FAQs
- Digital Outreach
 - Digital outreach that will occur during this time will include organic, paid, and influencer digital campaigns that emphasize:
 - Going to the TCAD website to learn more about this year's process
 - Filing protests online
 - Using the online get-in-line system
 - The importance of getting in line early
 - Upcoming deadlines
 - Additionally, the possibility of sending out emails reminders to people who have online accounts will be explored. Ideally, email reminders should be sent out at the following milestones:
 - Outlining next steps once a protest has been submitted
 - Reminding people who haven't come in for their informal hearing or accepted an online offer that they should come in (approximately every two weeks)
 - Notifying people who haven't come in for their informal hearing or accepted an online offer of special locations, days and times for hearings (Travis County Community Centers)
- In-Person Outreach
 - In-person outreach will supplement this campaign. Efforts will include:
 - Reaching out to HOAs and community organizations to attend local meetings to answer questions, emphasize deadlines, and encourage people to act early
 - Hosting an informal training with local realtors to update them on the process and the importance of acting early
 - Working with local elected officials to identify opportunities to distribute information to their constituents