

Travis Central Appraisal District



Board of Director's Meeting
February 19, 2020
11: 30 a.m.

Prepared: February 15, 2020
Revised: February 16, 2020
Revised: February 17, 2020

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

JAMES VALADEZ
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
THERESA BASTIAN
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

TOM BUCKLE
BRUCE ELFANT
ANTHONY NGUYEN
ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA
BLANCA ZAMORA-GARCIA

TRAVIS CENTRAL APPRAISAL DISTRICT, 2ND FLOOR, 8314 CROSS PARK DRIVE, AUSTIN, TEXAS 78754.

AGENDA

REGULAR MEETING - WEDNESDAY, FEBRUARY 19, 2020 – 11:30AM

1. CALL TO ORDER
2. ESTABLISHMENT OF QUORUM
3. CITIZENS COMMUNICATION - This is an opportunity for the public to address the Board on a subject within the Board's jurisdiction that is not listed as a separate item on the Board's meeting agenda. To be eligible to speak to the Board, persons must complete a Speaker Registration Form and submit it to the Board's presiding officer before the meeting begins. State law does not allow the Board to deliberate on any item that is not listed on its agenda, and limits any Board action to making a statement of fact or policy about the topic; or direct that the topic be placed on a future agenda. The Board's presiding officer limit the time allotted to each speaker to three minutes. **Persons wishing to address the Board on an item that is listed on the agenda may do so when that item is considered by the Board.**
4. CONSENT AGENDA - These items may be acted upon by one motion. No separate discussion or vote on any of the items will be had unless requested by a Board member.
 - a. APPROVAL OF THE MINUTES OF THE JANUARY 21, 2020 MEETING
 - b. TAXPAYER LIAISON REPORT
 - c. SECTION 25.25B REPORT
 - d. ACCOUNTING STATEMENTS
 - e. LINE ITEM TRANSFERS
 - f. PERSONNEL REPORT
5. REGULAR AGENDA
 - a. DISCUSSION AND POSSIBLE ACTION ON CHIEF APPRAISER REPORT TO INCLUDE: 2020 VALUATION EFFORTS, 2020 INFORMAL MEETING PREPARATION, LAKE AUSTIN PROPERTIES, TAXPAYER OUTREACH PROGRAMS, 2019 ANNUAL REPORT, 2019 MAPS FINAL REPORT, 850 EAL RENOVATION STATUS
 - b. DISCUSSION AND POSSIBLE ACTION ON PURCHASE OF PHONE SYSTEM ENHANCEMENTS IN SUPPORT OF 2020 INFORMAL MEETING PREPARATION
 - c. DISCUSSION AND POSSIBLE ACTION ON ALLOCATION OF FUNDS FROM RESERVES FOR TECHNOLOGY ENHANCEMENTS FOR PHONE SYSTEM ENHANCEMENTS
 - d. DISCUSSION AND POSSIBLE ACTION ON LITIGATION AND APPEALS RELATED TO PENDING LAWSUITS AND ANICIPATED LAWSUITS
 - e. DISCUSSION AND POSSIBLE ACTION TO ADD ITEMS TO FUTURE AGENDAS
 - f. 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, Director of Operations of the Travis Central Appraisal District, do hereby certify that on the 14th day of February 2020, by 12 o'clock pm this Notice of Meeting was posted at the District's Offices, located at 8314 Cross Park Drive, Austin, Texas 78754. 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.

Leana H. Mann

By:
Printed Name: Leana Mann
Title: Director of Operations



Came to hand and posted on a Bulletin Board in the Courthouse, Austin, Travis County, Texas on this the 14th day of February 2020.

Dana DeBeauvoir
County Clerk, Travis County, Texas

By *Belle* Deputy
Brittany Wellington



COPY
OFFICIAL PUBLIC RECORDS

Dana DeBeauvoir
Dana DeBeauvoir, County Clerk
Travis County, Texas

202080252

Feb 14, 2020 10:38 AM
Fee: \$3.00 WELLINB

AGENDA ITEM

#4A

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
JAMES VALADEZ
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
THERESA BASTIAN
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS
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ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA
BLANCA ZAMORA-GARCIA

TCAD - BOARD OF DIRECTORS MINUTES OF THE JANUARY 21, 2020 MEETING

1. Call to order

Meeting called to order by James Valadez at 11:30 a.m. on January 21, 2020 at 8314 Cross Park Drive, Austin, Texas 78754.

2. Establishment of Quorum

James Valadez, Chairperson	Travis County	Present
Bruce Grube, Vice Chairperson	Travis County	Present
Theresa Bastian, Secretary	Austin ISD	Present
Felipe Ulloa	Austin ISD/City of Austin	Present
Blanca Zamora-Garcia	City of Austin	Present
Eleanor Powell	City of Austin	Absent
Ryan Steglich	Austin ISD	Present
Tom Buckle	West Travis County	Present
Anthony Nguyen	East Travis County	Present
Bruce Elfant	Travis Co. Tax Assessor-Collector	Present

Also present were Marya Crigler, Chief Appraiser, Leana Mann, Director of Operations, and Karen Evertson of Evertson & Sanchez.

3. Citizens Communication

None

4. Consent Items

- a. Approval of the minutes of the January 13, 2020 meeting

MOTION: Approve consent agenda
RESULT: **ADOPTED [UNANIMOUS]**
MOVER: Bruce Grube

SECONDER: Ryan Steglich

AYES: James Valadez, Bruce Grube, Theresa Bastian, Felipe Ulloa, Ryan Steglich, Tom Buckle

ABSENT: Eleanor Powell, Blanca Zamora Garcia, Anthony Nguyen

5A. Discussion and possible action on 2020 protest season informal meeting logistics and communications plan.

Members of the board heard from:
Marya Crigler, Chief Appraiser

MOTION: Travis Central Appraisal District provide in person face-to-face informal meetings to educate 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 under the general guidelines set forth in the 2020 informal meeting and communication plan.

FRIENDLY AMENDMENT: Call the informal meetings informal consultation meeting
MOVER: Anthony Nguyen
RESULT: **FRIENDLY AMENDMENT NOT ACCEPTED**

FRIENDLY AMENDMENT: Call the informal meetings informal conference
MOVER: James Valadez
RESULT: **FRIENDLY AMENDMENT ACCEPTED**

Note: A vote on the standing motion was taken.

RESULT: **APPROVED [7-1]**
MOVER: Bruce Grube **SECONDER:** Ryan Steglich

AYES: James Valadez, Bruce Grube, Theresa Bastian, Felipe Ulloa, Blanca Zamora-Garcia, Ryan Steglich, Tom Buckle

NAYS: Anthony Nguyen

ABSENT: Eleanor Powell

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

RESULT: **DISCUSSED**

Note: Board Members requested the following items be added to the next agenda:

- *Update on informal conferences for 2020 (Chief Appraisers report)*
- *Discussion on exemptions along Lake Austin*
- *Next meeting: Wednesday, February 19, 2020 at 11:30 a.m.*

5C. Adjournment

MOTION: Adjourn meeting at 12:12 PM
RESULT: **APPROVED [UNANIMOUS]**
MOVER: Tom Buckle **SECONDER:** Theresa Bastian

AYES: Bruce Grube, James Valadez, Felipe Ulloa, Blanca Zamora-Garcia, Ryan Steglich,
Theresa Bastian, Tom Buckle, Anthony Nguyen

ABSENT: Eleanor Powell

Respectfully submitted,

Theresa Bastian, Secretary

Approved:

James Valadez, Chairperson

AGENDA ITEM

#4B

Taxpayer
Liaison
Report

02/19/2020

Martin Wilbanks

Travis Taxpayer Liaison Activity Report

Property Owner Contacts 2016 2017 2018 2019
 430 653 674 1,576

	Complaints	Property Owner Interactions									
	ARB Hearings	General Inquiries	Protest Process	efiling	Exemptions	Change of Address	Agent Appointment	BBP Issues	Open Records	Tax Issues	Year to Date Total
Jan	0	16	23	0	24	0	5	4	1	21	94
Feb											
March											
April											
May											
June											
July											
Aug											
Sept											
Oct											
Nov											
Dec											
Total	<u>0</u>	<u>16</u>	<u>23</u>	<u>0</u>	<u>24</u>	<u>0</u>	<u>5</u>	<u>4</u>	<u>1</u>	<u>21</u>	<u>94</u>

AGENDA ITEM

#4C



Travis Central Appraisal District

Section 25.25B Report

From: January 13, 2020 To: February 14, 2020

Prop ID	Year	Owner Name/ Legal Description	Location	NOAV Market	Current Market
203182	2019	FUENTES ANAI & ISSAC JOEL MARTINEZ LOT 436 BLK C IMPERIAL VALLEY SEC 2	5704 BLAZEWOOD DR	\$132,935	\$59,746
PER OK UPDATE CORRECTION & PRINT VALUE CERT FOR 2019, MEC 1/29/20 // PER OW IN OFFC WITH STATEMENT OF OWNERSHIP, UF					
216752	2015	BLANCHETTE RAYMOND LOT 2 BLK B BROOKSIDE ESTATES	1703 WESTMOOR DR	\$100,000	\$100,000
DV4 APP WAS SUBMITTED TIMELY - ADDING DV4 FOR 2015 GOING FORWARD					
238867	2016	COLEMAN MOLLY E1/2 OF LOT 4 LOT 5 BLK 32 MANOR TOWN OF	309 E PARSONS ST	\$91,780	\$91,780
CHG IMP HOMESITE FROM 0-100% FOR 2015 GOING FORWARD					
238867	2015	COLEMAN MOLLY E1/2 OF LOT 4 LOT 5 BLK 32 MANOR TOWN OF	309 E PARSONS ST	\$93,417	\$93,417
CHG IMP HOMESITE FROM 0-100% FOR 2015 GOING FORWARD					
265177	2019	FIGUEROA ISRAEL & ELVIRA LOT 11 BLK H DESSAU ESTATES SEC 4	2005 MILLHOUSE DR	\$109,793	\$83,413
PER TCAD RSCH AND VERF FRM STATEMENT OF OWNERSHIP SUBMITTED BY OW, IT WAS FOUND THAT THE MH WAS SET UP AS A 200.					
288685	2012	PHILLIPS HERMAN I & DAISY S ABS 5 SUR 33 BURLESON J ACR 10.0 [1-D-1]	HUNTERS BEND RD	\$103,586	\$101,426
PER OW PH CALL THE 1974 14X56 MH HAS NOT EXISTED SINCE 2009, PER TCAD GIS RSCH. AERIALS CONFIRMS IT IS DESTROYED ANL					
288685	2011	PHILLIPS HERMAN I & DAISY S ABS 5 SUR 33 BURLESON J ACR 10.0 [1-D-1]	HUNTERS BEND RD	\$103,586	\$101,610
PER OW PH CALL THE 1974 14X56 MH HAS NOT EXISTED SINCE 2009, PER TCAD GIS RSCH. AERIALS CONFIRMS IT IS DESTROYED ANL					
288685	2010	PHILLIPS HERMAN I & DAISY S ABS 5 SUR 33 BURLESON J ACR 10.0 [1-D-1]	HUNTERS BEND RD	\$103,586	\$101,610
PER OW PH CALL THE 1974 14X56 MH HAS NOT EXISTED SINCE 2009, PER TCAD GIS RSCH. AERIALS CONFIRMS IT IS DESTROYED ANL					
288685	2009	PHILLIPS HERMAN I & DAISY S ABS 5 SUR 33 BURLESON J ACR 10.0 [1-D-1]	HUNTERS BEND RD	\$103,586	\$101,840
PER OW PH CALL THE 1974 14X56 MH HAS NOT EXISTED SINCE 2009, PER TCAD GIS RSCH. AERIALS CONFIRMS IT IS DESTROYED ANL					
289669	2019	VEGA CAROLINA B LOT 232 RIVER TIMBER	1307 CITATION CIR	\$59,054	\$40,570
PER OW PH CALL & TCAD RSCH, THIS MH WAS SOLD 11/2018 & MVD TO BCAD SEE 8712649, RMV 1998 32X48 DWMH FOR 2019 AND FO					
301667	2019	BARRON EDUARDO G LOT 15 MUSTANG RANCH	8512 OLD LOCKHART RD	\$149,555	\$142,315
PER OW IN OFFC THIS MH BURNED DOWN IN 2018, CNFRM VIA TCAD AERIALS, REPLACED WITH NEW PP MH SEE PID 909898, RMV 199					
790918	2016	MATTOX PAUL PERSONAL PROPERTY M/H SERIAL# TXFL1AF468605112 LABEL# TEX0372911	23009 SUNNY OAK LN	\$3,326	\$3,326
ADDING HS PER APP SUBMITTED TIMELY IN 2011					



Travis Central Appraisal District

Section 25.25B Report

From: January 13, 2020 To: February 14, 2020

Prop ID	Year	Owner Name/ Legal Description	Location	NOAV Market	Current Market
790918	2015	MATTOX PAUL PERSONAL PROPERTY M/H SERIAL# TXFL1AF468605112 LABEL# TEX0372911 ADDING HS PER APP SUBMITTED TIMELY IN 2011	23009 SUNNY OAK LN	\$3,326	\$3,326
790918	2014	MATTOX PAUL PERSONAL PROPERTY M/H SERIAL# TXFL1AF468605112 LABEL# TEX0372911 ADDING HS PER APP SUBMITTED TIMELY IN 2011	23009 SUNNY OAK LN	\$3,326	\$3,326
790918	2013	MATTOX PAUL PERSONAL PROPERTY M/H SERIAL# TXFL1AF468605112 LABEL# TEX0372911 ADDING HS PER APP SUBMITTED TIMELY IN 2011	23009 SUNNY OAK LN	\$3,293	\$3,293
790918	2012	MATTOX PAUL PERSONAL PROPERTY M/H SERIAL# TXFL1AF468605112 LABEL# TEX0372911 ADDING HS PER APP SUBMITTED TIMELY IN 2011	23009 SUNNY OAK LN	\$3,293	\$3,293
838954	2014	NAVARI LLC PERSONAL PROPERTY COMMERCIAL FORTE ZERO VALUE FOR 2014 TO CORRECT APPRAISER ERROR. SET UP FROM TENANT LIST HOWEVER SPACE WAS STILL UNDER CONSTRU	800 BRAZOS ST # 215	\$59,781	\$0
868178	2019	NGUYEN ANTHONY V UNT 99 RETREAT AT HARRIS RIDGE CONDOMINIUMS PLUS .926 % INT IN COM AREA 25.25b Removed solar system for 2019 ; the solar system is leased from SunStreet per owner MTH 1/14/2019	14006 STRIPLING LN	\$266,936	\$261,063
878614	2019	MASON INGRID LOT 6 BLK 83 MUELLER SEC 10A 25.25 b Corrected 2019 value due to Inventory Valuation per MXC 01/29/2020//	2902 ZACH SCOTT ST	\$337,040	\$165,800
914286	2019	RODRIGUEZ JOANN Z & CHATEAU AT ONION CRK MH PARK, SPACE 194, SN1 CAVTX15112988A; SN2 CAVTX15112988B; HUD# NTA1542719; PER CONTACT FRM MORTG CO INQ ABOUT 2019 VALUE & UPON TCAD RSCH IT WAS FOUND THAT THE VALUE WAS FLAT VALUED AT ZE	7612 BARKDALE CT # 194	\$0	\$67,973

AGENDA ITEM

#4D

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

JAMES VALADEZ
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
THERESA BASTIAN
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

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FELIPE ULLOA
BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Director of Operations

DATE: February 16, 2020

SUBJECT: December 2019 Unaudited Financial Statements

The unaudited financial statements for December 2019 are attached. Financial highlights for the month are as follows:

- The District's ending fund balance was \$11,546,593. Of that, \$541,218 was nonspendable in the form of prepaid expenditures, \$6,433,450 was held in reserves, and \$4,571,925 unassigned fund balance. The net change in fund balance for the fiscal year to date is \$(100,907).
- The reserve balances total \$6,433,450. Detail account balances for each reserve account are as follows:

	<u>Current Balance</u>
Reserve for Computer Equipment	\$ 150,000
Reserve for Network Infrastructure	\$ 350,000
Reserve for Technology Enhancements	\$ 250,000
Reserve for Litigation	\$ 2,956,914
Reserve for Building Repair & Replacement	\$ 2,726,536
	<u>\$ 6,433,450</u>

- The District ended the month with a budget surplus of \$960,548.
- The District's board of Director's approved a transfer from the reserve for litigation to the general fund in the amount of \$1,750,000 for fiscal year 2019.
- 850 EAL Holding Corp. is considered a blended component unit of the District. A record of their financial position has been provided for review only. 850 EAL Holding Corp.'s revenues and expenses will be blended into the District's financial statements at year end.

Travis Central Appraisal District
Budget to Actual
For the month ended December 31, 2019

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Transfers	Amended		
REVENUES					
Appraisal assessments	19,486,627	-	19,486,627	19,486,627	-
Refund of appraisal assessments	-	-	-	-	-
Net appraisal assessments	\$ 19,486,627	\$ -	\$ 19,486,627	\$ 19,486,627	\$ -
Investment earnings	40,000	-	40,000	329,105	289,105
Charges for services	30,000	-	30,000	15,710	(14,290)
Miscellaneous revenue	75,000	-	75,000	87,038	12,038
TOTAL REVENUE	\$ 19,631,627	\$ -	\$ 19,631,627	\$ 19,918,480	\$ 286,853
EXPENDITURES					
Appraisal services					
Personnel Cost	8,452,982	1,093,280	9,546,262	9,117,154	429,108
Benefit Cost	4,062,583	(701,230)	3,361,353	3,146,632	214,721
Software maintenance	557,328	-	557,328	511,294	46,033
Travel expenditures	48,850	-	48,850	32,332	16,518
Operating Supplies	202,750	88,321	291,071	285,192	5,879
Rentals	172,220	315,500	487,720	487,706	14
Legal expenditures	824,250	-	824,250	1,514,483	(690,233)
Appraisal services	362,820	(240,000)	122,820	118,820	4,000
Professional services	1,513,195	(784,172)	729,023	701,554	27,468
Utilities	263,525	128,000	391,525	354,890	36,635
Building and equipment maintenance	189,189	161,900	351,089	367,254	(16,165)
Printing and mailing services	443,395	232,947	676,342	688,620	(12,278)
Subscriptions and data purchases	199,330	2,450	201,780	202,786	(1,006)
Training and education	177,730	(8,200)	169,530	96,941	72,589
Insurance	50,500	3,200	53,700	48,271	5,429
Security services	129,000	178,000	307,000	305,863	1,137
Aerial photography	442,297	-	442,297	442,297	-
Other services	106,890	21,725	128,615	113,792	14,823
Capital outlay	1,287,795	(491,721)	796,074	277,050	519,024
TOTAL EXPENDITURES	19,486,627	-	19,486,627	18,812,932	673,695
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	145,000	-	145,000	1,105,548.28	960,548
OTHER FINANCING SOURCES (USES):					
Transfers out	-	-	-	(1,206,455)	1,206,455
TOTAL OTHER FINANCING SOURCES (USES)	-	-	-	(1,206,455)	1,206,455
NET CHANGE IN FUND BALANCE	145,000	-	145,000	(100,907)	2,167,003
FUND BALANCE, beginning of year	11,647,500	-	11,647,500	11,647,500	11,647,500
FUND BALANCE, end of year	\$ 11,792,500	\$ -	\$ 11,792,500	\$ 11,546,593	\$ 13,814,503

Travis Central Appraisal District

Governmental Fund Balance Sheet

December 31, 2019

	<u>General Fund</u>
ASSETS	
Cash and cash equivalents	5,033,074
Short-term investments	11,692,174
Receivables	103,487
Prepaid items	541,218
	<hr/>
TOTAL ASSETS	\$ 17,369,953
	<hr/>
LIABILITIES	
Accounts payable and accrued expenditures	774,886
Deferred revenue	5,048,473
	<hr/>
TOTAL LIABILITIES	5,823,360
	<hr/>
FUND BALANCES	
Fund balance, committed	6,433,450
Fund balance, nonspendable	541,218
Fund balance, unassigned	4,571,925
	<hr/>
TOTAL FUND BALANCES	11,546,593
	<hr/>
TOTAL LIABILITIES AND FUND BALANCE	\$ 17,369,953
	<hr/>

Travis Central Appraisal District
Statement of Revenues and Expenditures
For the month ended December 31, 2019

	<u>General Fund</u>
REVENUES	
Appraisal assessments	\$ 19,486,627
Refund of appraisal assessments	-
Net appraisal assessments	<u>19,486,627</u>
Investment earnings	329,105
Charges for services	15,710
Miscellaneous revenue	87,038
TOTAL REVENUE	<u>19,918,480</u>
EXPENDITURES	
Appraisal services	
Payroll and related expenditures	12,284,173
Data processing	511,294
Transportation	32,332
Operating supplies	285,192
Rentals	487,706
Legal and professional	2,334,858
Utilities and telephone	354,890
Building and equipment maintenance	367,254
Other services	1,878,183
Capital outlay	277,050
TOTAL EXPENDITURES	<u>18,812,932</u>
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	1,105,548
OTHER FINANCING SOURCES (USES):	
Transfers out	(1,206,455.08)
TOTAL OTHER FINANCING SOURCES (USES)	<u>(1,206,455.08)</u>
NET CHANGE IN FUND BALANCE	(100,907)
FUND BALANCE, beginning of year	<u>11,647,500</u>
FUND BALANCE, end of year	<u>\$ 11,546,593</u>

850 EAL Holding Corp.

Statement of Financial Position

December 31, 2019

ASSETS

CURRENT ASSETS

Cash and Cash Equivalents 1,647,046

PROPERTY, PLANT & EQUIPMENT

Construction in Progress 9,569,425

TOTAL ASSETS \$ 11,216,472

LIABILITIES

CURRENT LIABILITIES

Accounts payable and accrued expenditures 169,615

LONG-TERM LIABILITIES

Notes Payable 9,840,400

TOTAL LIABILITIES 10,010,015

NET ASSETS

Beginning Net Assets -

Current YTD Net Income 1,206,457

Total Net Assets 1,206,457

TOTAL LIABILITIES & NET ASSETS \$ 11,216,472

850 EAL Holding Corp.

Statement of Activities

For the month ended December 31, 2019

REVENUES

General Revenues	1,206,455
Other Income	\$ 2

TOTAL INCOME	<u>1,206,457</u>
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EXPENSES

Direct program expenses	-
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TOTAL EXPENSES	<u>-</u>
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Change in Net Assets	1,206,457
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Net Assets at beginning of year	<u>-</u>
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Change in Net Assets	<u><u>\$ 1,206,457</u></u>
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**Monthly Investment Report
December 31, 2019**

A Bumpy Year Ahead

Well, yes, it will be a bumpy year but isn't that always the case especially with heightened geo-political tensions and an election year ahead. The bumps in this final quarter of 2019 have been seemingly endless but the one constant has been a relatively stable and solid US economy despite nerve-racking and media-rocking news including:

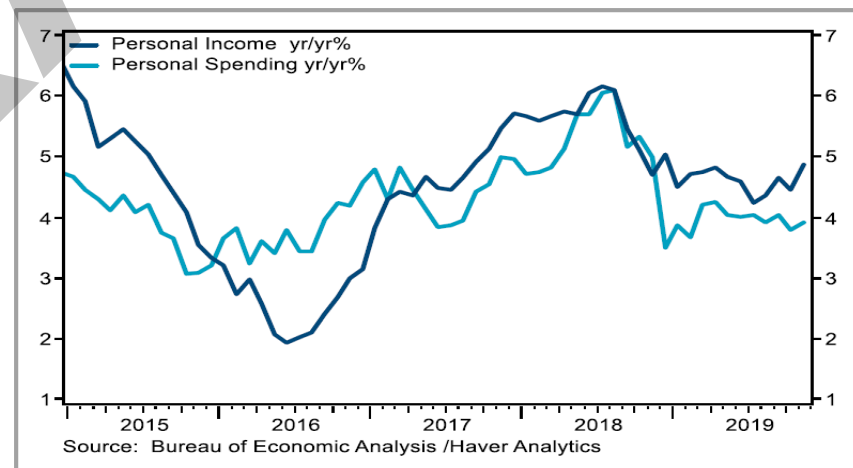
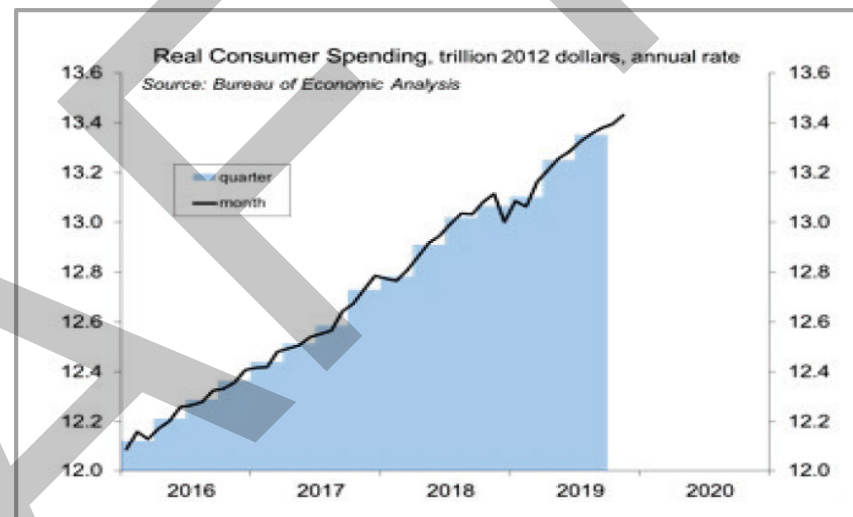
- Hong Kong political riots and restraints
- on and off trade talks between the US and China
- a FOMC cut in rates to 1.50-1.75%
- impeachment proceedings
- rockets hitting Iranian tankers in the Red Sea
- Brexit votes accompanying political party shifts in the UK
- Scotland's renewed move to independence
- major overnight liquidity problems

The financial markets have taken these events in stride and in fact reached new heights. They have shaken off geo-political events and trade vagaries concentrating on the economy instead.

The consumer has also been focusing on the increasing job opportunities and increased wages. Consumer confidence has declined marginally, but its main components are contradictory. The consumer's assessment of current conditions continued to improve, but future prospects softened.

Higher long term rates have contributed to consumer woes with higher mortgage rates, which then translates into a lower rate of new home sales. A growing lack of housing affordability also dampens sales with the median US home at \$330,000.

The softening on expectations is shown in a drop in durable goods (large items), which has been hit with Boeing's 737 Max suspensions as well as new orders and machinery. The trade uncertainties are certainly to blame for at least some of this softening.



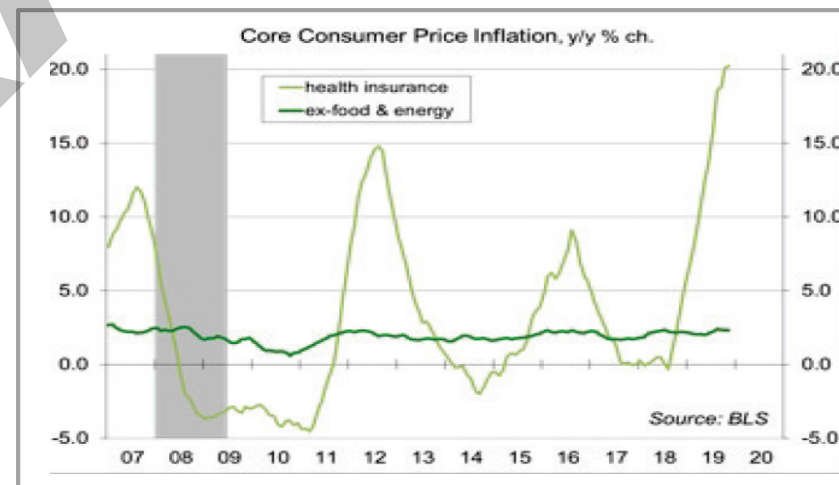
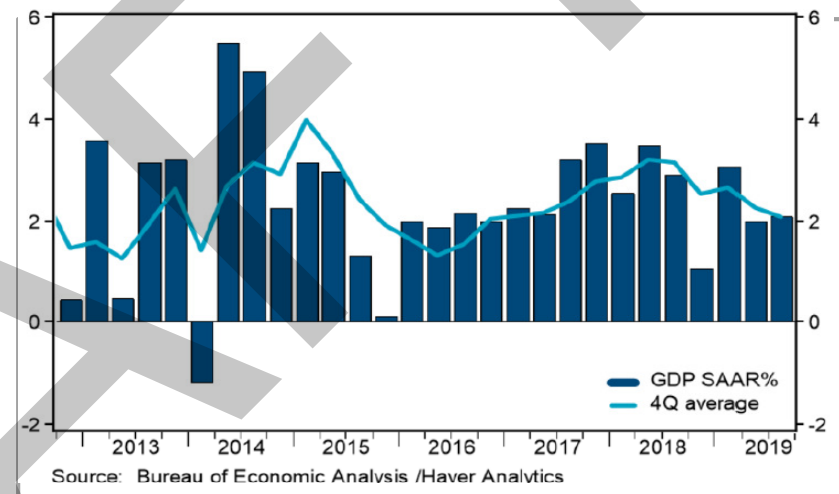
But the Fed Thinks We're In a *Good Place*

As seen in the overall economic numbers, and as stated by the Fed's Vice Chair Clarida, "the monetary policy is in a *good place* and should continue to support sustained growth, a strong labor market, and inflation running close to our symmetric 2% objective."

Obviously the Fed's FOMC does not want to make more rate cuts in case the economy takes off and kicks inflation in. GDP indicates the overall strength as it continues to slowly plod higher. It could end the year just shy of the Fed's 2% target. But inflation in that calculation remains hidden – and worrying to the Fed. Inflation has been sluggish for a decade and it is projected to remain limited through 2020. This will keep central banks on hold and accommodative as the bar slowly rises for further stimulus. Fear of not reaching the Fed's 2% target could push prices lower.

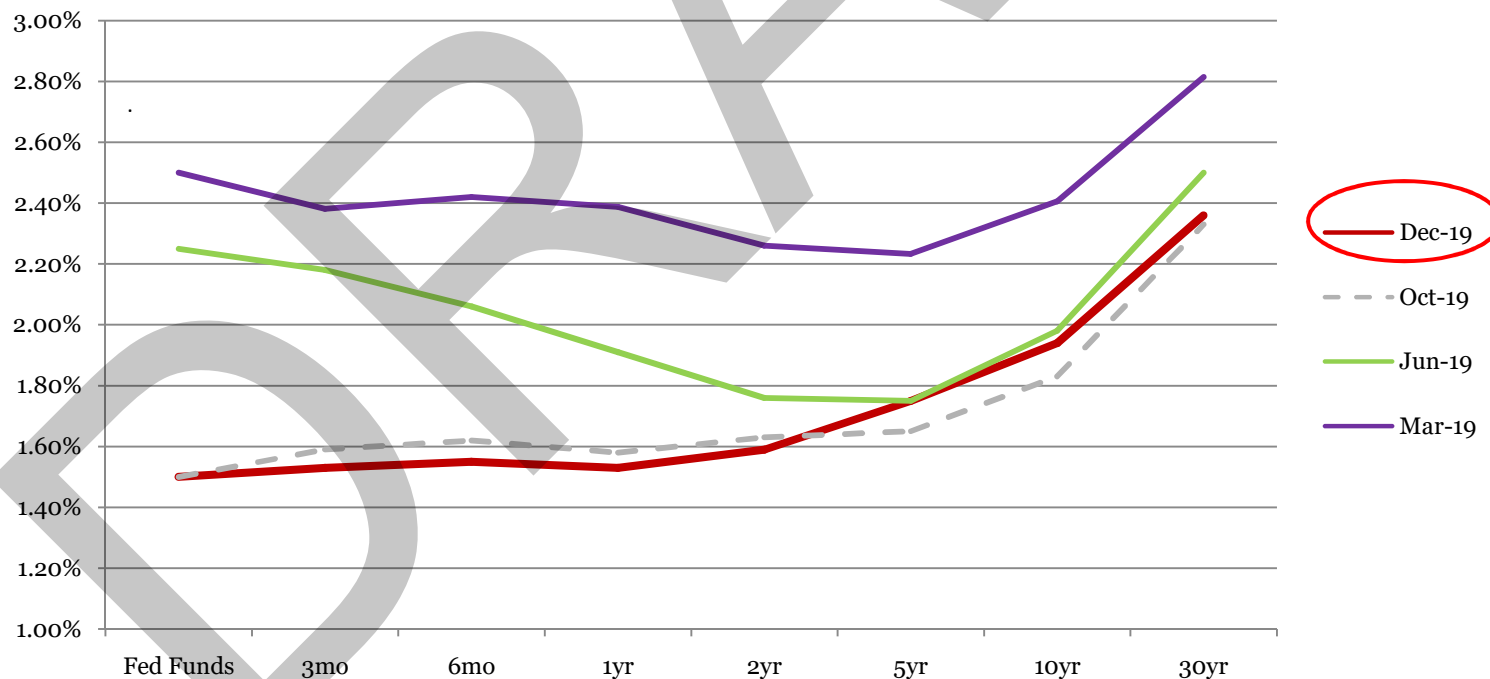
One factor which could impact inflation is the price of oil. Oil demand has been down and is at its weakest since 2016. That adds pressure to OPEC and the oil ministers are already threatening a cut in production. Unfortunately that harms other countries more than the US, which has become much more self reliant. A major run up in oil prices will harm our trading partners and keep the global economy down. If political tensions continue to grow in the Middle East there will also be reasons to fear oil price spikes.

Recognition of a severe market overnight liquidity situation, which caused a massive repo rate hike in September, has brought the Fed to a position of increasing T-Bill purchases in 4Q and beyond. This results in "non-QE" growth in the Fed balance sheet and has increased US Reserve balances by \$18 billion. This is directed towards the liquidity situation to alleviate funding issues (and their resulting rate spikes and liquidity shortages) but it certainly acts as an additional easing. The current reserves at 58 cents for every dollar of funding shows we have a way to go to solve this market problem. The volume of buying will keep short T-Bill rates lower also.



A Major Treasury Price Rally

- The curve has taken many different shapes in 2019 from an inversion in January, which deepened by mid-year as fears of recession proliferated. But as the Federal Reserve moved aggressively to be more accommodative through lower overnight rates, the curve and markets responded by changing their outlook and declaring the economy stable and solid.
- Many feel the inverted curve and its attendant recession fears was caused by the Fed too aggressively and prematurely raising interest rates in 2018. That may help keep the Fed accommodative but the lack of inflation will keep moderate and probably on the sidelines most if not all of 2020.
- As economic data stays relatively positive and without major shocks economically or geo-politically, the curve appears to be settling in with a normal upward trend.
- Major increases in the Fed's T-Bill purchases to control the liquidity situation may keep Bill rates lower than expected.

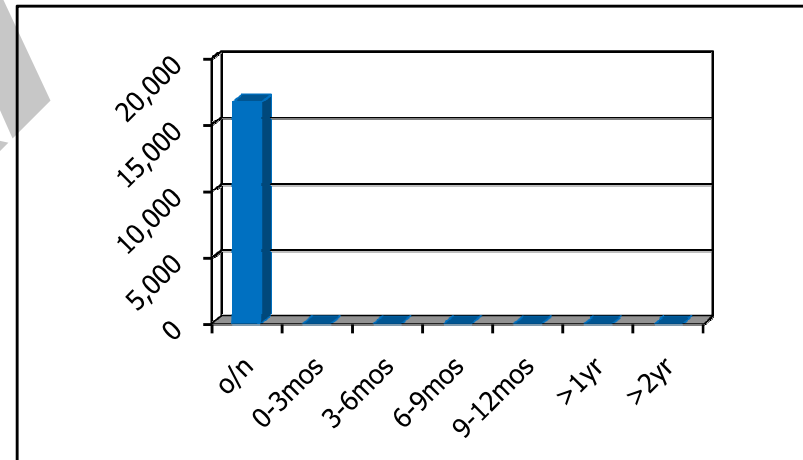
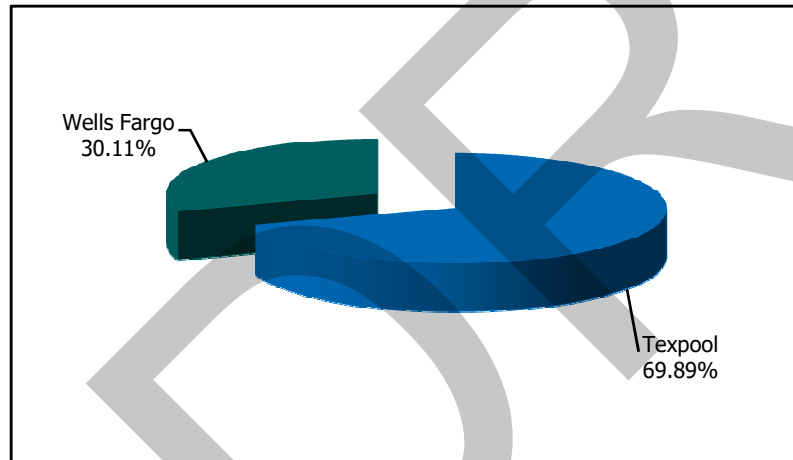


End of Month Rates - Full Yield Curve - Fed Funds to 30yr

Your Portfolio

As of December 31, 2019

- P&A constantly reviews your portfolio for optimal asset allocation and a controlled average maturity because a diversified portfolio can better adjust to volatile market conditions.
- The graphs below show asset allocations by market sector and by maturity. They do reflect our ongoing anticipation of lower rates in 2019. These rate cuts and the potential of more decreasing rates indicates the need to extend portfolios. Extending now will lock in yields even though rates may decrease and provides for extra safety.





**Travis Central Appraisal Dist.
Portfolio Management
Portfolio Summary
December 31, 2019**

Patterson & Associates
901 S. MoPac
Suite 195
Austin, TX 78746
-

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 365 Equiv.
Texpool/Texpool Prime	11,666,062.42	11,666,062.42	11,666,062.42	69.89	1	1	1.794
Wells Fargo Bank	5,025,974.82	5,025,974.82	5,025,974.82	30.11	1	1	1.209
Investments	16,692,037.24	16,692,037.24	16,692,037.24	100.00%	1	1	1.618

Total Earnings	December 31 Month Ending	Fiscal Year To Date	Fiscal Year Ending
Current Year	21,621.39	69,423.73	69,423.73

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.

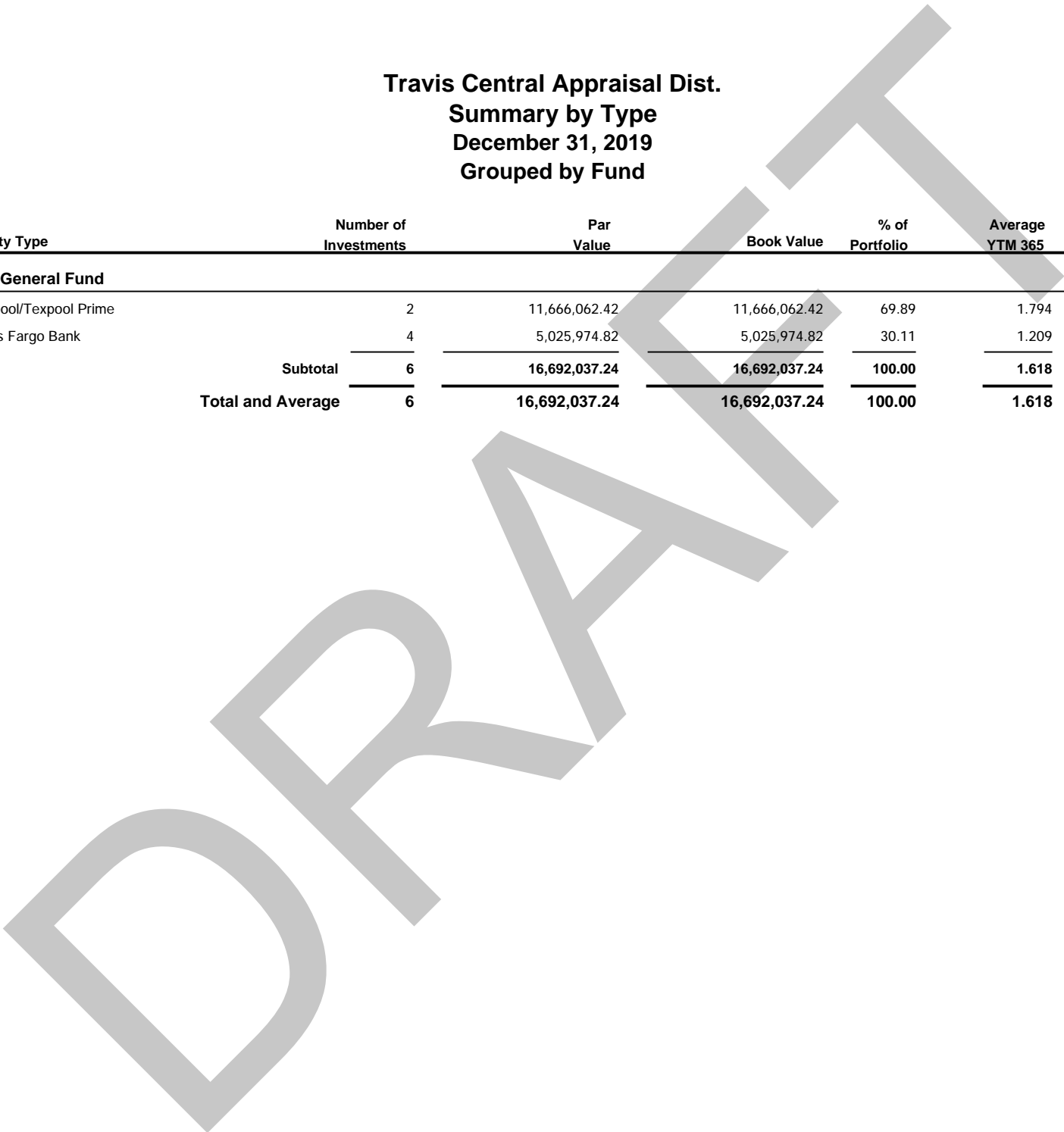
Leana Mann, Director of Operations



**Travis Central Appraisal Dist.
Summary by Type
December 31, 2019
Grouped by Fund**

Patterson & Associates
901 S. MoPac
Suite 195
Austin, TX 78746
-

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	11,666,062.42	11,666,062.42	69.89	1.794	1
Wells Fargo Bank	4	5,025,974.82	5,025,974.82	30.11	1.209	1
Subtotal	6	16,692,037.24	16,692,037.24	100.00	1.618	1
Total and Average	6	16,692,037.24	16,692,037.24	100.00	1.618	1

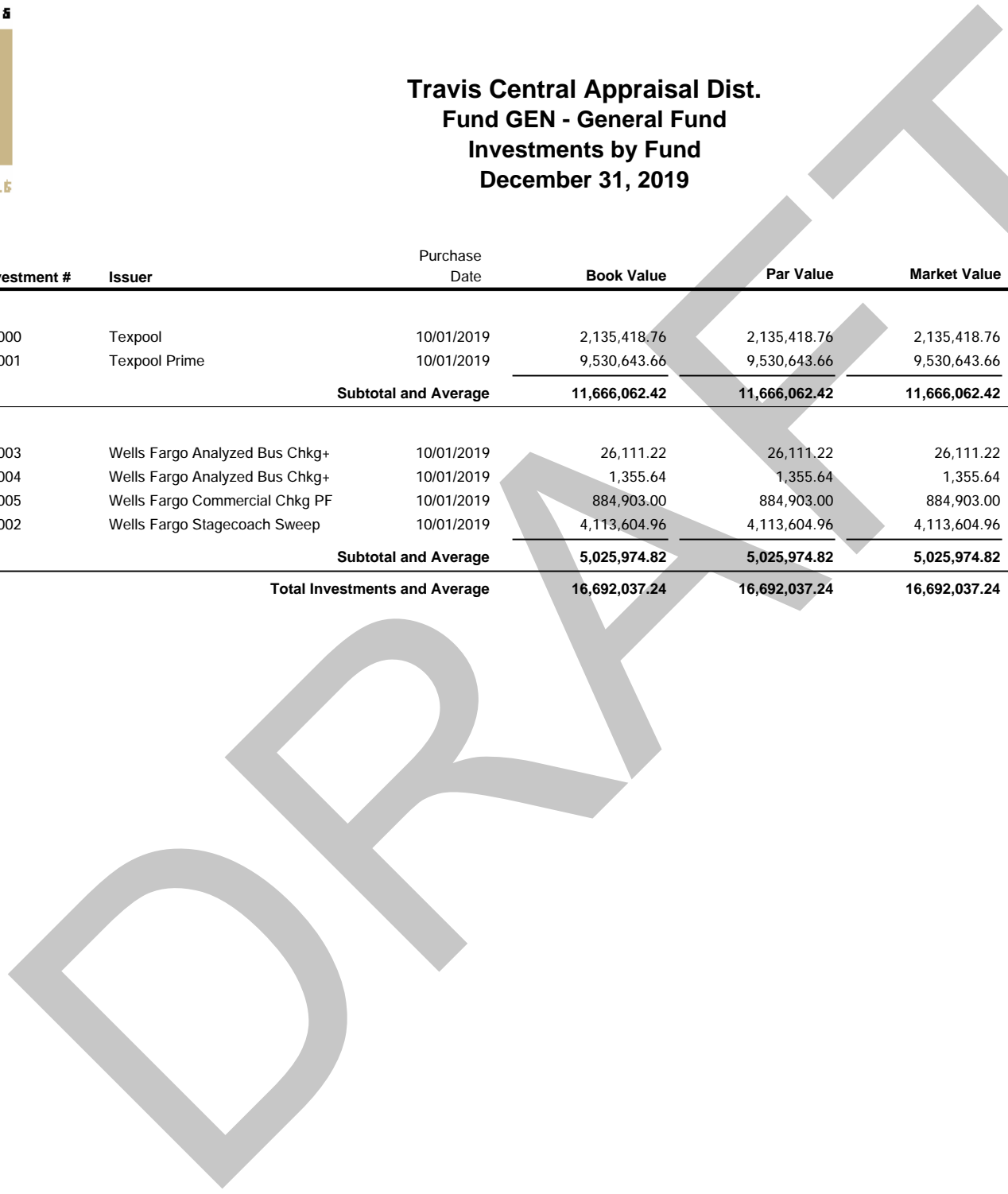




**Travis Central Appraisal Dist.
Fund GEN - General Fund
Investments by Fund
December 31, 2019**

Patterson & Associates
901 S. MoPac
Suite 195
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	2,135,418.76	2,135,418.76	2,135,418.76	1.623	1.600	1.622	1
900001A	10001	Texpool Prime	10/01/2019	9,530,643.66	9,530,643.66	9,530,643.66	1.832	1.807	1.832	1
Subtotal and Average				11,666,062.42	11,666,062.42	11,666,062.42		1.769	1.794	1
Wells Fargo Bank										
90401	10003	Wells Fargo Analyzed Bus Chkg+	10/01/2019	26,111.22	26,111.22	26,111.22	0.170	0.167	0.170	1
88469	10004	Wells Fargo Analyzed Bus Chkg+	10/01/2019	1,355.64	1,355.64	1,355.64	0.170	0.167	0.170	1
88477	10005	Wells Fargo Commercial Chkg PF	10/01/2019	884,903.00	884,903.00	884,903.00				1
8477	10002	Wells Fargo Stagecoach Sweep	10/01/2019	4,113,604.96	4,113,604.96	4,113,604.96	1.476	1.455	1.475	1
Subtotal and Average				5,025,974.82	5,025,974.82	5,025,974.82		1.192	1.209	1
Total Investments and Average				16,692,037.24	16,692,037.24	16,692,037.24		1.595	1.618	1





**Travis Central Appraisal Dist.
Interest Earnings
Sorted by Fund - Fund
December 1, 2019 - December 31, 2019
Yield on Average Book Value**

Patterson & Associates
901 S. MoPac
Suite 195
Austin, TX 78746
-

CUSIP	Investment #	Fund	Security Type	Ending Par Value	Beginning Book Value	Average Book Value	Maturity Date	Current Rate	Annualized Yield	Adjusted Interest Earnings			
										Interest Earned	Amortization/ Accretion	Adjusted Interest Earnings	
Fund: General Fund													
900001	10000	GEN	RRP	2,135,418.76	2,132,479.92	2,132,574.72		1.623	1.623	2,938.84	0.00	2,938.84	
900001A	10001	GEN	RRP	9,530,643.66	9,515,836.97	9,516,314.61		1.832	1.832	14,806.69	0.00	14,806.69	
8477	10002	GEN	RR2	4,113,604.96	2,656,532.93	3,092,295.17		1.476	1.474	3,872.08	0.00	3,872.08	
88469	10004	GEN	RR2	1,355.64	1,355.44	1,355.45		0.170	0.174	0.20	0.00	0.20	
90401	10003	GEN	RR2	26,111.22	17,290.56	24,793.91		0.170	0.170	3.58	0.00	3.58	
88477	10005	GEN	RR2	884,903.00	0.00	28,545.26				0.00	0.00	0.00	
Subtotal				16,692,037.24	14,323,495.82	14,795,879.11				1.721	21,621.39	0.00	21,621.39
Total				16,692,037.24	14,323,495.82	14,795,879.11				1.721	21,621.39	0.00	21,621.39

Travis Central Appraisal District
 Budget-to-Actual
 01 - ARB
 From 1/1/2019 Through 12/31/2019

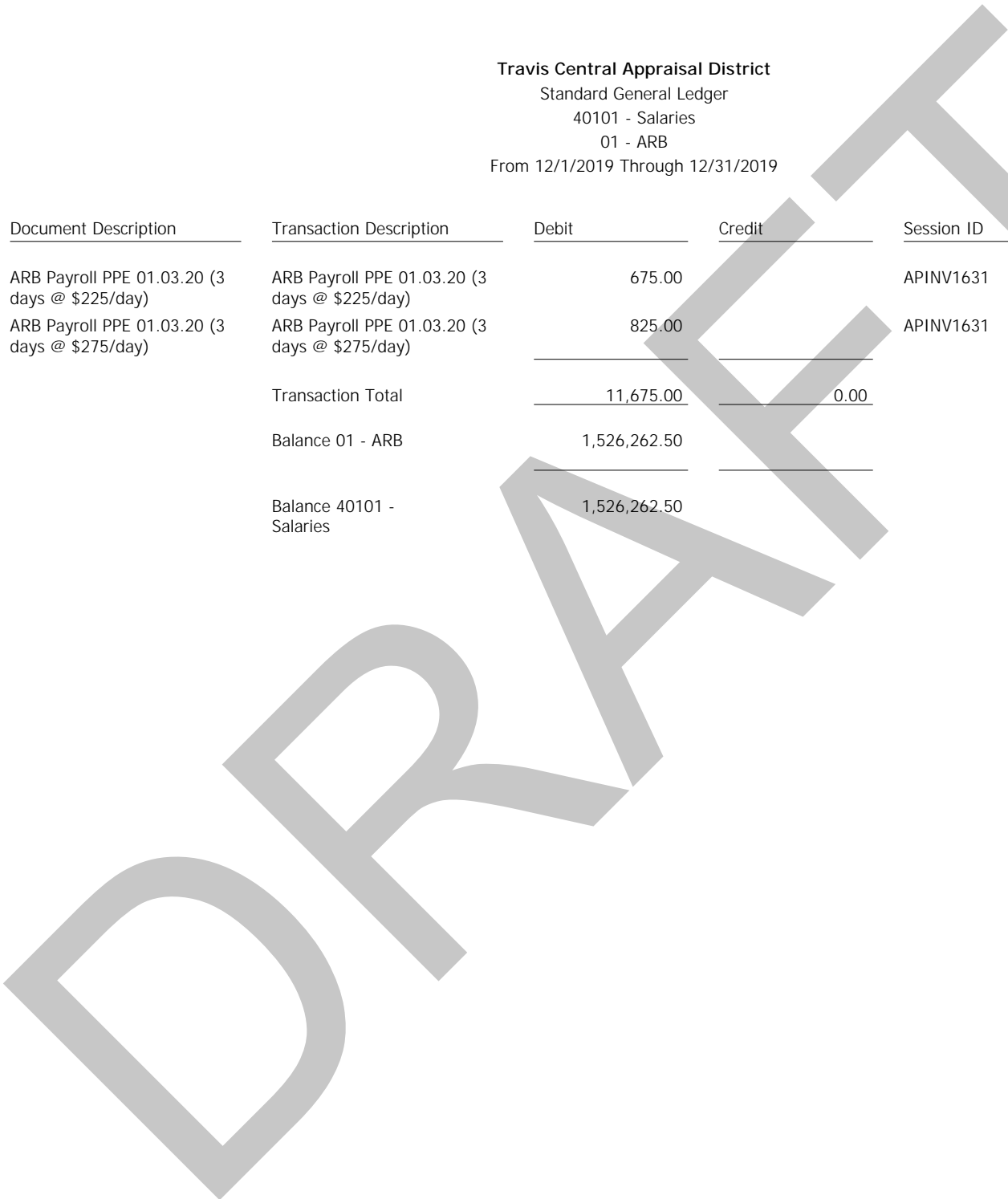
	Budgeted Amount- Total Budget	Budgeted Amount- YTD	Actual	Variance with Final Budget (Over) Under	Percent of Total Budget Remaining
Expenditures					
Payroll Costs					
Salaries	235,675.00	235,675.00	1,526,262.50	(1,290,587.50)	(547.61)%
Total Payroll Costs	235,675.00	235,675.00	1,526,262.50	(1,290,587.50)	(547.61)%
Supplies					
Operating Supplies	500.00	500.00	14,845.03	(14,345.03)	(2,869.01)%
Books/Publ/Subs/Data Bases	825.00	825.00	1,320.00	(495.00)	(60.00)%
Total Supplies	1,325.00	1,325.00	16,165.03	(14,840.03)	(1,120.00)%
Services					
Travel/Meal/Lodging	0.00	0.00	324.00	(324.00)	0.00%
Training & Education	7,500.00	7,500.00	8,890.00	(1,390.00)	(18.53)%
Attorney & Court Costs	12,750.00	12,750.00	22,537.58	(9,787.58)	(76.77)%
Total Services	20,250.00	20,250.00	31,751.58	(11,501.58)	(56.80)%
Total Expenditures	257,250.00	257,250.00	1,574,179.11	(1,316,929.11)	(511.93)%
Excess (Deficiency) of Revenues over (Under) Expenditures	(257,250.00)	(257,250.00)	(1,574,179.11)	(1,316,929.11)	511.93%

Travis Central Appraisal District
 Standard General Ledger
 40101 - Salaries
 01 - ARB
 From 12/1/2019 Through 12/31/2019

Effective Date	Document Description	Transaction Description	Debit	Credit	Session ID	Name
		Opening Balance	1,514,587.50			
12/13/2019	ARB Payroll PPE 12.06.19 (0.5 days @ \$200/day)	ARB Payroll PPE 12.06.19 (0.5 days @ \$200/day)	100.00		APINV1610	Fields, William
12/13/2019	ARB Payroll PPE 12.06.19 (0.5 days @ \$200/day)	ARB Payroll PPE 12.06.19 (0.5 days @ \$200/day)	100.00		APINV1610	Gaines, Teresa A.
12/13/2019	ARB Payroll PPE 12.06.19 (3.5 days @ \$275/day)	ARB Payroll PPE 12.06.19 (3.5 days @ \$275/day)	962.50		APINV1610	Thompson, Betty Lou
12/13/2019	ARB Payroll PPE 12.06.19 (6 days @ \$200/day)	ARB Payroll PPE 12.06.19 (6 days @ \$200/day)	1,200.00		APINV1610	King, Thomas L. Jr.
12/13/2019	ARB Payroll PPE 12.06.19 (7 days @ \$225/day)	ARB Payroll PPE 12.06.19 (7 days @ \$225/day)	1,575.00		APINV1610	Becker, Sara
12/27/2019	ARB Payroll PPE 11.21.19 (8.5 days @ \$225/day)	ARB Payroll PPE 11.21.19 (8.5 days @ \$225/day)	1,912.50		APINV1614	Becker, Sara
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$150/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$150/day)	75.00		APINV1614	Fadel, Med
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	85.00		APINV1614	Contreras, Felix
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	85.00		APINV1614	Ross, Pamela G.
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$170/day)	85.00		APINV1614	Storey, Cordelle B.
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$190/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$190/day)	95.00		APINV1614	Jarman, Eugene
12/27/2019	ARB Payroll PPE 12.20.19 (0.5 days @ \$200/day)	ARB Payroll PPE 12.20.19 (0.5 days @ \$200/day)	100.00		APINV1614	Gaines, Teresa A.
12/27/2019	ARB Payroll PPE 12.20.19 (2 days @ \$200/day)	ARB Payroll PPE 12.20.19 (2 days @ \$200/day)	400.00		APINV1614	Fields, William
12/27/2019	ARB Payroll PPE 12.20.19 (4 days @ \$275/day)	ARB Payroll PPE 12.20.19 (4 days @ \$275/day)	1,100.00		APINV1614	Thompson, Betty Lou
12/27/2019	ARB Payroll PPE 12.20.19 (6.5 days @ \$200/day)	ARB Payroll PPE 12.20.19 (6.5 days @ \$200/day)	1,300.00		APINV1614	King, Thomas L. Jr.
12/31/2019	ARB Payroll PPE 01.03.20 (1 day @ \$200/day)	ARB Payroll PPE 01.03.20 (1 day @ \$200/day)	200.00		APINV1631	Fields, William
12/31/2019	ARB Payroll PPE 01.03.20 (1 day @ \$200/day)	ARB Payroll PPE 01.03.20 (1 day @ \$200/day)	200.00		APINV1631	Gaines, Teresa A.
12/31/2019	ARB Payroll PPE 01.03.20 (3 Days @ \$200/day)	ARB Payroll PPE 01.03.20 (3 Days @ \$200/day)	600.00		APINV1631	King, Thomas L. Jr.

Travis Central Appraisal District
 Standard General Ledger
 40101 - Salaries
 01 - ARB
 From 12/1/2019 Through 12/31/2019

<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>	<u>Session ID</u>	<u>Name</u>
12/31/2019	ARB Payroll PPE 01.03.20 (3 days @ \$225/day)	ARB Payroll PPE 01.03.20 (3 days @ \$225/day)	675.00		APINV1631	Becker, Sara
12/31/2019	ARB Payroll PPE 01.03.20 (3 days @ \$275/day)	ARB Payroll PPE 01.03.20 (3 days @ \$275/day)	825.00		APINV1631	Thompson, Betty Lou
		Transaction Total	<u>11,675.00</u>	<u>0.00</u>		
		Balance 01 - ARB	<u>1,526,262.50</u>			
		Balance 40101 - Salaries	<u>1,526,262.50</u>			



Travis Central Appraisal District
 Standard General Ledger
 40220 - Operating Supplies
 01 - ARB
 From 12/1/2019 Through 12/31/2019

<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>	<u>Session ID</u>	<u>Name</u>
		Opening Balance	14,876.84			
12/18/2019	200 GB Storage for ARB Email	200 GB Storage for ARB Email	3.19		APINV1617	Miscellaneous Ancillary Charges
12/31/2019	To Clear Credit Card Invoices not Billed- 2019	To Clear Credit Card Invoices not Billed- 2019		17.50	APCM0176	Miscellaneous Ancillary Charges
12/31/2019	To Clear Credit Card Invoices not Billed- 2019	To Clear Credit Card Invoices not Billed- 2019		17.50	APCM0176	Miscellaneous Hotels on Credit Card
		Transaction Total	3.19	35.00		
		Balance 01 - ARB	14,845.03			
		Balance 40220 - Operating Supplies	14,845.03			

Travis Central Appraisal District
 Standard General Ledger
 40231 - Books, Publications, Subscriptions & Databases
 01 - ARB
 From 12/1/2019 Through 12/31/2019

<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>	<u>Session ID</u>	<u>Name</u>
		Current Balance	1,320.00			
		Balance 01 - ARB	1,320.00			
		Balance 40231 - Books, Publications, Subscriptions & Databases	1,320.00			

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Travis Central Appraisal District
Standard General Ledger
40320 - Travel, Meals & Lodging
01 - ARB
From 12/1/2019 Through 12/31/2019

<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>	<u>Session ID</u>	<u>Name</u>
		Current Balance	324.00			
		Balance 01 - ARB	324.00			
		Balance 40320 - Travel, Meals & Lodging	324.00			

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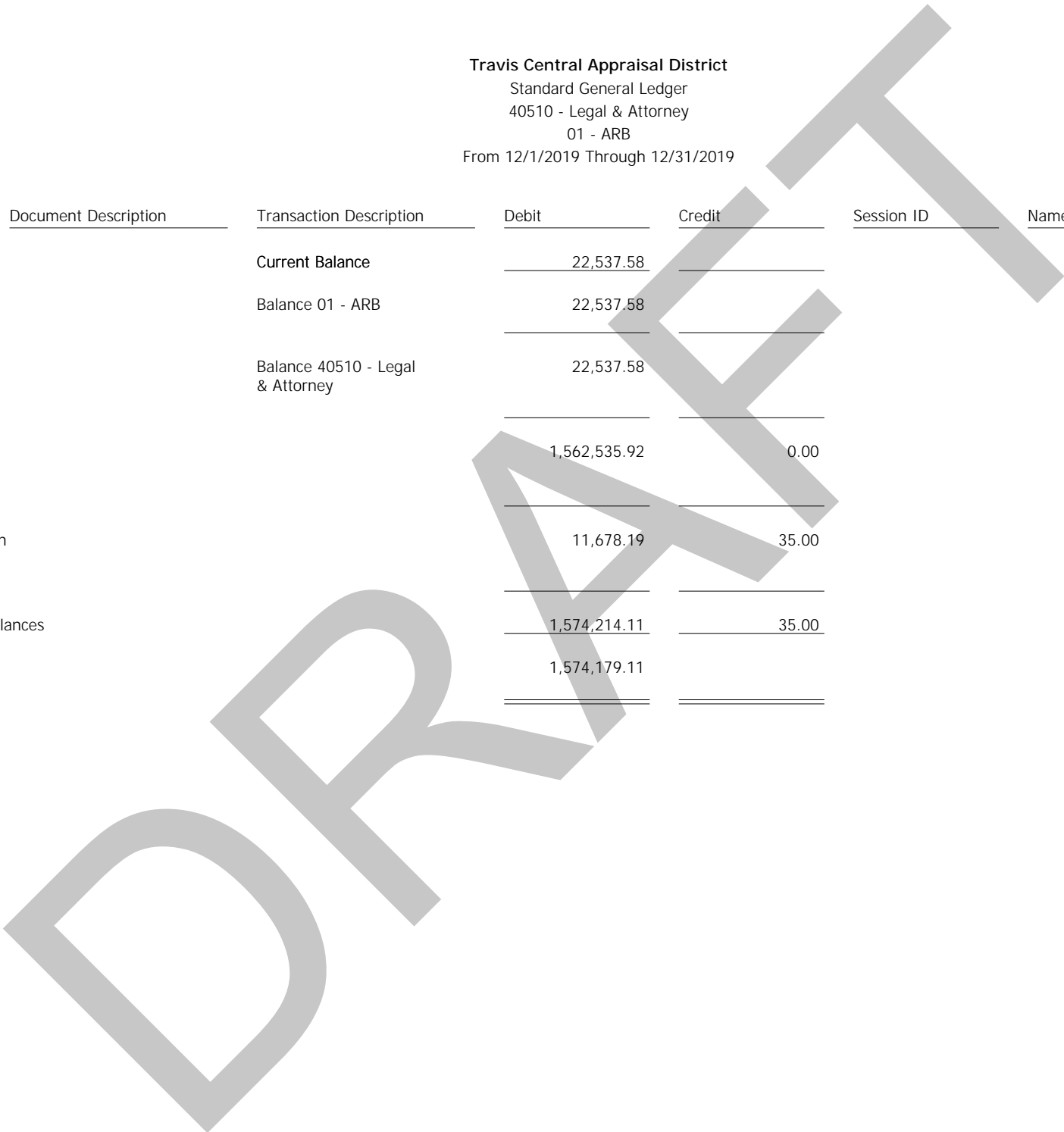
Travis Central Appraisal District
 Standard General Ledger
 40330 - Education & Training
 01 - ARB
 From 12/1/2019 Through 12/31/2019

<u>Effective Date</u>	<u>Document Description</u>	<u>Transaction Description</u>	<u>Debit</u>	<u>Credit</u>	<u>Session ID</u>	<u>Name</u>
		Current Balance	8,890.00			
		Balance 01 - ARB	8,890.00			
		Balance 40330 - Education & Training	8,890.00			

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Travis Central Appraisal District
Standard General Ledger
40510 - Legal & Attorney
01 - ARB
From 12/1/2019 Through 12/31/2019

Effective Date	Document Description	Transaction Description	Debit	Credit	Session ID	Name
		Current Balance	22,537.58			
		Balance 01 - ARB	22,537.58			
		Balance 40510 - Legal & Attorney	22,537.58			
Report Opening/Current Balance			1,562,535.92	0.00		
Report Transaction Totals			11,678.19	35.00		
Report Current Balances			1,574,214.11	35.00		
Report Difference			1,574,179.11			



**Travis Central Appraisal District
Q4 2019 Capital Expenditures**

Date	Vendor	Description	Amount
2/28/2019	Dimensions Floorplans LLC	Measuring & Floorplan Services (850 E Anderson Lane)	\$ 9,081.11
3/20/2019	Revive Technologies, LLC	Cisco 9300 Switch for ARB & Related Maintenance	\$ 11,970.72
4/10/2019	The Westcap Corp.	IT Equipment at 850 E. Anderson Lane (PoE Switches)	\$ 5,000.00
4/15/2019	PrismNet, Ltd.	Fiber Internet Installation- 850 E. Anderson Lane	\$ 1,034.21
4/30/2019	Team Services	A/C Unit #12 Replacement (850 E. Anderson Lane)	\$ 15,550.00
4/30/2019	Terracon Consultants, Inc.	Third Party Air Monitoring Services- Asbestos Remediation	\$ 5,307.50
5/2/2019	Compatico Inc.	ARB Workstations @ 850 E. Anderson Lane (Qty: 40)	\$ 39,952.08
5/16/2019	TAB Products- Austin	Installation of ARB Workstations at 850 E. Anderson Lane	\$ 14,986.00
5/16/2019	CDW-Government, LLC	Cisco Aironet 3802i Wireless Access Points (Qty: 7)	\$ 7,809.20
5/29/2019	Heart of Texas Music, Inc.	ARB Recording Equipment for 850 EAL	\$ 46,808.80
5/31/2019	Amazon, Inc.	HP Laserjet Enterprise 500 Printers (Qty: 3)	\$ 3,792.60
6/3/2019	Dell Marketing, LP	OptiPlex 5260 All-in-One Touch Screen Computers (Qty: 8)	\$ 8,817.52
6/25/2019	Revive Technologies, LLC	Cisco Catalyst 9300 48-port PoE Switch	\$ 7,592.75
7/3/2019	Knight Security Systems, LLC	Door Control Access System for 850 E. Anderson Lane	\$ 18,806.30
7/31/2019	Fox Commercial Services	A/C Replacement- 850 EAL	\$ 7,960.00
8/26/2019	Amazon, Inc.	Synology VDI Backup Solution	\$ 5,190.14
9/5/2019	Amazon, Inc.	Wireless Microphone System for BOD	\$ 1,088.95
9/12/2019	Team Services	Cooling Tower & Boiler Emergency Repairs- Spray Pump, Fan Shaft, Bearings, Spray Pump, HUB, Fan Motor, etc.	\$ 48,565.00
9/13/2019	Team Services	Hose Replacement on A/C WSHP in Waiting Room- 850 EAL	\$ 1,017.50
10/10/2019	Team Services	Compressor Replacement- A/C Unit for Mailroom	\$ 3,250.00
10/31/2019	Team Services	2nd Floor WSHP Repairs (850 EAL)	\$ 5,470.00
11/1/2019	Team Services	Waiting Room WSHP Replacement- 850 EAL	\$ 8,000.00
Total			\$ 277,050.38

AGENDA ITEM

#4E

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

JAMES VALADEZ
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
THERESA BASTIAN
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

TOM BUCKLE
BRUCE ELFANT
ANTHONY NGUYEN
ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA
BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Director of Operations

DATE: February 17, 2020

RE: Agenda Item 4E- Budget Line Item Transfers

I would like to request that the Board of Directors make the following line item transfers to the 2020 budget as presented on the following page. The line item transfers below do not require any additional funds from the taxing jurisdictions, nor will they impact the amount of unspent funds at the end of the year.

Respectfully submitted,

A handwritten signature in cursive script that reads "Leana H. Mann".

Leana H. Mann, CGFO
Director of Operations

Increases

40540	30	Professional Services- Deed Processing Automation	\$	78,300
40540	20	Professional Services- GIS Prof. Services	\$	249,600
				<hr/>
				\$ 327,900

Decreases

40101	30	Salaries	\$	78,300
40101	20	Salaries	\$	249,600
				<hr/>
				\$ 327,900

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AGENDA ITEM

#4F

Personnel Changes:

Name	Action	Date	Job Title	Division	Comments
Tanya Mercado	New Hire	1/31/2020	Team Lead	Appraisal Support	
Anbra Bruce	New Hire	1/31/2020	Property ID Clerk	IT	
Rod Hauserman	Retired	1/31/2020	Appraiser	Residential Appraisal	
John Giampaoli	New Hire	2/3/2020	Appraiser	Residential	
Lance Veillon	New Hire	2/3/2020	Appraiser	Residential	
Jonathan Moon	Separation	2/10/2020	Appraiser	Residential Appraisal	Did not pass Level IV test
Allsion Hicks	New Hire	2/18/2020	Full-Charge Bookkeeper	Admin	
Carly Howard	New Hire	2/24/2020	Appraiser Trainee	Commercial Appraisal	
Joshua Jorgenson	New Hire	2/18/2020	Appraiser Trainee	Commercial Appraisal	
Stefan Marroquin	New Hire	2/18/2020	Appraiser Trainee	Commercial Appraisal	
Andre Nieto	New Hire	2/18/2020	Appraiser	Residential	
Beverly Mills	Resignation	2/19/2020	Research Specialist	Commercial Appraisal	
Jeff Way	New Hire	3/9/2020	Appraiser	Residential Appraisal	
Matthew Martin	New Hire	3/23/2020	Data Analyst	IT	

Current Openings:				
Job Posting #	Date Posted	Position	Division	# of Positions
2020145301-06	1/7/2020	Appraiser	Residential Appraisal	6
2020142301	1/7/2020	BPP Appraiser	Commercial/BPP Appraisal	1
2020131202	2/4/2020	IT Manager	IT	1
	2/19/2020	Commercial Appraiser	Commercial/BPP Appraisal	1
Temp Service	1/10/2020	Customer Service	Customer Service	3
Temp Service	1/10/2020	Clerk	Appraisal Support	4
Temp Service	1/10/2020	Appeals Support Clerk	Admin	2

AGENDA ITEM

#5A

2020 VALUATION

**IMPACT OF MARKET DATA ON APPRAISED VALUES AND THE
PROPERTY VALUE STUDY**



TRAVIS CENTRAL
APPRAISAL DISTRICT

STATUTORY REQUIREMENTS

- The Texas Constitution Article 8 Section 20 states:
 - No property of any kind in this state shall ever be assessed for ad valorem taxes at a greater value than its **fair cash market value** nor shall any Board of Equalization of any governmental or political subdivision or taxing district within this State fix the value of any property for tax purposes at more than its fair cash market value.
- Texas Property Tax Code 23.01 states:
 - Except as otherwise provided by this chapter, all taxable property is appraised **at its market value as of January 1**



STATUTORY REQUIREMENTS

- Texas Property Tax Code 1.04 (7) defines market value as:
 - “**Market value**” means the price at which a property would transfer for cash or its equivalent under prevailing market conditions if:
 - a) exposed for sale in the open market with a reasonable time for the seller to find a purchaser;
 - b) both the seller and the purchaser know of all the uses and purposes to which the property is adapted and for which it is capable of being used and the enforceable restrictions on its use; and
 - c) both the seller and the purchaser seek to maximize their gains and neither is in a position to take advantage of the exigencies of the other



STATUTORY REQUIREMENTS

- ▶ Required to follow International Association of Assessing Officers (IAAO) Standard on Sales Verification
- ▶ Market data sources:
 - ▶ Real Estate Transfer Documents
 - ▶ Sales Verification Questionnaires
 - ▶ Buyers and Sellers
 - ▶ Third-Party Sources



REAL ESTATE TRANSFER DOCUMENTS

▶ Non-Sales Disclosure States

- ▶ Alaska
- ▶ Idaho
- ▶ Kansas
- ▶ Louisiana
- ▶ Mississippi
- ▶ Missouri (some counties)
- ▶ Montana
- ▶ New Mexico
- ▶ North Dakota
- ▶ **Texas**
- ▶ Utah
- ▶ Wyoming



DEEDS AND LAND CONTRACTS

- ▶ Rarely provide sales price information
 - ▶ “.....ten dollars and other valuable consideration”



SALES QUESTIONNAIRES

- ▶ Limited response
 - ▶ Mailed 21,741 sales letters
 - ▶ Received 2,389 responses
- ▶ Reddit – “Don't respond!, toss that shit in the trash. Texas is a non-disclosure state, you are not required to disclose your purchase price. Go to traviscad.org and look up your property and see what the current value is. If you paid less...ok, we know you didn't this is Austin after all, then by all means disclose.”



SALES QUESTIONNAIRES

Was this bought from a relative?

Yes No

Was this foreclosed property?

Yes No

Did this purchase include any personal property (i.e. farm/ranch equipment, vehicles, boats)?

Yes No

List the items of personal property negotiated as part of the sale price

Sex Swing (slightly used)

I paid \$

600

for the land and buildings and

1 BJ

for the personal property.



THIRD PARTY SOURCES

- ▶ **Multiple listing services**
- ▶ Title companies
- ▶ Financial institutions
- ▶ Leasing agencies
- ▶ Property managers
- ▶ Real estate brokers and agencies
- ▶ Government and private fee appraisers
- ▶ Attorneys
- ▶ Appraisal Organizations



CORELOGIC & AUSTIN BOARD OF REALTORS

- ▶ May 8, 2019 Cease and Desist Letter
- ▶ “TCAD must cease and desist unauthorized use of, and attempting to gain access to, the ACTRIS Database. TCAD must discontinue infringing ACTRIS copyrights, inducing third parties to breach their agreements with ACTRIS, and otherwise breaching third party agreements to gain unauthorized access to ACTRIS Database”
- ▶ “ACTRIS does not license the ACTRIS database for establishing property values for tax purposes, nor does ACTRIS grant licenses to any participant, subscriber, or third party to sublicense the ACTRIS database for establishing property values for tax purposes.”



2020 MARKET DATA DEFICIENCY

Tax Year	Real Estate Center Sales	TCAD Sale	
2012	12,086	12,260	101%
2013	14,415	13,963	97%
2014	16,521	14,461	88%
2015	16,199	15,132	93%
2016	16,782	17,460	104%
2017	17,444	17,830	102%
2018	17,954	17,411	97%
2019	18,501	17,709	96%
2020	19,163	2,929	15%
Avg % of sales 2012 thru 2019 -- 98%			
% of sales for 2020 -- 15%			



2020 MARKET DATA DEFICIENCY

- ▶ IAAO standard for Data Quality set forth sampling guidelines
- ▶ 6.1 - “There is a general relationship between statistical reliability and the number of observations in a sample.”
- ▶ 6.3 - “Formulas are available to compute the minimum sample size necessary to produce selected margin of error at a specified level of confidence”.
 - ▶ Confidence Level = 90% (IAAO Standard for Data Quality)
 - ▶ Margin of Error = 10% (IAAO) the Texas Comptroller uses 5% in the Property Value Study.



2020 MARKET DATA DEFICIENCY

- ▶ Travis CAD lacks sufficient sales information to reappraise residential property for tax year 2020.



APRIL ESTIMATES OF VALUE

- ▶ Due to deficient market data residential appraisal models cannot be re-calibrated for 2020.
 - ▶ New construction will be added to the 2020 appraisal roll using the 2019 appraisal valuation models.
 - ▶ Some properties below the homestead limitation will see an increase in assessed value as properties continue to catch up to their cap
 - ▶ Property owners and tax agents will be able to protest property value regardless of whether or not the parcel was reappraised



APRIL ESTIMATES OF VALUE

- Chart shows preliminary 2020 Freeze Adjusted Taxable without appraisal of any property categories.
- New construction is included in the Freeze Taxable values.
- The percentage is the growth attributed to the annual calculation required by Tax Code Section 23.23 (properties catching up to their homestead limitation cap) and does not include new value growth.

	2019 Freeze Taxable	2020 Freeze Taxable	New Value	
AUSTIN ISD	\$ 125,294,763,624	\$ 128,983,483,860	\$ 2,583,287,679	0.9%
COUPLAND ISD	\$ 4,139,255	\$ 4,135,370	\$ -	-0.1%
DEL VALLE ISD	\$ 7,118,245,139	\$ 7,601,932,007	\$ 375,463,606	1.5%
DRIPPING SPRINGS ISD	\$ 8,521,986	\$ 9,735,529	\$ 536,430	7.9%
EANES ISD	\$ 14,314,863,854	\$ 14,743,085,399	\$ 156,577,813	1.9%
ELGIN ISD	\$ 284,156,955	\$ 289,960,610	\$ 1,228,189	1.6%
HAYS CONSOLIDATED ISD	\$ 11,371,513	\$ 11,510,529	\$ 57,206	0.7%
JOHNSON CITY ISD	\$ 9,774,410	\$ 10,528,426	\$ -	7.7%
LAGO VISTA ISD	\$ 1,527,821,573	\$ 1,626,228,113	\$ 98,804,248	0.0%
LAKE TRAVIS ISD	\$ 11,191,776,766	\$ 11,769,253,891	\$ 340,493,493	2.1%
LEANDER ISD	\$ 9,494,769,870	\$ 9,821,738,696	\$ 257,509,856	0.7%
MANOR ISD*	\$ 5,301,876,830	\$ 5,593,271,509	\$ 240,824,019	1.0%
MARBLE FALLS ISD	\$ 467,639,264	\$ 484,718,565	\$ 4,848,057	2.6%
PFLUGERVILLE ISD	\$ 14,935,998,552	\$ 15,735,778,544	\$ 697,000,906	0.7%
ROUND ROCK ISD	\$ 8,698,615,167	\$ 8,809,902,063	\$ 45,503,068	0.8%



APRIL ESTIMATES OF VALUE

- ▶ Travis CAD is still:
 - ▶ Exploring alternative sources for residential market data
 - ▶ Inspecting properties and collecting new construction information
 - ▶ Evaluating commercial market data
 - ▶ Mailing BPP rendition forms
- ▶ April Estimates will be available **March 30th**



PROPERTY VALUE STUDY

- ▶ **2020** is a Property Value Study year for Travis school districts.
- ▶ PTAD has access to ABoR sales data and all sources will be used in the property value study
- ▶ PTAD will not release ABoR data to Travis CAD under PIA request due to confidentiality of sales data
 - ▶ Travis CAD will be tested based on data it has no means of acquiring



PROPERTY VALUE STUDY

- ▶ Generally, the margin of error for determining valid or acceptable values is 5%
- ▶ If the appraised values fall outside of the margin of error it is an “Invalid Finding”
- ▶ If an invalid finding is determined there is a possibility that the school district might qualify for grace period and be held harmless for the purposes of school funding.
- ▶ In grace period local value is assigned rather than state value.



PROPERTY VALUE STUDY

- ▶ Travis school districts can qualify for grace period in 2020 if:
 - ▶ In 2020 the local value is invalid and does not exceed the state value
 - ▶ In 2016 and 2018 the local value was valid
 - ▶ In 2020 the aggregate local value of all studied categories is not less than 90% of the margin of error
 - ▶ This calculates to a margin of error of 14.5% (or overall ratio of no lower than 85.5%)
 - ▶ Travis CAD was in compliance with the scoring requirements of the 2019 MAP review



PROPERTY VALUE STUDY

- ▶ Invalid finding will trigger another property value study in the subsequent year
- ▶ Grace period runs two years and does not reset until the CAD has passed two consecutive PVS studies.



TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

JAMES VALADEZ
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
THERESA BASTIAN
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

TOM BUCKLE
BRUCE ELFANT
ANTHONY NGUYEN
ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA
BLANCA ZAMORA-GARCIA

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

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.

- 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.
 -
- 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

HOMESTEAD EXEMPTIONS

SAVING MONEY ON YOUR PROPERTY TAXES



TRAVIS CENTRAL
APPRAISAL DISTRICT

EXEMPTIONS

An exemption is a deduction from taxable value.

- ▶ Texas offers a variety of partial or complete exemptions from local property tax.
- ▶ Property is taxable unless the owner shows that it meets the legal requirements for an exemption.
- ▶ In most circumstances, property tax exemptions require applications.
- ▶ The deadline for filing an exemption application is **April 30**.
- ▶ Exemptions can be state mandated or local option.



GENERAL RESIDENCE HOMESTEAD

This exemption is for owner-occupied residential properties and:

- ▶ Lowers the taxable value of your property by \$25,000 for school districts.
- ▶ Caps the increase in your property's assessed value to 10% per year.

Other taxing units *may* approve an exemption not to exceed 20%.



GENERAL RESIDENCE HOMESTEAD

A property must:

- ▶ Be designed or adapted for human residence.
- ▶ Be the principal place of residence.

A homeowner must:

- ▶ Own and occupy the property on January 1.
- ▶ Not be claiming a homestead exemption on any other property.
- ▶ File an application by April 30th.



PERSON AGE 65 OR OLDER EXEMPTION

This exemption is for homeowners age 65 or older and:

- ▶ Lowers the taxable value of your property by \$10,000 for school districts.
- ▶ Establishes a tax ceiling that limits school taxes to the amount paid in the year that you first qualified (unless you significantly improve your home).
- ▶ Allows you to transfer the percentage of school taxes paid to another homestead in Texas if you move.



PERSON AGE 65 OR OLDER EXEMPTION

Taxing units other than school districts:

- ▶ May adopt an exemption in a flat amount.
- ▶ May adopt the tax ceiling similar to school districts.

Tax ceilings from non-school district taxing units cannot be transferred if you move.



PERSON AGE 65 OR OLDER EXEMPTION

To qualify:

- ▶ You must be 65 or older.
- ▶ Your property must be your principal place of residence.
- ▶ You cannot claim this exemption on any other property.



PERSON AGE 65 OR OLDER EXEMPTION

Surviving spouses may qualify if:

- ▶ You were 55 years of age or older when your spouse died.
- ▶ Your spouse was receiving this exemption or would have qualified for it the year they died.



DISABLED PERSON EXEMPTION

This exemption may apply if you meet the Social Security Administration's standards for disability, even if you are not receiving disability benefits. It:

- ▶ Lowers the taxable value of your property by \$10,000 for school district taxes.
- ▶ Establishes a tax ceiling that limits school taxes to the amount you paid in the year that you first qualify.



DISABLED PERSON EXEMPTION

Taxing units other than school districts:

- ▶ May adopt an exemption in a flat amount.
- ▶ May adopt the tax ceiling similar to school districts.

You cannot transfer a tax ceiling from a non-school district taxing unit if you move.



DISABLED PERSON EXEMPTION

To qualify:

- ▶ You must have a medically-determined physical or mental impairment.
- ▶ The impairment must prevent you from engaging in any substantial gainful activity.
- ▶ The impairment must be expected to last for at least 12 months or result in death.



DISABLED PERSON EXEMPTION

NEW IN 2020

Surviving spouses may qualify if:

- ▶ You were 55 years of age or older when your spouse died.
- ▶ Your spouse was receiving this exemption the year they died.



NEW IN 2020

Individuals who qualify for the person age 65 or older and the disabled person exemptions may apply for **BOTH** exemptions.

Qualifying individuals may only **claim one** of these exemptions **per taxing unit**, but can choose which to claim.



100% DISABLED VETERAN EXEMPTION

This exemption may apply to a 100% disabled veteran. It:

- ▶ Exempts individuals from taxation of their residence homestead.



100% DISABLED VETERAN EXEMPTION

To qualify, a veteran must:

- ▶ Receive 100% disability compensation due to a service-connected disability AND
- ▶ Have a rating of 100% disabled or of individual unemployability from the Department of Veterans Affairs.

Surviving spouses must:

- ▶ Not be remarried.
- ▶ Continue to own and occupy the property.



DISABLED VETERAN

This exemption may apply to a veteran who is disabled. It:

- ▶ Is determined by the percentage of service-connected disability.
- ▶ May apply to properties that are not residence homesteads.



DISABLED VETERAN

To qualify, a veteran must:

- ▶ Be classified by the Veterans Administration as disabled with a service-connected disability of 10% or more.
- ▶ Be a veteran and Texas resident.

Surviving spouses must:

- ▶ Not be remarried.
- ▶ Be a Texas resident.



SURVIVING SPOUSE

*Of an armed services member killed in action
Of a first responder killed in the line of duty*

These exemptions may apply to a surviving spouse of a member of the U.S. armed services who is killed in action or a surviving spouse of a first responder killed in the line of duty.

These exemptions allow a 100% property tax exemption on a residence homestead.



TO APPLY FOR AN EXEMPTION

- ▶ Complete the required application.
- ▶ Include copies of all required documents.
- ▶ Submit your application to the appraisal district by April 30.

Applying for exemptions is free.



REQUIRED DOCUMENTS

A Texas Drivers License or Texas Identification Card

- ▶ The address must match the address of the property.

If your name is not on the deed, you must provide compelling evidence establishing ownership.



REQUIRED DOCUMENTS

Over Age 65

- ▶ Proof of age – i.e. license, birth certificate

Disabled Person

- ▶ Proof of Disability - Social Security Disability

Disabled Veteran

- ▶ Letter from Veterans Administration

First Responder

- ▶ Letter from Employees Retirement System of Texas



HEIR PROPERTY OWNERS

NEW IN 2020

Heir property owners have new options for proving their eligibility for a homestead exemption.



HEIR PROPERTY OWNERS

Required Documents

- ▶ Affidavit establishing ownership and heirship.
- ▶ Copy of prior property owner's death certificate.
- ▶ Copy of property's most recent utility bill.
- ▶ Citation of any available court records.
- ▶ Affidavit authorizing submission of application.



COMMON CONCERNS

- ▶ If multiple individuals (married couple) are on a deed, only one owner needs to sign the application.
- ▶ You can only receive a homestead exemption on one property in the same year.
- ▶ You may be eligible for multiple exemptions.



COMMON CONCERNS

- ▶ Exemptions reflect the owner of a property on January 1.
- ▶ You may file a late homestead exemption application.



CONTACT US

Travis Central Appraisal District
8314 Cross Park Drive
Austin, TX 78754
www.traviscad.org

Customer Service
512-834-9138
CSInfo@tcadcentral.org





Important Dates

Early October

Tax bills are delivered

December 31

Last day to claim IRS deduction

January 31

Deadline to pay

February 1

Penalty and interest is due

Payment Options

Monthly escrow payments in advance

**Age 65 or older, Disabled or Disabled Veteran
Homesteads**

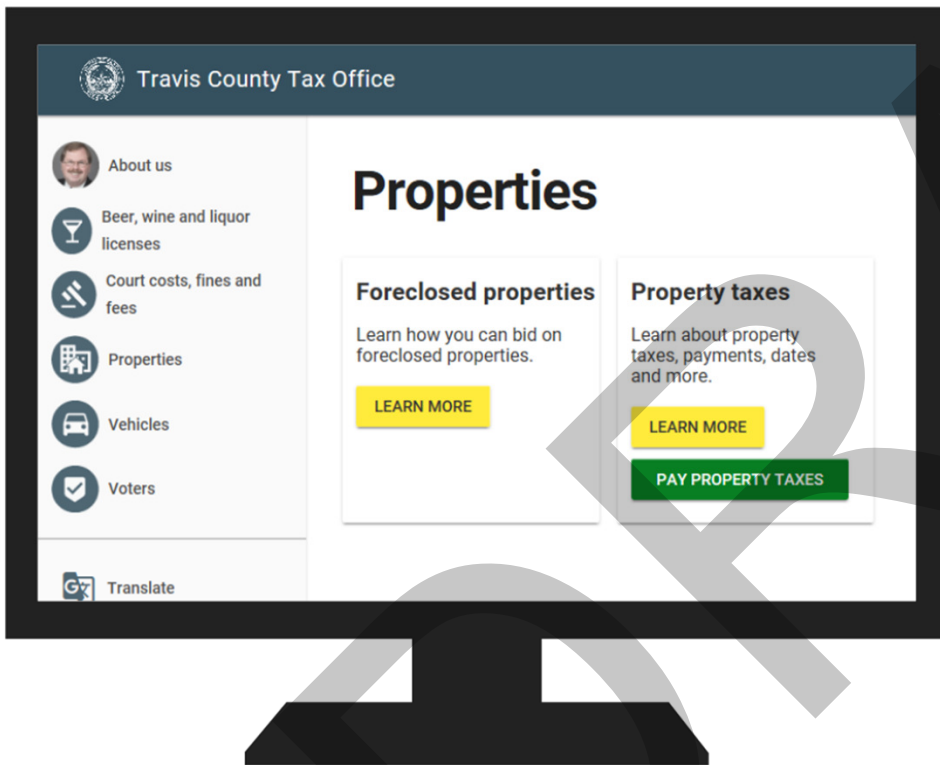
- Pay in four installments with no penalty or interest
- Defer taxes with 5% interest per year

Delinquent payment plans

- Penalty and interest starts at 7% in Feb
- Property will not be foreclosed



Simple. Secure. Fast!



- Sign up for eBill
- Pay online by eCheck for \$1
- Update your mailing address
- Download your receipt
- Apply for a payment plan

Skip the Trip

[TravisCountyTax.org](https://www.TravisCountyTax.org)

2019 ANNUAL REPORT



2/14/2020

Travis Central Appraisal District



DRAFT



A MESSAGE FROM THE CHIEF APPRAISER

It is my pleasure to present the 2019 Annual Report of the Travis Central Appraisal District. This annual report provides general information regarding Texas property tax appraisals as well as Travis Central Appraisal District (Travis CAD) statistics highlighting the results of our appraisal operations, taxpayer assistance, appeals process, financial stewardship, and statistical comparisons from the Property Tax Assistance Division Property Value Study.

My staff and I are committed to providing timely and accurate appraisal services in a manner resulting in fair and equitable treatment for all of Travis County's citizens and property taxpayers. We are very proud to have received Meets All ratings on the Methods and Assistance Program Review conducted by the State Comptrollers Property Tax Assistance Division. I acknowledge and thank my entire staff for this achievement.

Their hard work and dedication resulted in the timely certification of our appraised values to the taxing units. The property taxes generated from these appraisals provide an essential source of revenue to support Travis County, its public schools, cities, and special districts.

The Travis Central Appraisal District strives to be one of the premier governmental organizations in the State of Texas. Our goal is to maximize the level of public service we provide and to serve Travis County with professionalism and integrity in all aspects of our operations.

I thank you for taking the time to review this Annual Report and hope that you will gain insight into the operations of the Travis Central Appraisal District.

Sincerely,

A handwritten signature in black ink, appearing to read "Marya Crigler", written over a light gray rectangular background.

Marya Crigler
Chief Appraiser



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FOREWORD

Texas local units of government rely heavily on property tax to fund their operations. Nearly 4,000 separate taxing jurisdictions statewide impose a property tax; these include counties, school districts, cities, and special-purpose districts such as junior colleges, hospitals, utilities, flood control and emergency service districts.

In addition to property tax, the Texas Constitution and Legislature empower local governments to impose, levy and collect other taxes and fees that supplement their operations.

The Texas Constitution sets out five basic rules for property taxes ⁽²⁾:

- Taxation must be equal and uniform. No single property or type of property should pay more than its fair share.
- Generally, all property must be taxed on its current market value – the price it would sell for when both buyer and seller seek the best price and neither is under pressure to buy or sell. The Texas Constitution provides certain exceptions to this rule, such as the use of “productivity values” for agricultural and timberland. This means that the land is taxed based on the value of what it produces, such as crops and livestock, rather than its sale value. This lowers the tax bill for such land.
- Each property in a county must have a single appraised value. This means that the various local governments to which you pay property taxes cannot assign different values to your property; all must use the same value. This is guaranteed by the use of county appraisal districts.
- All property is taxable unless federal or state law exempts it from the tax. These exemptions may exclude all or part of your property value.
- Property owners have a right to reasonable notice of increases in their appraised property value.

Appraisal districts are political subdivisions of the State responsible for appraising property within county boundaries. Taxing entities use those appraised values to set their ad valorem tax rates and levy property taxes. The governing bodies of taxing units, such as school boards, commissioners’ court, city councils and special purpose district boards of directors, derive the tax rate by dividing the proposed tax levy by the taxable value of property, as provided by the appraisal district. Taxable value is a property’s appraised value minus all applicable exemptions, deductions and limitations. The tax rate is the level of taxation imposed by a taxing unit on taxable property within its boundaries. The local government’s tax assessor applies the tax rate to the taxable value in its jurisdiction to compute the tax due on each property. ⁽¹⁾

1 Texas Comptroller of Public Accounts Biennial Property Tax Report-Tax Years 2014 and 2015, Issued December 2016

2 Texas Comptroller of Public Account – Texas Property Tax System



There are three main parts to the property tax system in Texas:

- An appraisal district in each county sets the value of property each year. A chief appraiser is the chief administrator and operates the appraisal office.
- A citizen board, called the Appraisal Review Board (ARB), hears any disagreements between a property owner and the appraisal district about a property's value.
- Local taxing units—city, county, school and special districts—decide how much money they will spend by adopting a budget. Next, the units set tax rates that will raise the revenue necessary to fund their budgets. The adopted budgets and the tax rates set to fund the budgets determine the total amount of taxes that a person will pay.

The property tax year has four stages: appraising taxable property, protesting the appraised values, adopting the tax rates and collecting the taxes. The following represents a summary of the process.

1. A large part of each appraisal district's job is to estimate what your property is worth on January 1. What a property is used for on January 1, market conditions at that time and who owns the property on that date determine whether the property is taxed, its value and who is responsible for paying the tax. Your appraisal district also processes applications for tax exemptions, agricultural appraisals and other tax relief.
2. Around May 15, the appraisal review board begins hearing protests from property owners who believe their property values are incorrect or who did not get exemptions or agricultural appraisal. When the ARB finishes its work, the appraisal district gives each taxing unit a list of taxable property.
3. In August or September, the elected officials of each taxing unit adopt tax rates for their operations and debt payments. Several taxing units tax your property. Every property is taxed by the county and the local school district. You also may pay taxes to a city and to special districts such as hospital, junior college, water, fire and others.
4. Tax collection starts around October 1 as tax bills go out. Taxpayers have until January 31 of the following year to pay their taxes. On February 1, penalty and interest charges begin accumulating on most unpaid tax bills. Tax collectors may start legal action to collect unpaid taxes on February 1.



PROPERTY TAX CALENDAR

January 1	Appraisal districts are required to appraise property at its value on this date. A lien attaches to each taxable property to ensure property tax payment.
January 1 – April 30	Appraisal districts completes appraisal and processes applications for exemption.
January 31	Taxes due to local taxing units (or county tax assessor, if acting on their behalf)
February 1	Local taxing units begin charging penalty and interest for unpaid tax bills.
April – May	Appraisal districts send notices of appraised value.
May 15	Appraisal review boards begin hearing protests from property owners.
July 25	Appraisal districts certify current appraised values to taxing units.
August – September	Local taxing units adopt tax rates.
October 1	Local taxing units begin sending tax bills to property owners.





ROLE OF THE APPRAISAL DISTRICT

Each Texas county is served by an appraisal district that determines the value of all of the county’s taxable property. Generally, a local government that collects property taxes, such as county, cities and school districts, is a member of the appraisal district. A board of directors appointed by the member governments presides over the appraisal district.



The appraisal district is considered a political subdivision and must follow applicable laws such as Open Meetings and Public Information Acts. Meetings are generally open to the public and information generated by the appraisal district is, in most cases, also available to the public.

The appraisal district board of directors hires a chief appraiser, approves contracts, sets policies, and names members of the appraisal review board. The chief appraiser is the chief administrator of the appraisal district. The chief appraiser may employ and compensate professional, clerical and other personnel as provided by the appraisal district budget. The chief appraiser’s primary duty is to discover, list, review and appraise all taxable property in the appraisal district using generally accepted appraisal techniques.

BOARD MEMBERS	
Theresa Bastin Austin ISD Term Expires 2021	Ryan Steglich Austin ISD Term Expires 2020
Felipe Ulloa City of Austin/Austin ISD Term Expires 2021	Bruce Elfant Travis County Assessor Collector
Bruce Grube Travis County Term Expires 2021	Eleanor Powell City of Austin Term Expires 2020
Tom Buckle West Travis County Term Expires 2020	Anthony Nguyen East Travis County Term Expires 2021
James Valadez Travis County Term Expires 2020	Blanca Zamora Garcia City of Austin Term Expires 2021
CHIEF APPRAISER	
Marya Crigler Appointed: December 2011	



TRAVIS CAD MISSION

The activities of the Travis Central Appraisal District are governed by the Texas Property Tax Code, the laws passed by the legislature, and the administrative rules adopted by the Comptrollers Property Tax Assistance Division.

Our Mission

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

Our Vision

The Travis Central Appraisal District will act in accordance with the highest principals of professional conduct, ethics, accountability, efficiency, openness, skill and integrity. We approach our activities with a deep sense of purpose and responsibility.

Our Values

- **Appraise:** fairly, efficiently, and effectively, balancing the needs of both taxpayers and taxing units by adhering to the Texas Property Tax Code, USPAP, and generally accepted appraisal standards.
- **Educate:** taxpayers of their rights, remedies, and responsibilities.
- **Communicate:** collaboratively with and encourage communication among the taxing units, taxpayer public, and the agency.
- **Service:** Provide exceptional customer service that is accessible, responsive and transparent.
- **Performance:** Demand integrity, accountability and high standards from all staff and strive continuously for excellence and efficiency.

Strategic Goals

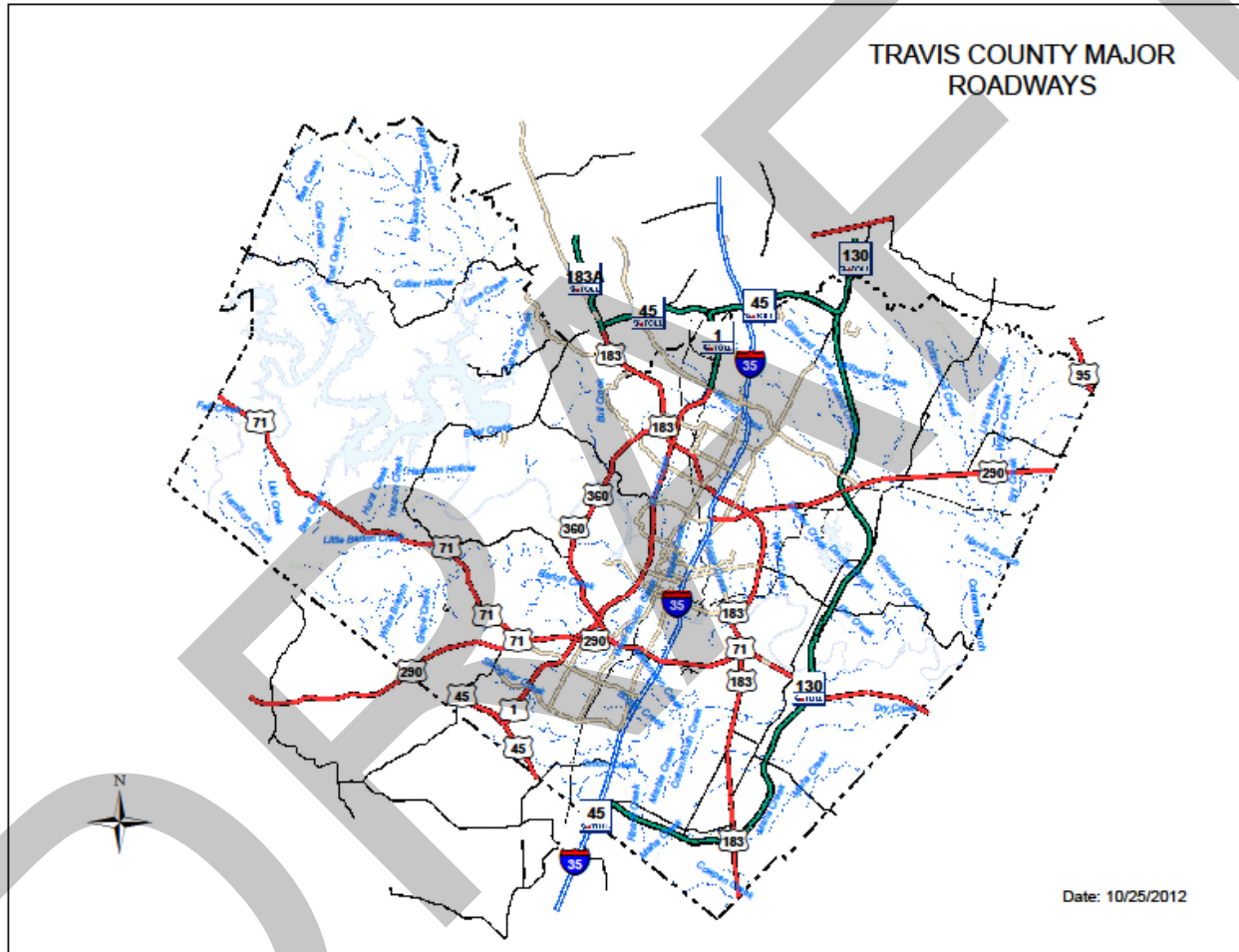
1. *Develop appraisals that reflect market value and ensure fairness and uniformity*
2. *Be efficient in business processes and ensure that mission critical tasks are completed in a timely manner with a high level of accuracy*
3. *Collect, create and maintain accurate data*
4. *Ensure that the district maintains a highly educated, motivated and skilled workforce*
5. *Provide customer service that is courteous, professional and accurate.*



TRAVIS COUNTY DEMOGRAPHICS

Travis County is located in south central Texas astride the Balcones Fault, the boundary between the Edwards Plateau to the west and the Blackland Prairies to the east. Its County seat, Austin, is also the capital of Texas.

Entity ID	Entity Cd	Entity Name	M&O Tax Rate	I&S Tax Rate	Total Tax Rate
1003	03	TRAVIS COUNTY	0.3079	0.0463	0.3542



Travis County Demographic

Established: January 25, 1840
 County Seat: Austin
 2010 Population: 790,390
 2016 Est Population: 1,223,816
 Square Miles: 1,023
 Jurisdictions: 15 Schools,
 21 Cities,
 89 Special Districts



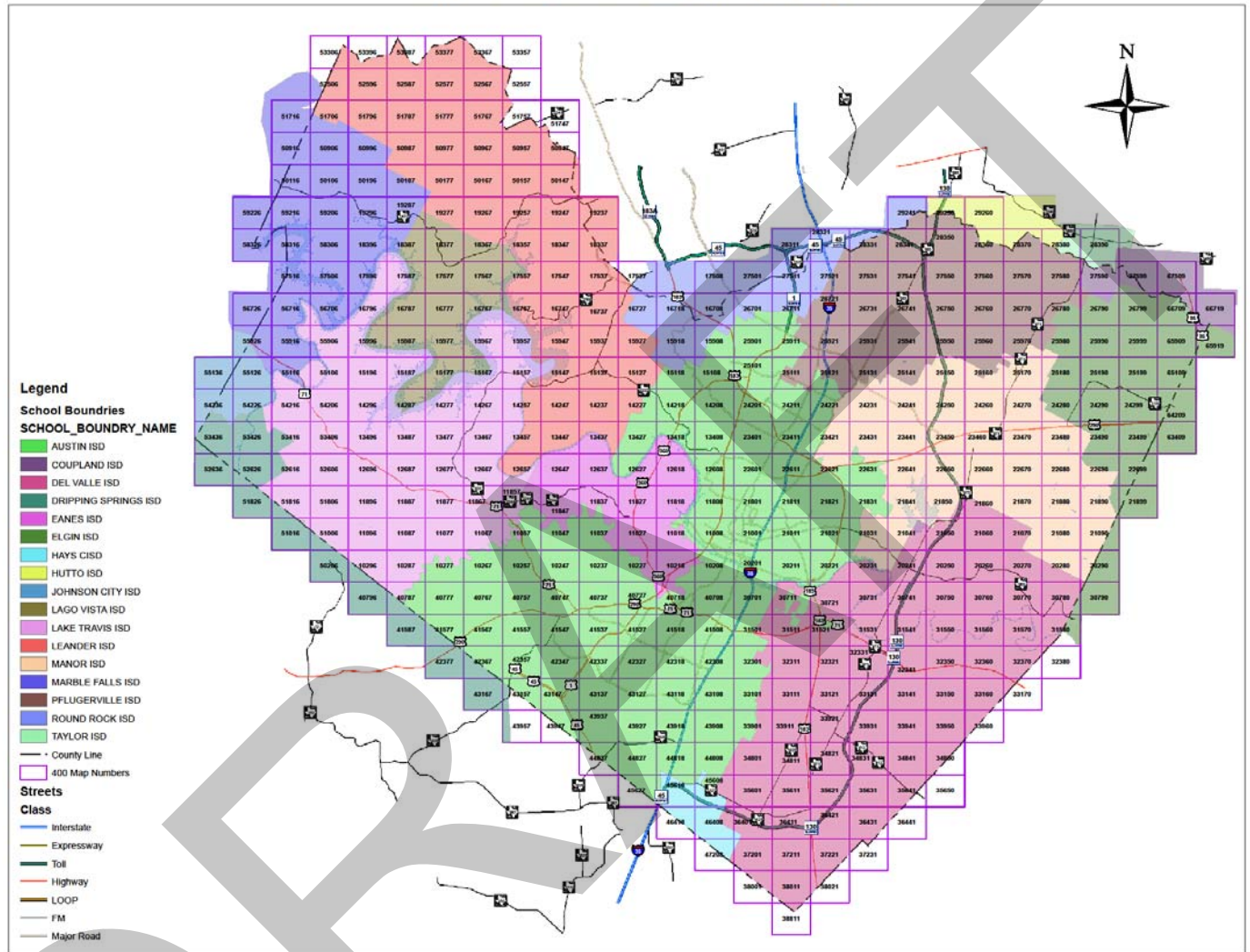
TRAVIS COUNTY SCHOOL DISTRICTS

Travis County has 6 school districts wholly contained within its boundaries and 9 school districts which are shared across county lines. Austin ISD is the largest school district in Travis County and the third largest school district in the State.

Entity ID	Entity Cd	Entity Name	M&O Tax Rate	I&S Tax Rate	Total Tax Rate
1001	01	AUSTIN ISD		0.1130	1.1220
1005	06	DEL VALLE ISD	0.9700	0.3400	1.3100
1006	07	LAKE TRAVIS ISD	0.9900	0.3475	1.3375
1007	08	EANES ISD	0.9900	0.1400	1.1300
1009	1A	HAYS CONSOLIDATED ISD	1.0400	0.4977	1.5377
1023	16	LAGO VISTA ISD	0.9900	0.2600	1.2500
1026	19	PFLUGERVILLE ISD	0.9900	0.4600	1.4500
1027	2A	ELGIN ISD	1.0683	0.4500	1.5183
1037	22	COUPLAND ISD	0.9700	-	0.9700
1042	3A	MARBLE FALLS ISD	0.9833	0.2153	1.1986
1053	34	MANOR ISD	0.9700	0.5000	1.4700
1057	38	DRIPPING SPRINGS ISD	1.1700	0.3500	1.5200
1059	4A	JOHNSON CITY ISD	1.0400	0.0939	1.1339
1072	5A	ROUND ROCK ISD	0.9700	0.2648	1.2348
1098	69	LEANDER ISD	0.9700	0.4675	1.4375



SCHOOL BOUNDARIES





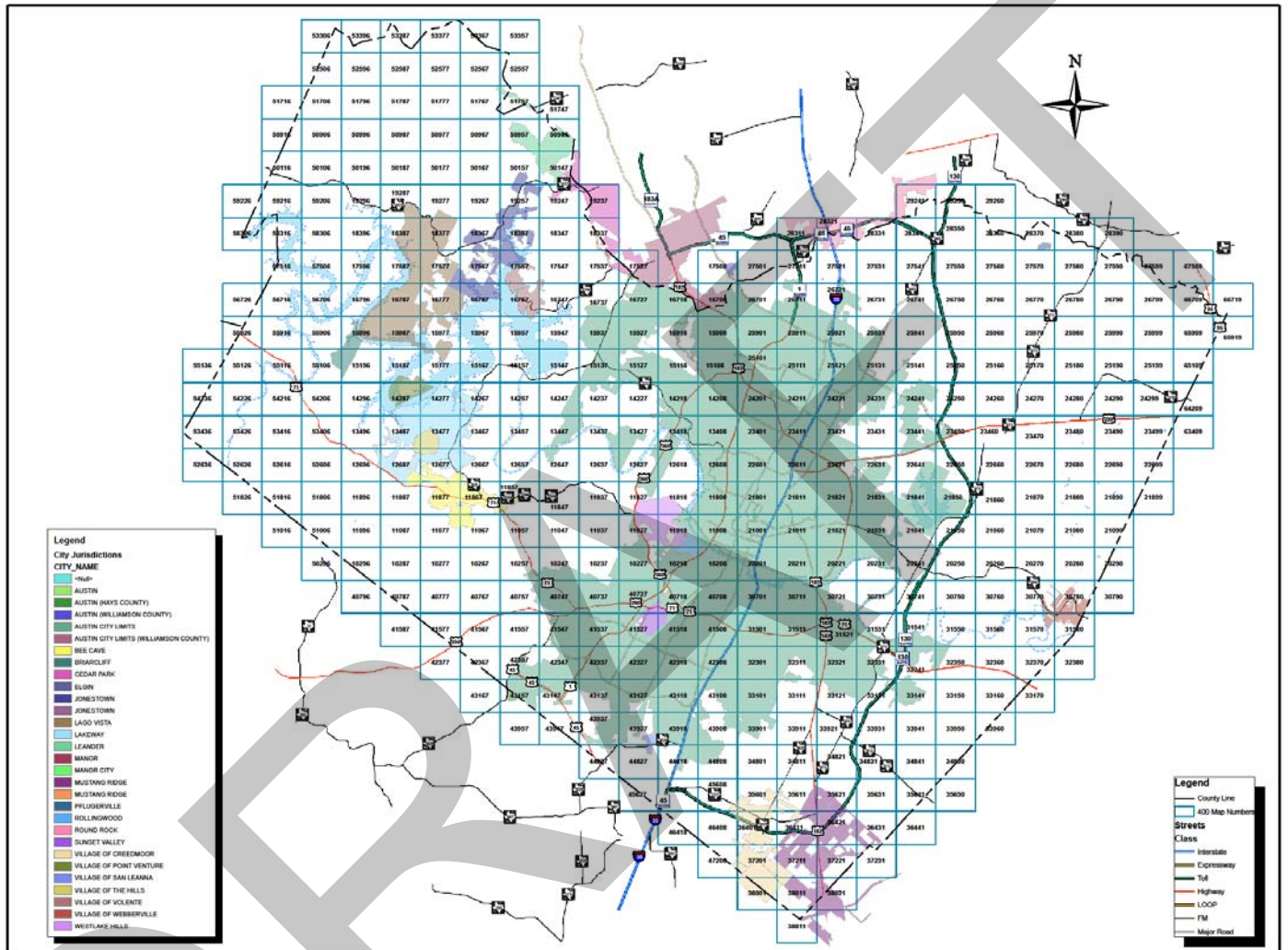
TRAVIS COUNTY CITIES

Travis County has 21 cities within its boundaries including the State capital Austin. Austin is the fourth largest city in the state and the 11th largest metropolitan statistical area in the United States. Residents of the area represent a diverse mixture of government employees, college students and staff, musicians, high-tech workers and business people.

Entity ID	Entity Cd	Entity Name	M&O Tax Rate	I&S Tax Rate	Total Tax Rate
1002	02	CITY OF AUSTIN	0.3337	0.1094	0.4431
1004	05	CITY OF MANOR	0.5845	0.2316	0.8161
1008	09	CITY OF WEST LAKE HILLS	0.0700	-	0.0700
1018	11	CITY OF ROLLINGWOOD	0.1196	0.0892	0.2088
1019	12	VILLAGE OF SAN LEANNA	0.2498	-	0.2498
1020	13	CITY OF SUNSET VALLEY	-	-	-
1031	2F	CITY OF ROUND ROCK	0.3135	0.1255	0.4390
1035	20	CITY OF PFLUGERVILLE	0.3104	0.1872	0.4976
1036	21	CITY OF LAKEWAY	0.1214	0.0431	0.1645
1046	3F	CITY OF CEDAR PARK	0.2393	0.2077	0.4470
1065	40	CITY OF CREEDMOOR	0.3160	-	0.3160
1071	49	CITY OF LAGO VISTA	0.3893	0.2607	0.6500
1075	5F	CITY OF ELGIN	0.4283	0.2286	0.6569
1076	5G	VILLAGE OF VOLENTE	0.0900	-	0.0900
1077	5H	VILLAGE OF WEBBERVILLE	0.0776	0.2297	0.3073
1078	50	CITY OF JONESTOWN	0.4705	0.0951	0.5656
1083	55	VILLAGE OF BRIARCLIFF	0.0542	0.0777	0.1319
1090	6F	CITY OF LEANDER	0.3199	0.2220	0.5419
1096	61	CITY OF MUSTANG RIDGE	0.4375	0.0317	0.4692
1102	7E	VILLAGE OF THE HILLS	0.1000	-	0.1000
1103	7F	VILLAGE OF POINT VENTURE	0.1220	-	0.1220
1122	83	CITY OF BEE CAVE	-	0.0200	0.0200



CITY BOUNDARIES





PROPERTY TAXES AT WORK

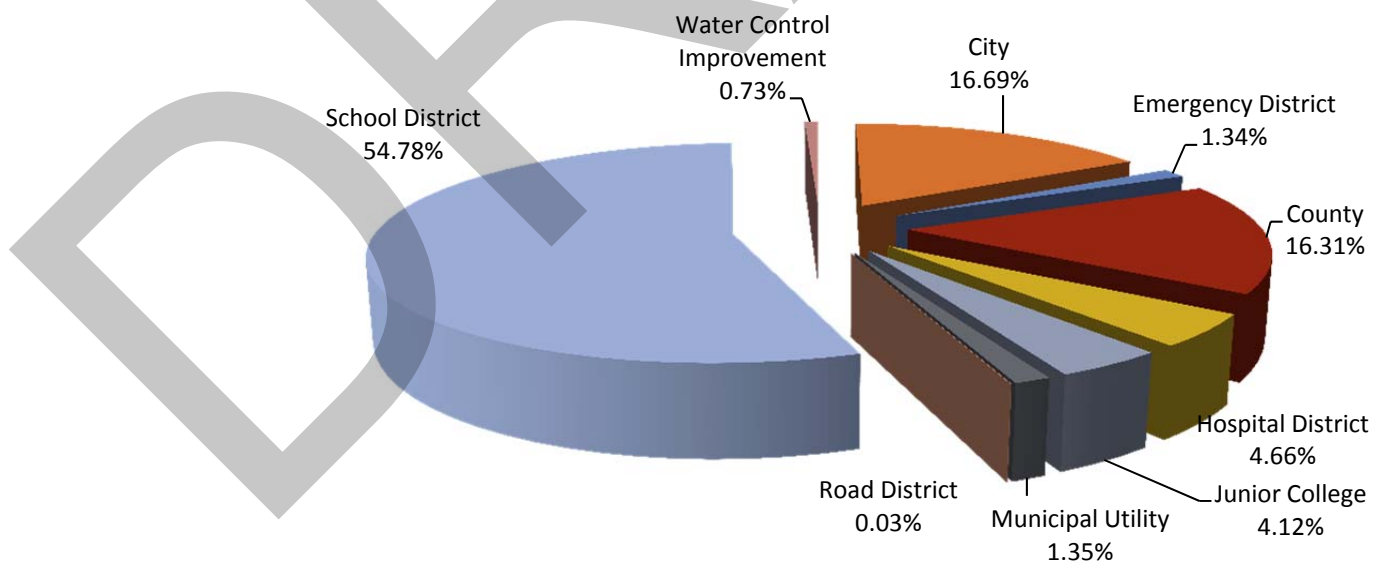
Property taxes are local taxes that are assessed locally, collected locally, and used locally. You pay your property taxes to the local tax collector. The tax collector distributes the funds to schools, cities and other local governments. Local governments spend the funds on schools, roads, hospitals, police departments, fire departments and other programs.



In Travis County property taxes support 131 local government agencies including 21 cities, 17 emergency districts, the county, the hospital district, the junior college, 57 municipal utility districts, 1 road districts, 15 school districts, and 17 water control improvement districts. For 2019 the projected tax levy for all taxing units in Travis County is \$4662,245,608.

DISTRIBUTION OF PROPERTY TAXES

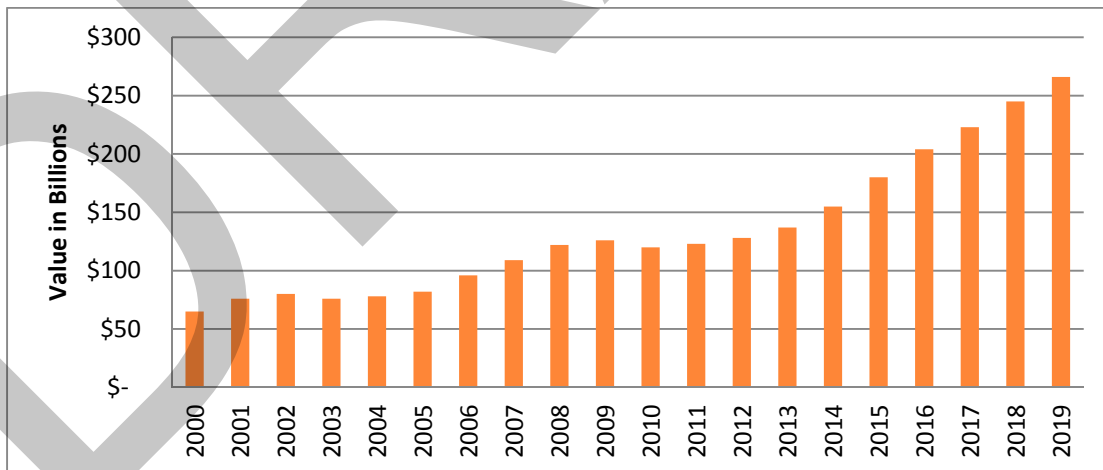
Budget by Taxing Unit Type





2019 was the ninth consecutive year of appraisal roll growth. All sectors experienced growth.

Year	Total Appraisal Roll	Appraisal Roll in Billions	Change from Prior Year	Percent Change
2000	\$ 64,972,923,504	\$ 65	\$ 11,250,139,691	20.94%
2001	\$ 76,239,434,155	\$ 76	\$ 11,266,510,651	17.34%
2002	\$ 79,727,220,411	\$ 80	\$ 3,487,786,256	4.57%
2003	\$ 76,468,299,684	\$ 76	\$ (3,258,920,727)	-4.09%
2004	\$ 77,780,497,021	\$ 78	\$ 1,312,197,337	1.72%
2005	\$ 82,376,017,030	\$ 82	\$ 4,595,520,009	5.91%
2006	\$ 95,938,443,366	\$ 96	\$ 13,562,426,336	16.46%
2007	\$ 108,849,163,598	\$ 109	\$ 12,910,720,232	13.46%
2008	\$ 121,880,175,682	\$ 122	\$ 13,031,012,084	11.97%
2009	\$ 125,920,708,866	\$ 126	\$ 4,040,533,184	3.32%
2010	\$ 120,247,416,959	\$ 120	\$ (5,673,291,907)	-4.51%
2011	\$ 123,196,201,548	\$ 123	\$ 2,948,784,589	2.45%
2012	\$ 128,176,409,480	\$ 128	\$ 4,980,207,932	4.04%
2013	\$ 136,609,794,659	\$ 137	\$ 8,433,385,179	6.58%
2014	\$ 154,513,882,900	\$ 155	\$ 17,904,088,241	13.11%
2015	\$ 179,776,622,324	\$ 180	\$ 25,262,739,424	16.35%
2016	\$ 203,900,582,596	\$ 204	\$ 24,123,960,272	13.42%
2017	\$ 223,147,520,227	\$ 223	\$ 19,246,937,631	9.44%
2018	\$ 245,338,206,315	\$ 245	\$ 41,437,623,719	20.32%
2019	\$ 266,184,989,892	\$ 266	\$ 20,846,783,577	8.50%





CERTIFIED TOTALS REPORT

TRAVIS County			2019 CERTIFIED TOTALS		As of Supplement 6	
Property Count: 449,097			03 - TRAVIS COUNTY		2/14/2020 11:00:27AM	
Grand Totals						
Land			Value			
Homestead:		45,868,496,927				
Non Homestead:		50,130,113,848				
Ag Market:		3,107,464,378				
Timber Market:		196,710				
			Total Land	(+)	99,106,271,863	
Improvement			Value			
Homestead:		81,735,653,138				
Non Homestead:		72,785,575,235				
			Total Improvements	(+)	154,521,228,373	
Non Real			Count	Value		
Personal Property:	43,688	13,645,852,020				
Mineral Property:	5	270,148				
Autos:	0	0				
			Total Non Real	(+)	13,646,122,168	
			Market Value	-	267,273,622,404	
Ag			Non Exempt	Exempt		
Total Productivity Market:	3,040,144,322	67,516,766				
Ag Use:	30,121,251	333,334				
Timber Use:	4,194	0				
Productivity Loss:	3,010,018,877	67,183,432				
			Productivity Loss	(-)	3,010,018,877	
			Appraised Value	-	264,263,603,527	
			Homestead Cap	(-)	4,390,232,852	
			Assessed Value	-	259,873,370,675	
			Total Exemptions Amount (Breakdown on Next Page)	(-)	54,008,112,010	
			Net Taxable	-	205,865,258,665	

APPROXIMATE TOTAL LEVY = NET TAXABLE * (TAX RATE / 100)
760,245,989.68 = 205,865,258,665 * (0.369293 / 100)

Tif Zone Code	Tax Increment Loss
017_3L	1,243,118,737
Tax Increment Finance Value:	1,243,118,737
Tax Increment Finance Levy:	4,590,750.48



TRAVIS County **2019 CERTIFIED TOTALS** As of Supplement 6
 03 - TRAVIS COUNTY
 Property Count: 449,097 Grand Totals 2/14/2020 11:01:05AM

Exemption Breakdown

Exemption	Count	Local	State	Total
CLT	1	33,000	0	33,000
DP	3,897	297,255,446	0	297,255,446
DV1	1,345	0	11,344,524	11,344,524
DV1S	78	0	385,000	385,000
DV2	741	0	6,568,514	6,568,514
DV2S	48	0	360,000	360,000
DV3	951	0	8,932,059	8,932,059
DV3S	39	0	330,000	330,000
DV4	2,522	0	20,567,864	20,567,864
DV4S	305	0	2,112,000	2,112,000
DVCH	2	0	459,427	459,427
DVHS	2,017	0	631,904,274	631,904,274
DVHSS	261	0	88,288,129	88,288,129
EX-XD	57	0	1,944,170	1,944,170
EX-XD (Prorated)	12	0	434,788	434,788
EX-XG	16	0	15,579,070	15,579,070
EX-XI	34	0	128,419,276	128,419,276
EX-XJ	209	0	729,461,871	729,461,871
EX-XJ (Prorated)	4	0	1,119,302	1,119,302
EX-XL	4	0	5,132,272	5,132,272
EX-XO	6	0	92,727	92,727
EX-XR	86	0	6,112,924	6,112,924
EX-XU	43	0	74,586,666	74,586,666
EX-XV	10,859	0	25,761,231,298	25,761,231,298
EX-XV (Prorated)	200	0	177,049,201	177,049,201
EX366	1,588	0	432,726	432,726
FR	261	1,659,002,642	0	1,659,002,642
FRSS	1	0	225,843	225,843
HS	220,000	18,697,288,791	0	18,697,288,791
HT	550	531,902,324	0	531,902,324
LIH	73	0	82,923,293	82,923,293
LVE	2	497,931	0	497,931
MASSS	4	0	1,632,773	1,632,773
OV65	57,375	4,674,522,403	0	4,674,522,403
OV6SS	3,526	279,701,368	0	279,701,368
PC	142	69,158,623	0	69,158,623
SO	4,007	41,119,491	0	41,119,491
Totals		26,250,482,019	27,757,629,991	54,008,112,010



TRAVIS County **2019 CERTIFIED TOTALS** As of Supplement 6
03 - TRAVIS COUNTY
Property Count: 449,097 Grand Totals 2/14/2020 11:01:05AM

State Category Breakdown

State Code	Description	Count	Aores	New Value	Market Value	Taxable Value
A	SINGLE FAMILY RESIDENCE	309,532		\$2,529,385,338	\$130,370,815,584	\$101,435,700,225
B	MULTIFAMILY RESIDENCE	12,999		\$658,502,289	\$31,906,944,824	\$31,649,909,666
C1	VACANT LOTS AND LAND TRACTS	30,116		\$860,271	\$3,303,478,069	\$3,303,127,892
D1	QUALIFIED OPEN-SPACE LAND	4,949	225,210.2448	\$0	\$3,040,132,335	\$29,355,707
D2	IMPROVEMENTS ON QUALIFIED OP	383		\$56,244	\$30,582,468	\$30,397,774
E	RURAL LAND, NON QUALIFIED OPE	5,905	43,882.9341	\$7,940,601	\$1,326,716,331	\$1,193,790,431
F1	COMMERCIAL REAL PROPERTY	14,526		\$1,379,806,815	\$54,402,857,966	\$54,070,620,188
F2	INDUSTRIAL AND MANUFACTURIN	44		\$0	\$804,225,175	\$793,978,075
G1	OIL AND GAS	5		\$0	\$270,148	\$270,148
J1	WATER SYSTEMS	29		\$0	\$13,835,866	\$13,835,866
J2	GAS DISTRIBUTION SYSTEM	10		\$0	\$167,085,549	\$167,085,549
J3	ELECTRIC COMPANY (INCLUDING C	36		\$0	\$200,092,153	\$200,092,153
J4	TELEPHONE COMPANY (INCLUDI	1,353		\$0	\$353,654,434	\$353,446,560
J5	RAILROAD	10		\$0	\$29,824,181	\$29,824,181
J6	PIPELINE COMPANY	126		\$0	\$32,961,844	\$32,890,702
J7	CABLE TELEVISION COMPANY	44		\$0	\$167,388,365	\$167,388,365
J8	OTHER TYPE OF UTILITY	1		\$0	\$16,000,000	\$16,000,000
J9	RAILROAD ROLLING STOCK	2		\$0	\$5,427,176	\$5,427,176
L1	COMMERCIAL PERSONAL PROPE	37,892		\$21,433,134	\$7,823,086,702	\$7,542,273,520
L2	INDUSTRIAL AND MANUFACTURIN	794		\$0	\$4,389,174,745	\$2,953,824,202
M1	TANGIBLE OTHER PERSONAL, MOB	9,972		\$22,540,687	\$230,745,750	\$207,151,744
N	INTANGIBLE PROPERTY AND/OR U	1		\$1,530	\$1,530	\$1,530
O	RESIDENTIAL INVENTORY	10,697		\$701,562,846	\$1,338,579,976	\$1,334,356,170
S	SPECIAL INVENTORY TAX	621		\$0	\$334,510,839	\$334,510,839
X	TOTALLY EXEMPT PROPERTY	12,713		\$168,940,001	\$26,985,230,394	\$0
Totals		269,093.1789		\$5,491,029,756	\$267,273,622,404	\$205,865,258,663



TRAVIS County **2019 CERTIFIED TOTALS** As of Supplement 6
 03 - TRAVIS COUNTY
 Property Count: 449,097 Effective Rate Assumption 2/14/2020 11:01:05AM

New Value

TOTAL NEW VALUE MARKET: \$5,491,029,756
 TOTAL NEW VALUE TAXABLE: \$5,007,545,166

New Exemptions

Exemption	Description	Count		
EX-XG	11.184 Primarily performing charitable functio	5	2018 Market Value	\$4,837,800
EX-XJ	11.21 Private schools	15	2018 Market Value	\$23,408,479
EX-XO	11.254 Motor vehicles for income production a	4	2018 Market Value	\$7,357
EX-XR	11.30 Nonprofit water or wastewater corporati	1	2018 Market Value	\$0
EX-XU	11.23 Miscellaneous Exemptions	5	2018 Market Value	\$14,344,373
EX-XV	Other Exemptions (Including public property, re	730	2018 Market Value	\$387,609,154
EX366	HB366 Exempt	272	2018 Market Value	\$270,889
ABSOLUTE EXEMPTIONS VALUE LOSS				\$430,478,052

Exemption	Description	Count	Exemption Amount
DP	Disability	164	\$12,994,347
DV1	Disabled Veterans 10% - 29%	86	\$570,000
DV1S	Disabled Veterans Surviving Spouse 10% - 29%	2	\$10,000
DV2	Disabled Veterans 30% - 49%	76	\$645,000
DV2S	Disabled Veterans Surviving Spouse 30% - 49%	2	\$15,000
DV3	Disabled Veterans 50% - 69%	116	\$1,204,000
DV3S	Disabled Veterans Surviving Spouse 50% - 69%	6	\$50,000
DV4	Disabled Veterans 70% - 100%	255	\$2,886,627
DV4S	Disabled Veterans Surviving Spouse 70% - 100%	13	\$120,000
DVHS	Disabled Veteran Homestead	271	\$62,462,791
DVHSS	Disabled Veteran Homestead Surviving Spouse	25	\$8,071,161
HS	Homestead	10,625	\$913,890,185
OV65	Over 65	5,013	\$410,837,986
OV65S	OV65 Surviving Spouse	280	\$21,890,355
PARTIAL EXEMPTIONS VALUE LOSS			\$1,435,647,452
NEW EXEMPTIONS VALUE LOSS			\$1,866,125,504

Increased Exemptions

Exemption	Description	Count	Increased Exemption Amount
INCREASED EXEMPTIONS VALUE LOSS			
TOTAL EXEMPTIONS VALUE LOSS			\$1,866,125,504

New Ag / Timber Exemptions

2018 Market Value \$3,386,642 Count: 19
 2019 Ag/Timber Use \$28,652
NEW AG / TIMBER VALUE LOSS \$3,357,990

New Annexations

New Deannexations



TRAVIS County		2019 CERTIFIED TOTALS		As of Supplement 6
03 - TRAVIS COUNTY				
Average Homestead Value				
Category A and E				
Count of HS Residences	Average Market	Average HS Exemption	Average Taxable	
216,259	\$453,138	\$105,783	\$347,355	
Category A Only				
Count of HS Residences	Average Market	Average HS Exemption	Average Taxable	
215,389	\$453,661	\$105,846	\$347,815	
Lower Value Used				
Count of Protected Properties	Total Market Value	Total Value Used		
149	\$55,509,331.00	\$44,876,490		

DRAFT



All Jurisdiction Certified Values

EntityID	Entity_Name	EntityType	Market	NetTaxable
1138	ACC DIST - WMSN CO	J	\$ 391,853	\$ 391,853
1439214	ANDERSON MILL LIMITED DISTRICT	M	\$ 17,356,282	\$ 13,857,156
1097	AUSTIN COMM COLL DIST	J	\$ 222,155,294,097	\$ 182,923,975,497
1001	AUSTIN ISD	S	\$ 166,873,904,741	\$ 138,061,722,450
1124	AUSTIN MUD NO 1	M	\$ 572,261,878	\$ 552,994,598
1125	AUSTIN MUD NO 2	M	\$ 467,214,865	\$ 454,037,039
1126	AUSTIN MUD NO 3	M	\$ 171,546,950	\$ 150,584,346
1364190	BASTROP-TRAVIS COUNTIES ESD NO 1	E	\$ 294,624,552	\$ 203,913,215
1329420	BELVEDERE MUD	M	\$ 207,476,472	\$ 207,053,470
1636026	CASCADES MUD NO 1	M	\$ 1,933,297	\$ 894,130
1150	CIRCLE C MUD NO 3	M	\$ 175,000	\$ 87
1002	CITY OF AUSTIN	C	\$ 196,343,999,759	\$ 157,880,603,576
1122	CITY OF BEE CAVE	C	\$ 2,765,889,062	\$ 2,348,720,469
1046	CITY OF CEDAR PARK	C	\$ 1,205,693,445	\$ 1,108,192,632
1065	CITY OF CREEDMOOR	C	\$ 110,056,829	\$ 74,541,105
1075	CITY OF ELGIN	C	\$ 155,530,605	\$ 96,357,173
1078	CITY OF JONESTOWN	C	\$ 594,471,562	\$ 503,003,251
1071	CITY OF LAGO VISTA	C	\$ 1,250,201,924	\$ 1,045,261,459
1036	CITY OF LAKEWAY	C	\$ 5,302,168,894	\$ 5,013,787,162
1090	CITY OF LEANDER	C	\$ 1,413,180,783	\$ 1,357,491,022
1004	CITY OF MANOR	C	\$ 1,139,810,433	\$ 957,922,517
1096	CITY OF MUSTANG RIDGE	C	\$ 120,786,196	\$ 85,837,856
1035	CITY OF PFLUGERVILLE	C	\$ 7,417,234,372	\$ 6,261,365,476
1018	CITY OF ROLLINGWOOD	C	\$ 1,076,690,234	\$ 1,033,403,096
1031	CITY OF ROUND ROCK	C	\$ 615,946,203	\$ 509,070,683
1020	CITY OF SUNSET VALLEY	C	\$ 489,616,544	\$ 444,776,391
1008	CITY OF WEST LAKE HILLS	C	\$ 2,621,570,669	\$ 2,311,926,055
1594404	COMMUNITY LAND TRUST	RO	\$ 150,966	\$ 88,216
1015	COTTONWD CREEK MUD NO 1	M	\$ 233,693,455	\$ 208,889,446
1037	COUPLAND ISD	S	\$ 17,437,098	\$ 5,134,535
1016	CYPRESS RANCH WCID NO 1	W	\$ 179,139,577	\$ 177,318,275
1005	DEL VALLE ISD	S	\$ 9,806,988,622	\$ 7,323,098,327
1028	DOWNTOWN PUB IMP DIST	P	\$ 13,705,139,522	\$ 10,898,435,923
1057	DRIPPING SPRINGS ISD	S	\$ 79,160,795	\$ 11,933,366
1049	E SIXTH ST PUB IMP DIST	P	\$ 665,438,759	\$ 663,084,340
1007	EANES ISD	S	\$ 18,906,122,057	\$ 17,118,165,980
1027	ELGIN ISD	S	\$ 592,770,427	\$ 316,708,768
1559173	ELGIN TIRZ #1	T	\$ 7,407,313	\$ 7,325,549
1671480	ESTANCIA HILL COUNTRY PID	P	\$ 151,311,885	\$ 139,109,255
1009	HAYS CONSOLIDATED ISD	S	\$ 30,825,207	\$ 11,752,607
1675215	HOMESTEAD PRESERVATION REINVESTMENT ZONE 1	T	\$ 6,518,095,913	\$ 4,930,734,450
1039	HURST CREEK MUD	M	\$ 665,539,722	\$ 520,668,265
1607165	INDIAN HILLS PID	P	\$ 1,296,795	\$ 191,435



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1059	JOHNSON CITY ISD	S	\$ 65,262,541	\$ 12,686,330
1306817	KELLY LANE WCID NO 1	W	\$ 243,666,468	\$ 235,097,021
1306818	KELLY LANE WCID NO 2	W	\$ 184,796,153	\$ 180,552,279
1023	LAGO VISTA ISD	S	\$ 2,376,009,541	\$ 1,868,064,911
1814277	LAGOS PID	P	\$ 6,765,809	\$ 5,699,856
1761821	LAKE POINTE MUD	M	\$ 590,912,522	\$ 554,125,559
1089	LAKE POINTE MUD NO 3 (DA)	M	\$ 289,010,173	\$ 265,507,683
1101	LAKE POINTE MUD NO 5 (DA)	M	\$ 301,660,401	\$ 288,205,671
1006	LAKE TRAVIS ISD	S	\$ 16,636,630,637	\$ 13,076,551,066
1332603	LAKESIDE MUD NO 3	M	\$ 223,927,335	\$ 217,598,473
1131	LAKESIDE WCID NO 1	W	\$ 165,772,425	\$ 162,610,794
1134	LAKESIDE WCID NO 2A	M	\$ 74,251,494	\$ 71,831,726
1135	LAKESIDE WCID NO 2B	W	\$ 147,155,986	\$ 144,341,401
1136	LAKESIDE WCID NO 2C	W	\$ 261,483,573	\$ 244,100,663
1137	LAKESIDE WCID NO 2D	W	\$ 216,629,371	\$ 209,131,251
1040	LAKEWAY MUD	M	\$ 1,409,330,622	\$ 1,369,156,461
1397701	LAZY NINE MUD NO 1A	M	\$ 24,884,109	\$ 18,548,110
1397702	LAZY NINE MUD NO 1B	M	\$ 381,555,218	\$ 375,439,606
1397703	LAZY NINE MUD NO 1C	M	\$ 208,935	\$ 992
1397704	LAZY NINE MUD NO 1D	M	\$ 163,725	\$ 777
1397705	LAZY NINE MUD NO 1E	M	\$ 10,189,458	\$ 48,366
1098	LEANDER ISD	S	\$ 12,203,439,745	\$ 10,719,319,181
1599645	LONE STAR RAIL DISTRICT	T	\$ 6,161,835,268	\$ 5,860,520,614
1685385	LOST CREEK LIMITED DISTRICT	M	\$ 1,144,404,964	\$ 1,112,312,815
1041	LOST CREEK MUD	M	\$ -	\$ -
1053	MANOR ISD	S	\$ 8,345,061,772	\$ 5,510,692,906
1042	MARBLE FALLS ISD	S	\$ 927,782,396	\$ 607,029,662
1099	MOORES CROSSING MUD	M	\$ 196,675,416	\$ 179,912,215
1127	NE TCRD DIST NO 4 (WELLS PT)	R	\$ 291,494,436	\$ 247,033,584
1111	NE TRAVIS CO ROAD DIST NO 2	R	\$ 1,342,578,258	\$ 1,143,156,359
1033	NE TRAVIS CO UTILITY DIST	M	\$ 339,159,940	\$ 329,291,153
1396104	NORTH AUSTIN MUD NO 1	M	\$ 132,646,884	\$ 126,136,986
1123	NORTHTOWN MUD	M	\$ 1,023,792,619	\$ 801,677,261
1113	NW TR CO RD DIST 3 GLDN TRI	R	\$ 802,309,254	\$ 802,288,252
1636256	ONION CREEK METRO PARK DIST	M	\$ 83,353,093	\$ 56,913,853
1026	PFLUGERVILLE ISD	S	\$ 19,680,256,631	\$ 16,025,638,931
1672423	PILOT KNOB MUD NO 1	M	\$ 1,686,413	\$ 676,895
1604242	PILOT KNOB MUD NO 2	M	\$ 2,852,761	\$ 2,852,761
1597862	PILOT KNOB MUD NO 3	M	\$ 119,840,273	\$ 116,476,807
1597864	PILOT KNOB MUD NO 4	M	\$ 1,907,952	\$ 357,359
1636020	PILOT KNOB MUD NO 5	M	\$ 1,855,960	\$ 909,819
1332144	PRESIDENTIAL GLEN MUD	M	\$ 224,594,863	\$ 218,575,893
1506857	REINVESTMENT ZONE # 1 CITY OF PFLUG	T	\$ 382,251,274	\$ 329,364,895
1761831	RIVER PLACE LIMITED DISTRICT	M	\$ 768,387,101	\$ 683,606,143
1087	RIVER PLACE MUD	M	\$ -	\$ -
1318757	RMMA REUSE & REDEVELOPMENT	T	\$ 1,948,991,166	\$ 1,713,582,944
1116	RNCH @ CYPRSS CRK MUD 1	M	\$ 111,295,993	\$ 108,377,312
1072	ROUND ROCK ISD	S	\$ 10,773,513,487	\$ 9,697,969,913



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1607163	SEAHOLM TIF	T	\$ 420,381,520	\$ 397,234,293
1074	SENNA HILLS MUD	M	\$ 319,636,283	\$ 318,354,873
1052	SHADY HOLLOW MUD	M	\$ 422,642,919	\$ 409,211,212
1676767	SOUTH CONGRESS PID	P	\$ 161,118,248	\$ 139,279,036
1558193	SOUTHEAST TRAVIS COUNTY MUD NO 1	M	\$ 14,551,986	\$ 13,718,620
1558195	SOUTHEAST TRAVIS COUNTY MUD NO 2	M	\$ 2,523,156	\$ 80,744
1636027	SOUTHEAST TRAVIS COUNTY MUD NO 3	M	\$ 3,398,346	\$ 117,224
1636028	SOUTHEAST TRAVIS COUNTY MUD NO 4	M	\$ 2,280,344	\$ 32,244
1373279	SUNFIELD MUD NO 1	M	\$ 238,963	\$ 171,322
1373280	SUNFIELD MUD NO 2	M	\$ 1,696,378	\$ 137,182
1373281	SUNFIELD MUD NO 3	M	\$ 302,485	\$ 9,885
1082	SW TRAVIS CO RD DIST NO 1	R	\$ 2,483,401,241	\$ 2,319,326,636
1013	TANGLEWD FOREST LTD DIST	M	\$ 507,014,986	\$ 453,243,316
1772331	TESSERA ON LAKE TRAVIS PID (IMP AREA #1)	A	\$ 68,508,589	\$ 66,501,370
1772333	TESSERA ON LAKE TRAVIS PID (IMP AREA #2)	A	\$ 7,834,334	\$ 7,414,658
1698761	TESSERA ON LAKE TRAVIS PID (MIA)	P	\$ 5,513,383	\$ 1,456,940
1000	TRAVIS CENTRAL APP DIST	A	\$ 268,313,018,548	\$ 232,877,403,338
1014	TRAVIS CO BCCP	M	\$ 12,242,732,380	\$ 10,049,590,972
1389381	TRAVIS CO BEE CAVE ROAD DIST NO 1	R	\$ 466,468,797	\$ 457,763,724
1066	TRAVIS CO ESD NO 1	E	\$ 3,739,861,776	\$ 3,145,554,692
1086	TRAVIS CO ESD NO 10	E	\$ 2,464,373,423	\$ 2,225,952,122
1079	TRAVIS CO ESD NO 11	E	\$ 2,118,992,229	\$ 1,594,894,502
1108	TRAVIS CO ESD NO 12	E	\$ 3,335,509,353	\$ 2,575,961,632
1332608	TRAVIS CO ESD NO 13	E	\$ 206,681,909	\$ 84,240,803
1107	TRAVIS CO ESD NO 14	E	\$ 757,052,504	\$ 587,222,810
1727173	TRAVIS CO ESD NO 15	E	\$ 2,124,222,028	\$ 1,595,015,291
1807956	TRAVIS CO ESD NO 16	E	\$ 2,784,095,564	\$ 2,245,874,949
1129	TRAVIS CO ESD NO 2	E	\$ 15,173,178,656	\$ 13,189,015,709
1011	TRAVIS CO ESD NO 3	E	\$ 3,864,438,125	\$ 3,508,671,588
1085	TRAVIS CO ESD NO 4	E	\$ 2,824,909,191	\$ 2,426,676,437
1084	TRAVIS CO ESD NO 5	E	\$ 1,747,857,012	\$ 1,573,260,774
1080	TRAVIS CO ESD NO 6	E	\$ 17,838,367,260	\$ 16,584,510,735
1010	TRAVIS CO ESD NO 7	E	\$ 3,250,753,518	\$ 2,788,622,481
1112	TRAVIS CO ESD NO 8	E	\$ 3,032,762,407	\$ 2,511,363,816
1058	TRAVIS CO ESD NO 9	E	\$ 8,845,405,215	\$ 8,158,975,198
1635977	TRAVIS CO IMPROVEMENT DIST NO 1	P	\$ 18,408,207	\$ 10,673,471
1062	TRAVIS CO MUD NO 10	M	\$ 117,276,796	\$ 106,267,466
1274977	TRAVIS CO MUD NO 11	M	\$ 336,966,750	\$ 332,039,149
1274978	TRAVIS CO MUD NO 12	M	\$ 210,663,099	\$ 205,938,117
1274981	TRAVIS CO MUD NO 13	M	\$ 209,158,080	\$ 207,984,129
1047	TRAVIS CO MUD NO 14	M	\$ 135,189,293	\$ 121,854,582
1091	TRAVIS CO MUD NO 15	M	\$ 639,928,856	\$ 561,195,152
1396736	TRAVIS CO MUD NO 16	M	\$ 225,793,056	\$ 221,827,108
1574082	TRAVIS CO MUD NO 17	M	\$ 110,737,225	\$ 108,220,017
1574543	TRAVIS CO MUD NO 18	M	\$ 240,967,700	\$ 238,752,915
1727347	TRAVIS CO MUD NO 19	M	\$ 5,177,700	\$ 1,728,256
1106	TRAVIS CO MUD NO 2	M	\$ 244,304,093	\$ 234,291,852
1727348	TRAVIS CO MUD NO 20	M	\$ 10,879,419	\$ 8,310,175



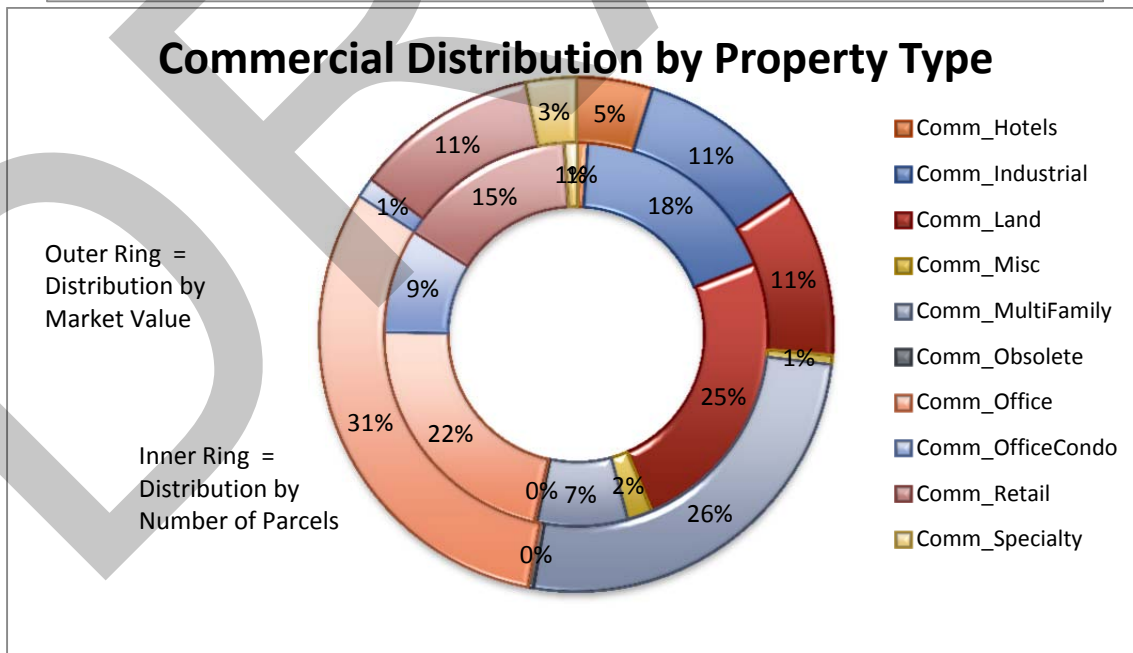
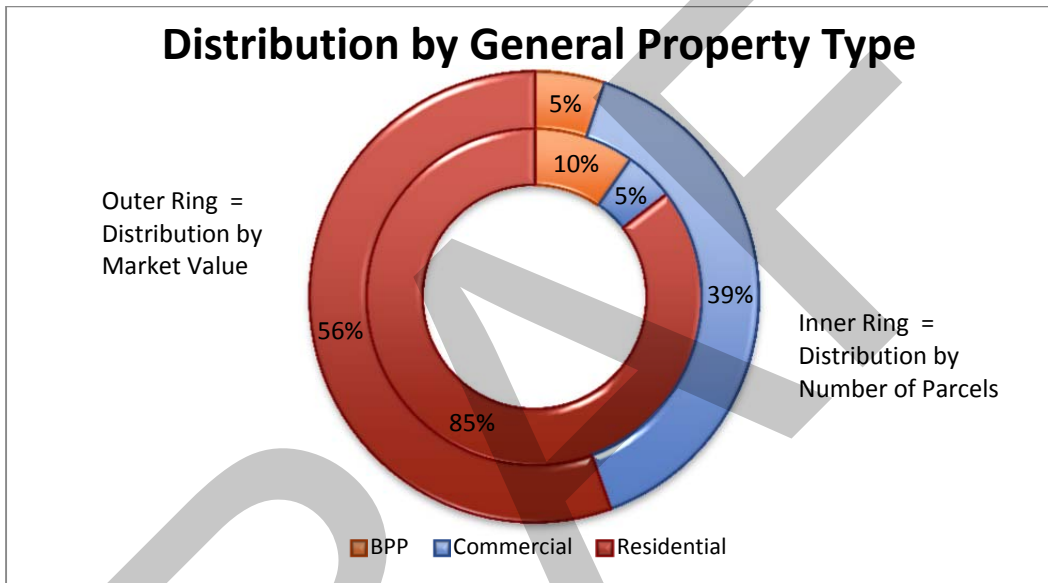
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1574074	TRAVIS CO MUD NO 21	M	\$ 364,840,515	\$ 356,403,147
1729857	TRAVIS CO MUD NO 22	M	\$ 11,558,631	\$ 3,465,035
1720114	TRAVIS CO MUD NO 23	M	\$ 72,718,001	\$ 68,320,772
1720115	TRAVIS CO MUD NO 24	M	\$ 7,034,552	\$ 165,092
1115	TRAVIS CO MUD NO 3	M	\$ 796,259,559	\$ 723,612,023
1130	TRAVIS CO MUD NO 4	M	\$ 122,732,762	\$ 122,729,054
1012	TRAVIS CO MUD NO 5	M	\$ 308,167,503	\$ 304,213,325
1029	TRAVIS CO MUD NO 6	M	\$ 150,061,870	\$ 149,950,319
1044	TRAVIS CO MUD NO 7	M	\$ 1,647,230	\$ 1,647,230
1061	TRAVIS CO MUD NO 8	M	\$ 151,266,040	\$ 151,266,040
1073	TRAVIS CO MUD NO 9	M	\$ 3,892,105	\$ 3,892,105
1100	TRAVIS CO WCID 17 COMANCHE TRAILS (DA)	W	\$ 224,815,673	\$ 203,137,358
1064	TRAVIS CO WCID 17 FLINTROCK (DA)	W	\$ 367,447,554	\$ 360,264,257
1481361	TRAVIS CO WCID 17 SERENE HILLS (DA)	W	\$ 250,214,813	\$ 235,488,228
1088	TRAVIS CO WCID 17 SOUTHVIEW (DA)	W	\$ 31,441,947	\$ 30,245,405
1043	TRAVIS CO WCID 17 STEINER RANCH (DA)	W	\$ 2,618,724,875	\$ 2,483,269,565
1017	TRAVIS CO WCID NO 10	W	\$ 5,050,214,629	\$ 4,554,020,460
1021	TRAVIS CO WCID NO 14	W	\$ 11,025,413	\$ 11,025,413
1024	TRAVIS CO WCID NO 17	W	\$ 7,978,871,492	\$ 6,961,955,442
1025	TRAVIS CO WCID NO 18	W	\$ 871,370,393	\$ 790,900,046
1054	TRAVIS CO WCID NO 19	W	\$ 230,879,329	\$ 228,238,647
1056	TRAVIS CO WCID NO 20	W	\$ 535,122,766	\$ 495,458,000
1055	TRAVIS CO WCID NO 21	W	\$ 2,868,993	\$ 2,523,815
1038	TRAVIS CO WCID POINT VENTURE	W	\$ 243,404,318	\$ 240,398,933
1003	TRAVIS COUNTY	G	\$ 267,273,622,404	\$ 205,865,258,665
1034	TRAVIS COUNTY HEALTHCARE DISTRICT	H	\$ 267,267,665,115	\$ 205,796,835,238
1436544	TRAVIS-CREEDMOOR MUD	M	\$ 31,312,758	\$ 31,051,736
1083	VILLAGE OF BRIARCLIFF	C	\$ 362,615,531	\$ 348,843,552
1095	VILLAGE OF GARFIELD	C	\$ 24,469	\$ 24,469
1103	VILLAGE OF POINT VENTURE	C	\$ 246,470,787	\$ 230,062,087
1019	VILLAGE OF SAN LEANNA	C	\$ 77,262,862	\$ 70,365,712
1102	VILLAGE OF THE HILLS	C	\$ 603,926,356	\$ 472,215,708
1076	VILLAGE OF VOLENTE	C	\$ 271,597,609	\$ 247,408,868
1077	VILLAGE OF WEBBERVILLE	C	\$ 31,155,774	\$ 25,539,429
1396737	WALLER CREEK TIF	T	\$ 2,007,299,016	\$ 1,508,348,784
1051	WELLS BRANCH MUD	M	\$ 1,576,884,463	\$ 1,352,447,623
1332609	WEST CYPRESS HILLS WCID NO 1	W	\$ 6,277,214	\$ 110,395
1092	WEST TRAVIS CO MUD NO 6	M	\$ 630,744,362	\$ 624,745,069
1093	WEST TRAVIS CO MUD NO 7	M	\$ 3,798,907	\$ 3,798,907
1094	WEST TRAVIS CO MUD NO 8	M	\$ 206,611,655	\$ 206,475,330
1607164	WHISPER VALLEY PID	P	\$ 56,934,101	\$ 31,690,608
1104	WILBARGER CRK MUD NO 1	M	\$ 79,411,629	\$ 61,232,804
1105	WILBARGER CRK MUD NO 2	M	\$ 7,509,943	\$ 7,509,943
1772334	WILDHORSE PID (IMP AREA #1)	P	\$ 7,997,852	\$ 7,997,852
1400491	WILLIAMSON/TRAVIS MUD NO 1	M	\$ 140,867,717	\$ 138,147,198
1032	WMSN CO WSID DIST 3	W	\$ 86,344,136	\$ 84,134,480



Value Distributions

Property Type	Count	Market Value
BPP	43,702	\$ 13,644,422,629
Commercial	21,499	\$ 104,837,772,966
Residential	383,858	\$ 147,658,594,297
	449,059	\$ 266,140,789,892





2019 State Property Categories

State Cd	State Cd Desc	Prop Count	New Market	Market Val	Taxable Val
A	SINGLE FAMILY RESIDENCE	309,532	\$ 2,529,385,338	\$ 130,370,815,584	\$ 101,435,700,225
B	MULTIFAMILY RESIDENCE	12,999	\$ 658,502,289	\$ 31,906,944,824	\$ 31,649,909,666
C1	VACANT LOTS AND LAND TRACTS	30,116	\$ 860,271	\$ 3,303,478,069	\$ 3,303,127,892
D1	QUALIFIED OPEN-SPACE LAND	4,949	\$ -	\$ 3,040,132,335	\$ 29,355,707
D2	IMPROVEMENTS ON QUALIFIED OPEN SPACE LAND	383	\$ 56,244	\$ 30,582,468	\$ 30,397,774
E	RURAL LAND, NON QUALIFIED OPEN SPACE LAND, IMPRVS	5,905	\$ 7,940,601	\$ 1,326,716,331	\$ 1,193,790,431
F1	COMMERCIAL REAL PROPERTY	14,526	\$ 1,379,806,815	\$ 54,402,857,966	\$ 54,070,620,188
F2	INDUSTRIAL AND MANUFACTURING REAL PROPERTY	44	\$ -	\$ 804,225,175	\$ 793,978,075
G1	OIL AND GAS	5	\$ -	\$ 270,148	\$ 270,148
J1	WATER SYSTEMS	29	\$ -	\$ 13,835,866	\$ 13,835,866
J2	GAS DISTRIBUTION SYSTEM	10	\$ -	\$ 167,085,549	\$ 167,085,549
J3	ELECTRIC COMPANY (INCLUDING CO-OP)	36	\$ -	\$ 200,092,153	\$ 200,092,153
J4	TELEPHONE COMPANY (INCLUDING CO-OP)	1,353	\$ -	\$ 353,654,434	\$ 353,446,560
J5	RAILROAD	10	\$ -	\$ 29,824,181	\$ 29,824,181
J6	PIPELINE COMPANY	126	\$ -	\$ 32,961,844	\$ 32,890,702
J7	CABLE TELEVISION COMPANY	44	\$ -	\$ 167,388,365	\$ 167,388,365
J8	OTHER TYPE OF UTILITY	1	\$ -	\$ 16,000,000	\$ 16,000,000
J9	RAILROAD ROLLING STOCK	2	\$ -	\$ 5,427,176	\$ 5,427,176
L1	COMMERCIAL PERSONAL PROPERTY	37,892	\$ 21,433,134	\$ 7,823,086,702	\$ 7,542,273,520
L2	INDUSTRIAL AND MANUFACTURING PERSONAL PROPERTY	794	\$ -	\$ 4,389,174,745	\$ 2,953,824,202
M1	TANGIBLE OTHER PERSONAL, MOBILE HOMES	9,972	\$ 22,540,687	\$ 230,745,750	\$ 207,151,744
N	INTANGIBLE PROPERTY AND/OR UNCERTIFIED PROPERTY	1	\$ 1,530	\$ 1,530	\$ 1,530
O	RESIDENTIAL INVENTORY	10,697	\$ 701,562,846	\$ 1,338,579,976	\$ 1,334,356,170
S	SPECIAL INVENTORY TAX	621	\$ -	\$ 334,510,839	\$ 334,510,839
X	TOTALLY EXEMPT PROPERTY	12,713	\$ 168,940,001	\$ 26,985,230,394	\$ -
		452,760	\$ 5,491,029,756	\$ 267,273,622,404	\$ 205,865,258,663



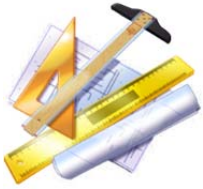
Top Ten Taxpayers

For Entity : **TRAVIS COUNTY**
Year: **2019**
State Code: **<ALL>**
Owner ID Taxpayer Name

Owner ID	Taxpayer Name	Market Value	Taxable Value
1533959	SAMSUNG AUSTIN SEMICONDUCTOR	\$1,244,351,527	\$1,204,238,259
189164	COLUMBIA/ST DAVIDS HEALTH CARE	\$555,124,650	\$555,124,650
104640	FINLEY COMPANY	\$463,230,711	\$460,673,703
1539270	APPLE INC	\$457,508,626	\$457,508,626
1640202	CSHV-401 CONGRESS LLC	\$395,274,088	\$395,274,088
1615357	DOMAIN RETAIL PROPERTY OWNER LP	\$371,062,907	\$371,062,907
518096	HEB GROCERY COMPANY LP	\$352,536,853	\$352,536,853
1629676	GW BLOCK 23 OFFICE LLC	\$351,900,000	\$351,900,000
1745605	BPP ALPHABET MF RIATA LP	\$331,596,135	\$331,596,135
1640197	CSHV-300 WEST 6TH STREET LLC	\$312,000,000	\$312,000,000

DRAFT

True Automation, Inc.



2019 APPRAISAL WORKLOAD

	2017	2018	2019
Permits	25,383	28,193	29,276
New Subdivision	318	317	270
New Lots	5,881	5,344	10,130
New Condos	872	1,325	1,357
New Units	2,253	3,808	3,826
New Construction	7,817	8,065	9,516
Field Inspections	149,829	170,128	206,592
Deed Transactions	20,928	20,471	21,678
Sales Transactions	19,181	18,725	19,265
Exemptions Processed	22,565	22,429	22,623
Renditions Processed	26,540	26,272	25,586
Notices of Appraised Value Mailed	418,339	426,432	341,382



EXEMPTIONS

The general homestead exemption is for owner occupied residential properties. The exemption removes a portion of your value from taxation providing a lower tax amount for the homestead property.

If you qualify for the Over 65 exemption there is a property tax “Ceiling” that automatically limits School taxes to the amount you paid in the year that you first qualified for the Over 65 exemption.

100% Disabled veterans are eligible for 100% exemptions for their residence homestead. Documentation from the Department of Veterans Affairs must be submitted indicating 1) 100 percent disability compensation due to a service connected disability; and 2) a rating of 100 percent disabled or a determination of individual unemployability from the VA.

Entity Name	State Mandated Homestead	Local Option Homestead	State Mandated Over 65	Local Option Over 65	State Mandated Disability	Local Option Disability
ACC DIST - WMSN CO		1.00		\$ 75,000		\$ 75,000
ANDERSON MILL LIMITED DISTRICT		20.00		\$ 10,000		\$ 10,000
AUSTIN COMM COLL DIST		1.00		\$ 160,000		\$ 160,000
AUSTIN ISD	\$ 25,000		\$ 10,000	\$ 25,000	\$ 10,000	\$ 15,000
CITY OF AUSTIN		10.00		\$ 88,000		\$ 88,000
CITY OF AUSTIN/HAYS CO				\$ 51,000		\$ 51,000
CITY OF AUSTIN/WMSN CO				\$ 51,000		\$ 51,000
CITY OF BEE CAVE		20.00		\$ 65,000		\$ 65,000
CITY OF CEDAR PARK		1.00		\$ 30,000		\$ 20,000
CITY OF ELGIN				\$ 15,000		\$ 15,000
CITY OF JONESTOWN		20.00		\$ 8,000		\$ 8,000
CITY OF LAGO VISTA		20.00				
CITY OF LAKEWAY				\$ 5,000		
CITY OF LEANDER				\$ 10,000		\$ 10,000
CITY OF MANOR				\$ 10,000		
CITY OF MUSTANG RIDGE				\$ 5,000		
CITY OF PFLUGERVILLE				\$ 35,000		\$ 35,000
CITY OF ROLLINGWOOD				\$ 3,000		
CITY OF ROUND ROCK				\$ 22,000		\$ 3,000
CITY OF SUNSET VALLEY		10.00		\$ 3,000		\$ 3,000
CITY OF WEST LAKE HILLS				\$ 4,000		
COTTONWD CREEK MUD NO 1				\$ 5,000		\$ 5,000
COUPLAND ISD	\$ 25,000		\$ 10,000		\$ 10,000	
DEL VALLE ISD	\$ 25,000		\$ 10,000		\$ 10,000	
DOWNTOWN PUB IMP DIST				\$ 70,000		\$ 70,000
DRIPPING SPRINGS ISD	\$ 25,000		\$ 10,000		\$ 10,000	
E SIXTH ST PUB IMP DIST				\$ 70,000		\$ 70,000
EANES ISD	\$ 25,000		\$ 10,000	\$ 20,000	\$ 10,000	\$ 20,000



Travis Central Appraisal District
2019 Annual Report

ELGIN ISD	\$ 25,000		\$ 10,000		\$ 10,000	
HAYS CONSOLIDATED ISD	\$ 25,000		\$ 10,000		\$ 10,000	
HURST CREEK MUD		20.00		\$ 10,000		\$ 10,000
HUTTO ISD	\$ 25,000		\$ 10,000		\$ 10,000	
JOHNSON CITY ISD	\$ 25,000		\$ 10,000		\$ 10,000	
LAGO VISTA ISD	\$ 25,000	20.00	\$ 10,000		\$ 10,000	
LAKE TRAVIS ISD	\$ 25,000	20.00	\$ 10,000		\$ 10,000	
LAKEWAY MUD				\$ 5,000		
LEANDER ISD	\$ 25,000		\$ 10,000	\$ 3,000	\$ 10,000	\$ 3,000
LOST CREEK LIMITED DISTRICT				\$ 4,000		
LOST CREEK MUD				\$ 4,000		
MANOR ISD	\$ 25,000		\$ 10,000	\$ 25,000	\$ 10,000	\$ 15,000
MARBLE FALLS ISD	\$ 25,000		\$ 10,000	\$ 3,000	\$ 10,000	
NORTH AUSTIN MUD NO 1				\$ 15,000		\$ 15,000
NORTHTOWN MUD		4.00				
PFLUGERVILLE ISD	\$ 25,000		\$ 10,000	\$ 9,100	\$ 10,000	
RIVER PLACE LIMITED DISTRICT		10.00		\$ 25,000		\$ 25,000
RIVER PLACE MUD		10.00		\$ 25,000		
RNCH @ CYPRSS CRK MUD 1				\$ 15,000		\$ 15,000
ROUND ROCK ISD	\$ 25,000		\$ 10,000		\$ 10,000	\$ 3,000
SOUTHEAST TRAVIS COUNTY MUD NO 1						
SOUTHEAST TRAVIS COUNTY MUD NO 2						
TANGLEWD FOREST LTD DIST		10.00		\$ 50,000		\$ 15,000
TRAVIS CO BCCP		20.00		\$ 65,000		\$ 65,000
TRAVIS CO ESD NO 9				\$ 4,000		
TRAVIS CO MUD NO 10		15.00		\$ 10,000		\$ 10,000
TRAVIS CO MUD NO 15				\$ 10,000		\$ 10,000
TRAVIS CO MUD NO 2				\$ 5,000		\$ 5,000
TRAVIS CO RFP DIST NO 6				\$ 3,000		\$ 3,000
TRAVIS CO WCID NO 10				\$ 4,000		
TRAVIS CO WCID NO 15		30.00		\$ 15,000		
TRAVIS CO WCID NO 17		10.00		\$ 15,000		\$ 15,000
TRAVIS CO WCID NO 18				\$ 30,000		
TRAVIS COUNTY		20.00		\$ 85,500		\$ 85,500
TRAVIS COUNTY HEALTHCARE DISTRICT		20.00		\$ 85,500		\$ 85,500
VILLAGE OF POINT VENTURE		10.00				
VILLAGE OF SAN LEANNA				\$ 25,000		
VILLAGE OF THE HILLS		20.00		\$ 10,000		\$ 10,000
VILLAGE OF VOLENTE				\$ 45,000		\$ 45,000
VILLAGE OF WEBBERVILLE		5.00				
WELLS BRANCH MUD		20.00				
WMSN-TR CO WCID NO 1F				\$ 15,000		\$ 15,000
WMSN-TR CO WCID NO 1G				\$ 15,000		\$ 15,000



Non-profit organizations that are eligible for property tax exemptions include but are not limited to: certain charitable organizations, youth development organizations, religious organizations, non-profit private schools, charitable hospitals, cemeteries and veterans' organizations.

Property owners with mineral property or business personal property worth less than \$500 are exempt from property taxes. No exemption application is required.

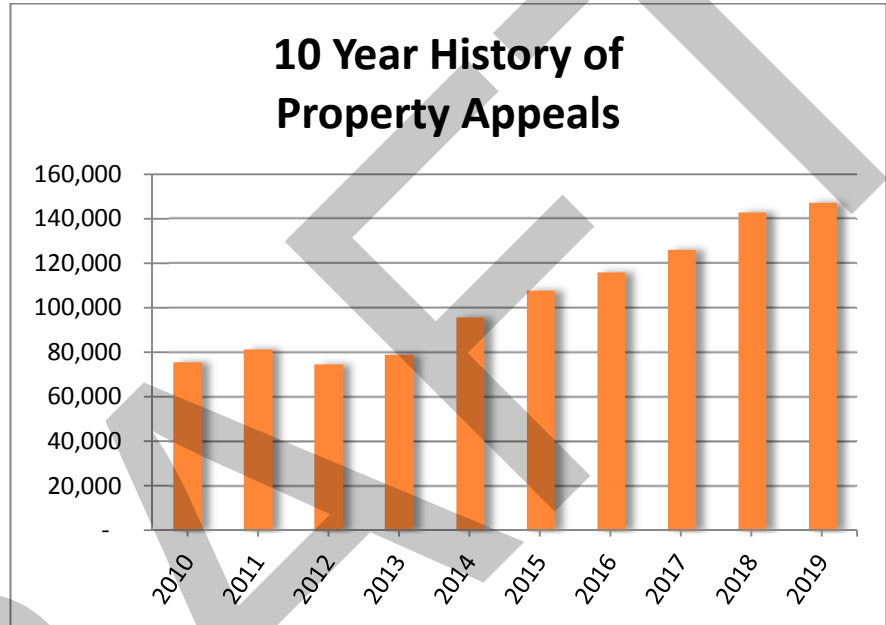
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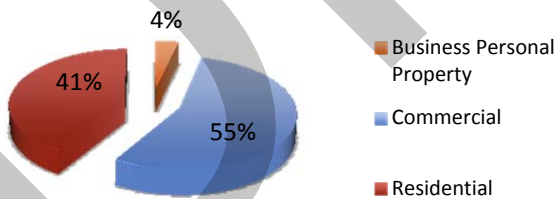
TAXPAYER APPEALS



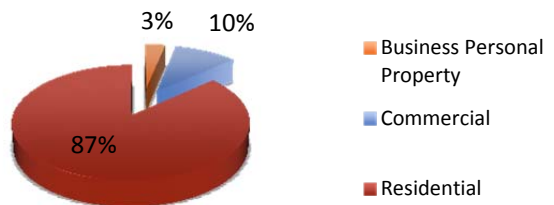
Taxpayers have the right to appeal their property's valuation. The Appraisal Review Board considers all evidence presented by the property owner and the Appraisal District Office at formal hearings. They then rule on the value of the property in question.



Distribution of 2019 Appeals by Market Value

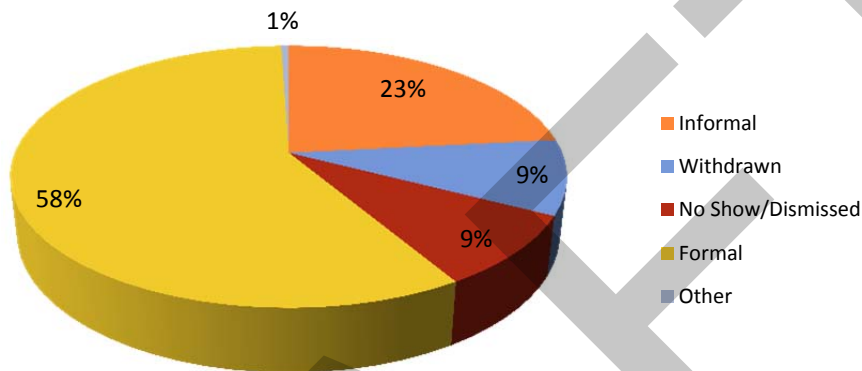


Distribution of 2019 Appeals By Number of Appeals Filed



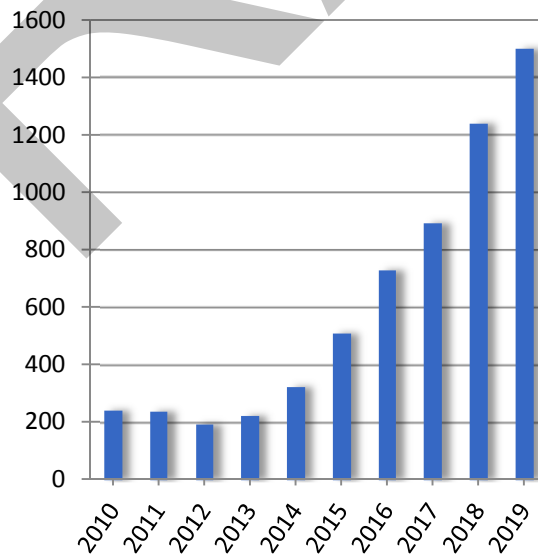


Taxpayers that file an appeal are first given an opportunity to meet “Informally” with an appraiser. The majority of protests filed are resolved at an informal level. If the property owner is unable to reach a value agreement with the appraiser they are then able to carry their protest to the Appraisal Review Board for a “Formal” hearing.



Taxpayers dissatisfied with the Appraisal Review Board “Formal” hearing determination may appeal the decision to: Arbitration, SOAH, or District Court.

10 Year History of Property Lawsuits





COMPTROLLER PTAD STUDIES

Annually the Comptroller's Property Tax Assistance Division performs either a Property Value Study (PVS) or Methods and Assistance Program (MAP) review of each appraisal district.

Travis CAD received its most recent PVS review in 2018. The purpose of the PVS is to determine the median level of appraisal for the appraisal district; and, determine the taxable value for each ISD for school funding purposes.

2018 Property Value Study

Category	Number of Ratios **	2018 CAD Rept Appraised Value	Median Level of Appr	Coefficient of Dispersion	% Ratios w /in (+/-) 10 % of Median	% Ratios w /in (+/-) 25 % of Median	Price - Related Differential
A. SINGLE-FAMILY RESIDENCES	8243	121,832,855,984	1.00	7.33	75.87	94.19	1.02
B. MULTI-FAMILY RESIDENCES	318	28,870,478,393	0.98	5.22	83.69	94.35	1.01
C1. VACANT LOTS	407	3,062,417,821	*	*	*	*	*
C2. COLONIA LOTS	0	0	*	*	*	*	*
D2. FARM/RANCH IMP	0	29,282,589	*	*	*	*	*
E. RURAL-NON-QUAL	47	1,235,172,304	*	*	*	*	*
F1. COMMERCIAL REAL	239	49,916,179,443	0.97	3.02	92.25	95.05	1.00
F2. INDUSTRIAL REAL	0	744,464,874	*	*	*	*	*
G. OIL, GAS, MINERALS	0	287,886	*	*	*	*	*
J. UTILITIES	7	983,099,408	*	*	*	*	*
L1. COMMERCIAL PERSONAL	209	7,330,031,386	1.00	14.48	66.64	84.50	1.10
L2. INDUSTRIAL PERSONAL	0	4,639,282,815	*	*	*	*	*
M. OTHER PERSONAL	0	210,908,552	*	*	*	*	*
O. RESIDENTIAL INVENTORY	0	811,089,883	*	*	*	*	*
S. SPECIAL INVENTORY	0	320,260,328	*	*	*	*	*
OVERALL	9470	219,985,811,666	0.99	8.09	74.89	92.47	1.02



Travis CAD received its most recent MAP review in 2019. The review is designed to determine whether appraisal districts are meeting minimum requirements for appraisal duties and reviews specifically for governance, taxpayer assistance, operating procedures, and appraisal standards and methodology. Travis CAD passed all mandatory requirements and received exceeds rating in all areas of review.

2019 Methods and Assistance Program Review

Glenn Hegar
Texas Comptroller of Public Accounts
2018-19 Final Methods and Assistance Program
Review

Travis Central Appraisal District

This review is conducted in accordance with Tax Code Section 5.102(a) and related Comptroller Rule 9.301. The Comptroller is required by statute to review appraisal district governance, taxpayer assistance, operating procedures and appraisal standards.

Mandatory Requirements	PASS/FAIL
Does the appraisal district have up-to-date appraisal maps?	PASS
Is the implementation of the appraisal district's most recent reappraisal plan current?	PASS
Are the appraisal district's appraisal records up-to-date and is the appraisal district following established procedures and practices in the valuation of property?	PASS
Are values reproducible using the appraisal district's written procedures and appraisal records?	PASS

Appraisal District Activities	RATING
Governance	Meets All
Taxpayer Assistance	Meets All
Operating Procedures	Meets All
Appraisal Standards, Procedures and Methodology	Meets

Appraisal District Ratings:

- Meets All – The total point score is 100
- Meets – The total point score ranges from 90 to less than 100
- Needs Some Improvement – The total point score ranges from 85 to less than 90
- Needs Significant Improvement – The total point score ranges from 75 to less than 85
- Unsatisfactory – The total point score is less than 75

Review Areas	Total Questions in Review Area (excluding N/A Questions)	Total "Yes" Points	Total Score (Total "Yes" Questions/Total Questions) x 100
Governance	15	15	100
Taxpayer Assistance	11	11	100
Operating Procedures	23	23	100
Appraisal Standards, Procedures and Methodology	31	30	97

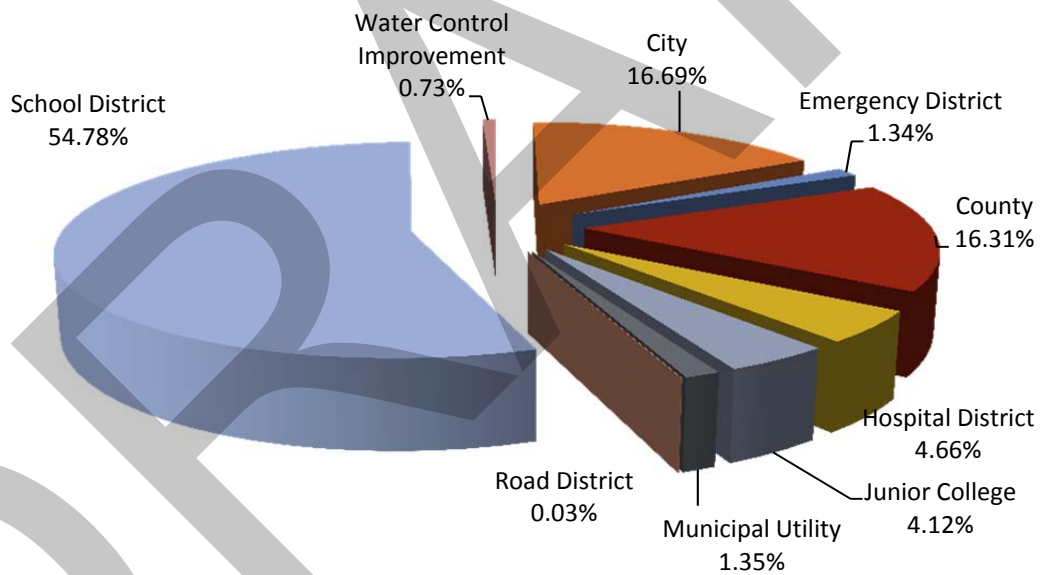


APPRAISAL DISTRICT FINANCES



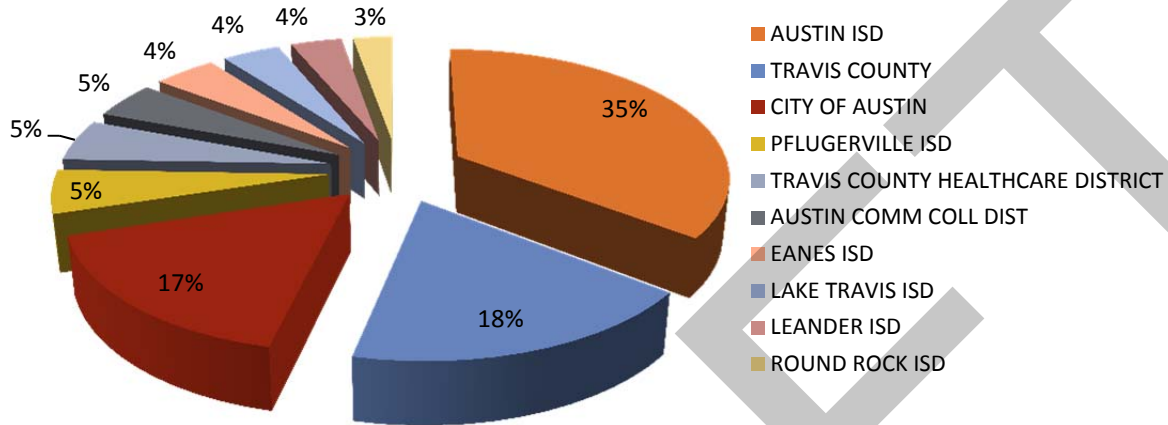
Local taxing units pay CAD expenses according to their share of the total property tax levy of all the taxing units in the CAD. Each taxing unit participating in the CAD is allocated a portion of the amount of the budget equal to the proportion that the total dollar amount of property taxes imposed in the CAD by the unit for the tax year in which the budget proposal is prepared bears to the sum of the total dollar amount of property taxes imposed in the CAD by each participating unit for that year.

Budget by Taxing Unit Type





Top 10 Contributing Taxing Units



The District's financial statements are audited annually by a CPA in accordance with generally accepted auditing standards. The results of the audit are presented to the Board.

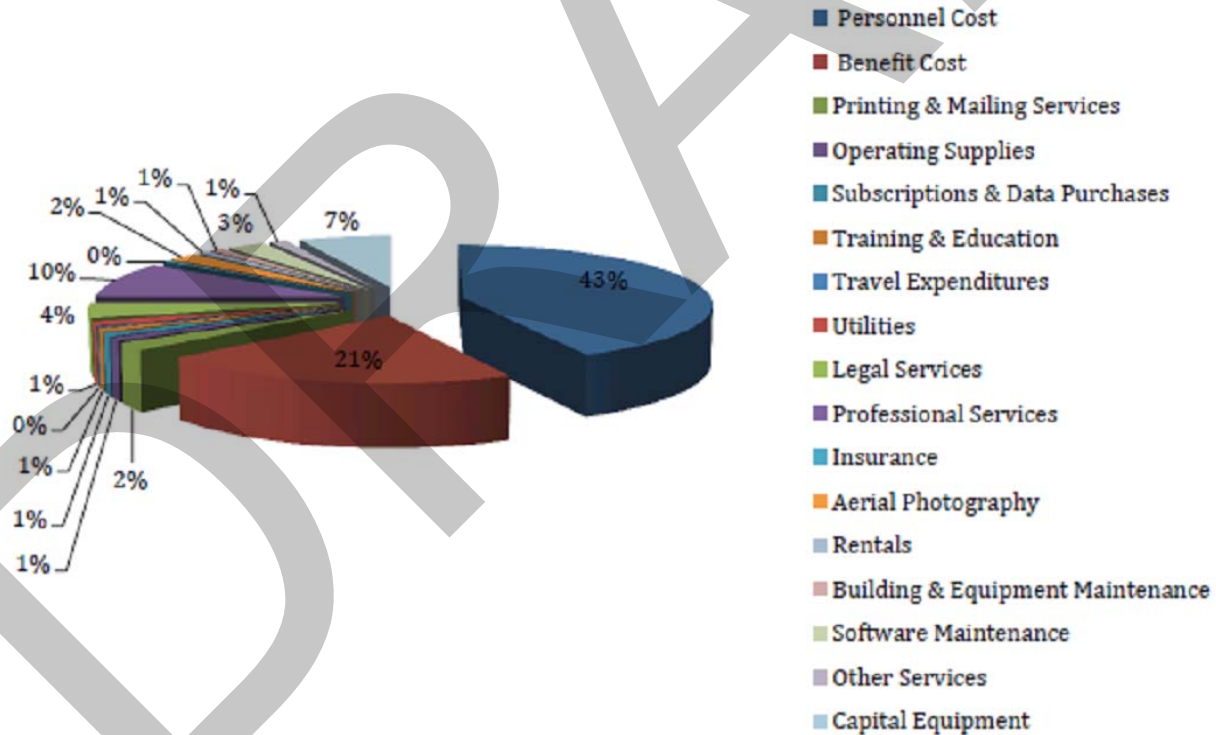
The appraisal district budget is prepared and presented to the Board of Directors and all taxing units in preliminary form no later than June 15th of the preceding budget year. After a public hearing is held, the Board formally adopts the district budget no later than September 15th. The budget outlines goals, objectives and programs to be accomplished; operating and maintenance expenditures, personnel breakdown with staffing levels and salary ranges; and capitalized equipment to purchased.



Below is summary of the major revenue sources and major expenditure categories by fiscal years for FY 2019 and the previous five years budget histories.

<i>Revenue Budget History FY 2014-2019</i>						
	2014	2015	2016	2017	2018	2019
Budgeted revenues:						
Appraisal assessments	\$14,246,848	\$17,149,799	\$17,492,994	\$18,103,517	\$18,827,658	\$ 19,486,627
Other revenue	86,500	83,000	83,000	110,000	145,000	145,000
Total budgeted revenues	\$14,333,348	\$17,232,799	\$17,575,994	\$18,213,517	\$18,972,658	\$ 19,631,627
Increase in Budgeted Revenues	7.17%	20.23%	2.00%	3.63%	4.17%	3.47%

Expenditures by Category





A useful statistic is comparing the CAD budget to the total taxes levied by the taxing entities. It reflects how much it costs to generate a dollar of property tax revenue which, in turn, indicates appraisal and operating efficiencies.

Top 10 CAD by 2016 Value	Market Value (Billions)	% of Total
Harris CAD	\$ 586.6	16.61%
Dallas CAD	\$ 321.4	9.10%
Travis CAD	\$ 246.9	6.99%
Tarrant CAD	\$ 235.4	6.66%
Bexar CAD	\$ 184.4	5.22%
Collin CAD	\$ 168.8	4.78%
Denton CAD	\$ 103.4	2.93%
Fort Bend CAD	\$ 90.3	2.56%
Williamson CAD	\$ 78.3	2.22%
Montgomery CAD	\$ 70.0	1.98%
State Total	\$ 3,532.0	

CAD	2018 Tax Levy	2019 Budget	% of Levy
Harris CAD	\$11,620,419,310	\$ 88,094,531	0.76%
Dallas CAD	\$7,014,577,007	\$ 28,144,871	0.40%
Tarrant CAD	\$4,873,619,791	\$ 24,912,805	0.51%
Travis CAD	\$4,379,778,953	\$ 19,486,627	0.44%
Bexar CAD	\$4,026,370,797	\$ 18,261,544	0.45%
El Paso CAD	\$1,220,095,973	\$ 15,663,771	1.28%



CAD STAFFING



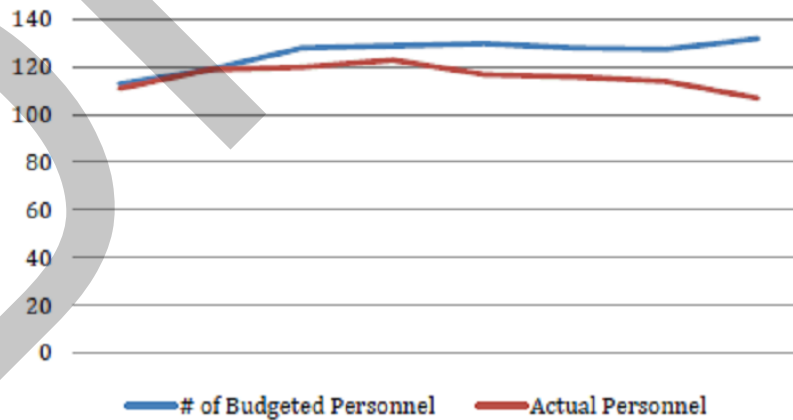
Key District Personnel

Chief Appraiser	Marya Crigler
Director of Operations	Leana Mann
Director Residential Appraisal	Monica Chacon
Assistant Director Residential Appraisal	Russell Ledbetter
Director Commercial Appraisal	Matt Markert
Director Customer Service	Eileen Hyland
Information Technology Manager	Tawnya Blaylock
Director Human Resources	Paula Fugate

The appraisal district employs a mixture of professional and clerical staff.

Year	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
# of Budgeted Personnel	119	128	129	130	128	127.5	132	131	132	123	125
Actual Personnel	119	120	123	117	116	114	107	108	102	114	N/A
Variance	0	8	6	13	12	13.5	25	23	30	9	N/A

Personnel Comparison





VISIT OR CONTACT US

Office Location:

Travis Central Appraisal District
8314 Cross Park Drive
Austin, TX 78754

Mailing Address:

P.O. Box 149012
Austin, TX 78714-9012

Customer Inquiries and Assistance:

Phone: (512) 834-9138
Fax: (512) 835-5371
Email: tcad_info@tcadcentral.org
Website: www.traviscad.org

Business Hours:

M, W, F -- 7:45am-4:45pm
Tu, Th -- 9:00am – 4:45pm

Directions:

From North Austin:

From north Austin go south on IH 35 and take the 183 Lockhart/Lampasas exit which will be exit number 240A - 239. Turn left at the light onto highway 183 South staying on frontage road approximately 3/4 miles. Turn left onto Cameron Rd. Continue for approximately one mile and turn right at the second stop light onto Cross Park Drive. Proceed 3/4 mile and our office at 8314 Cross Park will be on the right. If you have reached the post office on the left you have gone too far.

From South Austin:

From south Austin go north on IH 35 take the 183 Lockhart/Lampasas exit which will be exit number 240A - 239. At the second stop light turn right on Hwy 183 staying on frontage road approximately 3/4 miles. Turn left onto Cameron Rd. Continue for approximately one mile and turn right at the second stop light onto Cross Park Drive. Proceed 3/4 mile and our office at 8314 Cross Park will be on the right. If you have reached the post office on the left you have gone too far.

From East Austin:

From east Austin, heading west on Hwy 183 take the Cameron Road Exit, turn right onto Cameron Rd. Continue for approximately one mile and turn right at the second stop light onto Cross Park Drive. Proceed 3/4 mile and our office at 8314 Cross Park will be on the right. If you have reached the post office on the left you have gone too far.

From West Austin:

From west Austin, heading east on Hwy 183 take the Cameron Road exit. Turn left onto Cameron Rd. Continue for approximately one mile and turn right at the second stop light onto Cross Park Drive. Proceed 3/4 mile and our office at 8314 Cross Park will be on the right. If you have reached the post office on the left you have gone too far.



METHODS AND ASSISTANCE PROGRAM 2019 REPORT
Travis Central Appraisal District



Glenn Hegar Texas Comptroller of Public Accounts

Glenn Hegar
Texas Comptroller of Public Accounts
2018-19 Final Methods and Assistance Program
Review

Travis Central Appraisal District

This review is conducted in accordance with Tax Code Section 5.102(a) and related Comptroller Rule 9.301. The Comptroller is required by statute to review appraisal district governance, taxpayer assistance, operating procedures and appraisal standards.

Mandatory Requirements	PASS/FAIL
Does the appraisal district have up-to-date appraisal maps?	PASS
Is the implementation of the appraisal district's most recent reappraisal plan current?	PASS
Are the appraisal district's appraisal records up-to-date and is the appraisal district following established procedures and practices in the valuation of property?	PASS
Are values reproducible using the appraisal district's written procedures and appraisal records?	PASS

Appraisal District Activities	RATING
Governance	Meets All
Taxpayer Assistance	Meets All
Operating Procedures	Meets All
Appraisal Standards, Procedures and Methodology	Meets

Appraisal District Ratings:

Meets All – The total point score is 100

Meets – The total point score ranges from 90 to less than 100

Needs Some Improvement – The total point score ranges from 85 to less than 90

Needs Significant Improvement – The total point score ranges from 75 to less than 85

Unsatisfactory – The total point score is less than 75

Review Areas	Total Questions in Review Area (excluding N/A Questions)	Total "Yes" Points	Total Score (Total "Yes" Questions/Total Questions) x 100
Governance	15	15	100
Taxpayer Assistance	11	11	100
Operating Procedures	23	23	100
Appraisal Standards, Procedures and Methodology	31	30	97

Glenn Hegar
Texas Comptroller of Public Accounts
2018-19 Final Methods and Assistance Program Tier 1 Review

Travis Central Appraisal District

This review is conducted in accordance with Tax Code Section 5.102(a) and related Comptroller Rule 9.301. The Comptroller is required to review appraisal districts' governance, taxpayer assistance, operating procedures and appraisal standards, procedures and methodology. Each appraisal district is reviewed every other year. This report details the results of the review for the appraisal district named above.

GOVERNANCE

Governance Review Question	Answer	Recommendation
1. Does the appraisal district board of directors regularly evaluate the chief appraiser?	Yes	No Recommendation
2. Has the appraisal district's investment officer attended investment training as required by Government Code Section 2256.008?	Yes	No Recommendation
3. Does the appraisal district have a professional development program as discussed in IAAO's <i>Standard on Professional Development</i>?	Yes	No Recommendation
4. Has the chief appraiser calculated the number of votes to which each taxing unit is entitled and delivered written notice of the voting entitlement before October 1 of the most recent odd-numbered year as described in Tax Code Section 6.03(e) or if the appraisal district falls under 6.031, have they received nominating resolutions by December 1st?	Yes	No Recommendation
5. Before October 30, did the chief appraiser prepare a ballot, listing the candidates whose names were timely submitted and deliver a copy to each taxing unit that is entitled to vote in accordance with Tax Code Section 6.03(j)?	N/A	No Recommendation
6. Did the board of directors meet at least quarterly with a quorum in the previous year as required by Tax Code Section 6.04(b)?	Yes	No Recommendation
7. Was the most recent written reappraisal plan adopted by the appraisal district's board of directors by the Sept. 15 deadline listed in Tax Code Section 6.05(i)?	Yes	No Recommendation

Governance Review Question	Answer	Recommendation
8. Did the appraisal district board of directors provide notice of and host a public hearing for the 2017-18 reappraisal plan by September 15, 2016 or the 2019-20 reappraisal plan by September 15, 2018 pursuant to Tax Code Section 6.05(i)?	Yes	No Recommendation
9. Was the appraisal district's most recent preliminary budget produced and delivered to the taxing units according to the requirements of Tax Code Section 6.06(a)?	Yes	No Recommendation
10. Did the appraisal district prepare and post the most recent budget notice according to the requirements of Tax Code Section 6.062?	Yes	No Recommendation
11. Did the appraisal district board of directors provide notice of and host a public hearing for the most recent budget and approve a budget before September 15 according to the requirements of Tax Code Section 6.06(b)?	Yes	No Recommendation
12. Has the chief appraiser appointed a qualified agricultural appraisal advisory board and has that board met at least once within the previous year, as required by Tax Code Section 6.12?	Yes	No Recommendation
13. Did the appraisal district deliver a copy of the CADs most recent financial audit report to each taxing unit as described in Tax Code Section 6.063(b)?	Yes	No Recommendation
14. Do the current appraisal district board of director members meet the criteria listed in Tax Code Section 6.03(a) and 6.035(a)(2)?	Yes	No Recommendation
15. Did the chief appraiser prepare and deliver to the board of directors a list of nominees submitted by the entities to fulfill a BOD vacancy and did the board of directors elect, by majority vote, one of the nominees in accordance with Tax Code Section 6.03(l)?	Yes	No Recommendation
16. Are allocation statements sent to each taxing unit as described in Tax Code Section 6.06(e)?	Yes	No Recommendation

TAXPAYER ASSISTANCE

Taxpayer Assistance Review Question	Answer	Recommendation
17. Is the information on the appraisal district's website up-to-date?	Yes	No Recommendation
18. Does the appraisal district report, and make available to the public, the metered amount of electricity, water or natural gas consumed for which it is responsible to pay and the aggregate costs for those utility services as required by Government Code Section 2265.001?	Yes	No Recommendation
19. Has the appraisal district developed an annual report in each of the previous two calendar years, and is it made available to the public as described in IAAO's Standard on Public Relations?	Yes	No Recommendation
20. Are the written complaint procedures for the appraisal district made available to the public?	Yes	No Recommendation
21. Are the complaint procedures for the appraisal review board made available to the public upon request?	Yes	No Recommendation
22. Does the appraisal district have a procedure for receiving and responding to open records requests that complies with Government Code Chapter 552 and is the procedure being followed?	Yes	No Recommendation
23. Does the appraisal district notify property owners when denying, modifying or cancelling exemptions as described in Tax Code Sections 11.43(h) and 11.45(d)?	Yes	No Recommendation
24. For residence homestead exemptions cancelled after Sept. 1, 2015, did the appraisal district follow the procedure described in Tax Code Section 11.43(q) for individuals who are 65 years of age or older?	Yes	No Recommendation
25. Did the appraisal district publicize the notices required by Tax Code Sections 11.44(b), 22.21, 23.43(f), 23.54(g) and 23.75(g) in a manner designed to reasonably notify all property owners?	Yes	No Recommendation
26. Does the appraisal district include with each notice sent under Tax Code Section 25.19 to an eligible property owner, instructions for accessing and using the electronic protest system as described in Tax Code Section 41.415?	Yes	No Recommendation

Taxpayer Assistance Review Question	Answer	Recommendation
27. Has the appraisal district implemented a system that allows the owner of a property that has been granted a homestead exemption to electronically receive and review comparable sales data and other evidence that the chief appraiser intends to use at the protest hearing before the appraisal review board, as required by Tax Code Section 41.415(b)(2)?	Yes	No Recommendation

OPERATING PROCEDURES

Operating Procedures Review Question	Answer	Recommendation
28. Did the appraisal district timely submit the Comptroller's most recent appraisal district operations survey?	Yes	No Recommendation
29. Does the appraisal district receive and process arbitration requests as described in Tax Code Section 41A.05 and Comptroller Rule 9.804(b)(5)?	Yes	No Recommendation
30. Did the appraisal district compile a partial exemption list as described in Tax Code Section 11.46 and Comptroller Rule 9.3010 and was the most recent list made available to the public?	Yes	No Recommendation
31. Not later than April 30 of the most recent year, did the appraisal district prepare and certify to the assessor for each county, municipality and school district participating in the appraisal district an estimate of the taxable value of property in that taxing unit as described by Tax Code Section 26.01(e)?	Yes	No Recommendation
32. Did the chief appraiser prepare and certify the two most recent appraisal rolls to the assessor for each taxing unit participating in the district as described in Tax Code Section 26.01(a)?	Yes	No Recommendation
33. For changes made to the appraisal roll under Tax Code Section 25.25, are the changes coded by the appropriate subsection that authorizes the change?	Yes	No Recommendation

Operating Procedures Review Question	Answer	Recommendation
34. Are corrections of the appraisal roll presented to the appraisal district's board of directors and appraisal review board as described in Tax Code Section 25.25(b)?	Yes	No Recommendation
35. When the appraisal roll is changed according to Tax Code Section 25.25(d), does the appraisal district notify the tax assessor-collector that a 10 percent penalty should be charged to the property owner and, if the appraisal district also performs collection functions, is a 10 percent penalty assessed according to the requirements of Tax Code Section 25.25(d)?	Yes	No Recommendation
36. Has the appraisal district's records retention schedule that is on file with the State Library and Archives Commission, as described in Local Government Code Section 203.041, been implemented?	Yes	No Recommendation
37. Does the appraisal district have comprehensive and workable written procedures concerning disaster recovery and mitigation?	Yes	No Recommendation
38. Does the chief appraiser submit the completed appraisal records to the appraisal review board for review and determination of protests as described in Tax Code Section 25.22?	Yes	No Recommendation
39. Do the appraisal review board's orders of determination comply with the requirements of Tax Code Sections 41.47(c)(1) and (2) and the Comptroller's model hearing procedures as they relate to Tax Code Section 5.103(b)(2)?	Yes	No Recommendation
40. Does the appraisal district provide evidence during the appeals process?	Yes	No Recommendation
41. Did the appraisal review board hear and determine all or substantially all timely filed protests; determine all timely filed challenges; submit a list of approved changes in the records to the chief appraiser; and approve the appraisal records by the deadline established in Tax Code Section 41.12 in the previous year?	Yes	No Recommendation
42. Are agent authorization forms on file and complete in accordance with Tax Code Section 1.111(b)?	Yes	No Recommendation

Operating Procedures Review Question	Answer	Recommendation
43. Are properties correctly categorized according to PTAD classification guidelines?	Yes	No Recommendation
44. Are exempt properties correctly categorized in accordance with the PTAD Property Classification Guide?	Yes	No Recommendation
45. Did the appraisal district send copies of the most recent reappraisal plan to the presiding officers of the governing body of each taxing unit participating in the district and to the Comptroller by the date described in Tax Code Section 6.05(i)?	Yes	No Recommendation
46. Does the appraisal district's written reappraisal plan define the market areas in the county as required by Tax Code Section 25.18?	Yes	No Recommendation
47. Does the appraisal district's written reappraisal plan identify the properties to be appraised in each year covered by the plan as required by Tax Code Section 25.18 and have all scheduled activities been completed timely?	Yes	No Recommendation
48. Did the appraisal district submit the two most recent electronic appraisal rolls to the Comptroller timely?	Yes	No Recommendation
49. Did the appraisal district submit the two most recent electronic property transactions submissions to the Comptroller timely?	Yes	No Recommendation
50. Are sales provided in the most recent electronic property transaction submission valid sales?	Yes	No Recommendation

APPRAISAL STANDARDS, PROCEDURES AND METHODOLOGY

Appraisal Standards, Procedures and Methodology Review Question	Answer	Recommendation
51. Have the inspection dates in the appraisal records been updated within the previous six years as discussed in IAAO's <i>Standard on Mass Appraisal of Real Property</i> ?	Yes	No Recommendation
52. Do the appraisal district's appraisal cards contain all of the information as required by Comptroller Rule 9.3001?	Yes	No Recommendation

Appraisal Standards, Procedures and Methodology Review Question	Answer	Recommendation
53. Did the appraisal district complete and produce written mass appraisal reports in the previous two years as required by USPAP Standard 6?	Yes	No Recommendation
54. Do the appraisal district's contracts contain the items described in IAAO's <i>Standard on Contracting for Assessment Services</i> ?	Yes	No Recommendation
55. Does the appraisal district follow a procedure or process for reviewing, verifying or evaluating the work of their appraisal services and mapping contractors?	Yes	No Recommendation
56. Does the appraisal district run ratio studies by market area and neighborhood, property class, or stratum?	Yes	No Recommendation
57. Are the appraisal district's cost schedules and appraisal models used in such a way that adjustments are made for neighborhood factors and property specific factors?	Yes	No Recommendation
58. Has the appraisal district adjusted its residential property cost schedules based on sales data, ratio studies, local conditions or market factors within the previous two years?	Yes	No Recommendation
59. Has the appraisal district adjusted its commercial property cost schedules based on sales data, ratio studies, local conditions or market factors within the previous two years?	Yes	No Recommendation
60. Does the appraisal district follow its written procedures for inspecting new personal property accounts in the 12 months after they are created, as discussed in IAAO's <i>Standard on Valuation of Personal Property</i> ?	Yes	No Recommendation
61. Does the appraisal district apply the rendition penalty for taxpayers who do not render timely according to Tax Code Section 22.28 and are penalties waived when necessary, as described in Tax Code Section 22.30?	Yes	No Recommendation
62. Does the appraisal district perform multiple quality control steps to ensure the accuracy and uniformity of property valuations?	Yes	No Recommendation
63. Does the appraisal district gather income and expense data and calculate values using the income approach for multi-family properties?	Yes	No Recommendation

Appraisal Standards, Procedures and Methodology Review Question	Answer	Recommendation
64. Does the appraisal district gather income and expense data and calculate values using the income approach for office properties?	Yes	No Recommendation
65. Does the appraisal district gather income and expense data and calculate values using the income approach for retail properties?	Yes	No Recommendation
66. Does the appraisal district gather income and expense data and calculate values using the income approach for warehouse properties/mini storages?	Yes	No Recommendation
67. Does the appraisal district use market rents (comparable rents) rather than actual rents in the income approach pursuant to Tax Code Section 23.012?	Yes	No Recommendation
68. Are multi-family low income properties appraised in accordance with Section 23.215 and 11.1825(q) of the Property Tax Code?	Yes	No Recommendation
69. Does the appraisal district collect land sales and maintain a verified land sales file and does the appraisal district gather available real estate transfer documents and use available third-party sources in gathering sales information, according to IAAO's Standard on Verification and Adjustment of Sales, Sections 3.1 and 3.4?	Yes	No Recommendation
70. Does the appraisal district collect residential property sales and maintain a verified residential sales file and does the appraisal district gather available real estate transfer documents and use available third-party sources in gathering sales information, according to IAAO's Standard on Verification and Adjustment of Sales, Sections 3.1 and 3.4?	Yes	No Recommendation
71. Does the appraisal district collect commercial property sales and maintain a verified commercial sales file and does the appraisal district gather available real estate transfer documents and use available third-party sources in gathering sales information, according to IAAO's Standard on Verification and Adjustment of Sales, Sections 3.1 and 3.4?	Yes	No Recommendation

Appraisal Standards, Procedures and Methodology Review Question	Answer	Recommendation
72. Does the appraisal district collect multi-family property sales and maintain a verified multi-family sales file and does the appraisal district gather available real estate transfer documents and use available third-party sources in gathering sales information, according to IAAO's Standard on Verification and Adjustment of Sales, Sections 3.1 and 3.4?	Yes	No Recommendation
73. Are net-to-land calculations for agricultural use land designated as dry and irrigated cropland reproducible from the appraisal district's records and is the appraisal district following their dry and/or irrigated cropland schedule?	Yes	No Recommendation
74. Are net-to-land calculations for agricultural use land designated as native pasture reproducible from the appraisal district's appraisal records and is the appraisal district following their native pasture schedule?	Yes	No Recommendation
75. Does the appraisal district properly apply minimum acreage requirement for Wildlife properties in accordance with Comptroller Rule 9.2005?	Yes	No Recommendation
76. Does the appraisal district perform inspections of properties as a result of receiving wildlife management use appraisal applications?	Yes	No Recommendation
77. Does the appraisal district perform inspections of properties as a result of receiving agricultural use appraisal applications?	Yes	No Recommendation
78. For properties that have been granted agricultural use appraisal, are completed applications and required documentation on file?	No	Ensure that the appraisal district maintains completed applications and required documentation for all properties that have been granted agricultural use appraisal.
79. Have agricultural appraisal intensity-of-use standards been evaluated or updated within the previous five years?	Yes	No Recommendation
80. Is the appraisal district following their current guidelines for degree of intensity standards when granting special valuation appraisal for agricultural and/or timber use?	Yes	No Recommendation

Appraisal Standards, Procedures and Methodology Review Question	Answer	Recommendation
81. Does the appraisal district make an entry on the appraisal records when agricultural applications are received after April 30 and deliver written notice of imposition of the penalty as described in Tax Code Section 23.431?	Yes	No Recommendation

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850 EAL Holding Corp.
Construction Budget-to-Actual
February 17, 2020

	<u>Original Budget</u>	<u>Final Budget</u>	<u>Expenses</u>	<u>Variance (Over)/Under</u>	<u>% of Total Budget Remaining</u>
Architectural & Engineers (RFQ 2019-11)	\$ 490,100.00	\$ 537,400.00	\$ 387,079.19	\$ 150,320.81	27.97%
Constructions (RFP 2019-12)	7,800,000.00	6,846,857.05	426,328.58	6,420,528.47	93.77%
Total	8,290,100.00	7,384,257.05	813,407.77	6,570,849.28	88.98%

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850 EAL Holding Corp.
Construction Budget-to-Actual
February 17, 2020

	<u>Demo</u>	<u>Construction</u>	<u>Architectural</u>	<u>Total</u>
Total Budget	\$ 436,579.84	\$ 6,410,277.21	\$ 537,400.00	\$ 7,384,257.05
Total Approved Expenses	426,328.58	6,149,431.07	387,079.19	6,962,838.84
Remaining Budget	10,251.26	260,846.14	150,320.81	421,418.21
% of Budget Remaining	2.35%	4.07%	27.97%	5.71%
Status	Complete	Permit Approved		
Final Status	<i>Under Budget by</i> \$10,251.26	2/14/20		

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850 EAL Holding Corp.
 Purchase Orders- 850 EAL
 February 17, 2020

PO #	Description	Vendor	Amount	Status	Approval Date
	Site Survey- Boundary	Kimley Horn	\$ 6,000.00	Approved	8/30/2019
	Site Survey- Topographic	Kimley Horn	\$ 7,000.00	Approved	8/30/2019
TCAD-001	Demo & Abatement Package	Balfour Beatty	\$ 392,260.00	Approved	10/22/2019
TCAD-002	Change Order- Preconstruction Fees & Bonds	Balfour Beatty	\$ 11,366.00	Approved	11/7/2019
TCAD-003	Change Order- Additional Demo & Abatement	Balfour Beatty	\$ 14,304.74	Approved	11/13/2019
TCAD-004	Change Order- Temp Fencing	Balfour Beatty	\$ -	Approved	11/13/2019
TCAD-005	Architectural Fees	GSC Architects	\$ 490,100.00	Approved	10/1/2019
TCAD-006	Additional Demo & Electrical- IT Server Rm. Wall	Balfour Beatty	\$ 1,962.36	Approved	12/4/2019
TCAD-007	Refund of Unused Contingency	Balfour Beatty	\$ (10,251.26)	Approved	12/17/2019
TCAD-008	Renovation of 850 EAL	Balfour Beatty Construction	\$ 5,836,878.00	Approved	1/10/2020
TCAD-009	Site Plan Exemption for Water Tap for Fire System	GSC Architects	\$ 47,300.00	Approved	2/7/2020
TCAD-010	RCO 001: RFI 7- Repair to Woman's Restroom Wall	Balfour Beatty Construction	\$ -	Approved	1/29/2020
TCAD-011	RCO 002: Replace Exposed Paper Back Insulation	Balfour Beatty Construction	\$ -	Approved	1/30/2020
TCAD-012	RCO 003: Backfill Elevator Pit Cavity in Annex	Balfour Beatty Construction	\$ -	Approved	2/6/2020
TCAD-013	RCO 004: Battery Operated Flush Valves	Balfour Beatty Construction	\$ -	Approved	2/10/2020
TCAD-014	RCO 005: Remove & Replace Non ADA Compliant Concrete Entrance	Balfour Beatty Construction	\$ -	Approved	2/10/2020
TCAD-015	Data Cabling for 850 EAL	Cable Com Inc.	\$ 312,553.07	Approved	1/21/2020

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850 EAL Holding Corp.
10670- Construction in Progress
February 17, 2020

Date	Description	Amount
6/7/2019	Purchase Price of Building	8,530,000.00
6/7/2019	Closing Costs- Filing Fees	622.00
9/1/2019	Interest Cost- Loan Payment	107,837.25
10/1/2019	Architect Fees- September 2019	111,367.51
10/1/2019	Abatement Consulting- Design Documents	1,200.00
10/31/2019	Construction Fees- October 2019	29,660.00
10/31/2019	Architect Fees- October 2019	156,494.87
11/30/2019	Construction Fees- November 2019	158,978.94
11/30/2019	Abatement Consulting- Monitoring	8,441.25
11/30/2019	Architect Fees- November 2019	68,113.73
12/1/2019	Capitalized Interest Cost- 850 EAL Loan Payment- 12.01.1	106,981.32
12/10/2019	Permitting Fees- 850 EAL Renovation Project	7,855.12
12/27/2019	On-site Asbestos Abatement Project Management & Air M	9,767.50
12/31/2019	Construction Fees- December 2019	221,002.90
12/31/2019	Architect Fees- December 2019	51,103.08
1/31/2020	Construction Fees- January 2020	392,605.00
Total		9,962,030.47

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DESCRIPTION	Budget			Approved Expenditures								Balfour Beatty Billings			
	BALFOUR BEATTY	TCAD	TOTAL	RCO# 001	RCO# 002	RCO# 003	RCO# 004	RCO# 005	Cable Com	TOTAL ACTUAL	16412001-1	TOTAL BILLED	% Budget		
	\$	\$/SF	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	%		
ALLOWANCES	\$ 35,650.00	\$ 0.49	\$ 35,650.00	\$ 35,650.00	\$ (1,386.90)	\$ (12,916.80)					\$ 21,346.30		\$ -	40.12%	
HAZARDOUS MATERIAL ASSESSMENT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
SELECTIVE DEMOLITION	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
HAZARDOUS MATERIAL REMOVAL / ABATE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
THIRD PARTY CONSULTING- ABATEMENT	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
CONCRETE	\$ 69,345.00	\$ 0.95	\$ 69,345.00	\$ 69,345.00		\$ 3,817.00		\$ 10,112.00			\$ 83,274.00		\$ -	-20.09%	
MASONRY / CAST STONE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
STRUCTURAL / METAL FABRICATIONS	\$ 93,525.00	\$ 1.29	\$ 93,525.00	\$ 93,525.00							\$ 93,525.00	\$ 11,260.00	\$ 11,260.00	0.00%	
STAIRS & HANDRAILS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
DECORATIVE METALS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
ARCHITECTURAL WOODWORK	\$ 159,990.00	\$ 2.20	\$ 159,990.00	\$ 159,990.00							\$ 159,990.00		\$ -	100.00%	
MILLWORK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
DAMP/PROOFING & WATERPROOFING	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
MEMBRANE ROOFING	\$ 38,726.00	\$ 0.53	\$ 38,726.00	\$ 38,726.00							\$ 38,726.00		\$ -	0.00%	
SPRAYED INSULATION	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
DOORS / FRAMES / HARDWARE	\$ 106,444.00	\$ 1.46	\$ 106,444.00	\$ 106,444.00							\$ 106,444.00		\$ -	0.00%	
GLASS / GLAZING	\$ 81,310.00	\$ 1.12	\$ 81,310.00	\$ 81,310.00							\$ 81,310.00		\$ -	0.00%	
PLASTER / STUCCO	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
DRYWALL / ACOUSTICAL	\$ 403,400.00	\$ 5.55	\$ 403,400.00	\$ 403,400.00	\$ 1,340.00	\$ 12,480.00					\$ 417,220.00	\$ 55,000.00	\$ 55,000.00	-3.43%	
TILING	\$ 77,300.00	\$ 1.06	\$ 77,300.00	\$ 77,300.00							\$ 77,300.00	\$ 21,000.00	\$ 21,000.00	0.00%	
TERRAZZO FLOORING	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
RESILIENT FLOORING & CARPET	\$ 199,869.00	\$ 2.75	\$ 199,869.00	\$ 199,869.00							\$ 199,869.00		\$ -	0.00%	
PAINTING & WALLCOVERING	\$ 138,120.00	\$ 1.90	\$ 138,120.00	\$ 138,120.00							\$ 138,120.00		\$ -	0.00%	
DECORATIVE WALL FINISHING	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
SIGNAGE & IDENTIFICATION DEVICES	\$ 25,160.00	\$ 0.35	\$ 25,160.00	\$ 25,160.00							\$ 25,160.00		\$ -	0.00%	
OPERABLE PARTITIONS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
TOILET, BATH & LAUNDRY SPECIALTIES	\$ 49,400.00	\$ 0.68	\$ 49,400.00	\$ 49,400.00							\$ 49,400.00		\$ -	0.00%	
FIRE PROTECTION SPECIALTIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
LOCKERS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
APPLIANCES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
AUDIO-VISUAL EQUIPMENT	\$ -	\$ -	\$ 100,000.00	\$ 100,000.00							\$ -		\$ -	100.00%	
WINDOW TREATMENTS	\$ 8,420.00	\$ 0.12	\$ 8,420.00	\$ 8,420.00							\$ 8,420.00		\$ -	0.00%	
COUNTERTOPS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
SITE FURNISHINGS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
ELEVATORS / ESCALATORS / LIFTS	\$ 356,400.00	\$ 4.90	\$ 356,400.00	\$ 356,400.00							\$ 356,400.00		\$ -	0.00%	
FIRE SUPPRESSION SPRINKLER SYSTEM	\$ 226,440.00	\$ 3.11	\$ 226,440.00	\$ 226,440.00							\$ 226,440.00		\$ -	0.00%	
PLUMBING	\$ 377,550.00	\$ 5.19	\$ 377,550.00	\$ 377,550.00			\$ 8,960.15				\$ 386,510.15	\$ 28,221.00	\$ 28,221.00	-2.37%	
TESTING, ADJUSTING & BALANCING	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
DIRECT-DIGITAL CONTROL SYSTEM	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
HVAC	\$ 1,368,780.00	\$ 18.82	\$ 1,368,780.00	\$ 1,368,780.00							\$ 1,368,780.00	\$ 93,699.00	\$ 93,699.00	0.00%	
ELECTRICAL	\$ 1,260,102.00	\$ 17.33	\$ 1,260,102.00	\$ 1,260,102.00							\$ 1,260,102.00	\$ 59,100.00	\$ 59,100.00	0.00%	
STRUCTURED CABLING	\$ -	\$ -	\$ 312,553.07	\$ 312,553.07						\$ 312,553.07	\$ 312,553.07		\$ -	#DIV/0!	
ACCESS CONTROL & SECURITY	\$ -	\$ -	\$ 160,846.14	\$ 160,846.14							\$ -		\$ -	100.00%	
FIRE ALARM	\$ 41,223.00	\$ 0.57	\$ 41,223.00	\$ 41,223.00							\$ 41,223.00		\$ -	0.00%	
UTILITIES (FIRE SPRINKLER)	\$ 50,000.00	\$ 0.69	\$ 50,000.00	\$ 50,000.00							\$ 50,000.00		\$ -	0.00%	
CONCRETE PAVING	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
PAVEMENT MARKINGS & SPECIALTIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
TOTAL COST OF WORK	\$ 5,167,154.00		\$ 5,743,399.21	\$ 5,167,154.00	\$ (46.90)	\$ (436.80)	\$ 3,817.00	\$ 8,960.15	\$ 10,112.00	\$ 312,553.07	\$ 5,502,112.52	\$ 268,280.00	\$ -	\$ 268,280.00	-6.48%
GENERAL CONDITIONS/REQUIREMENTS	\$ 183,804.00		\$ 183,804.00	\$ 183,804.00							\$ 183,804.00	\$ 44,000.00	\$ 44,000.00	0.00%	
TOTAL COST OF WORK & GEN. CONDITIONS	\$ 5,350,958.00		\$ 5,927,203.21	\$ 5,350,958.00	\$ (46.90)	\$ (436.80)	\$ 3,817.00	\$ 8,960.15	\$ 10,112.00	\$ 312,553.07	\$ 5,685,916.52	\$ 312,280.00	\$ -	\$ 312,280.00	-6.26%
GENERAL LIABILITY	\$ 60,704.00	1.04%	\$ 60,704.00	\$ 60,704.00							\$ 60,704.00	\$ 12,150.00	\$ 12,150.00	0.00%	
BUILDER'S RISK INSURANCE	\$ 4,961.00	0.09%	\$ 4,961.00	\$ 4,961.00							\$ 4,961.00	\$ 975.00	\$ 975.00	0.00%	
BUILDING PERMIT	\$ -	\$ -	\$ -	\$ -							\$ -		\$ -	100.00%	
SUBGUARD	\$ 78,798.00	1.35%	\$ 78,798.00	\$ 78,798.00							\$ 78,798.00	\$ 16,000.00	\$ 16,000.00	0.00%	
PERFORMANCE BOND	\$ 49,613.00	0.85%	\$ 49,613.00	\$ 49,613.00							\$ 49,613.00	\$ 10,000.00	\$ 10,000.00	0.00%	
SUBTOTAL	\$ 5,545,034.00		\$ 5,743,399.21	\$ 5,545,034.00	\$ (46.90)	\$ (436.80)	\$ 3,817.00	\$ 8,960.15	\$ 10,112.00	\$ 312,553.07	\$ 5,879,992.52	\$ 351,405.00	\$ -	\$ 351,405.00	-6.04%
CONTRACTOR CONTINGENCY	\$ 87,553.00	1.50%	\$ 87,553.00	\$ 87,553.00			\$ (3,950.60)	\$ (9,273.76)	\$ (10,465.92)		\$ 63,862.72		\$ -	27.06%	
SUBTOTAL	\$ 5,632,587.00		\$ 5,743,399.21	\$ 5,632,587.00	\$ (46.90)	\$ (436.80)	\$ (133.60)	\$ (313.61)	\$ (353.92)	\$ 312,553.07	\$ 5,943,855.24	\$ 351,405.00	\$ -	\$ 351,405.00	-5.53%
FEE	\$ 204,291.00	3.50%	\$ 204,291.00	\$ 204,291.00	\$ 46.90	\$ 436.80	\$ 133.60	\$ 313.61	\$ 353.92		\$ 205,575.83	\$ 41,200.00	\$ 41,200.00	-0.63%	
SALES TAX	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
PRECONSTRUCTION FEE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					\$ -		\$ -	100.00%	
GRAND TOTAL COST	\$ 5,836,878.00		\$ 5,743,399.21	\$ 5,836,878.00	\$ (0.00)	\$ (0.00)	\$ (0.00)	\$ (0.00)	\$ (0.00)	\$ 312,553.07	\$ 6,149,431.07	\$ 392,605.00	\$ -	\$ 392,605.00	-5.35%

AGENDA ITEM

#5B

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

TOM BUCKLE
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
JAMES VALADEZ
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

THERESA BASTIAN
BRUCE ELFANT
BLAMCA ZAMORA-GARCIA
ANTHONY NGUYEN
ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Director of Operations

DATE: February 14, 2020

RE: Item No. 5B- IFB 2020-2: Phone System Enhancements

The District requests the purchase of necessary phone system enhancements in order to facilitate providing informal conference offer amounts and the ability to accept or reject those offer amounts via telephone. The vendor for this project was selected using the Department of Information Resources (DIR), a state purchasing contract. The vendor provided the District's current IP phone system.

Description	Amount
Software Licensing	\$ 41,318.89
Professional Services- Development & Implementation	\$ 51,282.16
Maintenance	\$ 3,207.33
TOTAL COST	\$ 95,808.38

Respectfully submitted,

A handwritten signature in black ink that reads "Leana H. Mann".

Leana H. Mann, CGFO
Director of Operations

Solution Summary

Enghouse IVR and IP Office Services

<p>Customer: Travis Central Appraisal District</p> <p>Ship To Address: 8314 Cross Park Drive Austin, TX 78754</p> <p>Bill To Address: PO Box 149012 Austin, TX 78714-9012</p> <p>Customer ID: TRACEN0001</p> <p>Customer PO:</p>	<p>Primary Contact: Leana Mann</p> <p>Email: lmann@tcadcentral.org</p> <p>Phone: (512) 834-9317</p> <p>National Account Manager: Chris Van Houten</p> <p>Email: CVanHouten@convergeone.com</p> <p>Phone: +15127587251</p>
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Solution Summary	Current Due	Next Invoice	Due	Remaining	Total Project
Software	\$41,318.89		One-Time		\$41,318.89
Professional Services	\$51,282.16		One-Time		\$51,282.16
Maintenance					
Manufacturer Maintenance	\$3,207.33		Prepaid		\$3,207.33
Project Subtotal	\$95,808.38				\$95,808.38
Estimated Tax	NOT INCLUDED				
Estimated Freight	NOT INCLUDED				
Project Total	\$95,808.38				\$95,808.38

This Solution Summary summarizes the documents(s) that are attached hereto and such documents are incorporated herein by reference (collectively, this "Order"). Customer's signature on this Order (or Customer's issuance of a purchase order in connection with this Order) shall represent Customer's agreement with each document in this Order and acknowledgement that such attached document(s) are represented accurately by this Solution Summary.

Unless otherwise specified in this Order, this Order shall be subject to the following terms and conditions (the "Agreement"): (i) the Master Sales Agreement or other applicable master agreement in effect as of the date hereof between ConvergeOne, Inc. and/or its subsidiaries and affiliates (collectively, "C1" or "ConvergeOne" or "Seller") and Customer; or (ii) if no such master agreement is currently in place between C1 and Customer, the Online General Terms and Conditions currently found on the internet at: <https://www.convergeone.com/online-general-terms-and-conditions/> . If Customer's Agreement is a master agreement entered into with one of ConvergeOne, Inc.'s predecessors, affiliates and/or subsidiaries ("Legacy Master Agreement"), the terms and conditions of such Legacy Master Agreement shall apply to this Order, subject to any modifications, located at: <https://www.convergeone.com/online-general-terms-and-conditions/> . In the event of a conflict between the terms and conditions in the Agreement and this Order, the order of precedence shall be as follows: (i) this Order (with the most recent and specific document controlling if there are conflicts between the Solution Summary and any applicable supporting document(s) incorporated into this Order), (ii) Attachment A to the Agreement (if applicable), and (iii) the main body of the Agreement.

This Order may include the sale of any of the following to Customer: (a) any hardware, third party software, and/or Seller software (collectively, "Products"); (b) any installation services, professional services, and/or third party provided support services that are generally associated with the Products and sold to customers by Seller (collectively, "Professional Services"); (c) any Seller-provided vendor management services, software release management services, remote monitoring services and/or, troubleshooting services (collectively, "Managed Services"); and/or (d) any Seller-provided maintenance services ordered by Customer to maintain and service Supported Products or Supported Systems at Supported Sites to ensure that they operate in conformance with their respective documentation and specifications (collectively, "Maintenance Services"). For ease of reference only, Professional Services, Managed Services and Maintenance Services may be referred to collectively as "Services." Unless otherwise defined herein, capitalized terms used herein will have the same meanings as set forth in the Agreement.

Products and/or Services not specifically itemized are not provided hereunder. This Order will be valid for a period of thirty (30) days following the date hereof. Thereafter, this Order will no longer be of any force and effect.

This Order is a configured order and/or contains software.

Special Comment to Solution Summary:

DIR-TSO-4308 The terms and conditions of TX DIR-TSO-4308 shall apply to this Solution Summary, and shall specifically supersede the terms of all other agreements referenced herein, including a Master Sales Agreement, the Online General Terms and Conditions, and/or a Legacy Master Agreement

ACCEPTED BY:

BUYER: _____ DATE: _____ SELLER: _____ DATE: _____

TITLE: _____ TITLE: _____

Solution Quote

#	Item Number	Description	Public Sector Contract	Term	Qty	Unit List Price	Extended List	% Disc	Unit Price	Extended Price
1	Professional Services	Professional Services	DIR-TSO-4308		1		\$57,459.00	10.75 %	\$51,282.16	\$51,282.16
2	MISC	CP-SIP-DIA-HMP: CP SIP Port - Dialogic HMP (\$ / Port)	DIR-TSO-4308		12	\$100.00	\$1,200.00	30.00 %	\$70.00	\$840.00
3	MISC	CP-SIP-DIA-SPCH: CP SIP Port - Dialogic Speech Processing (\$ / Port)	DIR-TSO-4308		12	\$55.00	\$660.00	30.00 %	\$38.50	\$462.00
4	MISC	Maintenance CP: CP Software Assurance - Standard	DIR-TSO-4308		1	\$3,403.00	\$3,403.00	5.75 %	\$3,207.33	\$3,207.33
5	MISC	CP-VOICE10: CP Voice Media Self-Service Bundle (\$ / 10 Ports)	DIR-TSO-4308		1	\$11,000.00	\$11,000.00	30.00 %	\$7,700.00	\$7,700.00
6	MISC	CP-VOICEPORT: CP Voice Media Self-Service Port (\$ / Port)	DIR-TSO-4308		2	\$575.00	\$1,150.00	30.00 %	\$402.50	\$805.00
7	MISC	CP-Audio-Branding: CP Voice Personas (\$/SOW)	DIR-TSO-4308		2	\$1,215.00	\$2,430.00	30.00 %	\$850.50	\$1,701.00
8	MISC	3LVSWA: LumenVox Software Assurance	DIR-TSO-4308		1	\$5,229.99	\$5,229.99	5.00 %	\$4,968.49	\$4,968.49
9	MISC	TTSP: LumenVox Text to Speech	DIR-TSO-4308		12	\$674.96	\$8,099.52	5.00 %	\$641.21	\$7,694.52
10	MISC	ASR3P: LumenVox Tier 3 ASR (Full)	DIR-TSO-4308		12	\$1,253.50	\$15,042.00	5.00 %	\$1,190.82	\$14,289.84
11	MISC	ASR3L: LumenVox Tier 3 ASR Language	DIR-TSO-4308		12	\$250.71	\$3,008.52	5.00 %	\$238.17	\$2,858.04

AGENDA ITEM

#5C

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

TOM BUCKLE
CHAIRPERSON
BRUCE GRUBE
VICE CHAIRPERSON
JAMES VALADEZ
SECRETARY/TREASURER



MARYA CRIGLER
CHIEF APPRAISER

BOARD MEMBERS

THERESA BASTIAN
BRUCE ELFANT
BLAMCA ZAMORA-GARCIA
ANTHONY NGUYEN
ELEANOR POWELL
RYAN STEGLICH
FELIPE ULLOA

TO: Travis Central Appraisal District
Board of Directors

FROM: Leana H. Mann
Director of Operations

DATE: February 14, 2020

RE: Item No. 5C- Request for Transfer of Funds from Reserve for Technology Enhancements

The District is requesting that the Board of Directors approve a transfer of committed fund balance from the reserve for technology enhancements to the general fund's unassigned fund balance for phone system enhancements. These funds will be used to purchase the necessary licensing and professional services to implement the ability for property owners to receive and accept/reject their informal conference offer amount. The total amount of funds to be transferred is \$95,808.38.

Respectfully submitted,

A handwritten signature in black ink that reads "Leana H. Mann".

Leana H. Mann, CGFO
Director of Operations