

Travis Central Appraisal District



Board of Director's Meeting
Thursday, May 14, 2026
11:30 AM

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS

NICOLE CONLEY
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
ELIZABETH MONTOYA
SECRETARY/TREASURER



LEANA MANN
CHIEF APPRAISER

BOARD MEMBERS

BRUCE ELFANT
JETT HANNA
CELIA ISRAEL
DICK LAVINE
AARON MORENO
SHENGHAO "DANIEL" WANG

Board Room, 850 East Anderson Lane, Austin, TX 78752 and VIA VIDEOCONFERENCE

The public may hear and view this meeting while in progress online at:

www.traviscad.org/boardmeetings

AGENDA

REGULAR MEETING OF THE BOARD OF DIRECTORS - THURSDAY, MAY 14, 2026 - 11:30 AM

1. CALL TO ORDER

2. ESTABLISHMENT OF A QUORUM

3. CITIZENS COMMUNICATION

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

4. CONSENT AGENDA

Description: *These items may be acted upon by one motion. No separate discussion or vote on any of the items will be held unless requested by a board member.*

4.a. APPROVAL OF THE MINUTES OF THE APRIL 9, 2026 REGULAR MEETING

4.b. SECTION 25.25B REPORT

4.c. ACCOUNTING STATEMENTS

4.d. PERSONNEL REPORT

5. REGULAR AGENDA

5.a. DISCUSSION ON REPORT FROM BOARD OPERATING POLICIES COMMITTEE

5.b. DISCUSSION AND POSSIBLE ACTION ON PROPOSED REVISIONS AND ADOPTION OF THE BOARD OF DIRECTORS OPERATING POLICIES

5.c. DISCUSSION AND POSSIBLE ACTION ON TAXPAYER LIAISON OFFICER REPORT

5.d. DISCUSSION AND POSSIBLE ACTION ON REMOVAL OF APPRAISAL REVIEW BOARD MEMBERS WHO RESIGNED

5.e. DISCUSSION AND POSSIBLE ACTION ON APPRAISAL REVIEW BOARD CHAIRPERSON'S REPORT

5.f. DISCUSSION AND POSSIBLE ACTION ON ADOPTION OF PROPOSED PERSONNEL POLICY

5.g. DISCUSSION AND POSSIBLE ACTION ON CHIEF APPRAISER'S REPORT TO INCLUDE: 2026 MASS APPRAISAL REPORT, 2026 PROTEST SEASON, HOMESTEAD VERIFICATION PROGRAM, COMMUNITY OUTREACH, AND TAXPAYER EXPERIENCE SNAPSHOT

5.h. DISCUSSION AND POSSIBLE ACTION ON PERFORMANCE REVIEW AND COMPENSATION FOR CHIEF APPRAISER

5.i. 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
- SEC. 551.0761 Deliberation regarding critical infrastructure facility
- SEC. 551.089 Deliberation regarding IT Security

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

CERTIFICATE OF POSTING

I, Davina Barton, Executive Assistant of the Travis Central Appraisal District, do hereby certify that on the 8th day of May 2026, by 5 o'clock P.M., this Notice of Meeting was posted at the District's Offices, located at 850 East Anderson Lane, Austin, Texas 78752. This Notice of Meeting was posted in a place readily accessible to the general public at all times for three business days prior to the meeting, filed with the Travis County Clerk for posting by the Clerk at the Travis County Courthouse, and posted on the District's website.

By: *Davina Barton*

Printed Name: Davina Barton

Title: Executive Assistant

TRAVIS CENTRAL APPRAISAL DISTRICT

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DEBORAH CARTWRIGHT
VICE CHAIRPERSON
ELIZABETH MONTOYA
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SHENGHAO "DANIEL" WANG

TCAD - BOARD OF DIRECTORS MINUTES OF THE APRIL 9, 2026 MEETING

1. Call to order

Meeting called to order by Nicole Conley at 11:33 a.m. on, April 9, 2026.

2. Establishment of Quorum

Nicole Conley, Chairperson	Appointed	Present
Elizabeth Montoya, Secretary	Appointed	Present
Debbie Cartwright, Vice Chairperson	Appointed	Present
Jett Hanna	Elected, Place 1	Present
Shenghao "Daniel" Wang	Elected, Place 2	Present
Dick Lavine	Elected, Place 3	Absent
Celia Israel	Travis County Tax Assessor-Collector	Present
Bruce Elfant	Appointed	Absent
Aaron Moreno	Appointed	Present

Also present were Leana Mann, Chief Appraiser, and Dustin Banks, Sr. In-House Counsel

3. Citizens Communication

Louise Bell

4. Consent Agenda

- a. APPROVAL OF THE MINUTES OF THE FEBRUARY 19, 2026 meeting.
- b. SECTION 25.25B REPORT
- c. ACCOUNTING STATEMENTS
- d. PERSONNEL REPORT

MOTION: Move to pass items 4A, 4B, and 4C on the consent agenda.

RESULT: **PASSED [UNANIMOUS]**

MOVER: Debbie Cartwright

SECONDER: Elizabeth Montoya

AYES: Nicole Conley, Debbie Cartwright, Elizabeth Montoya, Aaron Moreno, Celia Israel, Dick Lavine, Jett Hanna, Shenghao "Daniel" Wang

ABSENT: Bruce Elfant

MOTION: Move to pass item 4D on the consent agenda.
RESULT: **PASSED [UNANIMOUS]**
MOVER: Debbie Cartwright **SECONDER:** Shenghao “Daniel” Wang

AYES: Nicole Conley, Debbie Cartwright, Elizabeth Montoya, Aaron Moreno, Celia Israel, Dick Lavine, Jett Hanna, Shenghao “Daniel” Wang

ABSENT: Bruce Elfant

5A. Appointment of board members to standing board committee as outlined in the Board Operating Policies.

Members of the board heard from Nicole Conley, Chairperson

A listing of the standing committees and appointments are as follows:

Board Policies

- Nicole Conley
- Debbie Cartwright
- Elizabeth Montoya

ARB Subcommittee

- Dick Lavine
- Jett Hanna
- Daniel Wang

Chief Appraiser Evaluation & Search Subcommittee

- Nicole Conley
- Dick Lavine
- Bruce Elfant

Budget & Audit Committee

- Nicole Conley
- Elizabeth Montoya
- Aaron Moreno

Purchasing & Contract Review Committee

- Elizabeth Montoya
- Jett Hanna
- Daniel Wang

Reappraisal Plan Committee

- Debbie Cartwright
- Aaron Moreno
- Bruce Elfant

Taxpayer Liaison Committee

- Daniel Wang
- Dick Lavine
- Celia Israel

Board Vacancy Review Committee (Ad Hoc)

- Dick Lavine
- Jett Hanna
- Bruce Elfant

Ag Advisory Board Committee

- Debbie Cartwright
- Jett Hanna
- Celia Israel

5B. Discussion on the Taxpayer Liaison Report

Members of the board heard from Tony Tran, Taxpayer Liaison.

RESULT: DISCUSSED

5C. Discussion and possible action on removal of Appraisal Review Board Members that have resigned.

Members of the board heard from Tony Tran, Taxpayer Liaison.

MOTION: Move to remove Teresa Griffin, Al Henton, and Nick Wallace, who have formally resigned from the Appraisal Review Board.
RESULT: **PASSED [UNANIMOUS]**
MOVER: Jett Hanna **SECONDER:** Celia Israel

AYES: Nicole Conley, Debbie Cartwright, Elizabeth Montoya, Aaron Moreno, Celia Israel, Dick Lavine, Jett Hanna, Shenghao “Daniel” Wang

ABSENT: Bruce Elfant

5D. Discussion and possible action on Appraisal Review Board Chairperson’s Report.

Members of the board heard from Meg Brooks, Appraisal Review Board Chairperson

RESULT: **DISCUSSED**

5E. Discussion and possible action on Chief Appraiser report to include: 2026 Homestead Verification Program, Community Outreach, and Taxpayer Experience Snapshot.

Members of the board heard from Leana Mann, Chief Appraiser

RESULT: **DISCUSSED**

At 12:05 P.M. All THE BOARD moved to executive session; TO DELIBERATE ON 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 and contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the board under the Texas disciplinary rules and professional conduct of the State Bar of Texas.

SEC. 551.076; Deliberations regarding security devices

MOTION: Move to enter Executive Session
RESULT: **PASSED [UNANIMOUS]**
MOVER: Dick Lavine **SECONDER:** Shenghao “Daniel” Wang

AYES: Nicole Conley, Debbie Cartwright, Elizabeth Montoya, Aaron Moreno, Celia Israel, Dick Lavine, Jett Hanna, Shenghao “Daniel” Wang

ABSENT: Bruce Elfant

At 1:20 PM, the Board resumed the public session and returned to Item 5F.

5F. Discussion on Cybersecurity practices at Travis CAD.

Members of the board heard from Tim

RESULT: DISCUSSED IN EXECUTIVE SESSION

5G. Discussion and possible action on Litigation and Appeals related to pending and anticipated lawsuits

RESULT: DISCUSSED IN EXECUTIVE SESSION

5H. Adjournment

MOTION: Move to adjourn

RESULT: PASSED [UNANIMOUS]

MOVER: Celia Israel

SECONDER: Elizabeth Montoya

AYES: Nicole Conley, Debbie Cartwright, Elizabeth Montoya, Aaron Moreno, Celia Israel, Dick Lavine, Jett Hanna, Shenghao "Daniel" Wang

ABSENT: Bruce Elfant

Respectfully submitted,

Elizabeth Montoya, Secretary

Approved:

Nicole Conley, Chairperson

TRAVIS CENTRAL APPRAISAL DISTRICT

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TO: Travis Central Appraisal District
Board of Directors

FROM: Kat Harvey
Director of Administration

SUBJECT: March 2026 Unaudited Financial Statements

The unaudited financial statements for March 2026 are enclosed. Financial highlights for the month are as follows:

The District's ending fund balance was \$9,356,379. Of that, \$705,077 was nonspendable in the form of prepaid expenditures, \$4,174,224 was held in reserves as committed fund balance, and \$4,477,079 was unassigned fund balance.

The net change in fund balance for the fiscal year to date is \$1,283,318.

The reserve balances total \$4,174,224. Detail account balances for each reserve account are as follows:

	<u>Current Balance</u>
Reserve for Computer Equipment	\$ 89,594
Reserve for Network Infrastructure	\$ 350,000
Reserve for Technology Enhancements	\$ 154,192
Reserve for Litigation	\$ 2,860,884
Reserve for Building Repair & Replacement	\$ -
Reserve for ARB Operations	\$ -
Reserve for Market Data Purchases	\$ 150,000
Reserve for Board Elections	\$ 569,554
	<u>\$ 4,174,224</u>

The District ended the month with a budget surplus of \$1,186,818.

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

Travis Central Appraisal District
 Budget to Actual- Governmental Funds
 For the month ended March 31, 2026

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Amended	YTD		
REVENUE:					
Appraisal assessments	34,160,980	34,160,980	8,540,245	8,540,245	-
Refund of appraisal assessments	-	-	-	-	-
Net appraisal assessments	\$ 34,160,980	\$ 34,160,980	\$ 8,540,245	\$ 8,540,245	\$ -
Investment earnings	150,000	150,000	37,500	133,829	96,329
Charges for services	9,000	9,000	2,250	1,002	(7,998)
Miscellaneous revenue	50,000	50,000	12,500	52,781	2,781
TOTAL REVENUE	\$ 34,369,980	\$ 34,369,980	\$ 8,592,495	\$ 8,727,857	\$ 91,112
EXPENDITURES:					
ARB Per diem payments	1,178,125	1,178,125	294,531	91,725	202,806
Personnel Cost	14,004,772	14,004,772	3,501,193	3,312,492	188,701
Benefit Cost	5,850,244	5,850,244	1,462,561	1,252,295	210,266
Printing and mailing services	675,279	675,279	168,820	379,134	(210,314)
Operating supplies	265,950	265,950	66,488	80,250	(13,763)
Subscriptions and data purchases	633,755	633,755	158,439	272,869	(114,430)
Training and education	176,991	176,991	44,248	29,283	14,965
Travel expenditures	54,767	54,767	13,692	4,068	9,624
Utilities	535,800	535,800	133,950	106,333	27,617
Legal expenditures	3,630,000	3,630,000	907,500	156,219	751,281
Professional services	3,819,852	3,819,852	954,963	700,343	254,620
Insurance	109,866	109,866	27,467	36,757	(9,291)
Aerial photography	657,650	657,650	164,413	385,734	(221,321)
Rentals	154,320	154,320	38,580	33,452	5,128
Building and Equipment maintenance	450,579	450,579	112,645	79,885	32,760
Software maintenance	430,627	430,627	107,657	177,943	(70,286)
Other services	422,516	422,516	105,629	73,209	32,420
Capital Outlay	361,049	361,049	90,262	85,338	4,925
Debt Service- Principal	713,483	713,483	178,371	175,508	2,863
Debt Service- Interest	35,355	35,355	8,839	11,702	(2,863)
TOTAL EXPENDITURES	34,160,980	34,160,980	8,540,245	7,444,539	1,095,706
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	209,000	209,000	52,250	1,283,318	1,186,818
OTHER FINANCING SOURCES (USES):					
Transfers In	-	-	-	187,209	(187,209)
Transfers out	-	-	-	(187,209)	187,209
TOTAL OTHER FINANCING SOURCES (USES)	-	-	-	-	-
NET CHANGE IN FUND BALANCE	209,000	209,000	52,250	1,283,318	1,186,818
Beginning Fund Balance	8,073,061	8,073,061	8,073,061	8,073,061	
Ending Fund Balance	\$ 8,282,061	\$ 8,282,061	\$ 8,125,311	\$ 9,356,379	\$ 1,186,818

Travis Central Appraisal District

Governmental Fund Balance Sheet

March 31, 2026

	General Fund	Special Revenue Fund	Total Governmental Funds
ASSETS			
Cash and cash equivalents	8,161,421	-	8,161,421
Short-term investments	9,601,244	-	9,601,244
Receivables	162,466	-	162,466
Prepaid items	<u>705,077</u>	<u>-</u>	<u>705,077</u>
TOTAL ASSETS	<u>\$ 18,630,208</u>	<u>\$ -</u>	<u>\$ 18,630,208</u>
LIABILITIES			
Accounts payable and accrued expenditures	733,584	-	733,584
Unearned revenue	<u>8,540,245</u>	<u>-</u>	<u>8,540,245</u>
TOTAL LIABILITIES	9,273,829	-	9,273,829
FUND BALANCES			
Fund balance, committed	4,174,224	-	4,174,224
Fund Balance, restricted	-	-	-
Fund balance, nonspendable	705,077	-	705,077
Fund balance, unassigned	<u>4,477,079</u>	<u>-</u>	<u>4,477,079</u>
TOTAL FUND BALANCES	<u>9,356,379</u>	<u>-</u>	<u>9,356,379</u>
TOTAL LIABILITIES AND FUND BALANCE	<u>\$ 18,630,208</u>	<u>\$ -</u>	<u>\$ 18,630,208</u>

Travis Central Appraisal District

Statement of Revenues, Expenditures and Changes in Fund Balance
For the month ended March 31, 2026

	General Fund	Special Revenue Fund	Total Governmental Funds
REVENUES			
Appraisal assessments	\$ 8,540,245	\$ -	\$ 8,540,245
Refund of appraisal assessments	-	-	-
Net appraisal assessments	8,540,245	-	8,540,245
Investment earnings	133,829	-	133,829
Charges for services	1,002	-	1,002
Miscellaneous revenue	52,781	-	52,781
TOTAL REVENUE	8,727,857	-	8,727,857
EXPENDITURES			
Appraisal services			
Payroll and related expenditures	4,656,513	-	4,656,513
Data processing	177,943	-	177,943
Transportation	4,068	-	4,068
Operating supplies	80,250	-	80,250
Rentals	33,452	-	33,452
Legal and professional	856,562	-	856,562
Utilities and telephone	106,333	-	106,333
Building and equipment maintenance	79,885	-	79,885
Insurance	36,757	-	36,757
Other services	1,140,229	-	1,140,229
Capital outlay	85,338	-	85,338
Debt Service- Principal	-	175,508	175,508
Debt Service- Interest	-	11,702	11,702
TOTAL EXPENDITURES	7,257,329	187,209	7,444,539
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	1,470,528	(187,209)	1,283,318
OTHER FINANCING SOURCES (USES):			
Transfers in	-	187,209	187,209
Transfers out	(187,209)	-	(187,209)
TOTAL OTHER FINANCING SOURCES (USES)	(187,209)	187,209	-
NET CHANGE IN FUND BALANCE	1,283,318	-	1,283,318
FUND BALANCE, beginning of year	8,073,061	-	8,073,061
FUND BALANCE, end of year	\$ 9,356,379	\$ -	\$ 9,356,379

Travis Central Appraisal District

Investment Report

As of March 31, 2026



M E E D E R

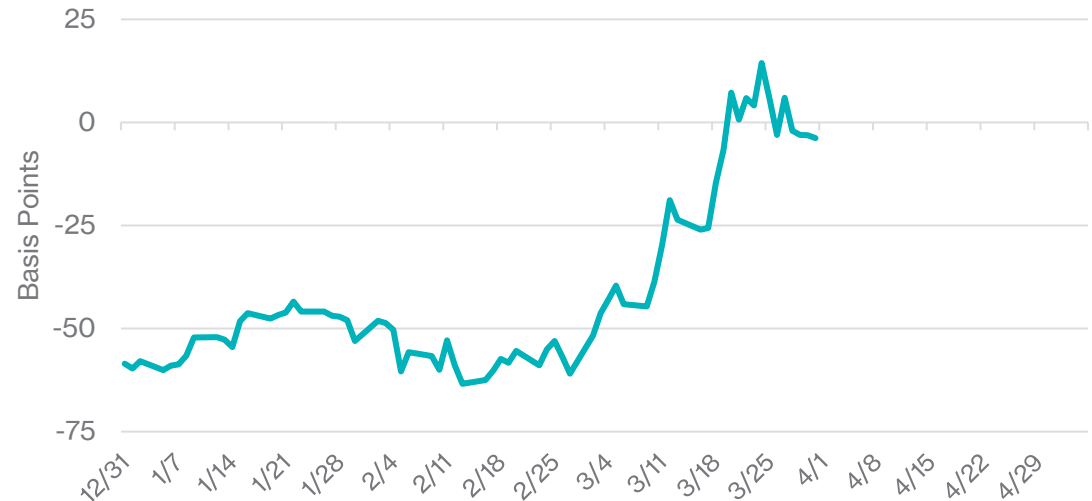
PUBLIC FUNDS

OBSERVATIONS AND EXPECTATIONS

- Interest rates were higher for March, generally due to increases of energy prices
- The Fed Funds futures market has been bouncing around, projecting no 2026 moves
- Economic growth for the fourth quarter of 2026 was revised lower to 0.7% from 1.4%
- Labor market data continue to show there's not much hiring or firing taking place
- The rate of change of inflation has slowed, but cumulative inflation is above average

- During most of February, the Fed Funds futures market was pricing in over two .25% Fed cuts this year.
- At the end of March, futures market data are projecting the Fed to be on hold this year.

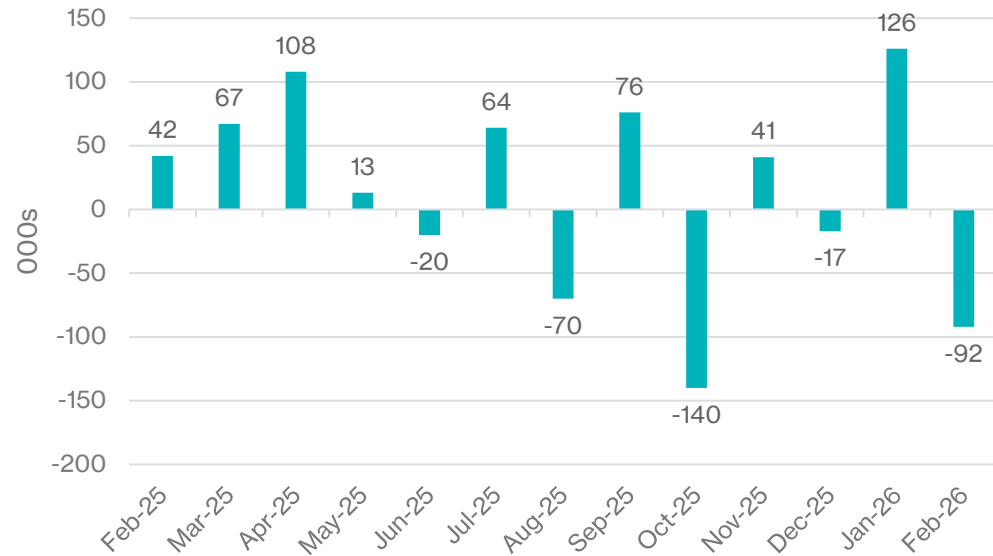
Projected Fed .25% Cuts/Hikes to Dec 2026



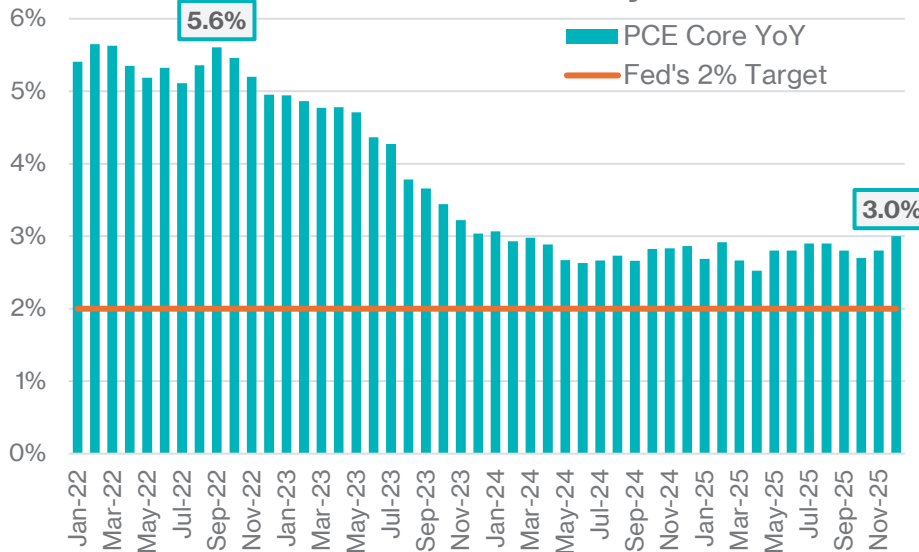
- Monthly nonfarm payrolls have alternated between negative and positive the past nine months.
- This is the highest string of consecutively contrasting job data on record.
- Many analysts and economists have stated we are experiencing a “no hire, no fire” job market.

SOURCE: BLOOMBERG,

Nonfarm Payrolls - MoM Change



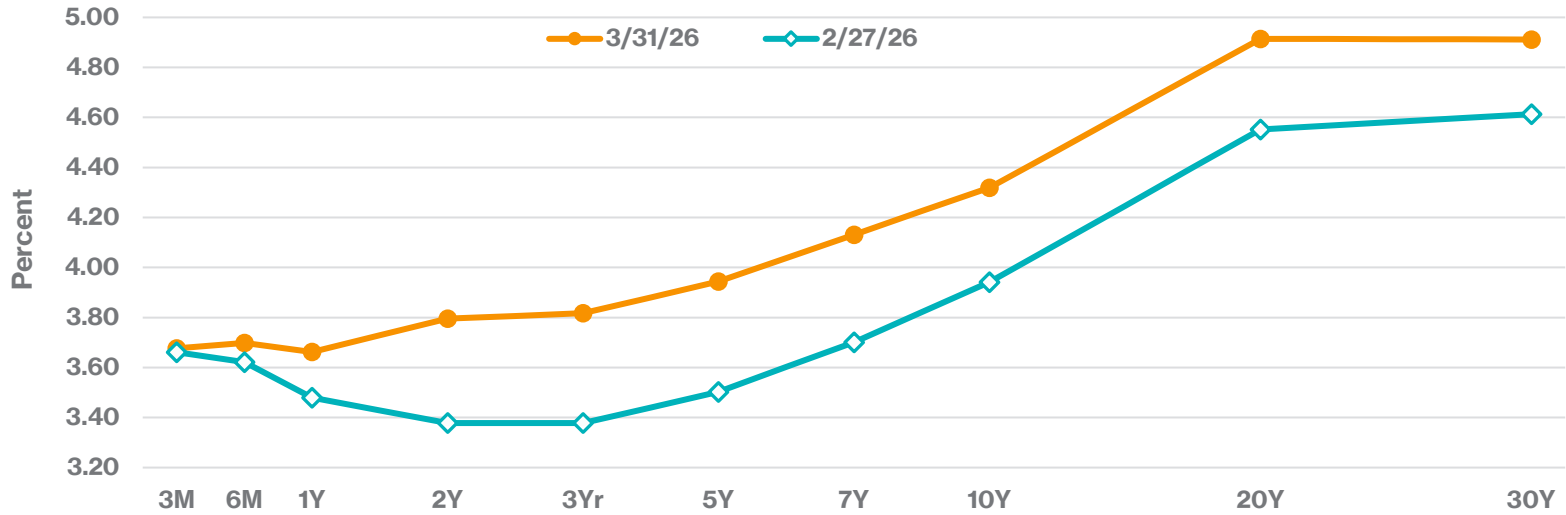
PCE Core Inflation Yoy



- The Consumer Price Index's YoY rate of change has slowed materially since the COVID year highs.
- The five-year cumulative change is up over 26%, which is well above a rolling 5-year average.
- U.S. consumers say their greatest financial concern right now is affordability, due to the accumulated inflation since the pandemic.

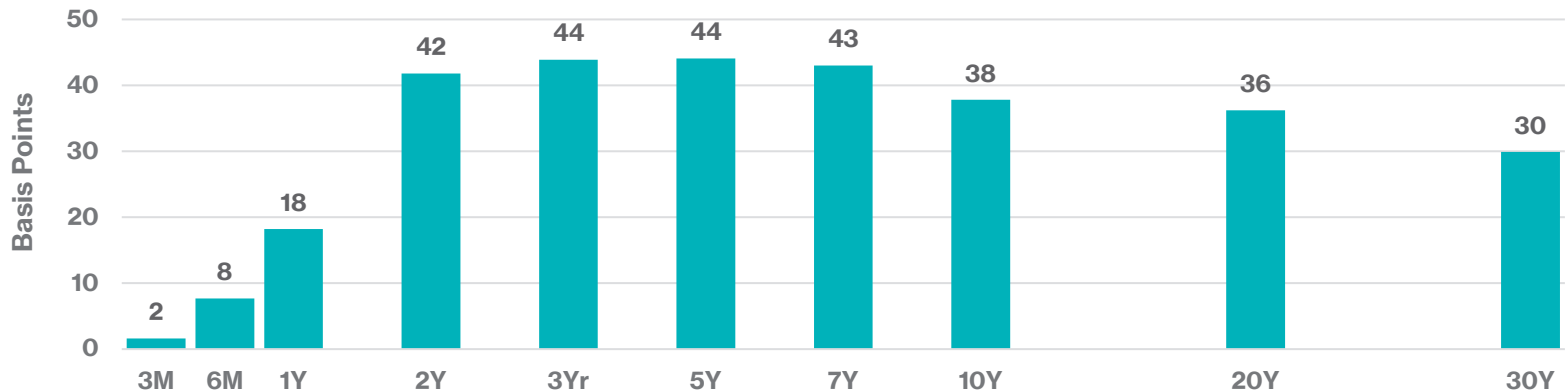
SOURCE: BLOOMBERG, *2026 YOY THROUGH FEB

U.S. Treasury Yield Curve Change



SOURCES: BLOOMBERG

Basis Point Change



SOURCES: BLOOMBERG

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Portfolio Summary

3.59

Weighted Average Yield to Maturity

0.00

Weighted Average Maturity (Years)

0.00

Portfolio Effective Duration (Years)

0.00

Weighted Average Life (Years)

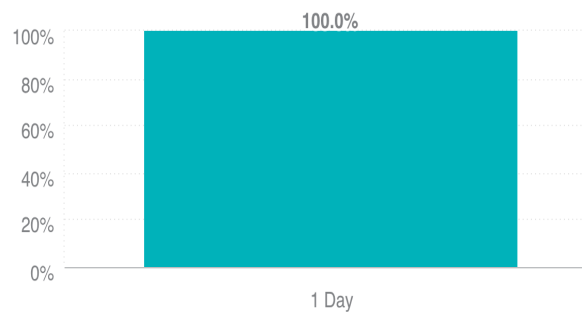
AAA

Average Credit Rating

Portfolio Position

Par Value	\$17,646,455
Principal Cost	\$17,646,455
Book Value	\$17,646,455
Market Value	\$17,646,455
Unrealized Gain/Loss	\$0
Accrued Interest	\$0

Maturity Distribution



Sector Allocation



● LGIP	54.41%
● Money Market Funds	42.89%
● Bank Deposits	2.70%

Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
Bank Deposits	476,423.42	476,423.42	476,423.42	2.70%	1	0.48
LGIP	9,601,244.20	9,601,244.20	9,601,244.20	54.41%	1	3.78
Money Market Funds	7,568,787.24	7,568,787.24	7,568,787.24	42.89%	1	3.55
TOTAL	17,646,454.86	17,646,454.86	17,646,454.86	100.00%	1	3.59

CASH AND ACCRUED INTEREST

Purchased Accrued Interest		0.00	0.00			
TOTAL CASH AND INVESTMENTS	17,646,454.86	17,646,454.86	17,646,454.86		1	3.59

TOTAL EARNINGS

	CURRENT MONTH	FISCAL YEAR TO DATE
	42,073.51	136,420.24

Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
GENERAL FUND						
Bank Deposits	2	476,423.42	476,423.42	2.70	0.48	1
LGIP	2	9,601,244.20	9,601,244.20	54.41	3.78	1
Money Market Funds	1	7,568,787.24	7,568,787.24	42.89	3.55	1
TOTAL	5	17,646,454.86	17,646,454.86	100.00	3.59	1
<hr/>						
GRAND TOTAL	5	17,646,454.86	17,646,454.86	100.00	3.59	1



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
GENERAL FUND												
BANK DEPOSITS												
6224690401	Wells Fargo Analyzed Bus Chkg+	03/31/2026 03/31/2026	476,423.34	476,423.34 0.00	476,423.34	0.48		1	1.00 476,423.34	0.00 476,423.34	2.70	NA NA
7556188469	Wells Fargo Analyzed Bus Chkg+	03/31/2026 03/31/2026	0.08	0.08 0.00	0.08	0.49		1	1.00 0.08	0.00 0.08	0.00	NA NA
BANK DEPOSITS TOTAL			476,423.42	476,423.42 0.00	476,423.42	0.48		1	1.00 476,423.42	0.00 476,423.42	2.70	NA
LGIP												
TEXPOOL	TexPool	03/31/2026 03/31/2026	1,631,048.79	1,631,048.79 0.00	1,631,048.79	3.68		1	1.00 1,631,048.79	0.00 1,631,048.79	9.24	AAA
TEXPRIME	TexPool Prime	03/31/2026 03/31/2026	7,970,195.41	7,970,195.41 0.00	7,970,195.41	3.80		1	1.00 7,970,195.41	0.00 7,970,195.41	45.17	AAA
LGIP TOTAL			9,601,244.20	9,601,244.20 0.00	9,601,244.20	3.78		1	1.00 9,601,244.20	0.00 9,601,244.20	54.41	AAA
MONEY MARKET FUNDS												
7556188477S	Wells Fargo Stage- coach Sweep	03/31/2026 03/31/2026	7,568,787.24	7,568,787.24 0.00	7,568,787.24	3.55		1	1.00 7,568,787.24	0.00 7,568,787.24	42.89	NA NA
MONEY MARKET FUNDS TOTAL			7,568,787.24	7,568,787.24 0.00	7,568,787.24	3.55		1	1.00 7,568,787.24	0.00 7,568,787.24	42.89	NA
GENERAL FUND TOTAL			17,646,454.86	17,646,454.86 0.00	17,646,454.86	3.59		1	17,646,454.86	0.00 17,646,454.86	100.00	AAA
GRAND TOTAL			17,646,454.86	17,646,454.86 0.00	17,646,454.86	3.59		1	17,646,454.86	0.00 17,646,454.86	100.00	AAA



Cash Reconciliation Report



Transaction Statement

**NO ACTIVITY DURING
CURRENT PERIOD**

Amortization Schedule

CUSIP	DESCRIPTION	PAR VALUE	PRINCIPAL COST	ORIGINAL PREMIUM OR DISCOUNT	BEGINNING BOOK VALUE	CURRENT PERIOD AMORT	ENDING BOOK VALUE	TOTAL AMORTIZATION	UNAMORTIZED BALANCE
GRAND TOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
GENERAL FUND									
TEXPOOL	TexPool	2026-03-31	1,631,048.79	1,631,048.79	0.00	0.00	5,071.50	5,071.50	0.00
TEXPRIME	TexPool Prime	2026-03-31	7,970,195.41	7,970,195.41	0.00	0.00	25,604.47	25,604.47	0.00
6224690401	Wells Fargo Analyzed Bus Chkg+	2026-03-31	476,423.34	476,423.34	0.00	0.00	193.81	193.81	0.00
7556188469	Wells Fargo Analyzed Bus Chkg+	2026-03-31	0.08	0.08	0.00	0.00	0.08	0.08	0.00
7556188477S	Wells Fargo Stagecoach Sweep	2026-03-31	7,568,787.24	7,568,787.24	0.00	0.00	11,203.65	11,203.65	0.00
TOTAL			17,646,454.86	17,646,454.86	0.00	0.00	42,073.51	42,073.51	0.00
GRAND TOTAL			17,646,454.86	17,646,454.86	0.00	0.00	42,073.51	42,073.51	0.00



Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
GENERAL FUND											
6224690401	Wells Fargo Analyzed Bus Chkg+	476,423.34	465,062.59	476,423.34	03/31/2026	1.00	0.48	193.81	0.00	0.00	193.81
7556188469	Wells Fargo Analyzed Bus Chkg+	0.08	111.12	0.08	03/31/2026	1.00	0.49	0.08	0.00	0.00	0.08
7556188477S	Wells Fargo Stagecoach Sweep	7,568,787.24	1,978,189.01	7,568,787.24	03/31/2026	0.00	3.55	11,203.65	0.00	0.00	11,203.65
TEXPOOL	TexPool	1,631,048.79	1,625,977.29	1,631,048.79	03/31/2026	5.34	3.68	5,071.50	0.00	0.00	5,071.50
TEXPRIME	TexPool Prime	7,970,195.41	7,944,590.94	7,970,195.41	03/31/2026	4.50	3.80	25,604.47	0.00	0.00	25,604.47
TOTAL		17,646,454.86	12,013,930.95	17,646,454.86		2.55	3.59	42,073.51	0.00	0.00	42,073.51
GRAND TOTAL		17,646,454.86	12,013,930.95	17,646,454.86		2.55	3.59	42,073.51	0.00	0.00	42,073.51

Disclosure

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

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TRAVIS CENTRAL APPRAISAL DISTRICT

Quarterly Investment Report

AS OF MARCH 31, 2026



M E E D E R

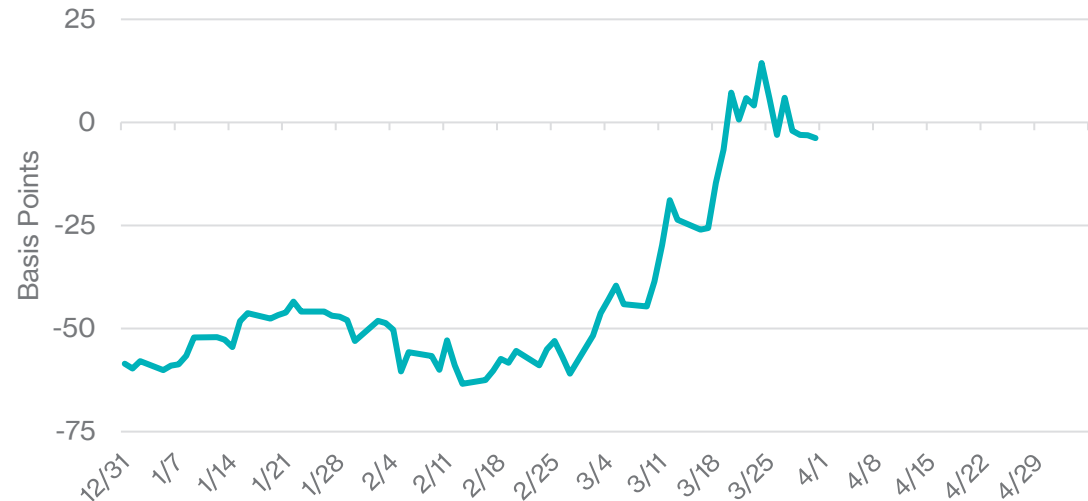
PUBLIC FUNDS

OBSERVATIONS AND EXPECTATIONS

- Interest rates were higher for March, generally due to increases of energy prices
- The Fed Funds futures market has been bouncing around, projecting no 2026 moves
- Economic growth for the fourth quarter of 2026 was revised lower to 0.7% from 1.4%
- Labor market data continue to show there's not much hiring or firing taking place
- The rate of change of inflation has slowed, but cumulative inflation is above average

- During most of February, the Fed Funds futures market was pricing in over two .25% Fed cuts this year.
- At the end of March, futures market data are projecting the Fed to be on hold this year.

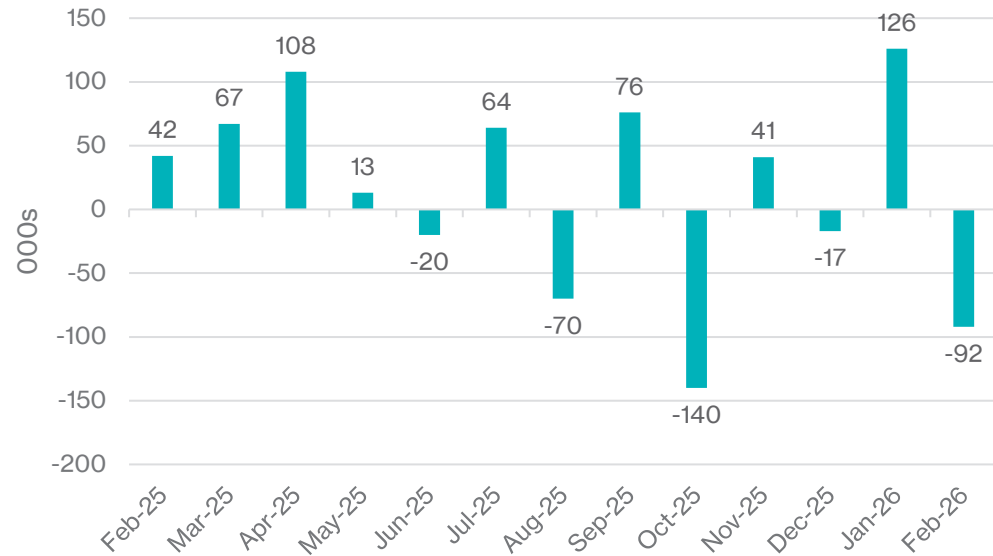
Projected Fed .25% Cuts/Hikes to Dec 2026



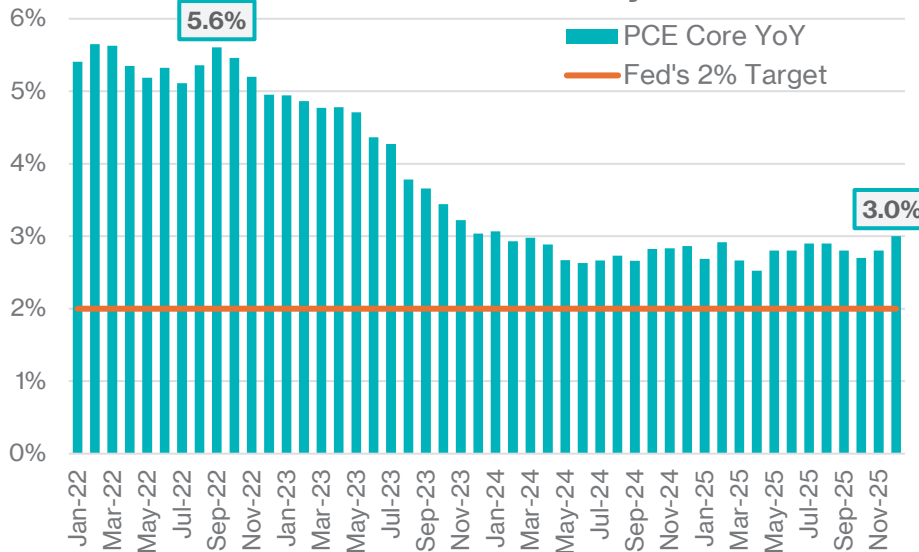
- Monthly nonfarm payrolls have alternated between negative and positive the past nine months.
- This is the highest string of consecutively contrasting job data on record.
- Many analysts and economists have stated we are experiencing a “no hire, no fire” job market.

SOURCE: BLOOMBERG,

Nonfarm Payrolls - MoM Change



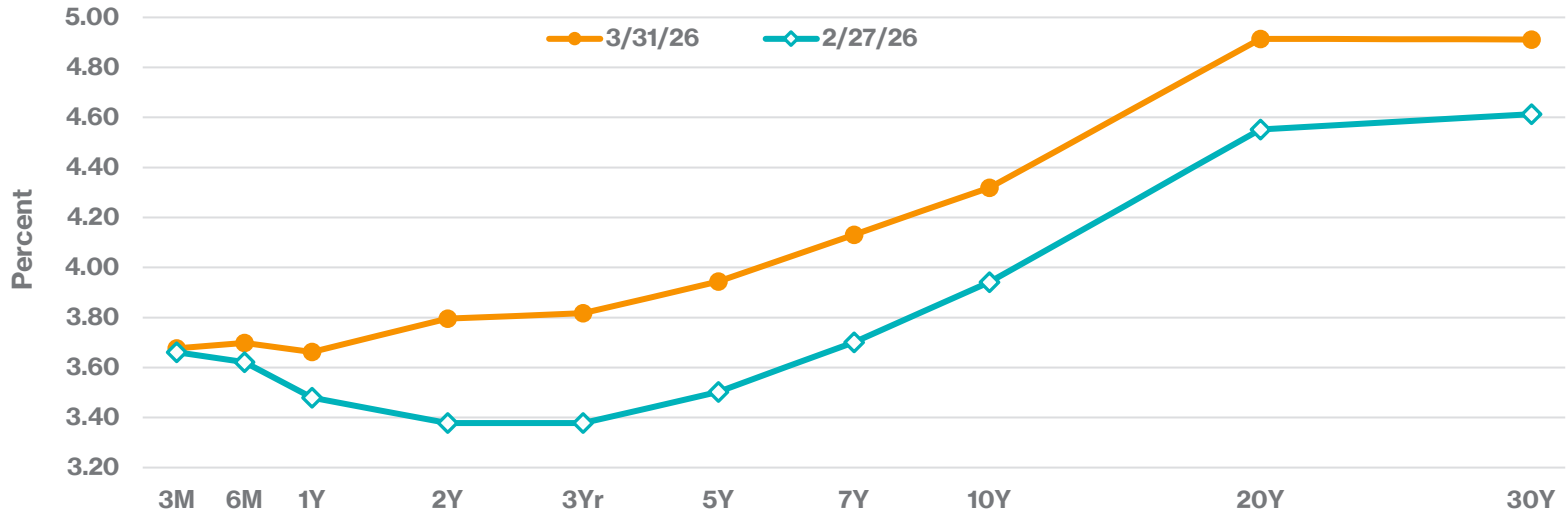
PCE Core Inflation Yoy



- The Consumer Price Index's YoY rate of change has slowed materially since the COVID year highs.
- The five-year cumulative change is up over 26%, which is well above a rolling 5-year average.
- U.S. consumers say their greatest financial concern right now is affordability, due to the accumulated inflation since the pandemic.

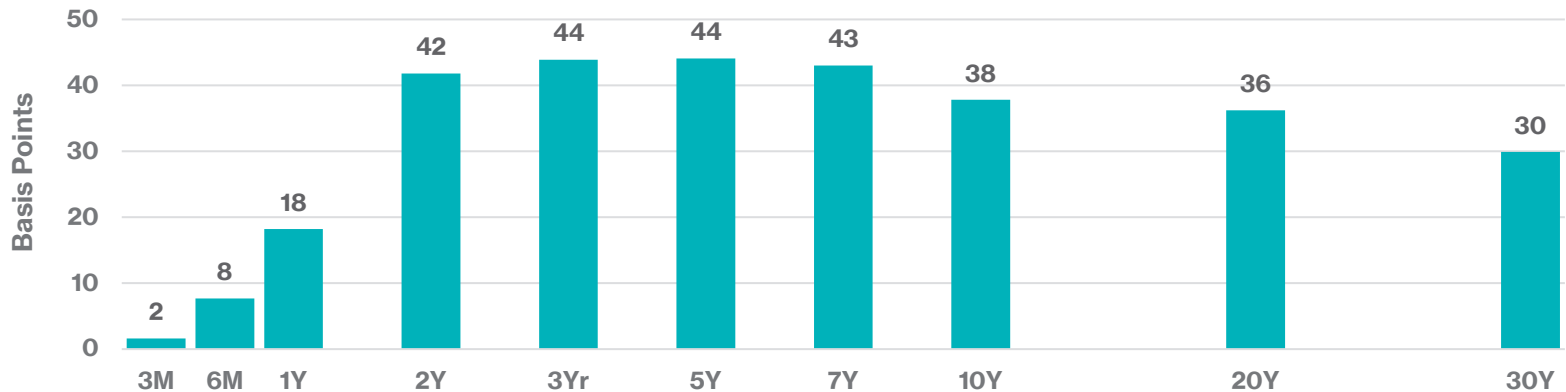
SOURCE: BLOOMBERG, *2026 YOY THROUGH FEB

U.S. Treasury Yield Curve Change



SOURCES: BLOOMBERG

Basis Point Change



SOURCES: BLOOMBERG



Compliance Certification

The undersigned acknowledge they have reviewed this quarterly investment report for the period ending March 31, 2026. Officials designated as investment officers by this entity's Investment Policy attest that all investments comply with the Texas Public Funds Investment Act and this entity's Investment Policy.

Leana H. Mann, Deputy Chief Appraiser

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Portfolio Statistics

3.59

Weighted Average Yield to Maturity

0.00

Weighted Average Maturity (Years)

0.00

Portfolio Effective Duration (Years)

0.00

Weighted Average Life (Years)

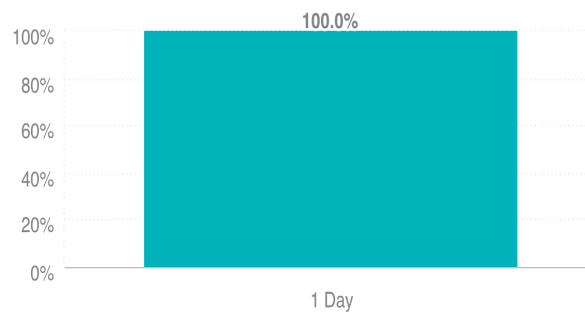
AAA

Average Credit Rating

Portfolio Position

Par Value	\$17,646,455
Principal Cost	\$17,646,455
Book Value	\$17,646,455
Market Value	\$17,646,455
Unrealized Gain/Loss	\$0
Accrued Interest	\$0

Maturity Distribution



Sector Allocation



● LGIP	54.41%
● Money Market Funds	42.89%
● Bank Deposits	2.70%

Quarterly Portfolio Summary

This quarterly report is prepared in compliance with the Investment Policy and the Strategy of this entity and the Public Funds Investment Act (Chapter 2256, Texas Government Code).

Portfolio as of December 31, 2025

BEGINNING BOOK VALUE	\$17,645,577.12
BEGINNING MARKET VALUE	\$17,645,577.12
UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	3.75

Portfolio as of March 31, 2026

ENDING BOOK VALUE	\$17,646,454.86
ENDING MARKET VALUE	\$17,646,454.86
INVESTMENT INCOME FOR THE PERIOD	\$136,420.24
UNREALIZED GAIN/(LOSS)	\$0.00
CHANGE IN UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	3.59

Quarterly Portfolio Summary By Fund

PORTFOLIO MARKET VALUE BY FUND	12/31/2025	03/31/2026	CHANGE	INTEREST EARNED
GENERAL FUND	17,645,577.12	17,646,454.86	877.74	136,420.24
TOTAL	17,645,577.12	17,646,454.86	877.74	136,420.24

Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
Bank Deposits	476,423.42	476,423.42	476,423.42	2.70%	1	0.48
LGIP	9,601,244.20	9,601,244.20	9,601,244.20	54.41%	1	3.78
Money Market Funds	7,568,787.24	7,568,787.24	7,568,787.24	42.89%	1	3.55
TOTAL	17,646,454.86	17,646,454.86	17,646,454.86	100.00%	1	3.59

CASH AND ACCRUED INTEREST

Purchased Accrued Interest		0.00	0.00			
TOTAL CASH AND INVESTMENTS	17,646,454.86	17,646,454.86	17,646,454.86		1	3.59

TOTAL EARNINGS

	CURRENT QUARTER	FISCAL YEAR TO DATE
	136,420.24	136,420.24

Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
GENERAL FUND						
Bank Deposits	2	476,423.42	476,423.42	2.70	0.48	1
LGIP	2	9,601,244.20	9,601,244.20	54.41	3.78	1
Money Market Funds	1	7,568,787.24	7,568,787.24	42.89	3.55	1
TOTAL	5	17,646,454.86	17,646,454.86	100.00	3.59	1
GRAND TOTAL	5	17,646,454.86	17,646,454.86	100.00	3.59	1



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
GENERAL FUND												
BANK DEPOSITS												
6224690401	Wells Fargo Analyzed Bus Chkg+	03/31/2026 03/31/2026	476,423.34	476,423.34 0.00	476,423.34	0.48		1	1.00 476,423.34	0.00 476,423.34	2.70	NA NA
7556188469	Wells Fargo Analyzed Bus Chkg+	03/31/2026 03/31/2026	0.08	0.08 0.00	0.08	0.49		1	1.00 0.08	0.00 0.08	0.00	NA NA
BANK DEPOSITS TOTAL			476,423.42	476,423.42 0.00	476,423.42	0.48		1	1.00 476,423.42	0.00 476,423.42	2.70	NA
LGIP												
TEXPOOL	TexPool	03/31/2026 03/31/2026	1,631,048.79	1,631,048.79 0.00	1,631,048.79	3.68		1	1.00 1,631,048.79	0.00 1,631,048.79	9.24	AAA
TEXPRIME	TexPool Prime	03/31/2026 03/31/2026	7,970,195.41	7,970,195.41 0.00	7,970,195.41	3.80		1	1.00 7,970,195.41	0.00 7,970,195.41	45.17	AAA
LGIP TOTAL			9,601,244.20	9,601,244.20 0.00	9,601,244.20	3.78		1	1.00 9,601,244.20	0.00 9,601,244.20	54.41	AAA
MONEY MARKET FUNDS												
7556188477S	Wells Fargo Stage- coach Sweep	03/31/2026 03/31/2026	7,568,787.24	7,568,787.24 0.00	7,568,787.24	3.55		1	1.00 7,568,787.24	0.00 7,568,787.24	42.89	NA NA
MONEY MARKET FUNDS TOTAL			7,568,787.24	7,568,787.24 0.00	7,568,787.24	3.55		1	1.00 7,568,787.24	0.00 7,568,787.24	42.89	NA
GENERAL FUND TOTAL			17,646,454.86	17,646,454.86 0.00	17,646,454.86	3.59		1	1.00 17,646,454.86	0.00 17,646,454.86	100.00	AAA
GRAND TOTAL			17,646,454.86	17,646,454.86 0.00	17,646,454.86	3.59		1	1.00 17,646,454.86	0.00 17,646,454.86	100.00	AAA

Cash Reconciliation Report



Transaction Statement

No activity during current
period



Amortization Schedule

CUSIP	DESCRIPTION	PAR VALUE	PRINCIPAL COST	ORIGINAL PREMIUM OR DISCOUNT	BEGINNING BOOK VALUE	CURRENT PERIOD AMORT	ENDING BOOK VALUE	TOTAL AMORTIZATION	UNAMORTIZED BALANCE
GRAND TOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
GENERAL FUND									
TEXPOOL	TexPool	2026-03-31	1,631,048.79	1,631,048.79	0.00	0.00	14,742.18	14,742.18	0.00
TEXPRIME	TexPool Prime	2026-03-31	7,970,195.41	7,970,195.41	0.00	0.00	74,768.47	74,768.47	0.00
6224690401	Wells Fargo Analyzed Bus Chkg+	2026-03-31	476,423.34	476,423.34	0.00	0.00	541.61	541.61	0.00
7556188469	Wells Fargo Analyzed Bus Chkg+	2026-03-31	0.08	0.08	0.00	0.00	0.16	0.16	0.00
7556188477S	Wells Fargo Stagecoach Sweep	2026-03-31	7,568,787.24	7,568,787.24	0.00	0.00	46,367.82	46,367.82	0.00
TOTAL			17,646,454.86	17,646,454.86	0.00	0.00	136,420.24	136,420.24	0.00
GRAND TOTAL			17,646,454.86	17,646,454.86	0.00	0.00	136,420.24	136,420.24	0.00



Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
GENERAL FUND											
6224690401	Wells Fargo Analyzed Bus Chkg+	476,423.34	420,933.50	476,423.34	03/31/2026	1.00	0.48	541.61	0.00	0.00	541.61
7556188469	Wells Fargo Analyzed Bus Chkg+	0.08	111.04	0.08	03/31/2026	1.00	0.49	0.16	0.00	0.00	0.16
7556188477	Wells Fargo Commercial Chkg PF	0.00	3,661.00	0.00	03/31/2026	4.90	0.00	0.00	0.00	0.00	0.00
7556188477S	Wells Fargo Stagecoach Sweep	7,568,787.24	7,709,138.03	7,568,787.24	03/31/2026	0.00	3.55	46,367.82	0.00	0.00	46,367.82
TEXPOOL	TexPool	1,631,048.79	1,616,306.61	1,631,048.79	03/31/2026	5.34	3.68	14,742.18	0.00	0.00	14,742.18
TEXPRIME	TexPool Prime	7,970,195.41	7,895,426.94	7,970,195.41	03/31/2026	4.50	3.80	74,768.47	0.00	0.00	74,768.47
TOTAL		17,646,454.86	17,645,577.12	17,646,454.86		2.55	3.59	136,420.24	0.00	0.00	136,420.24
<hr/>											
GRAND TOTAL		17,646,454.86	17,645,577.12	17,646,454.86		2.55	3.59	136,420.24	0.00	0.00	136,420.24

Projected Cashflows

For the Period April 01, 2026 to September 30, 2026

CUSIP	DESCRIPTION	POST DATE	TRANSACTION TYPE	AMOUNT
GRAND TOTAL				



Change in Value

IDENTIFIER	ISSUER PAR VALUE	YIELD	TRADE DATE MATURITY DATE	INTEREST ACCRUAL INTEREST RECEIVED	BEGINNING BOOK VALUE BEGINNING MARKET VALUE	PURCHASES/ ADDITIONS	REDEMPTIONS	CHANGE IN BOOK VALUE CHANGE IN MARKET VALUE	ENDING BOOK VALUE ENDING MARKET VALUE
GENERAL FUND									
TEXPRIME	TexPool Prime 7,970,195.41	3.80	03/31/2026	74,768.47 74,768.47	7,895,426.94 7,895,426.94	74,768.47	0.00	74,768.47 74,768.47	7,970,195.41 7,970,195.41
7556188469	Wells Fargo Analyzed Bus Chkg+ 0.08	0.49	03/31/2026	0.16 0.16	111.04 111.04	0.08	(111.04)	(110.96) (110.96)	0.08 0.08
7556188477	Wells Fargo Commercial Chkg PF 0.00	0.00	12/31/2025 03/31/2026	0.00 0.00	3,661.00 3,661.00	0.00	(3,661.00)	(3,661.00) (3,661.00)	0.00 0.00
6224690401	Wells Fargo Analyzed Bus Chkg+ 476,423.34	0.48	03/31/2026	541.61 541.61	420,933.50 420,933.50	55,489.84	0.00	55,489.84 55,489.84	476,423.34 476,423.34
7556188477S	Wells Fargo Stagecoach Sweep 7,568,787.24	3.55	03/31/2026	46,367.82 46,367.82	7,709,138.03 7,709,138.03	5,590,598.23	(5,730,949.02)	(140,350.79) (140,350.79)	7,568,787.24 7,568,787.24
TEXPOOL	TexPool 1,631,048.79	3.68	03/31/2026	14,742.18 14,742.18	1,616,306.61 1,616,306.61	14,742.18	0.00	14,742.18 14,742.18	1,631,048.79 1,631,048.79
TOTAL		3.59		136,420.24 136,420.24	17,645,577.12 17,645,577.12	5,735,598.80	(5,734,721.06)	877.74 877.74	17,646,454.86 17,646,454.86
GRAND TOTAL		3.59		136,420.24 136,420.24	17,645,577.12 17,645,577.12	5,735,598.80	(5,734,721.06)	877.74 877.74	17,646,454.86 17,646,454.86

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**Travis Central Appraisal District
A/R – Jurisdiction Outstanding Invoices (10410)
Through May 7, 2026**

No.	Entity Name	1st Quarter 2026- Due 12/31/2025	2nd Quarter 2026- Due 3/31/2026	P&I Outstanding	Prior Year O/S	Total per Juris. No.
17	TRAVIS CO WCID NO 17			\$ 382.15		\$ 382.15
6F	CITY OF LEANDER		\$ 19,712.28	\$ -		\$ 19,712.28
2K	PRESIDENTIAL GLEN MUD		\$ 1,833.90	\$ -		\$ 1,833.90
8N	ANDERSON MILL LIMITED DISTRICT		\$ 0.34	\$ -		\$ 0.34
9L	TRAVIS CO WCID 17 SERENE HILLS (DA)			\$ 176.00		\$ 176.00
9M	SOUTHEAST TRAVIS CO MUD NO 1		\$ 2,027.30	\$ -		\$ 2,027.30
6L	TRAVIS CO MUD NO 17		\$ 4,624.62	\$ -		\$ 4,624.62
4M	PILOT KNOB MUD NO 3	\$ 9,984.59	\$ 10,080.32	\$ -		\$ 20,064.91
4N	PILOT KNOB MUD NO 4	\$ 14.87	\$ 15.01	\$ -	\$ 9.91	\$ 39.79
4P	PILOT KNOB MUD NO 2		\$ 4,149.11	\$ 211.12		\$ 4,360.23
4R	PILOT KNOB MUD NO 5	\$ 433.75	\$ 437.91	\$ -		\$ 871.66
3P	PILOT KNOB MUD NO 1	\$ 28.44	\$ 28.71	\$ -		\$ 57.15
8P	RIVER PLACE LIMITED DISTRICT		\$ 897.81	\$ -		\$ 897.81
-	Total	\$ 10,461.65	\$ 43,807.31	\$ 769.27	\$ 9.91	\$ 55,048.14

Travis Central Appraisal District
Statement of Revenues and Expenditures
01 - ARB
From 1/1/2026 Through 4/30/2026

	Total Budget Amended	YTD Budget	Actual	Budget Variance	Percent of Total Budget Final
Expenditures					
Per Diem Expenditures					
Per Diem Payments	1,178,125.00	392,708.32	142,062.50	250,645.82	87.94%
Total Per Diem Expenditures	1,178,125.00	392,708.32	142,062.50	250,645.82	87.94%
Supplies					
Operating Supplies	5,000.00	1,666.68	2,647.03	(980.35)	47.05%
Total Supplies	5,000.00	1,666.68	2,647.03	(980.35)	47.06%
Services					
Training & Education	5,000.00	1,666.68	3,970.08	(2,303.40)	20.59%
Attorney & Court Costs	35,000.00	11,666.68	705.00	10,961.68	97.98%
Professional Services	15,000.00	5,000.00	0.00	5,000.00	100.00%
Total Services	55,000.00	18,333.36	4,675.08	13,658.28	91.50%
Total Expenditures	1,238,125.00	412,708.36	149,384.61	263,323.75	87.93%
Excess (Deficiency) of Revenues over (Under) Expenditures	(1,238,125.00)	(412,708.36)	(149,384.61)	(263,323.75)	87.93%

Travis Appraisal Review Board Cost per Hearing- 2026

ARB Expenditures through 04/30/2026 \$ 149,384.61

Number of ARB Hearings 1/1/2026-5/7/2026 708
(excludes topline agreements)

FY 2026 Cost per Hearing \$ 211.00

FY 2025 Cost per Hearing \$ 35.65

Current Cost per Hearing \$ 211.00

\$ Increase (Reduction) in Cost per Hearing \$ 175.35

% Increase (Reduction) in Cost per Hearing 491.9%

Personnel Changes:				
Name	Action	Date	Job Title	Division
Eric Godinez	New Hire	05/04/2026	BPP Appiraser	Commercial
Gretchen Stevens	Transfer	05/04/2026	Litigation Appraiser	Appeals

Current Openings:

Job Posting#	Posting Date	Position	Division	# of Positions
Temp Service		Customer Service Rep	Customer Service	4
Temp Service		Appraisal Support	Appraisal Support Clerk	1



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5A: Discussion on Report from Board Operating Policies Committee

Presenter Deborah Cartwright, Board Policies Committee Member

Background Information

The Board Policies Committee members met on May 5, 2026 to discuss proposed changes to the Board Policies.

Copies of the Board of Directors Operating Policies with proposed changes can be found under the materials for Item 5B.

Staff Recommendation & Motion Language

No staff recommendations on this item.

No action is needed on this item.

(Action will be taken under agenda item 5B)



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5B: Discussion and Possible Action on Proposed Revisions and Adoption of Board of Directors Operating Policies

Presenter Board Policies Committee

Background Information

The proposed changes include:

- Removed language regarding taxing units' rights to veto decisions of the appraisal district Board of Directors. This right was removed when populous districts were established (Page 4)
- Updated the standing committees to match the current committee structure (Page 16)
- Added language that ARBs are appointed to act independently of the appraisal district and to make fair and impartial determinations. The ARB has only the authority specifically granted by statute (Page 24)
- Updated Taxpayer Liaison job description (Page 40- Appendix F)
- General Updates: Minor formatting and wording updates were made throughout the document.

Staff Recommendation & Motion Language

There are no staff recommendations for this item.

I move to pass Resolution 20260511-5B Resolution of the Board of Directors of the Travis Central Appraisal District to adopt the Board of Director's Operating Policies as presented.

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
NICOLE CONLEY
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
ELIZABETH MONTOYA
SECRETARY/TREASURER



LEANA MANN
CHIEF APPRAISER

BOARD MEMBERS
BRUCE ELFANT
JETT HANNA
CELIA ISRAEL
DICK LAVINE
AARON MORENO
SHENGHAO "DANIEL" WANG

RESOLUTION 20260514-5B

RESOLUTION OF THE BOARD OF DIRECTORS OF THE TRAVIS CENTRAL APPRAISAL DISTRICT TO ADOPT THE BOARD OF DIRECTOR'S OPERATING POLICIES

WHEREAS, the Board of Directors of the Travis Central Appraisal District (Board) desires to update its operating and other written policies to address upcoming changes in the Texas Property Tax Code and to consolidate its policies into one format; and

WHEREAS, the Board reviewed the attached Exhibit A, referred to as the "Board Policies of the Travis Central Appraisal District" (Board Policies), and desires to formally adopt the Board Policies.

NOW, THEREFORE BE IT RESOLVED by the Board, that:

Section 1: The Board hereby approves and adopts the Board Policies attached hereto as **Exhibit A**.

Section 2: The Chief Appraiser is hereby directed to provide a copy of Appendix A of the Board Policies (regarding General Policies and Procedures for Public Access) to the Taxpayer Liaison Officer and make it readily available to all members of the public.

Section 3: The Board Policies, attached as Exhibit A, supersede and replace all prior Board Policies and resolutions addressing the same topic. To the extent a conflict exists between the Board Policies attached as **Exhibit A** and another prior board policy or resolution, the Board Policies attached as **Exhibit A** shall control. As stated in the Board Policies of Exhibit A, the effective date commences upon adoption of this Resolution.

Section 4: The Board finds and determines that this meeting, where this Resolution is adopted and passed, is open to the public because the Board gave public notice of the time, place, and purpose of this meeting, as required by law.

Section 5: This Resolution is effective immediately upon its adoption.

PASSED AND APPROVED on the 14th day of May 2026, by the Board of Directors of the Travis Central Appraisal District.

TRAVIS CENTRAL APPRAISAL DISTRICT:

Nicole Conley, Chairperson
Board of Directors

ATTEST:

Elizabeth Montoya, Secretary
Board of Directors



**BOARD POLICIES
OF THE
TRAVIS CENTRAL APPRAISAL DISTRICT**

EFFECTIVE ~~JANUARY 28, 2025~~ TBD

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I. INTRODUCTION

1. Creation and Purpose

- The Travis Central Appraisal District (the “District”) is a political subdivision of the State of Texas created pursuant to Title 1 of the Tax Code. The District's primary responsibility is to develop an annual property appraisal roll for use by taxing units in imposing ad valorem taxes on property in the District.
- The District's boundaries are the same as the Travis County boundaries.

2. Allocation of Operating Costs

- The costs of District operations are allocated to the various taxing units participating in the District on an annual basis based on their relative tax levy. For example, a taxing unit that levies five (5) percent of the combined total of taxes levied by all participating taxing entities is allocated five (5) percent of the District's annual operating costs.
- Each taxing unit shall pay its annual allocation in four (4) equal payments. Payments are due before the first day of each calendar quarter, and late payments are assessed penalty and interest.

3. Rights of Taxing Units

- A majority of the taxing units entitled to vote in the selection of the District's Board of Directors (the “Board”) have the authority to veto the appraisal district's budget ~~and any other action of the Board.~~

4. Definitions

- “ARB” means the Appraisal Review Board
- “Board” means the Board of Directors of the District
- “District” means the Travis Central Appraisal District
- “Tax Code” means the Texas Property Tax Code

5. Policy Updates

- The Board may amend or revise these policies from time to time as they see fit in ~~their~~ its sole discretion and as consistent with state law.

II. DISTRICT BOARD OF DIRECTORS

1. Number

- The District is governed by a Board of nine (9) directors.

2. Eligibility

- To be eligible to serve on the Board, an individual other than the Travis County Tax Assessor-Collector must be a resident of the District and must have resided in the District for at least two (2) years immediately preceding the date of appointment or election. [Tax Code Section 6.03(a)]
- An employee of a taxing unit participating in the District is not eligible to serve unless the individual is also a member of the governing body or an elected official of a taxing unit participating in the District. [Tax Code Section 6.03(a)]
- A person may not be appointed or continue to serve on the Board if related within the second degree of consanguinity (blood) or affinity (marriage) as determined by Chapter 573 of the Government Code to the following persons:
 - An appraiser who appraises property for use in an ARB proceeding; or
 - A person who represents property owners for compensation before the ARB.
 [Tax Code Section 6.035(a)(1)] A Board member who continues to hold office knowing he or she is related in this manner to the above-described persons commits a Class B misdemeanor offense. [Tax Code Section 6.035(b)]
- Persons who appraise property for compensation for use in property tax proceedings or tax agents who represent owners for compensation are ineligible to serve on the Board until the expiration of three (3) years after such activity. [Tax Code Section 6.035(a-1)]
- A person is ineligible to serve on the Board if he or she owns property on which delinquent property taxes have been owed for more than 60 days after the date the person knew or should have known of the delinquency, unless the delinquent taxes and any penalties and interest are being paid under an installment payment agreement or a suit to collect the delinquent taxes is deferred or abated. [Tax Code Section 6.035(a)(2)]
- An individual is not eligible to be appointed to or to serve on the Board if an individual has a substantial interest in a business entity that is a party to a contract or the individual is a party to a contract with the District. This prohibition also applies to contracts with a taxing unit that participates in the District if the contract relates to the performance of an activity governed by the Tax Code. A District may not enter into a contract with a Board member or with a business entity in which a Board member has a substantial interest. A taxing unit may not enter into a contract relating to the performance of an activity governed by the Tax Code with a Board member in which the taxing unit participates or with a business entity in which a Board member has a substantial interest. An individual has a substantial interest in a business entity if:
 - the combined ownership of the Board member and the Board member's spouse is at least 10 percent of the voting stock or shares of the business entity; or
 - the Board member or the Board member's spouse is a partner, limited partner, or officer of the business entity. [Tax Code Section 6.036]

3. District Term of Office

- Members of the Board appointed by the taxing units participating in the district serve staggered four-year terms beginning on January 1 of every other even-numbered year. Elected members of the Board serve staggered four-year terms beginning on January 1 of every other odd-numbered year. [Tax Code Section 6.0301]
- The terms of members of the Board appointed by the taxing units participating in the District who are serving on December 31, 2024, expire on January 1, 2025. Not later than December 31, 2024, the taxing units participating in the appraisal district that are entitled to appoint directors shall appoint five directors to serve terms that begin on January 1, 2025. Two directors shall be appointed to serve a term of one year, and three directors shall be appointed to serve a term of three years. Thereafter, all appointed directors serve staggered four-year terms beginning on January 1 of every other even-numbered year.
- The first election for the elective positions on the Board shall occur on the uniform election date in May 2024. The directors then elected take office on July 1, 2024, and serve a term that expires on December 31, 2026. The second election for the elective positions on the Board shall occur with the general election conducted in November 2026. Directors elected in November 2026 take office on January 1, 2027. At the first meeting of the Board that follows the November 2026 general election, the three elected directors shall draw lots to determine which directors shall serve a term of four years and which director shall serve a term of two years. Thereafter, elected members of the Board serve staggered four-year terms beginning on January 1 of every other odd-numbered year. [Tax Code Section 6.0301]

4. Selection

- The appraisal district is governed by a Board of nine (9) directors. Five (5) members are appointed by the taxing units that participate in the district. Three (3) members are elected by majority vote at the general election for state and county officers by voters of the county in which the district is established. The county assessor-collector serves as an ex officio director [Tax Code Section 6.0301]. Appointed members of the Board are selected as follows [Tax Code Section 6.03]:
 - Appointed members of the Board are appointed by vote of the governing bodies of the incorporated cities and towns, the school districts, the junior college districts, and the county. [Tax Code Section 6.03(c)]
 - The chief appraiser shall calculate the number of votes to which each taxing unit is entitled [Tax Code Section 6.03(c)].
 - The voting entitlement of a taxing unit that is entitled to vote for directors is determined by dividing the total dollar amount of property taxes imposed in the district by the taxing unit for the preceding tax year by the sum of the total dollar amount of property taxes imposed in the district for that year by each taxing unit that is entitled to vote, by multiplying the quotient by 1,000, and by rounding the product to the nearest whole number. [Tax Code Section 6.03(d)]
 - Before October 1st of each odd-numbered year, the chief appraiser shall deliver to the presiding officer of each taxing unit their voting entitlement. [Tax Code Section 6.03(e)]
 - Before October 15th, each taxing unit that is entitled to vote may nominate by resolution adopted by its governing body one candidate for each position to be filled on the Board. [Tax Code Section 6.03(g)]

- Before October 30th, the chief appraiser shall prepare a ballot listing all candidates and shall deliver a copy of the ballot to the presiding officer of the governing body of each taxing unit entitled to vote. [Tax Code Section 6.03(j)]
- Before December 15th, the governing body of each taxing unit entitled to vote shall determine its vote by resolution and submit it to the chief appraiser. [Tax Code Section 6.03(k)]
- The chief appraiser shall count the votes and declare the five candidates who receive the largest cumulative vote totals the appointed members. The results must be submitted to the presiding officer of each taxing unit entitled to vote before December 31st. [Tax Section Code 6.03(k)]

5. Oath of Office and Anti-Bribery Statement

- The Texas Constitution requires each Board member to sign an anti-bribery statement and take an oath of office before beginning a term. The anti-bribery statement and official oath of office are on forms located on the Texas Secretary of State's website and provided as **Appendix D** of this policy.
- No Board member can act until his or her anti-bribery statement is executed, and oath of office is administered.
- The oath of office and statement of office (**Appendix D**) shall be administered to all Board members at the first meeting of each calendar year.

6. Open Government Training and Compliance

- Board members are required to comply with all mandatory training requirements outlined by state law and board policies, including the open government training requirements set forth in the Government Code Section 551.006 (Texas Open Meetings Act).
- On completion of the required training courses, the Board Member shall provide the certificates of course completion to the District's public information officer or the chief appraiser. Additional information on the required training can be found at: <https://texasattorneygeneral.gov/faq/og-open-government-training-information>.
- Open sessions of the Board's meetings and workshops shall be recorded and the recordings made available to the public under the Texas Public Information Act or on the District's website.

7. Ex Parte Communications

- A Board member commits a Class C misdemeanor offense if the Board member directly or indirectly communicates with the chief appraiser on any matter relating to the appraisal of property by the District. [Tax Code Section 6.15(a)] This prohibition also applies to communications with District employees regarding appraisal matters subject to a protest filed by a Board member with the ARB.

However, this type of communication is allowed in:

- an open meeting of the Board or another public forum; or
 - a closed meeting of the Board held to consult with its attorney about pending litigation, at which the chief appraiser's presence is necessary for full communication between the Board and its attorney. [Tax Code Section 6.15(a)(1)-(2) and (d)] Also, the prohibition does not prohibit a Board member from transmitting to the chief appraiser without comment a complaint by a property owner or taxing unit about the appraisal of a specific property, provided that the transmission is in writing. [Tax Code Section 6.15(c-1)]
- A Board member commits a Class A misdemeanor offense if the Board member communicates with a member of the ARB with the intent to influence a decision by the ARB in the ARB member's capacity as a member of the ARB. [Tax Code Section 6.411(c-1)] However, this provision does not apply to the communications described in Tax Code Section 6.411(c) (communication with the Board's legal counsel) or the following communications described in Tax Code Section 6.411(c-1):
 - 1) during a hearing on a protest or other proceeding before the ARB;
 - 2) that constitute social conversation;
 - 3) that are specifically limited to and involve administrative, clerical, or logistical matters related to the scheduling and operation of hearings, the processing of documents, the issuance of orders, notices, and subpoenas, and the operation, appointment, composition, or attendance at the training of the ARB; or
 - 4) that are necessary and appropriate to enable the Board to determine whether to appoint, reappoint, or remove a person as a member or officer of the ARB. [Tax Code Section 6.411(b), (c), (c-1), (d)]

8. Vacancies on the Board

- In the event of a vacancy of an appointed member of the Board, each taxing unit that is entitled to vote may nominate by resolution adopted by its governing body and delivered to the chief appraiser a candidate to fill the vacancy within 45 days of the notification of the vacancy. The chief appraiser shall prepare and deliver a list of nominees to the Board within five (5) days. The Board shall appoint by a majority vote of its members one of the nominees to fill the vacancy. [Tax Code Section 6.0301(f)]
- In the event of a vacancy of an elected member of the Board, the Board shall appoint by majority vote of its members a person to fill the vacancy. [Tax Code Section 6.0301(g)]

9. Recall of Board Members

- The governing body of a taxing unit may call for the recall of an appointed member of the Board for whom the taxing unit cast any of its votes in the appointment of the Board. The recall must be in the form of a resolution filed with the chief appraiser. The chief appraiser shall deliver a written notice of the filing with the presiding officer of each taxing unit. [Tax Code Section 6.033]
- The taxing units may not recall an elected Board member. [Tax Code Section 6.033]

10. Officers

- The required officers of the Board shall consist of a Chairperson and Secretary who shall be selected by majority vote at the Board's first regular meeting each year and serve a one-year term. [Tax Code Section 6.04(a)]
- The Board may also select a Vice-Chairperson to serve in the absence of the Chairperson.
- In the event of a vacancy of office, the vacancy is filled at the first regular meeting following the vacancy.
- Board officers may be reappointed for successive one-year terms.
- The duties of the Chairperson shall include:
 - presiding at Board meetings;
 - appointing Board committee members;
 - signing all legal instruments requiring Board approval;
 - performing legal duties as required by state statute; and
 - any other functions assigned by the Board.

The Chairperson may vote on any matter coming before the Board except as prohibited by statute.

- The duties of the Vice-Chairperson shall include:
 - performing the duties of the Chairperson when the Chairperson is unavailable; and
 - any other functions assigned by the Board.
- The duties of the Secretary shall include:
 - presiding at meetings when both the Chairperson and Vice-Chairperson are absent from the meeting;
 - assist the chief appraiser in meeting statutory notice requirements; and
 - any other functions assigned by the Board.

11. Authority and Functions of the Board

The statutory responsibilities of the Board and additional information regarding the implementation of these responsibilities include:

- **Establish the appraisal district office. [Tax Code Section 6.05(a)]**

The District's office is located at 850 East Anderson Lane, Austin, TX 78752.

- **Hire a chief appraiser. [Tax Code Section 6.05(c)]**
 - The Board shall appoint a chief appraiser.
 - The Board shall take appropriate action to solicit a number of qualified applicants in the event the position of chief appraiser becomes vacant. Applicant solicitations are to be posted in appropriate media outlets, newspapers, trade journals, etc. Such applicant solicitations shall include entry requirements as stated in the chief appraiser job description.

- Applicant references shall be requested and contacted.
 - The chief appraiser is an officer of the District for purposes of the nepotism laws.
 - The District may not employ or contract with the chief appraiser's spouse, parent or stepparent, child or stepchild, or the spouse of any of these.
 - The Board may form a committee to assist with the annual evaluation of the chief appraiser. The committee shall report to the full Board with any recommendations, including goal setting.
 - The chief appraiser job description is attached hereto as **Appendix B** and may be amended from time to time by the Board.
- **Adopt the District's annual operating budget after fulfilling notice requirements and holding a public hearing. [Tax Code Section 6.06(b)]**
 - The Board shall consider and adopt an annual budget by September 15th of each year.
 - The budget may not be adopted until written notice is given to the taxing entities, and the Board has conducted a public hearing on the proposed budget.
 - The chief appraiser shall prepare the proposed budget and send to all taxing entities for their review before June 15th of each year.
 - The budget shall include the following:
 - each proposed employee position with salary range and benefits;
 - each proposed capital expenditure;
 - an estimate of the budget to be allocated to each taxing unit;
 - a list of obligated reserve funds; and
 - other items necessary for District operations, including contract payments for services, funds for ARB operations, reimbursement for Board expenses, employee education expenses, legal fees, and other expenses incurred by the District and the ARB.
 - Not later than the 10th day before the date of the public hearing, the Secretary of the Board shall deliver to the presiding officer of the governing body of each taxing unit participating in the District a written notice of the date, time, and place of the public hearing.
 - Based on changes to the proposed budget as approved by the Board, the chief appraiser shall prepare the final budget and present it for final Board approval as required by statute.
 - The Board may amend the budget if necessary but must deliver a written copy of the proposed amendment to the taxing entities not later than the 30th day before the date the Board acts on it. [Tax Code Section 6.06(c)]
- **Adopt a new budget within 30 days after a budget is disapproved by voting taxing units. [Tax Code Section 6.06(b)]**
 - **Comply with statutory requirements for the appraisal review board (ARB) member and auxiliary member selection process. [Tax Code Section 6.41(b), (d), (d-1), (d-2-1), and (e), Section 6.414(a), and Section 6.42(a)]**
 - See **Chapter IV** of this Policy.
 - **Notify taxing units of any vacancy on the Board and elect by majority vote of members one of the submitted nominees. [Tax Code Section 6.03(l)]**

- **Elect from members a Chairperson and Secretary at the first meeting of the calendar year, and, at its option, a Vice-Chairperson. [Tax Code Section 6.04(a)]**
- **Have Board meetings at least once each calendar quarter. [Tax Code Section 6.04(b)]**
 - The Board typically conducts meetings called at the discretion of the Chairperson.
 - Attendance by the Board at its meetings shall be in-person.
- **Develop and implement policies regarding reasonable access to the Board. [Tax Code Section 6.04(d) and (e)]**
 - See **Appendix A** regarding public access to the Board.
- **Prepare information describing the Board’s functions and complaint procedures, which must be made available to the public and the appropriate taxing units. [Tax Code Section 6.04(f)]**
 - See Appendix A regarding public access to the Board.
- **Notify parties to a complaint filed with the Board of the status of the complaint unless otherwise provided. [Tax Code Section 6.04(g)]**
 - See Appendix A regarding public access to the Board.
- **Appoint a taxpayer liaison officer (TLO). [Tax Code Section 6.052(a)]**
 - See Appendix A regarding public access to the Board.
 - See Appendix F regarding the job responsibilities of the TLO.
- **Biennially develop a written plan for the periodic reappraisal of all property in the District’s boundaries, hold a public hearing with the required notice, approve a plan by Sept. 15 of each even-numbered year, and distribute copies to participating taxing units and to the Comptroller’s office as required. [Tax Code Section 6.05(i)]**
 - The Board shall develop biennially a written plan for the periodic reappraisal of all property within the boundaries of the District according to the requirements of Tax Code Section 25.18 and shall hold a public hearing to consider the proposed plan.
 - The Board chairperson shall appoint an advisory committee to assist the chief appraiser with the preparation of the reappraisal plan. The advisory committee shall be appointed at the first regularly scheduled Board meeting in each even-numbered year. The advisory committee shall meet at the call of the Board chairperson.
 - Not later than the 10th day before the date of the hearing, the Secretary of the Board shall deliver to the presiding officer of the governing body of each taxing unit participating in the District a written notice of the date, time, and place for the hearing.

- Not later than September 15 of each even-numbered year, the Board shall complete its hearings, make any amendments, and by resolution finally approve the plan.
- Copies of the approved plan shall be distributed to the presiding officer of the governing body of each taxing unit participating in the District and to the Comptroller's office within 60 days of the approval date.
- The plan shall provide for the following reappraisal activities for all real and personal property in the District at least once every three years:
 - (1) identifying properties to be appraised through physical inspection or by other reliable means of identification, including deeds or other legal documentation, aerial photographs, land-based photographs, surveys, maps, and property sketches;
 - (2) identifying and updating relevant characteristics of each property in the appraisal records;
 - (3) defining market areas in the District;
 - (4) identifying property characteristics that affect property value in each market area, including:
 - (a) the location and market area of the property;
 - (b) physical attributes of property, such as size, age, and condition;
 - (c) legal and economic attributes, and
 - (d) easements, covenants, leases, reservations, contracts, declarations, special assessments, ordinances, or legal restrictions;
 - (5) developing an appraisal model that reflects the relationship among the property characteristics affecting value in each market area and determines the contribution of individual property characteristics;
 - (6) applying the conclusions reflected in the model to the characteristics of the properties being appraised; and
 - (7) reviewing the appraisal results to determine value.
- **Make an agreement with any newly formed taxing unit's governing body on an estimated budget allocation for the new taxing unit. [Tax Code Section 6.06(h)]**
- **Have prepared an annual financial audit conducted by an independent certified public accountant and deliver a copy of the audit to each voting taxing unit and make available for inspection at the District office. [Tax Code Section 6.063(a) and (b)]**
- **Designate the District depository at least once every two years with authority to extend the contract for one additional two-year period. [Tax Code Section 6.09]**
- **Receive taxing units' resolutions disapproving Board actions. [Tax Code Section 6.10]**
- **Adhere to requirements regarding purchasing and contracting under Local Government Code Chapter 252. [Tax Code Section 6.11]**

- Provide advice and consent to the chief appraiser concerning the appointment of an agricultural appraisal advisory board and determine the number of members on that advisory board. [Tax Code Section 6.12(a)]
- Adhere to laws concerning the preservation, microfilming, destruction, or other disposition of records. [Tax Code Section 6.13]
- Adopt and implement a policy for the temporary replacement of an ARB member who violates ex-parte communication requirements. [Tax Code Section 41.66(g)]
 - See Chapter IV of this Policy.
- Provide for the operation of a consolidated central appraisal district by interlocal contract between two or more adjoining central appraisal districts if requested. [Tax Code Section 6.02]
- Have Board meetings at any time at the call of the Chairperson or as provided by Board rule, but not less than once each calendar quarter. [Tax Code Section 6.04(b)]
- Contract with another appraisal district or with a taxing unit in the District to perform the duties of the District. [Tax Code Section 6.05(b)]
- Prescribe, by resolution, specified actions of the chief appraiser relating to District finances or administration that are subject to Board approval. [Tax Code Section 6.05(h)]
- Employ a general counsel for the District to serve at the pleasure of the Board. [Tax Code Section 6.05(j)]
- Purchase or lease real property and construct improvements necessary to establish and operate an appraisal office or branch office. [Tax Code Section 6.051(a)]
- Convey real property owned by the District. [Tax Code Section 6.051(c)]
- Authorize the chief appraiser to disburse District funds. [Tax Code Section 6.06(f)]
- Change the District's method of financing unless any participating taxing unit opposes the change [Tax Code Section 6.061(a)]
- Contract with the governing body of a taxing unit or county to assess and collect taxes through the Interlocal Cooperation Act. [Tax Code Section 6.24(a) and (b)]
- Authorize the chief appraiser to (1) contract with private appraisal firms to perform appraisal services under Tax Code Section 25.01(b); and (2) as permitted by law, appeal certain ARB orders to the District Court [Tax Code Section 42.02].

- **Authorize the Chief Appraiser to change the appraisal roll at any time to correct a name or address, a determination of ownership, a description of property, multiple appraisals of a property, an erroneous denial or cancellation of any exemption authorized by Tax Code Section 11.13 if the applicant or recipient is disabled or is 65 or older or an exemption authorized by Sections 11.13(q), 11.131, or 11.22, or a clerical error or other inaccuracy as prescribed by Board rule that does not increase the amount of tax liability. [Tax Code Section 25.25(b)]**

12. Conflicts of Interest and General Ethics

- Board members are expected to be independent, impartial, and responsible to property owners in the District, not to use the office for personal gain, and comply with state law.
- The District may not enter into a contract with a member of the ARB or with a business entity in which a member of the ARB has a substantial interest. Also, a taxing unit may not enter into a contract with a member of the ARB or with a business entity in which a member of the ARB has a substantial interest. An individual has a substantial interest in a business entity if:
 - (1) the combined ownership of the individual and the individual's spouse is at least 10 percent of the voting stock or shares of the business entity; or
 - (2) the individual or the individual's spouse is a partner, limited partner, or officer of the business entity.

The term "business entity" means a sole proprietorship, partnership, firm, corporation, holding company, joint-stock company, receivership, trust, or other entity recognized by law. [Tax Code Section 6.413(b), (d), and (e)]

- Board members are also subject to the provisions of Tax Code Section 6.036 (regarding eligibility), Local Government Code Chapters 171 and 176 (regarding conflicts of interest), and Chapter 39 of the Penal Code (regarding abuse of office). A recusal form for use under Local Government Code Chapter 171 is attached in **Appendix C**. Forms for use for Chapter 176 purposes are available on the Texas Ethics Commission's website.
- Board members shall also comply with the Board of Directors Code of Ethics.
 - See **Appendix G** regarding the Board of Directors Code of Ethics.

13. Authority of Individual Board Members

- Individual Board members shall have the authority to speak or act on behalf of the Board only as consistent with a resolution or other specific authority granted to an individual Board member by a majority of the Board members present at a meeting held in compliance with the Open Meetings Act.
- The Board shall not be bound in any way by any statement or action on the part of any individual member except when such statement or action is in pursuance of specific instructions of a majority of the Board members present at a meeting held in compliance with the Open Meetings Act.

- Individual Board members may not use District resources, including its facilities personnel, equipment, supplies, name, and intellectual property, for private purposes. Individual Board members may not authorize the use of District resources, including its facilities, personnel, equipment, supplies, name, and intellectual property, by a third party.
- Individual Board members shall not exercise any authority over the District, its property, or its employees. No individual Board member has the authority to direct District employees, including the Chief Appraiser, regarding the performance of their duties.
- Except for appropriate duties and functions of the Board Chairman, an individual may not act on behalf of the Board without the express authorization of the Board.
- No Director may communicate with District staff in informal meetings or any other manner concerning his or her protest filed with the Appraisal Review Board. No Director shall appear during the protest process, before the Appraisal Review Board, or before the Board of Directors as an advocate for himself or herself or any other person, business entity, or property, unless he or she discloses to the Board his or her position and responsibilities with the District.
- No Director shall represent, directly or indirectly, any other person, business entity, or property in any action or proceeding against the interests of the District or in any litigation in which the District is a party.
- If any Director accepts or is soliciting a promise of future employment from any person or business entity who has a substantial interest in a person, business entity, or property that would be affected by any decision upon which the Director might reasonably be expected to act, investigate, advise, or make a recommendation, the Director shall disclose the fact to the Board and the Chief Appraiser and shall take no future action on matters regarding the potential future employer.
- No Director shall use his or her official position to secure a special privilege or exemption for himself, herself, or others; to secure confidential information for any purpose not related to his or her official responsibilities; or unless it is in the performance of his or her official duties as outlined by state law.

14. Board Committees

- The Board may establish committees as needed to assist it in carrying out its responsibilities. A majority vote of the Board members present at a meeting held in compliance with the Open Meetings Act will be required to establish a committee unless otherwise provided by Board rule. If the Board approves the establishment of a committee, the Chairperson shall appoint individual Board members to serve as committee members.

- The standing committees may include:
 - Ag Advisory Board Committee
 - Appraisal Review Board Committee
 - ~~Bank Depository Committee~~
 - Budget & Audit Committee
 - Board Policy Policies Committee
 - Chief Appraiser Search and Evaluation Committee
 - Purchasing & Contract Review Committee
 - ~~Employee Benefits Committee~~
 - ~~Facility Needs Committee~~
 - ~~Financial Audit Committee~~
 - Reappraisal Plan Advisory Committee
 - Taxpayer Liaison Committee.
- A committee member shall be appointed and serve at the pleasure of the Board chairperson for one calendar year, consistent with annual planning calendar. Committee assignments will be announced in the first meeting after the election of the Board Chairperson, or at the determination of the Board Chairperson.
- A committee member may be removed and/or replaced from the committee at the discretion of the Board Chairperson for any reason.
- Except as otherwise provided herein, each committee may establish its own written operating procedures, subject to the approval by the Board.
- The committees may act only in an advisory capacity to the Board and may not take any action which in any way binds or usurps the power and/or responsibilities of the Board or the chief appraiser.

15. Authorization of Chief Appraiser to Perform Board Secretary Functions

The Tax Code outlines specific statutory duties that the Board Secretary must perform. The Board authorizes and delegates to the chief appraiser or an employee of the District performance of the tasks required by the Board Secretary.

16. Developing the Board Meeting Agenda

- The Chief Appraiser is responsible for preparing the meeting agenda for the Board.
- The Chief Appraiser may include any items he or she deems necessary related to the District operations and needing attention from or action by the Board.
- Any board member may propose an item be placed on the agenda. These requests should be submitted to the Chief Appraiser at least 10 days before a scheduled meeting date to be considered.

- The Chief Appraiser will present submitted items to the Board Chairman for consideration. The Chief Appraiser and Board Chairman will determine if an item should be added to an upcoming agenda, should be added to a future agenda, should be referred to the appropriate committee, or should be addressed by other means. The Board Chairman shall consider agenda length, number of action items scheduled for the meeting, regularly scheduled action items, statutorily required items, and timing when considering proposed agenda items.

17. Board Meetings

Board meetings will be conducted at the District's office located at 850 E. Anderson Lane, Austin, Texas 78752. In the event that a meeting is held at an off-site location, proper notice of the date, time, and location of the meeting will be posted in accordance with applicable laws. Attendance and participation will occur as required by the Texas Open Meetings Act and Texas Government Code Section 551.127. Remote participation by Board Members will not be allowed. Remote viewing is available through the District's website.

18. Travel and Training

Board members are not expected to travel on District business. If a Board member is requested to attend a training or function on behalf of the Board, applicable registration fees and lodging will be paid directly by the District. No expenses for optional training will be reimbursed.

19. Communication with Legal Counsel

The Board shall retain an attorney, as necessary, to serve as the Board's legal counsel and representative in matters requiring legal services. Individual Board members shall channel legal inquiries through the Chief Appraiser, as appropriate, when advice or information from the District's internal or external legal counsel is sought.

III. DISTRICT ADMINISTRATION

1. Chief Appraiser

- The chief appraiser is the chief administrative officer of the District.
- The Board appoints the chief appraiser, who serves at the pleasure of the Board. The Board evaluates the chief appraiser annually.
- The chief appraiser is an officer of the District for purposes of the nepotism law, Chapter 573, Government Code. The District may not employ or contract with the chief appraiser's spouse, parent or stepparent, child or stepchild, or the spouse of any of these. [Tax Code Section 6.05(g)]
- To be eligible to serve as a chief appraiser, a person must hold one of the following professional designations:
 - Registered Professional Appraiser (RPA) from TDLR;
 - MAI from the Appraisal Institute;
 - Assessment Administration Specialist from the International Association of Assessing Officers (IAAO);
 - Certified Assessment Evaluator (CAE) from IAAO; or
 - Residential Evaluation Specialist (RES) from IAAO.
- A chief appraiser with a professional designation other than an RPA must become certified with TDLR as an RPA within five (5) years of appointment as chief appraiser. [Tax Code Section 6.05(c)]
- An individual may not serve as a chief appraiser unless the individual has completed chief appraiser training pursuant to Texas Occupations Code Section 1151.164 and Tax Code Section 5.042. However, a person may serve in a temporary, provisional, or interim capacity as chief appraiser for up to one year without completing the required training. [Tax Code Section 5.042(b)] Chief appraisers are required to complete at least half of their required continuing education hours in programs devoted to one or more of the topics listed in Occupations Code Section 1151.164(b) and at least two of the hours in ethics specific to maintaining the independence of an appraisal office from political pressure. [Texas Occupations Code Section 1151.1581]
- Owing delinquent property taxes disqualifies a person from serving as chief appraiser. [Tax Code Section 6.035(a)] A person is ineligible for employment as a chief appraiser if he or she owns property on which delinquent property taxes have been owed for more than 60 days after the date the person knew or should have known of the delinquency. [Tax Code Section 6.035(a)] This disqualification does not apply if the person is paying the delinquent taxes and any penalties and interest under an installment payment agreement or has deferred or abated a suit to collect the delinquent taxes. [Tax Code Section 6.035(a)] A person is also disqualified from employment as the chief appraiser if the person is related within the second degree by consanguinity or affinity to a person who appraises property for compensation for use in proceedings under the Tax Code or to a person who represents property owners for compensation in such proceedings in the CAD. [Tax Code Section 6.035(a)]

- A chief appraiser who remains employed, knowing he or she is related to an appraiser or tax representative as prohibited, commits a Class B misdemeanor offense. [Tax Code Section 6.035(a)] A chief appraiser who is not eligible to serve cannot perform any action required by law for chief appraisers, including the preparation, certification, or submission of any part of the appraisal roll. [Tax Code Section 6.05(c)] A chief appraiser must give written notice of eligibility to serve as chief appraiser to the Comptroller's office no later than January 1 each year. [Tax Code Section 6.05(c)] The Comptroller's office will appoint an eligible person to perform the duties of chief appraiser for a CAD whose chief appraiser is ineligible to serve. [Tax Code Section 6.0501(a)]
- In the event a vacancy occurs in the office of the chief appraiser, the deputy chief appraiser shall exercise the responsibilities of the chief appraiser until the Board can meet to designate an interim chief appraiser who shall coordinate the search for a replacement with the Board. In the event of the chief appraiser's retirement or resignation, the Board and the interim chief appraiser shall coordinate the search for a replacement. The Board may retain outside assistance deemed necessary to recruit the best possible candidate. The Board's Chief Appraiser Search and Evaluation Committee shall make a recommendation to the Board.

2. Chief Appraiser Duties and Responsibilities

- The chief appraiser coordinates and implements the goals and objectives established by Board policy, provisions of the Tax Code, and other applicable laws and rules. The chief appraiser's responsibilities include numerous statutory responsibilities related to the development of appraisal rolls and for the administration of the appraisal office, such as:
 - appraising all taxable property at market value, except as otherwise provided by law;
 - determining eligibility for exemptions;
 - determining eligibility for special appraisal and establishing both a market and special value on qualified property;
 - studying property values and sales to determine prevailing market prices;
 - creating appraisal records – appraisal cards, tax maps, property identification system, lists, forms applications, and other items;
 - creating procedures for equitable and uniform taxation;
 - sending notices of appraised value;
 - determining whether the property qualified for agricultural or timber appraisal has undergone a change of use and sending a notice of change of use to the owner;
 - submitting complete appraisal records of all property to the ARB;
 - testifying before the ARB on proposed values or exemptions and other actions taken by the chief appraiser or designating a staff member to do so;
 - contracting, with the approval of the Board, with private appraisal firms, if appropriate;
 - presenting supplemental records and other items for ARB consideration;
 - correcting records as ordered by the ARB;
 - certifying an appraisal roll and other listings to each taxing unit participating in the District;
 - issuing permits for “going out of business sales” and sending notices of such sale to other entities;
 - appointing an agricultural advisory Board, with the advice and consent of the Board; and
 - perform other legal responsibilities or duties assigned by the Board.

- The chief appraiser is assigned duties by the Board necessary to conduct Board duties and implementation of Board policy. The chief appraiser shall:
 - establish a comprehensive program to conduct all appraisal activities and keep the Board informed on the progress of appraisal activities;
 - develop and implement sound administrative procedures to conduct all District functions;
 - develop and implement an effective financial management system and provide reports to the Board to allow evaluation of the District's fiscal affairs;
 - develop and implement an effective internal budget development system and prepare a proposed budget by June 15 of each year;
 - serve as the District's spokesperson in providing information to news media, taxing units, and the general public on the operations of the District and provisions of the property tax laws;
 - prepare the agenda for each Board meeting, attend all meetings, and provide staff recommendations for all appropriate Board actions;
 - In consultation with the District's chief legal counsel, provide recommendations on litigation matters for Board action;
 - develop and implement a personnel management system for job assignments, personnel evaluations, staff hiring, and other personnel-related matters; and
 - employ and compensate professional, clerical, and other personnel as provided by the budget. However, the chief appraiser may not intentionally or knowingly employ any individual related to a member of the Board within the second degree by affinity or within the third degree by consanguinity, as determined under Chapter 573, Texas Government Code. Such an offense is a misdemeanor punishable by a fine of not less than \$100 or more than \$1,000. [Tax Code Section 6.05(f)] Also, an individual may not be employed by the District if the individual is (1) an officer of a taxing unit that participates in the appraisal district or (2) an employee of a taxing unit that participates in the appraisal district. [Tax Code Section 6.054]

3. Chief Appraiser Compensation

The chief appraiser is entitled to compensation as provided by the budget adopted by the Board. [Tax Code Section 6.05(d)] The chief appraiser's compensation may not be directly or indirectly linked to an increase in the total market, appraised, or taxable value of property in the District. [Tax Code Section 6.05(d)]

4. Chief Appraiser Communications

- The chief appraiser commits a Class C misdemeanor offense if the chief appraiser directly or indirectly communicates with a District Board member on any matter relating to the appraisal of property by the District, except in:
 - (1) an open meeting of the Board or another public forum; or
 - (2) a closed meeting of the Board is held to consult with the Board's attorney about pending litigation, at which the chief appraiser's presence is necessary for full communication between the Board and the Board's attorney.
- However, the foregoing prohibition does not apply to a routine communication between the chief appraiser and the Travis County Assessor-Collector that relates to the administration of an appraisal roll, including a communication made in connection with the certification, correction, or collection of an account [Tax Code Section 6.15 (b), (c), and (d)]

- Also, the foregoing prohibition does not prohibit a Board member from transmitting to the Chief Appraiser without comment a complaint by a property owner or taxing unit about the appraisal of a specific property, provided that the transmission is in writing. [Tax Code Section 6.15 (c-1)]
- The chief appraiser commits a Class B misdemeanor offense if the chief appraiser refers a person, whether gratuitously or for compensation, to another person for the purpose of obtaining an appraisal of property, whether or not the appraisal is for ad valorem tax purposes. [Tax Code Section 6.035(c)]
- The chief appraiser commits a Class A misdemeanor offense if the chief appraiser communicates with the applicable appointing authority regarding the appointment of ARB members. [Tax Code Section 6.41(i), (k)] However, this prohibition does not apply to:
 - (1) a communication between a member of the ARB and the applicable appointing authority regarding the member's appointment to the ARB;
 - (2) a communication between the Taxpayer Liaison Officer for District and the applicable appointing authority in the course of the performance of the Officer's clerical duties so long as the Officer does not offer an opinion or comment regarding the appointment of ARB members;
 - (3) a communication between a chief appraiser or another employee or agent of the District, a member of the ARB, or a member of the Board, and the applicable appointing authority regarding information relating to or described by Tax Code Section 6.41 (d-1) ("All applications submitted to the appraisal district or to the appraisal review board from persons seeking appointment as a member of the appraisal review board shall be delivered to the applicable appointing authority. The appraisal district may provide the applicable appointing authority with information regarding whether any applicant for appointment to or a member of the board owes any delinquent ad valorem taxes to a taxing unit participating in the appraisal district."); Tax Code Section 6.41 (d-5) ("The appraisal district of the county shall provide to the applicable appointing authority, or to the appraisal review board commissioners, as the case may be, the number of appraisal review board positions that require appointment and shall provide whatever reasonable assistance is requested by the applicable appointing authority or the commissions"); Tax Code Section 6.41(f) (relating to grounds for removal); or Government Code Section 411.1296 (criminal history record information of an ARB applicant);
 - (4) a communication between a property tax consultant or, a property owner or an agent of the property owner and the Taxpayer Liaison Officer regarding information relating to or described by Tax Code Section 6.41(f) (relating to grounds for removal). The Taxpayer Liaison Officer shall report the contents of the communication relating to or described by Subsection (f) to the applicable appointing authority; or
 - (5) a communication between a property tax consultant or a property owner or an agent of the property owner and the applicable appointing authority regarding information relating to or described by Tax Code Section 6.41 (f).

- A chief appraiser commits a Class A misdemeanor offense if the chief appraiser communicates with a member of the ARB, a member of the Board, or the local administrative District judge if the judge is the appointing authority for the district, regarding a ranking, scoring, or reporting of the percentage by which the appraisal review board or a panel of the board reduces the appraised value of the property. [Tax Code Section 6.41(j), (k)]
- A chief appraiser commits a Class A misdemeanor offense if the chief appraiser communicates with a member of the ARB with the intent to influence a decision by the ARB in the ARB member's capacity as a member of the ARB. [Tax Code Section 6.411(c-1)] This provision does not apply to the communications described in Tax Code Section 6.411(c) (communication with the Board's legal counsel) or the following communications described in subsection Tax Code Section 6.411(c-1):
 - 1) during a hearing on a protest or other proceeding before the ARB;
 - 2) that constitute social conversation;
 - 3) that are specifically limited to and involve administrative, clerical, or logistical matters related to the scheduling and operation of hearings, the processing of documents, the issuance of orders, notices, and subpoenas, and the operation, appointment, composition, or attendance at the training of the ARB; or
 - 4) that are necessary and appropriate to enable the Board to determine whether to appoint, reappoint, or remove a person as a member or ~~the~~an officer of the ARB.
 [Tax Code Section 6.411(b), (c), (c-1), (d)]

5. Taxpayer Liaison Officer (TLO)

- The Board appoints a TLO whose duties are described in Tax Code Section 6.04(d), (e), and (f) and Section 6.052. A job description for the Taxpayer Liaison Officer is attached as **Appendix F**.
- The TLO administers public access functions for the District; provides information and materials to the public; resolves disputes that do not involve matters that may be protested under Tax Code Section 41.41; receives, compiles, and forwards complaints, comments, and suggestions concerning ARB matters to the Comptroller's office; and delivers ARB applications received and provides clerical assistance to the Board as part of the ARB selection process. The TLO serves at the pleasure of the Board.
- The chief appraiser or any other person who performs legal or appraisal services for the District for compensation is not eligible to be the TLO. The TLO is entitled to compensation as provided by the budget adopted by the Board [Tax Code Section 6.052(e)].
- The TLO must administer the public access functions required by Tax Code Sections 6.04(d), (e), and (f) which include allowing the public to speak before the Board; preparing and maintaining a written plan on reasonable access to the Board for those who do not speak English or who have physical, mental or developmental disabilities; and preparing information describing the functions of the Board and the complaint process [Tax Code Section 6.052(a)]. **See Appendix A.**

- The TLO provides information and materials designed to assist property owners in understanding the appraisal process, protest procedures, procedures for filing comments, suggestions or complaints, and related matters. The Taxpayer Liaison Officer is required to provide comments and suggestions to the Comptroller's office concerning ARBs [Tax Code Section 6.052(b)].
- The TLO is also responsible for providing clerical assistance to the Board in the selection of ARB members. The TLO shall deliver to the Board applications to serve on the ARB that are submitted to the TLO and shall perform other duties as requested by the Board. The TLO may not influence the process for selecting ARB members. [Tax Code Section 6.41(d-1) and Section 6.051(f)]
- The Board may appoint one or more deputy taxpayer liaison officers to assist the TLO in the performance of the TLOs duties. [Tax Code Section 6.41(a)]

IV. APPRAISAL REVIEW BOARD

1. ARB Duties

- The ARB is responsible for the local administrative review of appraisal records and hearing taxpayer protests. ARBs are appointed to act independently of the appraisal district and to make fair and impartial determinations. The ARB has only the authority specifically granted by statute.
- The Board, by resolution, establishes the number of ARB members and auxiliary ARB members. [Tax Code Section 6.41(b)] The number of ARB members may change from time to time as the Board determines.

2. ARB Member Selection

- The Board appoints the members of the ARB. [Tax Code Section 6.41(d-1)]
- An individual interested in appointment to the ARB must apply on forms designated by the Board and in the manner determined by the Board.
- The ARB Committee of the Board shall review all applications received and interview selected candidates for purposes of recommending appointees to the ARB by the Board.
- When making recommendations of ARB members to the Board, the ARB Committee shall consider geographical representation of the County to ensure that members of the ARB adequately represent all areas.
- The ARB committee shall recommend a chairman and a secretary from among the members of the ARB. The committee is encouraged to select a chairman of the ARB who has a background in law and property appraisal. The recommendation for chairman and secretary of the ARB shall be presented to the full Board for appointment by majority vote.
- The ARB Committee shall submit to the full Board a list of recommended appointees to the ARB. The Board shall vote on the list of recommended appointees presented by the Committee.
- The Board must make appointments to the ARB, by majority vote, with at least two members of the majority being elected members of the Board. [Tax Code Section 6.41(d-2-1)] If a majority vote on the list of recommended appointees cannot be reached, the full Board shall vote on each individual on the list of recommended appointees. If the Board votes on individuals on the list of recommended appointees, the vote of each member of the Board shall be recorded. Any Board member who disapproves an individual on the list of recommended ARB appointees shall identify the basis for the disapproval.
- The Board shall provide the TLO with the appointed members of the ARB, and the TLO shall notify the appointees of their appointment, provide any additional paperwork required for appointment, and inform the appointments about when and where they are to appear. [Tax Code Section 6.41 (d-3)]

- In appointing or reappointing ARB members, the Board shall be provided with information, as applicable, described in Tax Code Section 6.41(d-1) (regarding whether an ARB applicant owes any delinquent ad valorem taxes to a taxing unit of the District), Section 6.41(d-5) (the number of ARB positions requiring appointment), Section 6.41 (f) (grounds for removal of an ARB member), and Government Code Section 411.1296 (criminal history record information of an ARB applicant). [Tax Code Section 6.41(i) and (k)]
- As allowed by Tax Code Section 6.41(e), the Board, by resolution, shall provide for staggered terms so that the terms of as close to one-half of the ARB members as possible expire each year. In making the initial or subsequent appointments, the Board shall designate those ARB who serve one-year terms as needed to comply with the Board's resolution.
- An auxiliary ARB member is appointed in the same manner and for the same term as an ARB member under Tax Code Section 6.41 and is subject to the same eligibility requirements and restrictions as a Board member under Tax Code Sections 6.41, 6.412, and 6.413. [Tax Code Section 4.414(b)]
- A member of the ARB may be removed by a majority vote of the Board. Grounds for removal are: (1) a violation of Tax Code Sections 6.412, 6.413, 41.66(f), or 41.69; (2) good cause relating to the attendance of members at called meetings of the ARB as established by written policy adopted by a majority of the Board, attached as Appendix E; or (3) evidence of repeated bias or misconduct. [Tax Code Section 6.41(f)]

3. ARB Ex Parte Communications

- ARB members commit an offense if the ARB member communicates with the chief appraiser or, another employee, or a member of the District's Board in violation of Tax Code Section 41.66(f), which provides that an ARB member may not communicate with another person concerning:
 - the evidence, argument, facts, merits, or any other matters related to an owner's protest, except during the hearing on the protest; or
 - a property that is the subject of the protest, except during a hearing on another protest or other proceeding before the board at which the property is compared to other property or used in a sample of properties.

4. ARB Ethics and Conflicts of Interest

- The District may not enter into a contract with a member of the ARB or with a business entity in which a member of the ARB has a substantial interest. Also, a taxing unit may not enter into a contract with a member of the ARB or with a business entity in which a member of the ARB has a substantial interest. An individual has a substantial interest in a business entity if:
 - the combined ownership of the individual and the individual's spouse is at least 10 percent of the voting stock or shares of the business entity; or
 - the individual or the individual's spouse is a partner, limited partner, or officer of the business entity.

The term "business entity" means a sole proprietorship, partnership, firm, corporation, holding company, joint-stock company, receivership, trust, or other entity recognized by law. [Tax Code Section 6.413(b), (d), (e)]

5. ARB Clerical Support

- The chief appraiser assigns District staff to provide clerical assistance to the ARB. The law requires the ARB to adopt rules of procedure. The ARB must post its hearing procedures wherever it conducts protest hearings.

6. ARB Budget

- The District budget should separately identify ARB budget expenses in the District's budget to the extent practicable.
- The ARB Chairperson should make every effort to schedule ARB panel hearings and meetings in a manner calculated not to exceed the District budget.

7. ARB Attorney

- The ARB may employ legal counsel of its choice if provided for in District budget, or use the services of the County Attorney if the District budget does not provide for retention of a private ARB attorney. [Tax Code Section 6.43(a), (e)]
- Except for the County Attorney, an attorney may not serve as legal counsel for the ARB if the attorney or a member of that attorney's law firm has during the year before the date of the ARB's hiring of the attorney represented a property owner who owns property in the District, a taxing unit member of the District, or the District in a matter addressed by Tax Code Sections 1.111 or 25.25, Subtitle F of Title 1 of the Tax Code, or Subchapter Z, Government Code. [Tax Code Section 6.43(b)]
- If the ARB is a defendant in litigation, no settlement may be reached in the matter without the approval of the Board.

8. ARB Compensation

- Members of the ARB, including auxiliary ARB members, are entitled to per diem set by the District budget for each day the ARB meets and to reimbursement for actual and necessary expenses incurred in the performance of ARB functions as provided by the District budget.
Tax Code Section 6.42(c)].
- The Board shall adopt a schedule of per diem payments for ARB members based on their levels of experience and years of service.

9. Temporary Appointment of ARB members

- Depending on the staffing needed to meet the statutory obligations of the ARB, if one or more ARB members have resigned or been removed from office, the ARB chairman shall notify the Taxpayer Liaison Officer about the temporary or permanent vacancy (as the case may be). The TLO shall notify the applicable appointing authority of the number of temporary or permanent vacancies needing to be filled and request that the position(s) be filled .
- If the vacancy is permanent, the request to the applicable appointing authority shall be for appointment of replacement ARB member(s) for the unexpired term(s) of the recusing, removed, or resigning member. If the vacancy is temporary, the request to the applicable appointing authority shall be for a replacement ARB member to serve until the expiration of the temporary vacancy period, which shall not be longer than December 31 of any calendar year.
- The term of service of any appointee filling a temporary or permanent vacancy shall commence on the first day of his or her service as an ARB member; the past service term of the recusing, removed, or resigning ARB member shall not count toward the service term of the replacement ARB member.

**Appendix A
Travis Central Appraisal District
General Policies & Procedures for Public Access**

I. General Information about the District

The Travis Central Appraisal District's (District's) primary function is appraising taxable property for Travis County, cities, school districts, and other special taxing units such as fire, water, and hospital districts, which levy property taxes within their jurisdictional boundaries. The District appraises thousands of property parcels annually. The District also administers property tax exemptions and determines taxable situs of property. The chief executive of the District is the chief appraiser.

II. District Board of Directors

The governing body of the District is its Board of Directors (Board), who are elected or appointed by the taxing units served by the District. The Board selects a chief appraiser, the Taxpayer Liaison Officer, and the Board general counsel. The Board also adopts the annual District budget and ensures that the District follows policies and procedures and appropriate state laws and regulations. The Board does not appraise property, hear protests, or make decisions affecting appraisal records.

III. Taxpayer Liaison Officer

The Taxpayer Liaison Officer handles public access and informational matters and provides clerical assistance to the applicable appointing authority. The Taxpayer Liaison Officer also resolves complaints that fall outside the jurisdiction of the Appraisal Review Board (ARB). At each regular meeting of the Board, the Taxpayer Liaison Officer reports on the number, nature, and status of resolution on any complaints.

The Taxpayer Liaison Officer is responsible for preparing information of public interest describing the functions of the Board and the Board's procedures by which complaints are filed with and resolved by the Board. The Taxpayer Liaison Office shall make the information available to the public and the appropriate taxing jurisdictions.

The Taxpayer Liaison Officer also:

- administers the appraisal District's public access functions;
- provides information and materials to the public to assist property owners in understanding the appraisal process, procedures for filing comments, suggestions or complaints, and related matters;
- resolves disputes that do not involve matters that may be protested under Tax Code Section 41.41 and provides reports to the Board on the status of all complaints;
- receives, compiles, and forwards complaints, comments, and suggestions concerning ARB matters to the Texas Comptroller's Office;
- delivers ARB applications received and provides clerical assistance to the applicable appointing authority as part of the ARB selection process; and

- Performs similar duties and responsibilities as assigned.

The Board may also appoint one or more deputy taxpayer liaison officers who can assist the taxpayer liaison officer with statutory duties as needed.

IV. Who May Address the Board

It is the policy of the Board to provide the public with a reasonable opportunity to address the Board at any public meeting of the Board on any issue or matter within its jurisdiction in accordance with the Texas Open Meetings Act. The Board allows each member of the public who desires to address the Board on an item to do so before the Board's consideration of the item.

V. Procedures for Speaking at a Board Meeting

The procedures for addressing the Board are outlined below:

The public may address the Board during the "Citizen Communication" agenda item, which shall be placed on the agenda before the Consent Agenda and the Regular Agenda. To be eligible to speak during "Citizen Communication," persons must complete a Speaker Registration Form and submit it to the presiding officer before the meeting begins. At the beginning of each regular meeting, the presiding officer will use the Speaker Registration Forms to invite those who wish to speak to come forward to the podium, state their name and the agenda item they wish to address for the record, and make their remarks within the prescribed time limits. If a person wishes to speak about a subject that is not on the agenda but is within the Board's jurisdiction, the speaker may speak for the prescribed time, but in accordance with state law, the Board may not deliberate or take any action regarding the subject other than to provide a statement of fact in response to an inquiry, recite existing policy, or direct that the subject be placed on an agenda for a subsequent meeting. The presiding officer may, but is not required to, invite anyone who did not fill out and submit a Speaker Registration Form before the meeting began to submit a late Speaker Registration Form and address the Board during "Citizen Communication." The public may also address the Board virtually. If the public intends to address the Board virtually, that can be designated on the Speaker Registration Form. Any and all procedures for addressing the Board in-person or virtually are the same.

The speaker registration form can be submitted online at:
traviscad.org/speakerregistration.

Speaker Time Limits:

General Rule

The first ten individuals who sign up to speak before the Board during a meeting's "Citizen Communication" agenda item will each have three (3) minutes to address the Board. All subsequent individuals will each be allotted one (1) minute to address the Board. The Board's presiding officer may limit the time for each speaker if comments are repetitive or extend a speaker's time at their discretion.

Exceptions to these limits include:

Exception for Speakers Needing Translators

Speakers who will be addressing the Board through a translator will have six (6) minutes to address the Board. Citizens may be accompanied by their own translator or request that a translator be provided by the District. Please note, however, that requests for a translator must be made to the District at least seven (7) days in advance of the Board meeting.

Exception for Donating Time

Persons may donate their time to another speaker if (a) the person donating time is present when the speaker begins to address the Board and (b) the person donating time specifies the name of the speaker to whom they are donating their time. Individuals may accrue no more than three (3) minutes of speaking time through a combination of their allotted time and time donated to them.

Exception for Executive Session

Citizen participation is not permitted during Executive Session.

Prohibited Speech

The presiding officer may limit or terminate the speaking time of speakers who use obscene, vulgar, or profane language or whose speech is prohibited by law. However, the Board will not prohibit criticism of the Board or any action, omission, policy, procedure, program, or service of the District unless the criticism is otherwise prohibited by law.

Reasonable time shall be provided during each Board meeting for public comment on District and ARB policies and procedures and a report from the Taxpayer Liaison Officer. [Tax Code Section 6.04(d)]

VI. Policies for Reviewing and Responding to Complaints and Certain Grievances

The Board will consider written complaints about the policies and procedures of the District, the ARB, the Board, any specific member thereof, or any other matter within the Board's lawful jurisdiction. Complaints should specify the name of the individual(s), Board or department involved, dates, nature of the complaint, and the complainant's contact information. *Please note, however, that the Board is prohibited by law from addressing any matter that might involve a challenge, protest, or correction before the ARB. Additionally, the Board has no authority to overrule the chief appraiser or an ARB decision on a value, correction, or a protest.*

Please mail or deliver written complaints and correspondence to:

Taxpayer Liaison Officer
Travis Central Appraisal District
P.O. Box 149012
Austin, TX 78714-9012
taxpayerliaison@tcadcentral.org

Complaints and correspondence may also be emailed to the Board at BOD@tcadcentral.org.

At each regularly scheduled meeting, the Taxpayer Liaison Officer shall report to the Board on the nature of complaints and the status of resolution, if there are any.

Board deliberations concerning complaints will comply with provisions of the Texas Open Meetings Act, Chapter 551, Government Code.

Until the final disposition of a complaint, the Taxpayer Liaison Officer will notify the complainant at least quarterly on the status of a complaint unless such a notice would jeopardize an investigation.

The Board shall also hear and make determinations on certain grievances properly filed under Section 13.3 of the Personnel Policy Manual relating to Grievances Against the Chief Appraiser. The provisions of Section 13.3 of the Personnel Policy Manual shall govern those grievance proceedings.

VII. Interpreters/Translators

The Board will provide an interpreter at a Board meeting upon the request of a person who does not speak English or who must communicate by sign language. The request must be in writing, received by the Taxpayer Liaison Officer at least seven (7) days before the meeting at which the interpreter is needed, state the language required to be interpreted, and state that the requestor is unable to provide their own interpreter. If written notice is not received by the Taxpayer Liaison Officer at least seven (7) days prior to the meeting, the District will not be able to make the appropriate accommodations.

VIII. Access by Disabled Persons

The District's offices are wheelchair accessible. Disabled persons who wish to address the Board and need special assistance for entry or access should notify the Taxpayer Liaison Officer in writing at least seven (7) days before the meeting. The District office has van-accessible parking spaces available to disabled persons in its parking lot in front of the building. The main entrance doors have wheelchair-assist buttons.

The Board meeting room is also wheelchair accessible. A person who needs additional assistance for entry or access should notify the Taxpayer Liaison Officer in writing at least seven (7) days before the meeting. If notice is not given within seven (7) days, the District will attempt to make the appropriate accommodations.

IX. Community Outreach

District personnel are available to speak to civic groups and other organizations and address issues on taxpayer rights, exemption issues, recent changes to property tax laws, and other appraisal-related issues of interest. A minimum of two (2) weeks advance notice is required. For more information on our community outreach program, please contact the Taxpayer Liaison Officer at (512) 834-9317 or via email at taxpayerliaison@tcadcentral.org.

Requests can also be submitted online at traviscad.org/speakerrequest.

X. District Website and Social Media

The Travis Central Appraisal District maintains a website online at traviscad.org. Information provided on that website includes live broadcasts and previous recordings of Board of Directors meetings, webinar archives, video tutorials, public information reports, forms, instructional documents, District calendar, District contact information, property owner portal, comprehensive property search, and other information required by state law or in the interest of the public.

The Travis Central Appraisal District maintains a presence on multiple social media sites to connect with and provide important information to the public. Links to active profiles can be found at traviscad.org. The District does not provide customer service support through these sites.

XI. Tax Calendar

January 1	Appraisal districts are required to appraise property at its value on this date.
January 1 – April 30	Appraisal districts complete appraisals and process applications for exemptions.
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.
January 31	Taxes due to local taxing units (or county tax assessor, if acting on their behalf).
February 1	Local taxing units begin charging penalties and interest for unpaid tax bills.

**TRAVIS CENTRAL APPRAISAL DISTRICT
CONTACT INFORMATION:**

Address:

850 East Anderson Lane, Austin, Texas 78752

Business Hours:

Monday, Wednesday and Friday 7:45 am - 4:45 pm
Tuesday and Thursday, 9:45 am – 4:45 pm

Phone:

(512) 834-9317

Website:

www.traviscad.org

Taxpayer Liaison Officer

(512) 834-9317

taxpayerliaison@tcadcentral.org

APPENDIX B

TRAVIS CENTRAL APPRAISAL DISTRICT | JOB DESCRIPTION



DATE	August 24, 2023	JOB TITLE	Chief Appraiser
DEPARTMENT	Administration	STATUS	Exempt

POSITION SUMMARY

The chief appraiser coordinates and implements the goals and objectives established by Board policy, provisions of the Property Tax Code, and other applicable laws and rules. The chief appraiser's responsibilities include numerous statutory responsibilities related to the development of appraisal rolls and for the administration of the appraisal office.

ESSENTIAL DUTIES

- Appraising all taxable property at market value, except as otherwise provided by law.
- Determining eligibility for exemptions.
- Determining eligibility for special appraisal and establishing both a market and special value on qualified property.
- Studying property values and sales to determine prevailing market prices.
- Creating appraisal records – appraisal cards, tax maps, property identification system, lists, forms applications and other items.
- Creating procedures for equitable and uniform taxation.
- Sending notices of appraised value.
- Determining whether property qualified for agricultural, or timber appraisal has undergone a change of use and sending a notice of change of use to the owner.
- Submitting complete appraisal records of all property to the Appraisal Review Board.
- Testifying before the Appraisal Review Board on proposed values or exemptions and other actions taken by the chief appraiser or designating a staff member to do so.
- Contracting, with the approval of the Board of Directors, with private appraisal firms, if appropriate.
- Presenting supplemental records and other items for Appraisal Review Board consideration.
- Correcting records as ordered by the Appraisal Review Board.
- Certifying an appraisal roll and other listings to each taxing unit participating in the appraisal District.
- Issuing permits for "going out of business sales" and sending notices of such sale to other entities.
- Appointing an agricultural advisory Board, with the advice and consent of the Board of Directors.
- Perform other legal responsibilities or duties assigned by the Board of Directors.

Additionally, the chief appraiser is assigned duties by the Board of Directors necessary for conduct of Board duties and implementation of Board policy. The chief appraiser shall:

- Establish a comprehensive program for the conduct of all appraisal activities and keep the Board informed on the progress of appraisal activities.
- Develop and implement sound administrative procedures for conduct of all District functions.
- Develop and implement an effective financial management system and provide reports to the Board to allow evaluation of the District's fiscal affairs.
- Develop and implement an effective internal budget development system and prepare a proposed budget by June 15 of each year.
- Serve as the District's spokesperson in providing information to news media, taxing units, and the general public on the operations of the appraisal District and provisions of the property tax laws.
- Prepare the agenda for each Board meeting, attend all meetings, and provide staff recommendations for all appropriate Board actions.
- In consultation with the appraisal District legal counsel, provide recommendations on litigation matters for Board action.
- Develop and implement a personnel management system for job assignments, personnel evaluations, staff hiring, and other personnel related matters.
- Employ and compensate professional, clerical, and other personnel as provided by the budget.

QUALIFICATION REQUIREMENTS

- College degree or equivalent experience plus ten years management experience.
- Must hold Registered Professional Appraiser (RPA) designation with the Texas Department of Licensing and Regulation or hold one of the following designations:
 - Appraisal Institute's MAI
 - International Association of Assessing Officer's (IAAO)
 - Assessment Administration Specialist (AAS)
 - Certified Assessment Evaluator (CAE)
 - Residential Evaluation Specialist (RES).
- Individuals who are not an RPA but who have an MAI, AAS, CAE, or RES designation must obtain an RPA certification within five years of appointment or start.
- Ability to complete chief appraiser training within one year of assuming position.

PHYSICAL REQUIREMENTS

Sitting, standing, kneeling, bending, reaching, twisting upper body, carrying, pushing and lifting up to 30 lbs. in the office.

The Travis Central Appraisal District is an equal opportunity/affirmative action employer. The Travis Central Appraisal District does not discriminate on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, military service, AIDS or HIV status, ancestry, national or ethnic origin and any other characteristic protected by law.

Resumes are welcome, but applicant must submit a completed employment application before an interview will be granted.

APPENDIX C

LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT <small>(Instructions for completing and filing this form are provided on the next page.)</small>		FORM CIS
<p>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</p> <p>This is the notice to the appropriate local governmental entity that the following local government officer has become aware of facts that require the officer to file this statement in accordance with Chapter 176, Local Government Code.</p>	OFFICE USE ONLY Date Received _____	
1 Name of Local Government Officer		
2 Office Held		
3 Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code		
4 Description of the nature and extent of each employment or other business relationship and each family relationship with vendor named in item 3.		
5 List gifts accepted by the local government officer and any family member, if aggregate value of the gifts accepted from vendor named in item 3 exceeds \$100 during the 12-month period described by Section 176.003(a)(2)(B).		
Date Gift Accepted _____ Description of Gift _____ Date Gift Accepted _____ Description of Gift _____ Date Gift Accepted _____ Description of Gift _____ (attach additional forms as necessary)		
6 SIGNATURE I swear under penalty of perjury that the above statement is true and correct. I acknowledge that the disclosure applies to each family member (as defined by Section 176.001(2), Local Government Code) of this local government officer. I also acknowledge that this statement covers the 12-month period described by Section 176.003(a)(2)(B), Local Government Code.		
_____ Signature of Local Government Officer		
Please complete either option below:		
(1) Affidavit		
NOTARY STAMP / SEAL		
Sworn to and subscribed before me by _____ this the _____ day of _____, 20_____, to certify which, witness my hand and seal of office.		
Signature of officer administering oath	Printed name of officer administering oath	Title of officer administering oath
OR		
(2) Unsworn Declaration		
My name is _____, and my date of birth is _____.		
My address is _____, _____, _____, _____, _____. <small>(street) (city) (state) (zip code) (country)</small>		
Executed in _____ County, State of _____, on the _____ day of _____, 20_____. <small>(month) (year)</small>		
_____ Signature of Local Government Officer (Declarant)		

APPENDIX C

MEETING DATE: _____
AGENDA ITEM: _____

AFFIDAVIT ON ABSTENTION FROM VOTING

STATE OF TEXAS §
COUNTY OF TRAVIS §

I, _____, a member of the Board of Directors of the Travis Central Appraisal District file this affidavit in accordance with the provisions of Chapter 171 of the Texas Local Government Code, and hereby on oath state the following:

A. Business Entity

Name of Entity: _____

I and/or person(s) related to me* have a substantial interest in a business entity that would be specially affected economically by the matter presently pending before the Board. The nature and extent of the interest is:

- _____ Ownership of ten percent (10%) or more of the voting stock or shares of the business entity or ownership of \$15,000 or more of the fair market value of the business entity.
- _____ Funds received from the business entity exceed 10 percent of gross income for the previous twelve months.

B. Real Property

_____ I and/or person(s) related to me*, have an interest in real property that has a fair market value of \$2,500 or more, and it is reasonably foreseeable that the action presently pending before the Board will have a special economic effect on the value of the property, distinguishable from the effect on the public.

**For purposes of this affidavit, "person(s)" refers to first degree by consanguinity (parents or child, natural or adoptive), or first degree by affinity (spouse, step child, mother-in-law, father-in-law, daughter-in-law, son-in-law). (In cases of divorce or death, if a child is living, the marriage is considered as continuing, even after divorce or death.)*

B. Other

_____ Other

Explanation: _____

As a result of this interest, I will refrain from participating in discussion and voting on the item(s).

Signature of Board Member

Date

BEFORE ME, the undersigned authority, on this day personally appeared _____, who on oath stated that the above facts are within _____ personal knowledge and are true and correct.

SWORN TO AND SUBSCRIBED BEFORE ME on this _____ day of _____.

[seal]

NOTARY PUBLIC

MY COMMISSION EXPIRES: _____

APPENDIX D

<p>Rev. 04/2017</p> <p>Submit to: Custodian of election records</p> <p>Filing Fee: None</p>	<p style="text-align: right;">This space reserved for office use</p> <div style="text-align: center;">  OATH OF OFFICE </div>
---	--

IN THE NAME AND BY THE AUTHORITY OF THE STATE OF TEXAS,
 I, _____, do solemnly swear (or affirm), that I will faithfully execute the duties of the office of _____ of the State of Texas, and will to the best of my ability preserve, protect, and defend the Constitution and laws of the United States and of this State, so help me God.

Signature of Officer

State of _____)
 County of _____)

Sworn to and subscribed before me this _____ day of _____, 20____.

(seal)

Signature of Notary Public or Other Officer Administering Oath

Printed or Typed Name

APPENDIX D

<p>Rev. 04/2017</p> <p>Submit to: Custodian of election records Filing Fee: None</p>	<p style="text-align: right;">This space reserved for office use</p> <div style="text-align: center;">  <p>STATEMENT OF OFFICER</p> </div>
--	---

Statement

I, _____, do solemnly swear (or affirm) that I have not directly or indirectly paid, offered, promised to pay, contributed, or promised to contribute any money or thing of value, or promised any public office or employment for the giving or withholding of a vote at the election at which I was elected or as a reward to secure my appointment or confirmation, whichever the case may be, so help me God.

Title of Position to Which Elected/Appointed: _____

Execution

Under penalties of perjury, I declare that I have read the foregoing statement and that the facts stated therein are true.

Date: _____

Signature of Officer

State of _____)
County of _____)

Sworn to and subscribed before me this _____ day of _____, 20____.

(seal)

Signature of Notary Public or Other Officer
Administering Oath

Printed or Typed Name

Revised 04/2017

APPENDIX E

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
 BLANCA ZAMORA-GARCIA
 CHAIRPERSON
 BRUCE GRUBE
 VICE CHAIRPERSON
 ED KELLER
 SECRETARY/TREASURER



BOARD MEMBERS
 THERESA BASTIAN
 TOM BUCKLE
 BRUCE ELFANT
 KRISTOFFER S. LANDS
 ANTHONY NGUYEN
 ELEANOR POWELL
 JAMES VALADEZ

TRAVIS CENTRAL APPRAISAL DISTRICT
 APPRAISAL REVIEW BOARD ATTENDANCE POLICY

Last updated: March 12, 2018

1. After the submission of the appraisal records by the chief appraiser to the appraisal review board ("ARB"), formal protest hearings for the property owner shall be scheduled by the ARB chairperson and shall occur on business days consistent with operating days and hours of the Travis Central Appraisal District, unless otherwise allowed under Section 4 below.
2. Protest hearings shall be scheduled based on the volume of protests filed and in such a manner as to reasonably comply, at the earliest date possible, with threshold requirements, as applicable, of Tax Code Section 41.12, and subsequent to approval of the appraisal records, to substantially complete all protest at the earliest date possible.
3. The ARB chairperson shall schedule sufficient ARB members to be available on a daily basis to conduct protest hearings and operate the ARB in the most cost effective manner possible.
4. The ARB chairperson shall schedule sufficient ARB members to conduct hearings on Saturdays as required by law or requested by the chief appraiser.
5. Each member of the ARB shall be available when scheduled for duty by the ARB chairperson, and shall punctually appear at and attend all scheduled meetings, training, and protest hearings and remain on duty for the duration of his/her scheduled time, unless the member has been excused from attendance by the ARB chairperson for reasons listed in Section 6 below.
6. Excused absences include serious illness of member or member's immediate family, death in the family or attendance at a funeral, jury duty, or any other extenuating circumstance for good cause as allowed by the ARB chairperson. Good cause means a reason that was not intentional or the result of conscious indifference and will not cause undue delay or other injury to the ARB, District, taxpayers or taxing units of Travis County.
7. Strict adherence to the attendance policy for the ARB is critical in achieving the requirement of hearing and determining all or substantially all timely filed protests, and full attendance at all meetings and protest hearings for which that member's attendance is scheduled is a requirement.
8. A report of noncompliance with the attendance policy shall be prepared by the ARB Chairperson and presented to the board of directors at regularly scheduled meetings.
9. Failure to comply with the attendance policy is grounds for removal pursuant to Tax Code Section 6.41(f).

P.O. BOX 149012 8314 CROSS PARK DRIVE AUSTIN, TEXAS 78714-9012 (512) 834 9317 TDD (512) 836-3328 FAX (512) 835-5371
 WWW.TRAVISCAD.ORG

APPENDIX F



TRAVIS CENTRAL APPRAISAL DISTRICT

JOB DESCRIPTION

JOB TITLE	Taxpayer Liaison	DATE	Job #	January 2024	N/A
DEPARTMENT	Board of Directors	STATUS	Contract		
REPORTS TO	Board of Directors	PAY GRADE	Contract		

ESSENTIAL DUTIES

- Communicate and coordinate with the applicable appointing authority as required by the Texas Property Tax Code
- Facilitate communications between the public and the Travis Central Appraisal District
- Provides information regarding the district's responsibilities to property owners and the general public, both orally and in writing
- Provide written and oral activity reports to the TCAD Board of Directors
- Administers the public access functions required by Sections 6.04(d), (e) and (f) of the Property Tax Code
- Resolves disputes involving matters that may not be protested under Section 41.41
- Accomplish tasks as needed and assigned by the Board of Directors or Chief Appraiser
- Serves as the board's liaison to the appraisal review board on issues related to ARB management
- Responsible for receiving, and compiling a list of, and providing resolution to comments, complaints, and suggestions filed by the chief appraiser, property owner, or a property owner's agent concerning the matters listed in 5.103(b) or any other matter related to the fairness and efficiency of the appraisal review board
- All duties are performed independently and require self-motivation and a professional attitude in the work environment

REQUIREMENTS/ADDITIONAL RESPONSIBILITIES

- Must be authorized to work in the US, have reliable transportation, a valid Texas Driver's License, proof of Texas liability insurance, and verified good driving record
- Must complete required Comptroller training and education regarding the duties and responsibilities of the taxpayer liaison officer, including the procedures for the informal resolution of disputes

MINIMUM EDUCATION AND/OR EXPERIENCE

- Possession of a bachelor's degree from an accredited college or university, preferably in Real Estate or Appraisal. Acceptable work experience may be substituted for a college degree

KNOWLEDGE, SKILLS, AND ABILITIES

- Working knowledge of the Texas Property Tax Code, real estate appraisal, the policies, and procedures of TCAD and the Travis CAD Appraisal Review Board
- Must demonstrate strong verbal and written communication skills
- Ability to work effectively with others and to work independently
- Must be proficient in using Outlook, Excel and Microsoft Word
- Must be able to learn and become proficient in the use of the Districts CAMA system
- Spanish Bilingual a plus

PHYSICAL REQUIREMENTS

Requires sitting, walking, standing, bending, kneeling, reaching, and twisting upper body. Must use hands for data entry. Must have the ability to hear and speak. Must have the ability to see and read fine print as well as lift up to 30 pounds.

WORK ENVIRONMENT

Indoor activity with frequent exposure to video display computer terminal. Interface with the public. Moderate stress levels are constant with occasional significant stress.

The Travis Central Appraisal District is an equal opportunity/affirmative action employer. The Travis Central Appraisal District does not discriminate on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, military service, AIDS or HIV status, ancestry, national or ethnic origin and any other characteristic protected by law.

Resumes are welcome, but applicants must submit a completed employment application before an interview will be granted.

APPENDIX F



TRAVIS CENTRAL APPRAISAL DISTRICT

JOB DESCRIPTION

JOB TITLE	Taxpayer Liaison Officer	DATE	Job #	December 2025	N/A
DEPARTMENT	Administration	STATUS	Exempt		
REPORTS TO	Board of Directors	PAY GRADE	8		

This job description is not an employment agreement, contract agreement, or contract. Management has the exclusive right to alter this job description at any time without notice. This job description is intended to indicate the kinds of tasks and levels of work difficulty required of the position given this title and shall not be construed as declaring what the specific duties and responsibilities of any particular position shall be. It is not intended to limit or in any way modify the right of management to assign, direct and control the work of employees under supervision. The listing of duties and responsibilities shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

POSITION SUMMARY

The Taxpayer Liaison Officer serves as the primary point of contact between the Travis Central Appraisal District (TCAD), the public, and the Board of Directors. This position is responsible for ensuring open communication, transparency, and compliance with the Texas Property Tax Code by administering public access functions, resolving certain disputes, and facilitating communication regarding appraisal processes.

ESSENTIAL DUTIES

- Communicate and coordinate with the applicable appointing authority as required by the Texas Property Tax Code, including bridging communication between the Board of Directors and the appointing authority.
- Provide information regarding the district's responsibilities to property owners and the general public, both orally and in writing.
- Collaborate with TCAD outreach and customer service teams to support proactive taxpayer outreach efforts, to provide assistance, resolve concerns, and explain appraisal and protest processes.
- Provide written and oral activity reports to the TCAD Board of Directors, including regular reports detailing activities, progress, and challenges encountered.
- Facilitate communications between the public and the Travis Central Appraisal District through in-person meetings, telephone conversations, and written correspondence. Email communication may be used as a supplement but shall not be the sole method of contact.
- Administer the public access requirements as per Sections 6.04(d), (e), and (f) of the Property Tax Code.
- Resolve disputes involving matters that may not be protested under Section 41.41
- Provide direct assistance to taxpayers before, during, and after protest hearings, including follow-up communication after a protest hearing conducted by the TARB.
- Serve as the board's liaison to the appraisal review board on issues related to ARB management, including assisting as the board's representative in such matters.
- Responsible for receiving, compiling a list of, and providing resolution to comments, complaints, and suggestions filed by the chief appraiser, property owner, or a property owner's agent concerning the matters listed in 5.103(b) or any other matter related to the fairness and efficiency of the appraisal review board.
- Accomplish tasks as needed and assigned by the Board of Directors or Chief Appraiser.
- All duties are performed independently and require self-motivation and a professional attitude in the work environment, with the ability to maintain professionalism while working independently and performing all duties with minimal supervision.

REQUIREMENTS/ADDITIONAL RESPONSIBILITIES

- Must be authorized to work in the US, have reliable transportation, a valid Texas Driver's License, proof of Texas liability insurance, and verified good driving record
- Must complete required Comptroller training and education regarding the duties and responsibilities of the taxpayer liaison officer, including the procedures for the informal resolution of disputes

MINIMUM EDUCATION AND/OR EXPERIENCE

- Possession of a bachelor's degree from an accredited college or university, preferably in Real Estate or Appraisal. Acceptable work experience may be substituted for a college degree.
- Minimum of five (5) years of customer service experience, preferably in a public-facing, governmental, or regulatory environment.

KNOWLEDGE, SKILLS, AND ABILITIES

- Working knowledge of the Texas Property Tax Code, including protest procedures, appraisal review board processes, real estate appraisal principles, and appraisal district policies.
- Excellent verbal and written communication skills, with the ability to engage effectively with diverse groups.
- Strong customer service and interpersonal skills, with the ability to communicate complex information clearly and professionally in high-volume, in-person public settings.
- Proficiency in Microsoft Office applications (Outlook, Word, Excel).
- Must be able to learn and become proficient in the use of the Districts CAMA system
- Bilingual (Spanish) proficiency preferred

PHYSICAL AND ENVIRONMENTAL DEMANDS

Ability to sit, stand, walk, with occasional lifting of up to 30 pounds. Requires frequent use of hands for data entry. Must be able to hear, speak, and read fine print. Position is subject to occasional moderate stress due to workload and deadlines. Primarily an indoor office setting.

Employment is contingent upon a post-offer criminal background check.

The Travis Central Appraisal District is an equal opportunity/affirmative action employer. The Travis Central Appraisal District does not discriminate on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, military service, AIDS or HIV status, ancestry, national or ethnic origin and any other characteristic protected by law.

Resumes are welcome, but applicant must submit a completed employment application before an interview will be granted.

APPENDIX G

TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS CODE OF ETHICS POLICY

A. DECLARATION OF POLICY

It is the goal of the Travis Central Appraisal District to ensure the proper operation of open government. This goal requires that the Board of Directors be impartial and responsible to the public, that public office not be used for personal gain, and that the public have confidence in the integrity of the District. In recognition of these goals, a Code of Ethics for members of the Board of Directors is adopted.

This Code has four purposes:

- (1) To encourage high ethical standards in official conduct by the Board of Directors;
- (2) To establish guidelines for ethical standards of conduct for all such members by setting forth acts or actions that are incompatible with the best interest of the District;
- (3) To require disclosure of private financial or other interests in matters affected by the District; and
- (4) To serve as a basis for disciplining those who refuse to abide by its terms.

B. CODE OF ETHICS

Section 1. Definitions

The following terms shall have these meanings respectively ascribed to them:

Affected means reasonably likely to be subject to a direct economic effect or consequence, either positive or negative, as a result of the vote or decision in question. Affected does not include those persons or entities who are subject to an indirect or secondary effect from official action. Creditors, independent contractors, or guarantors of a person "affected" by a vote or decision are not also deemed to be "affected" by virtue of their relationship with the affected person. The vote or decision need not be the only producing cause of the economic effect or consequence reasonably likely to result. In determining whether a person, entity or property is or was "affected by" a vote or decision, it shall not be necessary to prove the actual existence or occurrence of an economic effect or consequence if such effect or consequence would be reasonably expected to exist or occur.

Board of Directors, or Directors, means the Board of Directors of the Travis Central Appraisal District.

APPENDIX G

Business Entity means a sole proprietorship, partnership, limited partnership, firm, corporation, professional corporation, holding company, joint stock company, receivership, or trust of any other entity recognized by law through which business may be conducted.

Chief Appraiser means the Chief Appraiser of the Travis Central Appraisal District.

Decision means any formal action or other matter voted on by the Board of Directors, as well as the discussion or deliberations that lead or could reasonably lead to a vote or formal action by the District.

District means the Travis Central Appraisal District.

Relatives are those related within the first degree of affinity or consanguinity as outlined below (Chapter 573 of the Government Code):

First degree of consanguinity: parents, children

First degree of affinity: spouse, spouse's children, spouse's relative listed under consanguinity, stepparents, stepchildren

Second degree of consanguinity: grandparents, brothers and sisters, grandchildren

Second degree of affinity: spouse's grandparents, spouse's brothers and sisters

Substantial Interest means an interest in another person or business entity if

- (1) The interest is ownership of ten percent or more of the voting stock or shares of the fair market value of the entity or ownership of five thousand dollars or more of the fair market value of the entity; or
- (2) Funds received by the person from the other person or business entity during either the previous twelve months or the previous calendar year exceeded ten percent of the person's gross income during that period; or
- (3) The person is a creditor, debtor, or guarantor of the other person or business entity in the amount of five thousand dollars or more.

Substantial Interest in Property means an interest in property that is equitable to or legal ownership with a market value of two thousand five hundred dollars or more.

Section 2. Standards of Conduct

- A. No Director shall transact any business in his or her official capacity with any person, business entity, or property in which he or she has a substantial interest. [Tax Code Section 6.036, Travis CAD Board Policies, Section 2.2, Section 2.12]
- B. No Director shall appear during the protest process, before the Appraisal Review Board, or before the Board of Directors as an advocate for himself or herself or any other person, business entity, or property, unless he or she discloses to the Board his or her position and responsibilities with the District. [Travis CAD Board Policies, Section 2.13]

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- C. No Director shall represent for compensation any other person, business entity, or property before the Appraisal Review Board or Board of Directors. [Tax Code Section 6.035(a-1), Travis CAD Board Policies, Section 2.2]
- D. No Director shall represent, directly or indirectly, any other person, business entity, or property in any action or proceeding against the interests of the District or in any litigation in which the District is a party. [Travis CAD Board Policies, Section 2.13]
- E. No Director shall accept or solicit any gift or favor that might reasonably tend to influence that individual in the discharge of his or her official duties or that the Director knows or should know has been offered with the intent to influence or reward official conduct. [Penal Code Section 36.02]
- F. No Director shall accept other employment to be performed or compensation to be received while still a Director if the employment or compensation could reasonably be expected to impair his or her independence in judgment of the performance of his or her official duties. [Penal Code Section 36.02, Ethics Advisory Opinion No. 155 (1993)]
- G. If any Director accepts or is soliciting a promise of future employment from any person or business entity who has a substantial interest in a person, business entity, or property that would be affected by any decision upon which the Director might reasonably be expected to act, investigate, advise, or make a recommendation, the Director shall disclose the fact to the Board and the Chief Appraiser and shall take no future action on matters regarding the potential future employer. [Travis CAD Board Policies, Section 2.13]
- H. No Director shall use his or her official position to secure a special privilege or exemption for himself, herself, or others; to secure confidential information for any purpose not related to his or her official responsibilities; or unless it is in the performance of his or her official duties as outlined by state law. [Travis CAD Board Policies, Section 2.13]
- I. No Director shall discuss any confidential information obtained as a result of his or her official position with a third party. [Texas Government Code Section 551.146]
- J. No Director shall use District facilities, personnel, equipment, resources, or supplies for private purposes, except to the extent such are lawfully available to the public. [Travis CAD Board Policies, Section 2.13]
- K. No Director shall use District facilities, personnel, equipment, resources, or supplies in political campaigns or advertising. [Election Code Section 255.003, Travis CAD Public Relations Policy, Ethics Advisory Opinion No. 172(1993)]
- L. No Director shall authorize a third party's use of the District's resources, including its name, logo, seal, and intellectual property. [Penal Code 37.10, Travis CAD Public Relations Policy]
- M. No Director shall act on behalf of, speak for, or purport to represent the District or the Board of Directors unless he or she has been authorized to do so by the Board. [Travis CAD Board Policies Section 2.13, Travis CAD Public Relations Policy]
- N. No Director shall attempt to use his or her position to undermine the authority of the Chief Appraiser to direct District staff. [Travis CAD Board Policies Section 2.13]
- O. Any Director required to file documents regarding conflicts of interest, financial disclosure, or campaign finance shall do so in accordance with legal requirements outlined by state law. [Local Government Code Section 171, Local Government Code Section 176, Election Code Chapter 254]

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- P. Directors are required to comply with all mandatory training requirements outlined by state law, including the open government training requirements set forth by the Texas Open Meetings Act. [Government Code Section 551.006, Travis CAD Board Policies Section 2.6]
- Q. No Director shall communicate directly or indirectly with the Chief Appraiser on any matter relating to the appraisal of property by the District unless it is in an open meeting of the Board, another public forum, or closed meeting of the Board in consultation with its attorney about pending litigation. [Tax Code Section 6.15(a), Travis CAD Board Policies Section 2.7]
- R. No Director shall communicate with a member of the Appraisal Review Board with the intent to influence a decision by the ARB in the ARB member's capacity as a member of the ARB. This does not apply to communications described in Tax Code Section 6.411. [Tax Code Section 6.411, Travis CAD Board Policies Section 2.7]
- S. Directors are required to comply with the Public Information Act, including maintaining records of public information and producing records in response to requests for information. [Texas Government Code, Section 552.021, Travis CAD Public Relations Policy]

Section 3. Future Employment

A Director, for a period of one year after leaving the District, may not appear or assist any person or entity that appears before the District, the Board, or the Appraisal Review Board for compensation, fees, contingent fees, or any emoluments concerning the valuation of any property located within the District's jurisdiction.

Section 4. Disclosure of Conflict of Interest

A Director shall disclose the existence of any substantial interest he or she may have in a person, business entity, or property that would be affected by a vote or decision of the Board. To comply with this Section, a Director, prior to the vote or decision, shall either file an affidavit as required by Tex. Local Government Code Ann. Section 171.004 or, if not so required, shall publicly disclose in the official records of the Board the nature and extent of such interest.

Section 5. Substantial Interest of Relative

A substantial interest of a relative of a Director shall be deemed to apply to that Director for the purposes of Section 4 concerning disclosure and recusal or reassignment. A Director subject to Tex. Local Government Code Ann. Chapter 17 may not participate in a vote or decision affecting a substantial interest of a person to whom the Director is related in the first degree of affinity or consanguinity. For the purposes of this Section, "substantial interest" shall be defined in Tex. Local Government Code Ann. Section 171.002.

Section 6. Other Relevant Ethics Considerations

Directors shall abide by all legal and ethical considerations, including but not limited to, the Texas Property Tax Code; Texas Department of Licensing and Regulation Section 94.100; Texas

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Open Meetings Act (Government Code Chapter 551); Public Information Act (Texas Government Code Chapter 552); Uniform Standards of Professional Appraisal Practice (USPAP); Texas Government Code Chapters 171, 176, 305, 551 and 552; Texas Penal Code Chapters 36 and 37; and Texas Election Code Chapters 15, 141, 254, and 255.

C. GIFTS AND HONORARIUMS

- (1) A Director shall not solicit any gift, favor, or service that may reasonably tend to influence him or her in the discharge of official duties, with the following exceptions:
 - a. A benefit used solely to defray the expenses that accrue in performing duties or activities in connection with the office. These expenses should not be reimbursable by the state or the District;
 - b. A political contribution as defined by Title 15 of the Election Code; or
 - c. An item with a value of less than \$50, excluding cash or a negotiable instrument.
- (2) If, during his or her term, a Director accepts the offer of any trip or excursion from a person or entity other than the District, then he or she shall report the following the Chief Appraiser before embarking on such trip or excursion:
 - a. The name of the sponsor;
 - b. The place or places to be visited;
 - c. The purpose of such trip or excursion;
 - d. The date and duration of any such trip or excursion.
- (3) Within fifteen days of return from such trip or excursion, the Director shall report the approximate value of the trip or excursion to the Chief Appraiser.
- (4) If any Director accepts a gift or loan of an item, other than food, on behalf of the District, such gift or loan must promptly be reported to the Chief Appraiser.
- (5) A Director shall not solicit, accept, or agree to accept an honorarium in consideration for services that the Director would not have been requested to provide but for his or her official position or duties. This does not prohibit a Director from accepting transportation or lodging expenses as outlined by Penal Code 36.07(b).

D. COMPLAINTS AND DISCIPLINARY ACTIONS

- (1) Individuals who believe a Director has violated a provision of this Code may file a complaint with the Chairman of the Board. The complaint must state that the facts alleged are true and factual to the best knowledge of the person filing the complaint and must specify each Code section alleged to have been violated.
- (2) If the Chairman is the accused Director, the Vice Chairman will direct this process.
- (3) All complaints are confidential unless required to be made public under the Public Information Act (Chapter 552 of the Texas Government Code).
- (4) Upon receipt of a complaint from any person of an alleged violation by any Director, the Chairman (or Vice Chairman, if the Chairman is the accused) shall appoint a committee of three Directors to hear the complaint.

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- (5) At least seven days in advance of such committee hearing, the committee shall notify the accused Director of the alleged violation and the time, date, and location of the hearing. The committee shall report the evidence it received, its findings, and its recommendations to the Board. The committee shall further provide a copy of its report to the Director at least seven days prior to consideration by the Board. The Board may confirm, modify, correct, reject, reverse, or recommit the report as it may deem proper and necessary. The Board shall notify the Director of its action within three days of when the action is taken. All notices and correspondence to the accused Director shall be delivered in person or by certified mail return receipt requested.
- (6) If the committee determines that a violation has occurred, the committee may impose or recommend the following sanctions:
- a. A letter of notification is the appropriate sanction when the violation is clearly unintentional. A letter of notification must advise the Director of any steps to be taken to avoid future violations.
 - b. A letter of admonition is the appropriate sanction if the committee finds the violation minor or may have been unintentional but requires a more substantial response than a letter of notification.
 - c. A reprimand is the appropriate sanction when the committee finds that a violation has been committed intentionally or through disregard of this Code.
 - d. A recommendation to forward the matter to the appropriate authorities is the appropriate sanction when the committee finds that a serious or repeated violation of this Code has been committed intentionally or through culpable disregard of this Code. This recommendation will be given to the Board for review and potential action.
- (7) A Director appointed by the taxing units who violates any requirement of this policy shall, upon a majority vote of the Board, have such violations reported to the taxing units that cast votes for the Director in his or her most recent appointment.
- (8) A Director elected by the voters who violates any requirement of this policy shall, upon a majority vote of the Board, have such violations reported to the appropriate legal authority, which may include the County Attorney, District Attorney, or Texas Ethics Commission.

E. FALSIFICATION OF GOVERNMENT RECORDS AN OFFENSE

Knowingly falsifying any information required to be filed under this policy is an offense under Tex. Penal Code Ann. Section 37.10.

VERIFICATION

I, _____, of my own free will, agree to abide by this Code of Ethics Policy.

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Signature of Affiant

State of Texas
County of Travis

Sworn to and subscribed before me, the undersigned authority, on the ____ day of
_____ 20_____, by _____

Signature of offer administering the oath

Title of officer administering oath



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5C: Discussion and Possible Action on Taxpayer Liaison Report

Presenter Tony Tran, Taxpayer Liaison Officer

Background Information

The TLO has provided the following reports:

- TLO Monthly Report- April 2026
- TLO Complaint Log

Staff Recommendation & Motion Language

There are no staff recommendations for this item.

No board actions needed for this item.

TAXPAYER LIAISON REPORT

Year to Date as of April 30, 2026

TOTAL INQUIRIES RECEIVED



190 Inquiries

AVERAGE DAYS TO RESOLVE



0.97 Days

INQUIRY SUMMARY

Month	General Inquiries	Narratives	Formal Hearings	Informal Meetings	Exemptions	BPP Issues	Open Records	Property Taxes	Market Values	TOTALS	
January	3	0	0	0	0	8	4	1	6	11	33
February	3	0	3	0	0	6	5	1	2	9	29
March	4	0	1	0	0	17	4	2	4	10	42
April	8	0	9	10	0	15	5	2	6	31	86
May	0	0	0	0	0	0	0	0	0	0	0
June	0	0	0	0	0	0	0	0	0	0	0
July	0	0	0	0	0	0	0	0	0	0	0
August	0	0	0	0	0	0	0	0	0	0	0
September	0	0	0	0	0	0	0	0	0	0	0
October	0	0	0	0	0	0	0	0	0	0	0
November	0	0	0	0	0	0	0	0	0	0	0
December	0	0	0	0	0	0	0	0	0	0	0
TOTALS	18	0	13	10	0	46	18	6	18	61	190

2026	2025	Yr Over Yr Change
33	64	-48%
29	35	-17%
42	53	-21%
86	98	-12%
0	102	%
0	131	%
0	111	%
0	81	%
0	31	%
0	16	%
0	52	%
0	48	%
190	822	

INQUIRY TYPE

Complaint Level

Level 1

General Inquiry/Education

Level 2

Complaint found to have been addressed appropriately by the CAD/ARB

Level 3

Complaint escalated to CAD/ARB leadership and resolved

Level 4

Complaint indicative of issues needing attention from the Board of Directors

Total

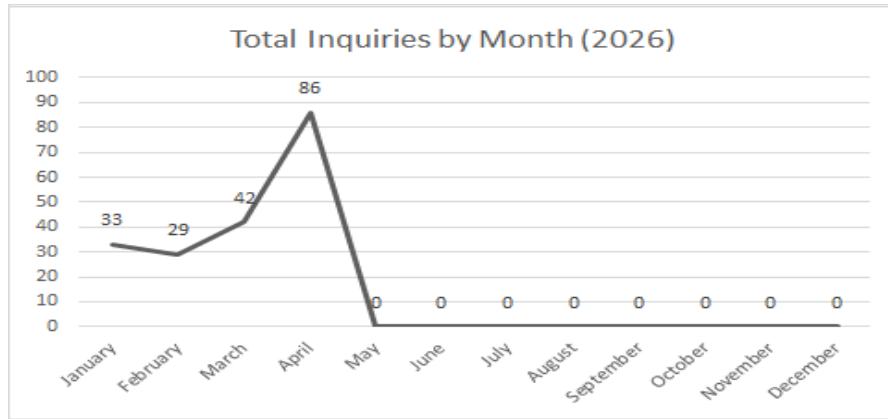
126

50

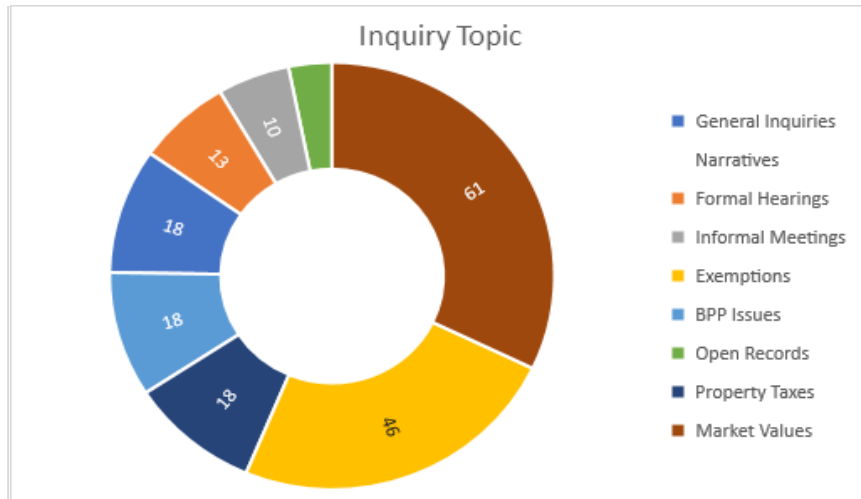
14

0

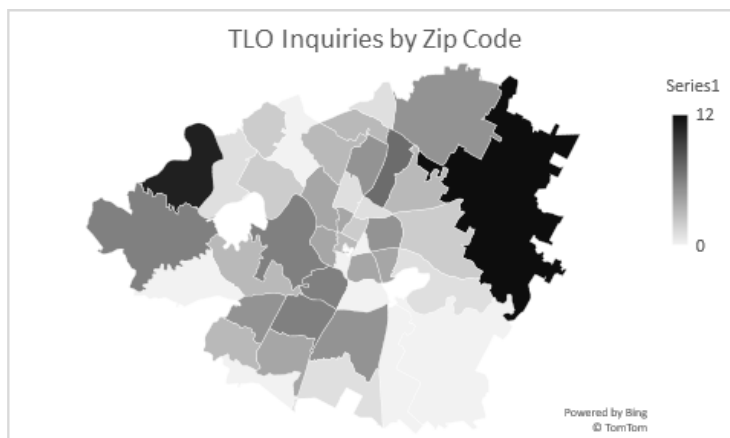
INQUIRY TIMELINE



INQUIRY TOPIC



INQUIRIES BY ZIP CODE



Date	Individual Type	Type of Contact	PID	Zip Code	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed Date	Days to Resolve	Complaint Level
4/30/2026	Property Owner	Phone	730165	78754	TCAD	Informal Meetings	had informal on 4/15 but have not received offer	presented to residential team lead, sent informal offer through the portal	4/30/2026	0	3
4/28/2026	Property Owner	Email	707826	78669	TCAD	Exemptions	HS removed	forwarded completed HS audit form to exemptions team, HS reinstated for 2026	4/29/2026	1	3
4/22/2026	Property Owner	In Person	768956	78735	TCAD	BPP Issues	just completed hearing, wanted to confirm account deactivated moving forward	brought to attention of BPP, deactivated account	4/22/2026	0	3
4/21/2026	Property Owner	Email	504829	78727	TCAD	Exemptions	HS exemption reduced to 90% in 2025 and solar exemption granted for 2026 but had since 2009	change to 90% corrected to 100% by exemption team for 2025 and moving forward, solar was not added by TCAD till 2026	4/23/2026	2	3
4/20/2026	Property Owner	In Person	200338	78702	TCAD	General Inquiries	update ownership to an heir property	located deed instrument in County Clerk database, provided to GIS and updated ownership	4/20/2026	0	3
4/9/2026	Agent	Email	991234	78721	TCAD	Property Taxes	improvements assigned to incorrect lot	forwarded error to appraisal support, deleted improvement from incorrect account and sending supplement to tax office	4/13/2026	4	3
4/6/2026	Property Owner	In Person	362081	78653	TCAD	Property Taxes	deed instrument filed under incorrect PID	emailed GIS to correct	4/7/2026	1	3
4/1/2026	Agent	Email	967019	78758	TCAD	BPP Issues	reported disposals were not removed from the 2025 workups	property owner/agent can have this issue reviewed by submitting 25.25(c)(1) correction forms with the ARB	4/6/2026	5	3
4/14/2026	Property Owner	Email	293066	78744	TCAD	Open Records	open record but request in preferred format	open records request fulfilled (no requirement to accommodate requested format); further review by GIS and legal, discovered court decision that states builder is owner of the property, TCAD corrected ownership based on court ruling	4/29/2026	15	2
4/30/2026	Property Owner	Phone	362570	78727	TCAD	Market Values	have not received offer but received formal hearing date	offers are at discretion of TCAD but have right to have informal, provided instructions on how to get into informal queue	4/30/2026	0	2
4/24/2026	Property Owner	Email	261958	78758	ARB	Exemptions	appeal ARB decision	will receive certified letter with ARB decision and options to continue protest	4/24/2026	0	2
4/22/2026	Property Owner	In Person	801317	78756	ARB	Formal Hearings	25.25c hearing but wanted to protest market value	late hearings are limited to scope of reason it was granted	4/22/2026	0	2
4/22/2026	Property Owner	In Person	217177	78723	TCAD	Exemptions	have 2nd improvement on property not being HS	2nd improvement was missed and added by TCAD in 2025, exemption team homesited 2nd improvement for 2025 and moving forward	4/23/2026	1	2
4/22/2026	Agent	Email	973992	78748	ARB	Formal Hearings	would like another formal hearing due to wrong information provided during hearing	only ARB can grant/deny late hearings, provided their email address	4/22/2026	0	2
4/22/2026	Agent	Email	994592	78653	ARB	Formal Hearings	25.25c denied	any prior year changes to the roll require protest via late hearing granted by ARB, which hearing was held and denied on 4/22	4/23/2026	1	2
4/22/2026	Property Owner	Email	155963	78669	ARB	Formal Hearings	41.411 denied	any prior year changes to the roll require protest via late hearing granted by ARB, which hearing was held and denied on 4/22	4/23/2026	1	2
4/21/2026	Property Owner	Email	349212	78739	TCAD	Market Values	submitted Characteristics review request, wanted to verify if it has been processed	square feet has been amended for 2026, advised will need to file late protest for prior year consideration, also tax agent still authorized, need to complete revocation form to remove	4/21/2026	0	2
4/15/2026	Property Owner	Email	783202	78748	TCAD	Market Values	larger unit had lower value than smaller unit	frieplace was deleted for smaller unit, will need to file late protest request via ARB for any potential change in value	4/15/2026	0	2
4/15/2026	Property Owner	Email	932002	78724	TCAD	Informal Meetings	not happy with informal, request to have another informal	only 1 informal per protested property, next step is formal hearing	4/16/2026	1	2

Date	Individual Type	Type of Contact	PID	Zip Code	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed Date	Days to Resolve	Complaint Level
4/13/2026	Property Owner	Email	982483	78702	TCAD	BPP Issues	ARB decision not applied to all associated BPP accounts	Response from BPP, "Pid 872486 has been closed, however the other two accounts are not associated in this board order. 982483 is a Res account & 926095 has a completely different ownership. It is not common for 1 board order to affect changes to other accounts, it is more customary that any affected accounts should file appeals separately."	4/13/2026	0	2
4/13/2026	Property Owner	Email	158926	78732	TCAD	Exemptions	exemptions was denied	submitted audit not application, 3/30 submitted application online	4/14/2026	1	2
4/9/2026	Property Owner	Email	146525	78734	TCAD	Market Values	disputing 2025 ARB decision, under impression that ARB are TCAD attorneys	attended 2025 formal hearing, advise ARB should have received certified letter with options on how to appeal	4/9/2026	0	2
4/8/2026	Property Owner	Email	818774	78645	TCAD	Exemptions	said applied for exemption on adjacent lot to HS prop	no app on file, adv to file HS app and reference main prop	4/8/2026	0	2
4/6/2026	Property Owner	Phone	188512	78702	TCAD	Market Values	have metal shed on roll as detached storage, removed for 2026 but wants prior years corrected	advised shed classified as appraisal judgement but can file late protest to TARB	4/6/2026	0	2
4/2/2026	Property Owner	Email	1003866	78751	TCAD	Exemptions	status of exemption app	exemption granted 4/2/26	4/3/2026	1	2
4/1/2026	Property Owner	Email	427720	78660	TCAD	Market Values	increase in land value	land value went up but overall went down, advise can file protest based on overall value	4/1/2026	0	2
4/1/2026	Property Owner	Email	939293	78723	TCAD	Market Values	AFF Prog, mkt annual increase greater than Covenant of Restriction	2024 had protest, covenant states 2% annual increase from purchase price; also did not have MOU with TCAD in 2023, prop did not qualify for AFF Prog until entered agreement w/TCAD in 2024	4/6/2026	5	2
4/30/2026	Property Owner	In Person	891127	78653	TCAD	Market Values	fireplace listed on improvement details but do not have a fireplace	need to file protest for this year and provided characteristics review form if fireplace is not deleted during protest	4/30/2026	0	1
4/30/2026	Property Owner	In Person	912088	78721	TCAD	BPP Issues	sold business in 2022	need to file late protest, only ARB have authority to grant/deny request	4/30/2026	0	1
4/29/2026	Agent	Email	509646	78745	ARB	Formal Hearings	intent to file LBA	ARB included in email, chief not included in email, forwarded email to chief	4/30/2026	1	1
4/29/2026	Property Owner	Phone	104552	78746	TCAD	Market Values	how does it work if they hire a property tax agency	companies have different fee structure, dependent on who they hire, can protest themselves or not protest at all	4/30/2026	1	1
4/28/2026	Property Owner	Email	321302	78749	TCAD	General Inquiries	protest sales date range and lookback for exemption filing	normally uses sales from january of last year to february of current year and 2 year lookback for exemptions	4/28/2026	0	1
4/28/2026	Agent	Phone	375071	78746	TCAD	Open Records	wants to speak to legal department or chief	spoke to records department, forwarded message to legal adjustments are based on paired sales analysis, advise if want complete list of all possible adjustments than file open record request	4/29/2026	1	1
4/27/2026	Property Owner	Email	382757	78669	TCAD	Market Values	land value adjustment		4/27/2026	0	1
4/27/2026	Property Owner	Email	113215	78746	TCAD	Informal Meetings	how to attend informal meeting	former ARB, not eligible for informal, full board formal only	4/27/2026	0	1
4/27/2026	Property Owner	In Person	966074	78653	TCAD	General Inquiries	how to complete protest form	went over protest options on form	4/27/2026	0	1
4/27/2026	Property Owner	In Person	906285	78641	TCAD	Property Taxes	receive tax bill, but taxes are supposed to be escrowed	advise to contact mortgage company	4/27/2026	0	1
4/27/2026	Property Owner	Email	259754	78753	TCAD	Exemptions	trust docs to be added to exemption app	forwarded trust docs to exemption team	4/28/2026	1	1

Date	Individual Type	Type of Contact	PID	Zip Code	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed Date	Days to Resolve	Complaint Level
4/24/2026	Property Owner	Email	874870	78753	TCAD	Market Values	have not received 2026 appraisal notice	can view appraisal notice online, for pin to protest- need to contact customer service	4/24/2026	0	1
4/24/2026	Property Owner	Phone	304193	78704	TCAD	Informal Meetings	missed informal meeting	can join informal meeting queue anyday before formal	4/24/2026	0	1
4/24/2026	Property Owner	In Person	716635	78660	TCAD	Informal Meetings	how to attend informal meeting	will receive text message and email to join meeting once an appraiser is available to start	4/24/2026	0	1
4/23/2026	Property Owner	Email	224810	78756	TCAD	Property Taxes	deferral of taxes	handled by the tax office, provided contact info	4/23/2026	0	1
4/22/2026	Property Owner	In Person	698628	78703	TCAD	General Inquiries	25.25c granted, will tax bills/penalties be voided	TCAD will send supplement to tax office, tax office decides on waiving fees/penalties	4/22/2026	0	1
4/22/2026	Property Owner	In Person	210159	78705	ARB	Formal Hearings	options to appeal ARB decision	will receive certified letter with ARB decision and options to continue protest	4/22/2026	0	1
4/22/2026	Property Owner	Email	460430	78753	TCAD	Property Taxes	ARB reduce value, how does this affect them	TCAD will send supplement to tax office, tax office will review and distribute any potential refunds. Every year is independent and need to protest 2026	4/22/2026	0	1
4/22/2026	Agent	In Person	509646	78745	TCAD	Formal Hearings	issue checking into hearing remotely	gave my contact info and can have mgr check them in manually	4/22/2026	0	1
4/22/2026	Property Owner	Email	982203	78738	TCAD	Exemptions	help to port exemptions to new home	provided HS application with options to submit and documentation to include with application	4/23/2026	1	1
4/21/2026	Property Owner	Email	709781	78645	ARB	Market Values	contest prior years value	prior year protests can only be approved by ARB, provided late protest brochure	4/21/2026	0	1
4/21/2026	Property Owner	Email	148274	78645	TCAD	Market Values	sq ft discrepancy, requesting correction	protest for current year and complete characteristic review form for future year	4/21/2026	0	1
4/21/2026	Property Owner	Email	282757	78704	TCAD	Exemptions	historic exemption form	provided historic exemption form and advised need to be postmarked or emailed by 4/30	4/22/2026	1	1
4/20/2026	Property Owner	Email	215229	78723	TCAD	Informal Meetings	missed informal, need help to reschedule	sent get in informal queue instructions	4/20/2026	0	1
4/20/2026	Property Owner	Email	102608	78704	TCAD	Market Values	requesting update on evidence and informal offer	advise evidence must be made available 14 days prior to formal, formal not scheduled yet. Offer likely to be made after formal, scheduled for 5/15	4/20/2026	0	1
4/17/2026	Property Owner	In Person	264779	78727	TCAD	Market Values	help completing protest form	provided assistance in completing protest form	4/17/2026	0	1
4/17/2026	Property Owner	In Person	176026	78729	TCAD	Informal Meetings	unable to log into portal	can get into informal queue without portal access	4/17/2026	0	1
4/16/2026	Property Owner	Email	186988	78645	TCAD	Market Values	disagree with class and condition	can request for internal inspection and/or complete characteristics review request form	4/16/2026	0	1
4/15/2026	Property Owner	Email	711305	78621	TCAD	Exemptions	question regarding AG special valuation and HS	advise can reapply for AG due by 4/30	4/15/2026	0	1
4/15/2026	Property Owner	Phone	356868	78669	TCAD	General Inquiries	review of NOAV, improvements is set at zero value	land was reassessed based on entire alpha but mkt did not have enough sales to warrant change, values rolled	4/15/2026	0	1
4/15/2026	Property Owner	Email	108527	78735	TCAD	Market Values	do not believe view adjustment is warranted	advise adjustments are based on paired sales analysis so can provide sales that show market is not willing to pay premium	4/16/2026	1	1
4/14/2026	Property Owner	In Person	942773	78653	TCAD	Market Values	help completing protest form	provided assistance in completing protest form	4/14/2026	0	1
4/14/2026	Property Owner	Email	831449	78734	ARB	General Inquiries	merged lots in 2025 and would like values for previous years be recalculated	any possible changes in value for previous years would require a protest which only ARB has authority to grant	4/15/2026	1	1
4/13/2026	Property Owner	In Person	973425	78645	TCAD	Market Values	purchase price is higher than appraised value	advise as property owner, have right to protest but not required	4/13/2026	0	1
4/13/2026	Property Owner	In Person	774583	78747	TCAD	Market Values	questions regarding ptotest form	helped completing protest form	4/13/2026	0	1

Date	Individual Type	Type of Contact	PID	Zip Code	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed Date	Days to Resolve	Complaint Level
4/13/2026	Property Owner	In Person	382868	78654	TCAD	Market Values	is it beneficial to merge lots	provided the form to combine lots and advised vacant lot may qualify for HS as it is adjacent to main property	4/13/2026	0	1
4/13/2026	Property Owner	In Person	383371	78756	TCAD	Formal Hearings	have late formal hearing scheduled	explained the process and what to expect during formal hearing	4/13/2026	0	1
4/13/2026	Property Owner	Email	780522	78744	ARB	BPP Issues	late hearing request	advised to send late protest request to ARB and send BPP email to review to inactivate	4/13/2026	0	1
4/13/2026	Property Owner	Email			TCAD	Market Values	land value increases in downtown Austin	file open records request for specific property or protest in which evidence will be available 14 days prior to formal hearing	4/14/2026	1	1
4/13/2026	Property Owner	Email	134448	78733	TCAD	Informal Meetings	missed informal yesterday, need help to reschedule	advised can have informal anytime before formal, can reschedule or just get in queue	4/14/2026	1	1
4/10/2026	Property Owner	Phone	309828	78704	TCAD	Informal Meetings	was not happy with informal, stated TCAD has incorrect information	advised next step is formal hearing and can also complete characteristics request review	4/10/2026	0	1
4/10/2026	Property Owner	In Person	204613	78723	TCAD	Exemptions	need assistance completing HS exemption application	assisted in completing HS application	4/10/2026	0	1
4/10/2026	Property Owner	Email	177032	78645	TCAD	General Inquiries	concern about title fraud and what tcad is doing to mitigate risk	no formal notification in place but tcad sends letter regarding exemptions when there is change in ownership	4/10/2026	0	1
4/10/2026	Property Owner	Phone	139782	78734	TCAD	Market Values	why mkt and net appraised value the same	advised HS max increase is 10% from previous yr but same as mkt if lower than 10% increase	4/10/2026	0	1
4/10/2026	Property Owner	Email	583690	78734	TCAD	Exemptions	what is O65 port	explained port is % established to cap school taxes	4/10/2026	0	1
4/10/2026	Property Owner	In Person	241779	78753	TCAD	Market Values	wants advice if they should file protest themselves or hire agency	cannot offer advice, gave options and explained the process	4/10/2026	0	1
4/10/2026	Property Owner	Email	522450	78734	TCAD	Market Values	market value doubled from last year	last year home was at 62% complete, now at 100% complete and mkt sales analysis	4/13/2026	3	1
4/10/2026	Property Owner	Email	878690	78723	TCAD	Market Values	upset said appraiser did not listen to any of the evidence he provided	advised next step is the formal hearing where he will be able to preset to ARB	4/13/2026	3	1
4/10/2026	Property Owner	Email	455973	78738	TCAD	Market Values	why land value went up so much	explained cannot give specifics as no protest on file, but might be due to paired land analysis of similar properties	4/13/2026	3	1
4/9/2026	Property Owner	In Person	864487	78726	TCAD	Market Values	want to appeal 2025 market value	advise deadline has passed for 2025 market value appeal	4/9/2026	0	1
4/9/2026	Property Owner	Email	152499	78734	TCAD	Exemptions	affects of exemptions on purchase of new home	advised to email exemption team	4/9/2026	0	1
4/8/2026	Property Owner	Phone	293853	78744	TCAD	Informal Meetings	have issue scheduling informal	guided PO to TCAD website to get in today's queue	4/8/2026	0	1
4/8/2026	Property Owner	In Person	292856	78744	TCAD	Market Values	review appraisal notice and options to lower	explained appraisal notice and how to file a protest	4/8/2026	0	1
4/8/2026	Property Owner	Email	140995	78738	TCAD	Market Values	mkt value increase after arbitration	advise each year is independent, but value has circuit breaker	4/8/2026	0	1
4/7/2026	Property Owner	Email	757199	78751	TCAD	Property Taxes	request help to lower property taxes	review of account shows no exemptions applied, suggested to review and apply for exemptions	4/7/2026	0	1
4/6/2026	Property Owner	Email	458883	78645	TCAD	Exemptions	disabled vet, want to know if can apply for other exemptions on 2nd property	advised exemptions are generally restricted for primary residence with exception of DV, which is already applied to PO vacant lot	4/6/2026	0	1
4/6/2026	Property Owner	Email	174915	78726	TCAD	General Inquiries	pin to file protest	advised to email CS with copy of ID	4/6/2026	0	1

Date	Individual Type	Type of Contact	PID	Zip Code	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Closed Date	Days to Resolve	Complaint Level
4/3/2026	Property Owner	Email	329821	78745	TCAD	Formal Hearings	how to obtain sales data to use as comps w/realtor.. or review TCAD evidence	TX non disclosure so sales not public info, can consult	4/3/2026	0	1
4/3/2026	Property Owner	Email	110234	78703	TCAD	Market Values	believes mkt value too high	advised to file a protest	4/3/2026	0	1



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5D: Discussion and possible action on removal of appraisal review board members who have resigned

Presenter Tony Tran, Taxpayer Liaison Officer

Background Information

Tax Code Section 6.41(f) states that a member of the ARB may be removed by a majority vote of the Board. Grounds for removal are:

- A violation of Tax Codes Sections 6.412, 6.413, 41.66(f), or 41.69;
- Good cause relating to the attendance of members at called meetings of the ARB as established by written policy adopted by a majority of the Board; or
- Evidence of repeated bias or misconduct.

The following ARB members have submitted a resignation notice and need to be formally removed from the ARB:

- Joel Mondragon (4/7/2026)
- Lynn Wilkinson (4/3/2026)
- Nicolas Zuniga (5/4/2026)

Staff Recommendation & Motion Language

No staff recommendation.

TLO & ARB recommend the removal of the members.

I move to remove Joel Mondragon, Lynn Wilkinson, and Nicolas Zuniga, who have formally resigned from the Appraisal Review Board.

From: **Lynn Wilkinson** [REDACTED]
Date: Fri, Apr 3, 2026 at 10:39 AM
Subject: 2026 Season
To: TARB Members <tarbmembers@gmail.com>

Hello,

I regret to inform you that I've decided not to serve for the current 2026 season. Some unforeseen circumstances have come up which has led me to the decision.

Should I land within Travis County again (my goal), I will likely contact the District about serving in the 2027 protest season.

It has been a pleasure to work with you and I wish you the best. Please let me know you've received this email.

LYNN WILKINSON REALTOR®, ABR, CNE, CHMS

Coldwell Banker Realty | Austin Northwest Office
[REDACTED]

From: **Joel M** [REDACTED]
Date: Tue, Apr 7, 2026 at 12:45 PM
Subject: Re: Checking in
To: TARB Members <tarbmembers@gmail.com>

Hello Mr. Gifford,

Apologies for the lack of communication.

I sadly no longer live in Austin as of March and can no longer fulfill my role as TARB Member.

Please accept this letter as a formal notice of my resignation.

In Best Regards,

Joel Mondragon

TARB Members <tarbmembers@gmail.com> To: TARB Members tarbmembers@gmail.com

Hi Mr.Byron.

Sorry I didn't respond but I will not be an ARB member this year. Shortly after last years protest season I found a role as an appraiser in San Antonio and that where I currently live now.

(Zuniga)



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5E: Discussion and Possible Action on Appraisal Review Board Chairperson's Report

Presenter Meg Brooks, ARB Chairperson

Background Information

ARB Chair Meg Brooks will brief the Board of Directors on activities of the ARB.

Staff Recommendation & Motion Language

There are no staff recommendations for this item.

No board action is needed for this item.



TO: Travis Central Appraisal District Board of Directors

FROM: Meg Brooks, Chair, Travis Appraisal Review Board

DATE: May 14, 2026 meeting

Below is a brief summary of what we have been working on since April.

Comptroller Training – All but two of our members have completed their new member or continuing education requirements from the Comptroller's Office.

Mock Hearing Training – The new members will participate in a day of mock hearings May 13, 14 and 15. Experienced chairs and other experienced members will conduct hearings with the new members as panel members to see what a hearing is really like. They will also have the opportunity to ask questions, which they can't always do in a regular hearing.

Correction Hearings – We have scheduled one day of correction hearings on May 21 to make sure we have most of the correction hearings done before the regular protest season starts.

Members – Our membership count is 99. We had one more member quit because he found full-time employment.

Hearing Procedures – We have amended our hearing procedures, voted on them and they have been accepted by the Comptroller's office

Scheduling Directive –The Scheduling Directive has been completed. I believe we have a structure that will help us efficiently get to certification.

We look forward to a productive hearing season.



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5F: Adoption of Proposed Personnel Policy

Presenter Kat Harvey, Director of Administration

Background Information

The TCAD Personnel Policy states:

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

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

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

- **Chapter 6: Compensation**
 - **Section 6.8 – Language Proficiency Pay (New):**
A new language proficiency pay policy has been added.
- **Chapter 9: Family and Medical Leave Act (FMLA)**
 - **Section 9.1.4 – Removal of Spousal Limitation:**
The prior spousal leave limitation has been removed.
 - **Section 9.1.5 – Health Insurance Premium Handling:**
Updated language regarding TCAD benefits during unpaid leave.
 - **Section 9.1.8 – Intermittent Leave or Reduced Work Schedule:**
Updated language aligns with standardized FMLA guidance.
- **General Updates**
 - Internal forms have been moved to SharePoint.
 - Minor formatting and wording updates were made throughout the document.

Per TCAD policy, the District sent the proposed changes to all staff on April 14, 2026, for review and comment at least 15 days in advance of the next scheduled Board of Directors meeting. A copy of the proposed Personnel Policy, including the proposed changes, has been provided for your review. A summary of staff comments and feedback regarding the proposed changes is attached.

Staff Recommendation & Motion Language

Staff recommends the board adopt the personnel policy changes.

I move to approve the proposed changes to the TCAD Personnel Policy as presented.

EMPLOYEE **PERSONNEL POLICY**



PROPOSED 2026



Policy Manual Disclaimer

This employee policy manual outlines the general personnel policies for all TCAD employees. It is not intended to create a contract or guarantee employment. TCAD reserves the right to alter, amend, or delete policies at any time as directed by the Chief Appraiser and the Board of Directors. Should any provision, or part thereof, be deemed invalid, unlawful, or unenforceable, the remaining provisions will remain in full force and effect. In instances where state laws or regulations supersede TCAD policies, those laws or regulations will take precedence only to the extent necessary to ensure compliance. Specific departments may have additional policies unique to their operations.

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

About TCAD Operations

TCAD operates within the framework established by Texas state statutes, which govern its responsibilities and oversight. Its internal organizational structure is determined by its leadership to align with operational needs and statutory requirements. Its operations are governed by state law and the actions of TCAD's leadership and Board of Directors.

Board of Directors

The Board of Directors consists of members elected or appointed in accordance with state law, serving designated terms. The Board provides guidance and oversight for TCAD operations and policies.

TCAD Operations

Operations at TCAD are managed through departments and offices, each led by appointed department heads. These operations align with the agency's mission to ensure fair and accurate property valuations for tax purposes, supporting local governments in the equitable distribution of tax burdens.

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MISSION STATEMENT

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



1 GENERAL PROVISIONS

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

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

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

1.2 Employee Status

TCAD is an "at will" employer. The contents of this manual do not alter an employee's employment status. The Personnel Policy Manual does not constitute a contract or a promise of employment.

- Employees may resign at any time for any reason, with or without notice. However, a resignation with less than two weeks' notice may negatively impact an employee's eligibility for rehire.
- TCAD retains the right to terminate the employment relationship at any time, with or without cause or notice.
- TCAD may change the terms and conditions of employment at any time, with or without notice.

1.3 Equal Opportunity Employment

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

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

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

2 RECRUITMENT AND STAFFING

2.1 Recruitment and Staffing

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

2.2 Job Description

A job description for each employment position should be maintained by the Human Resources Division. Each employee will be provided with a job description to sign upon hire, transition, promotion, or job change.

2.3 Posting

When a position becomes vacant, the position may be posted on the TCAD website, online job boards, internally via email, or the position may be filled by an applicant that has previously applied for a like position within the past 180 days. Assignment of a closing date is at the prerogative of the Chief Appraiser. The chart below generally defines the processes:

Job Posting Options			
Type	Description	Documentation	Process
External Job Posting	Vacant position is posted online through Human Resources.	A request to post must be sent to Human Resources.	Position will be posted through online hiring system for a minimum of 5 calendar days.
Internal Job Posting	Vacant position is posted internally through email or other written communication method to all staff.	An email or manual written posting may be used to notify employees of the vacancy.	Notify internal employees of the opportunity and provide instructions on how they must apply (i.e. website link, etc.). Applications should be accepted for a minimum of 5 calendar days.
Applicant Pool	Candidate applications submitted in response to job posting.	Contact Human Resources to request applications from a previous posting for a position with the same title and grade within the past 180 days.	Applications will be provided through the online hiring system for the hiring manager to review.

2.4 Application Process

All candidates being considered should meet the minimum requirements for the position and should go through a consistent screening and interviewing process. Prior to the employment interview applicants must complete the TCAD employment application. Applicants will be interviewed by management as appropriate. The Division Supervisor, Department Head or their designee will make the final selection in the recruitment process. Once a candidate is selected, the hiring manager must notify Human Resources to complete the final steps in the hiring process.

2.5 Pre-Employment Investigation

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

2.6 Pre-Adverse Letter

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

2.7 Other Employment

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

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

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

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

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

2.8 Nepotism

Nepotism is the hiring or influencing others to hire relatives within a specified prohibited degree. For more information on these rules please see the chart below and contact Human Resources with any questions.

TCAD may not employ or contract with an individual or the spouse of an individual who is related to the chief appraiser within the first degree by consanguinity or affinity. TCAD may not employ any individual related to a member of the TCAD Board of Directors within the second degree by affinity or the third degree by consanguinity.

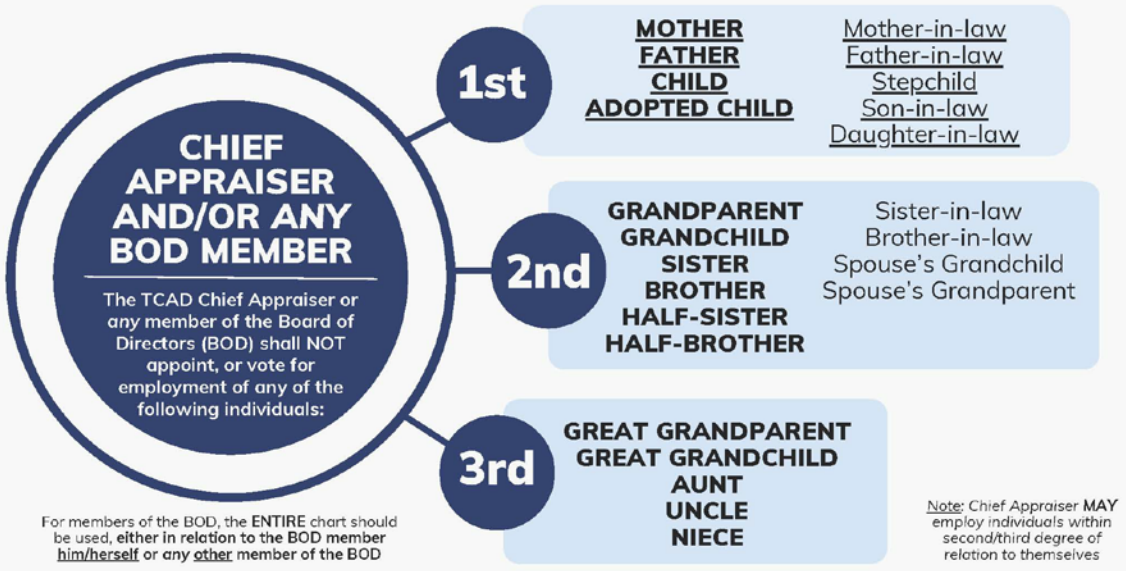
A prohibited relationship described above that arises as the result of a marriage will require the immediate resignation of the Board member or the employee; if neither chooses to resign the employee will be terminated.

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

Changes in relationships which may violate this policy must be immediately reported to Human Resources.

NEPOTISM PROHIBITED RELATIONSHIPS

TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS MEMBERS



For members of the BOD, the ENTIRE chart should be used, either in relation to the BOD member him/herself or any other member of the BOD

AS APPLIED TO CHIEF APPRAISER ONLY:
 Relationships underlined = Applies BOTH to Chief Appraiser OR any member of the TCAD Board
 Relationship NOT underlined = ONLY applies in relation to any member of the TCAD Board

Relationships in bold = **CONSANGUINITY** - by blood
 Relationships not in bold = Affinity - by marriage

NEPOTISM PROHIBITED RELATIONSHIPS

TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS MEMBERS

OK to hire:

- Great Aunt / Uncle
- Great Great Grandparent
- Cousin
- Children of Great Aunt / Uncle
- Step Relatives other than Stepchildren
- Foster Children

Tex.Gov't Code § 573.022-.025

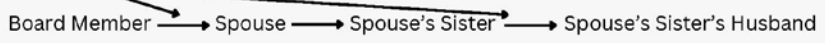
State nepotism laws prohibit hiring relatives of board members in the first, second, and third degrees of consanguinity and the first and second degrees of affinity.

Divorce or **death** do not sever a relationship for the purposes of nepotism if there are any living children of the relationship under the age of 21.

Tex.Gov't Code § 573.024(c)

Two Marriage Rule:

Two marriages = no nepotism

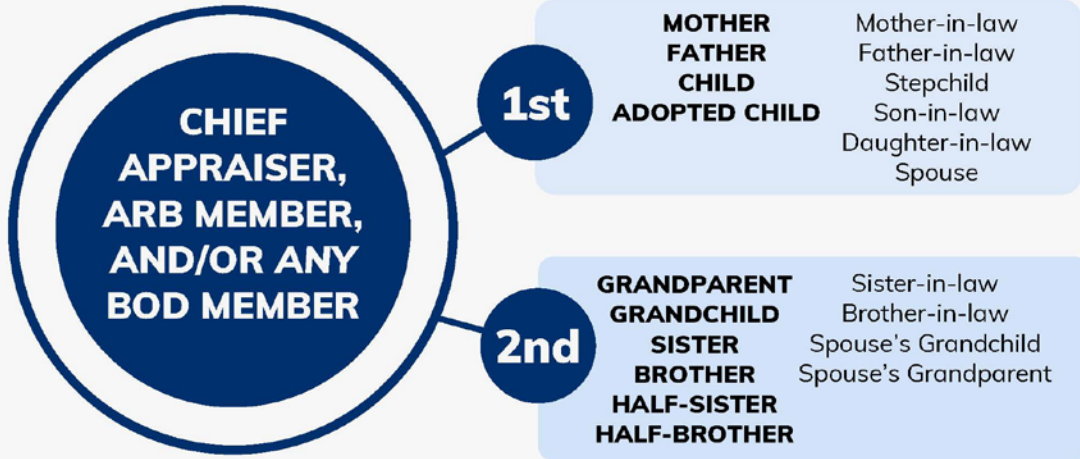


Tex. Att'y Gen. LO-88-121 (1988)

NEPOTISM PROHIBITED RELATIONSHIPS

INELIGIBILITY OF TCAD BOD MEMBERS, ARB MEMBERS, AND/OR CHIEF APPRAISER

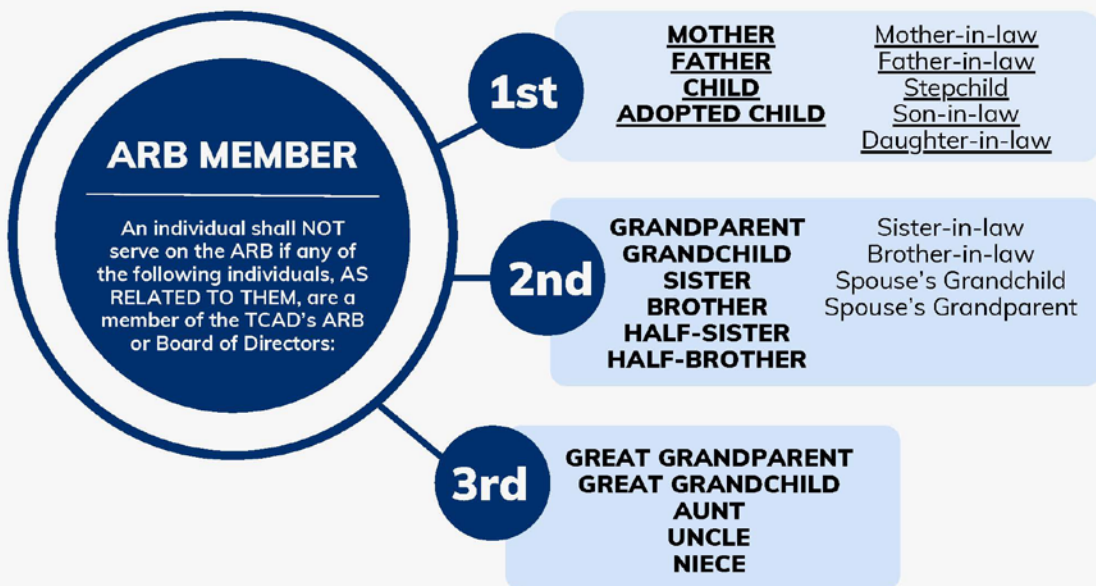
Any member of the TCAD Board of Directors, the ARB, and/or the Chief Appraiser are **INELIGIBLE** for their respective office/position if that person is related to **ANY** of the following individuals previously engaging in the business of paid property appraising or has represented property owners for compensation in proceedings with the Travis Central Appraisal District:



Relationships in bold = **CONSANGUINITY** - by blood
Relationships not in bold = Affinity - by marriage

NEPOTISM PROHIBITED RELATIONSHIPS

TRAVIS CENTRAL APPRAISAL DISTRICT APPRAISAL REVIEW BOARD (ARB) MEMBERS



Relationships in bold = **CONSANGUINITY** - by blood
Relationships not in bold = Affinity - by marriage

2.9 Career Development

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

2.10 Internal Application Process

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

2.11 Reduction in Force

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

2.12 Resignation

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

2.13 Discharge

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

1. Failure to complete and return any of the following:
 - i. TCAD Personnel Policy Manual Acknowledgement
 - ii. Federal I-9 Form
 - iii. Code of Ethics Acknowledgement
 - iv. Annual Financial Disclosure
 - v. Proof of Vehicle Insurance when required as part of job description
 - vi. Interview Procedures Acknowledgement (Supervisors)
2. Failure to maintain credentials required to execute duties, including any position which requires registration with the Texas Department of Licensing and Regulation.
3. Insubordination, including but not limited to, refusal to perform work, or refusal to work overtime, as directed by an authorized member of TCAD management.
4. Non-exempt employees working "off the clock". Non-exempt employees must be clocked in to work.

5. Acts of a dangerous, reckless or destructive nature, including intentional acts that damage persons and/or property.
6. Failure to treat members of the staff or the public respectfully.
7. Harassment or failure to report harassment including sexual harassment.
8. Theft of TCAD time or property.
9. Unauthorized use of public property
10. Tampering with timekeeping or reporting.
11. Willful release of confidential or other sensitive information.
12. An appraiser, appraising, brokering property or referring property to another agent or broker to list or sell in Travis County.
13. Failing to report accidents, incidents or injuries as required by TCAD policy.
14. Misrepresentation of a work-related injury
15. Failing to report a citation for a DWI or DUI when driving is a condition of employment.
16. Failing to report a suspension of driver's license when driving is a condition of employment.
17. Being under the influence of any drug in violation of TCAD policy as stated in this Manual.
18. Refusal to consent to a lawfully requested drug or alcohol screening.
19. A confirmed positive result to a lawfully administered drug or alcohol test.
20. Compromising TCAD integrity as defined by the Code of Ethics.
21. Violation of the No Fraternization policy.
22. Violation of the Electronic Resources Use policy.
23. Violation of Social Media policy.
24. Violation of Weapons policy.
25. Destruction of documents without proper documentation.
26. Failure to comply with the Public Information Act.
27. Gross or repeated neglect of duty.

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

3 REQUIREMENTS OF EMPLOYMENT

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

3.1 Certification Requirements

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

3.2 Professional Ethics

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

Appraisers are prohibited from appraising property, brokering real estate, or referring real estate sales to other agents or brokers, inside Travis County. Appraisers shall not conduct an informal or a formal hearing for friends, relatives, or as prohibited by the Code of Ethics. TCAD employees who protest their property value in Travis County must proceed directly to a formal hearing with a five-member Appraisal Review Board panel and are not eligible to participate in informal meetings or settlements.

3.3 Financial Disclosure

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

3.4 Vehicle Usage

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

3.4.1 License and Vehicle Safety

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

3.4.2 Maintain Vehicle Insurance

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

3.4.3 Accidents

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

If the accident involves an employee's personal vehicle, the employee's personal auto insurance policy is responsible for coverage. Employees are required to ensure their personal auto insurance is sufficient to meet State of Texas liability coverage standards.

4 ADMINISTRATIVE POLICIES

4.1 Work Attire

Employees are urged to use good judgment in the manner of their appearance. Appropriate clothing is essential in presenting a professional image and should be neat and business-like in appearance. As representatives of TCAD, employees should always convey a professional image to the public. This policy is in effect during the normal operating hours of the appraisal district, which are typically 7:45 a.m. to 4:45 p.m. Monday through Friday. The following are prohibited: shorts, backless or halter style attire, T-shirts, bare midriffs, tube tops, skirts shorter than four inches from the bend of the knee at the back of the leg, tank tops, spaghetti straps, leggings, see-through attire, graphic slogans, flip-flops, sweatpants, tight, revealing or otherwise inappropriate clothing, clothing that is ripped, frayed, stained or messy, or facial piercings. In addition, visible piercings and body art that TCAD management reasonably believes will be offensive to co-workers or the public are prohibited. At no time should undergarments be exposed. There are some job duties that are either permanently or occasionally labor intensive. In order to promote the safety of the employee and to prevent damage to clothing, anyone engaged in such duties may wear jeans or approved shorts as determined by the management. All employees are expected to comply with this dress code in a manner consistent with their gender identity and expression. An employee reporting to work in attire that is unacceptable will be sent home to change clothes. An employee who must leave work to change clothes will not be paid for the time needed to comply nor will they be allowed to use leave time. Repeated violations of the dress code will result in disciplinary action up-to-and including termination of employment. Questions of appropriate dress should be addressed to Human Resources.

4.1.1 Review Board and Protest Season Attire

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

4.1.2 Non-Protest Season Attire

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

4.2 Workplace Conduct

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

4.3 Harassment Prohibited

TCAD is committed to promoting a work environment that is free of harassment and strictly prohibits any conduct which constitutes harassment. Harassment includes, but is not limited to slurs, jokes, and other verbal, graphic or physical conduct relating to an individual's race, color, sex (including pregnancy, sexual orientation, gender identity, gender expression, gender change, gender stereotyping, or transgender status), HIV/AIDS status, religion, national origin, age, or disability, parental status, marital status, reprisal, or other non -merit factors, political affiliation, military or veteran status, or genetic information. Actions that constitute unlawful harassment may include 1) an explicit change to the terms or conditions of employment that is linked to harassment based on a protected characteristic, e.g., firing an employee because the employee rejected sexual advances; or 2) conduct that constructively changes the terms or conditions of employment through creation of a hostile work environment. The latter includes any unwelcome and offensive conduct taken on the basis of a protected characteristic, when such conduct is so severe or pervasive that it creates an objectively hostile or abusive work environment. All District employees are expected to conduct themselves in a manner consistent with their obligation to maintain a work environment free from discrimination and harassment, including discrimination and

harassment on the basis of sexual orientation, gender identity, or perceived gender non - conformity.

Sexual harassment in particular is defined as unwelcomed sexual advances, request for sexual favors and any other conduct of a sexual nature (including sexually explicit language, publications anywhere in the workplace, including derogatory or pornographic posters, pictures or drawings, jokes, etc.) when:

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

Please note: Off-duty actions may constitute sexual harassment.

Other types of conduct that may constitute harassment include:

- Verbal: includes insults, slurs, name-calling, offensive remarks, jokes, and profanity.
- Visual: can consist of sending or displaying offensive images or messages.
- Physical: blocking movement, threats of harm, intimidating gestures, or assault.

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

Employees who experience any form of harassment or who become aware of a threatening situation as described in this policy, are required to immediately report the facts to his or her Manager, Director, or Human Resources for investigation and corrective action. Call 911 for imminent threats of physical harm and notify a member of management immediately. TCAD understands the sensitive nature of this type of complaint, and the employee may contact Human Resources without going through the normal chain-of-command. Each department head, supervisor, and employee has the responsibility to maintain a work environment free of such harassment and to report or file a complaint as soon as possible.

TCAD will act promptly to investigate alleged harassment claims thoroughly and discipline any employee who is found to have committed such conduct. Employees involved in a harassment situation are required to cooperate in any investigation that occurs. During the investigation, confidentiality will be maintained to the extent possible, while conducting a thorough investigation. At the conclusion of the investigation, Human Resources will report appropriate findings and/or conclusions to the employee making the complaint and the subject of the complaint.

No employee shall be discriminated against, harassed, intimidated, nor suffer any reprisal as a result of reporting violations of this policy in good faith. The employment status of the person reporting the matter will not be jeopardized as a result of filing a complaint in good faith.

Where an investigation reveals that allegations of unwelcome harassment are true, appropriate remedial action, including discipline, will be taken. All disciplinary measures will be implemented promptly and shall be commensurate with the person's conduct. The remedies vary depending on the entire facts and circumstances found by the investigation.

4.4 Interaction with Board Members and Others

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

4.5 No Fraternization

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

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

4.6 Tobacco Use

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

4.7 Electronic Resource Use Policy and Privacy Notification

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

4.7.1 TCAD Right to Access Information

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

4.7.2 Restricted to TCAD Business

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

4.7.3 Prohibited Content

TCAD employees are prohibited from using TCAD's telephone, electronic, or computer network systems in any manner that may be offensive or disruptive to others. This includes, but is not limited to, the transmission of racial or ethnic slurs, gender-specific comments, sexually explicit images or messages, any remarks that would offend others on the basis of his or her age, political or religious beliefs, disability, national origin or sexual orientation, or any messages that may be interpreted to disparage or harass others. Please do not send non-work-related mass emails either while at work or while working remotely. Mass emails should go through Human Resources. No telephone, electronic or computer network communications may be sent that represent the sender as from another company or as someone else, or that try to hide the sender's identity. Inappropriate or excessive personal use of TCAD's property, including telephone,

electronic or computer network systems, may result in disciplinary action, up-to-and-including immediate termination of employment.

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

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

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

4.7.4 Social Media

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

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

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

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

- Do not provide advice or insight regarding the work conducted by the TCAD organization.
- Do not use TCAD logos or website references on blogs, web pages, or other social media outlets.
- Do not post pictures or documents stored on the TCAD system to social media outlets.
- If an employee references TCAD or its organization on a social media outlet, he or she must

clearly state that the views and opinions expressed are solely those of the employee and do not represent the TCAD organization.

- Employees shall state that the TCAD organization shall not be held liable for any misinformation he or she publishes; and

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

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

4.8 Personal Use of TCAD Phones

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

4.9 Personal Cell Phone

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

4.10 Personal Email

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

4.11 Solicitation

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

4.12 Political Involvement

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

4.13 Volunteer Opportunities/Outreach Events

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

4.14 Travel Reimbursement

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

4.15.1 Meal Expense

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

4.15.2 Mileage

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

4.16 Photography/Videography

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

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

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

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

4.16.1 Right of the Public to Record or Photograph

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

4.17 Working Out Problems with TCAD

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

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

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

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

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

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

5 TIME AND ATTENDANCE

5.1 Work Week

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

5.1.1 Telecommuting

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

5.1.2 Remote Workers

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

5.2 Full-time Status

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

5.3 Payroll

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

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

Time corrections in ADP are only processed by Human Resources, Finance, or the Chief Appraiser. Time records are a government record, and according to Texas Penal Code Section 37.10, employees are tampering with a government record if they knowingly submit their time records inaccurately. Employees or managers who tamper with time records will be subject to immediate termination of employment.

5.3.1 Non-Exempt Time Records

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

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

Clocking in more than seven (7) minutes prior to the schedule or seven (7) minutes after the end of the schedule must be approved by management. Employees cannot make up time or work overtime without management approval.

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

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

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

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

5.3.2 Appraisers Clocking When in the Field

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

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

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

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

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

5.3.3 Paid Work Breaks

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

5.3.4 Lunch Break

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

5.3.5 Lactation/Breastfeeding Breaks Policy

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

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

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

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

5.4 Good Work Habits for Non-Exempt Employees

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

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

5.5 Overtime

Classification	Eligibility	Accrual
Exempt	NO	Exempt employees are not eligible for overtime compensation.
Non-Exempt	YES	Time-and-a-half pay, after 40 hours actually worked in a work week.

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

5.5.1 Prior Approval of Overtime

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

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

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

5.6 Exempt Employees

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

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

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

5.6.1 Exempt Time Records

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

5.7 Flexible or Compressed Work Schedules

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

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

1. Standard Schedule - 7:45 a.m. 4:45 pm with 1 hour lunch. A non-standard start time may be approved by the director but must fall within the range of 6:45 am to 8:45 am. The lunch schedule may be modified but shall be no less than 30 minutes.
2. Compressed Schedule - 9/80 schedules may start work between the hours of 6:45 am and 8:45 am with a lunch break of 30, 45, or 60 minutes.

5.8 Attendance

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

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

5.8.1 Reporting Absences from Work

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

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

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

5.8.2 Job Abandonment

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

6 COMPENSATION

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

6.1 The Position Classification and Pay Plan

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

6.2 Market Analysis

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

6.3 Position Classification

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

6.4 New Employee Evaluation

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

6.5 Performance Evaluation and Salary Adjustments

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

6.6 Merit Increases

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

6.7 Longevity Pay

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

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

6.8 Language Proficiency Pay

To better serve the diverse population of Travis County and improve accessibility of District services, the District recognizes the value of employees who are proficient in languages other than English.

Effective January 1, 2027, employees who demonstrate proficiency in an approved secondary language and whose job duties require the use of that language may be eligible for a Language Proficiency Pay Incentive.

Eligible Languages:

- Spanish
- American Sign Language (ASL)
- Vietnamese
- Mandarin Chinese
- Other commonly spoken languages in Travis County as determined by the Chief Appraiser or designee.

6.8.1 Compensation

Employees approved for this incentive will receive a stipend of \$125 per month, paid as \$62.50 per pay semi-monthly period, in addition to their regular compensation.

This incentive may be modified or discontinued at any time. No employee is guaranteed to receive the incentive.

6.8.2 Eligibility Requirements

To qualify for the Language Proficiency Pay Incentive:

- The employee must submit an Application provided by the District and receive written approval.
- The employee must pass a District-approved language proficiency assessment (such as Berlitz, SOPI, or a comparable evaluation).
- Language proficiency must be job-related and used in the performance of assigned job duties.
- Department leadership must confirm that the employee's language skills are needed to support District operations or public service needs.
- Employees may receive the incentive for only one language.

6.8.3 Administration

- Documentation of language proficiency must be maintained in the employee's personnel file.
- The incentive will be issued each pay period through payroll.
- If an employee transfers to a position where the language is no longer required, the incentive may be discontinued.
- The District may require periodic verification of language proficiency to maintain eligibility
- Approval of the Language Proficiency Pay Incentive is at the discretion of the Chief Appraiser or designee.

7 TRAINING AND EDUCATION

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

7.1 Registered Professional Appraisers

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

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

7.2 State Licensed and Certified Appraisers

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

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

7.3 International Association of Assessing Officers (IAAO) Certification

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

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

7.4 Tuition Reimbursement

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

7.4.1 Conditions of Reimbursement

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

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

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

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

7.4.2 Procedures

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

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

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

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

8 EMPLOYEE BENEFITS

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

8.1 Benefit Coverage and Premium Deductions

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

8.2 Employee Assistance Program (EAP)

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

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

8.3 Work Related Injuries

TCAD provides workers' compensation insurance for employees. Workers' compensation insurance provides coverage for employees in the event of certain occupational injuries or illnesses. Workers' compensation is provided in accordance with the Workers' Compensation Laws of the State of Texas, and this law regulates the benefits for which employees may be eligible. For this reason, it is extremely important the employee notify his or her supervisor immediately in the event of a work-related illness, accident, or injury, no matter how small. Failure to report within 30 days of the injury may result in a denial of benefits (Texas Labor Code §§ 409.001, .002). HR will serve as a liaison with the workers' compensation insurance carrier regarding income benefits and medical benefits. An employee unable to work and eligible for benefits under workers' compensation may also be covered by the Family Medical Leave Act (FMLA), in which case, the FMLA time will run concurrently with the workers' compensation absence.

8.3.1 Medical Treatment

Medical benefits coverage is dependent upon use of the carrier's network of providers and facilities. If medical attention is requested by the employee or required by TCAD, the employee must see a physician participating in the Political Subdivision Workers Comp Alliance. The physician will be required to complete a medical narrative outlining the treatment provided and any work restrictions or limitations that will be in effect for the employee. If physically able, the employee is required to return the medical narrative to Human Resources by the next business day.

8.3.2 Release to Work

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

8.3.3 Fraud

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

8.4 Retirement

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

8.5 Optional Deferred Retirement

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

8.6 Medicare

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

8.7 Vacation Leave

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

8.7.1 Prorated Vacation

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

8.7.2 Scheduling Vacation

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

8.7.3 Vacation Scheduling Restrictions

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

8.7.4 Continuous Vacation

No more than two (2) weeks of continuous vacation may be scheduled without the prior approval of the Chief Appraiser. Employees requesting 2 weeks or more will be required to complete the Employee Time off Request Form. Please use the Employee Time off Request form located [on the SharePoint Site](#).

8.7.5 Vacation Calendar Year Carry-Over

Vacation time has no carryover limit and can be paid out at any time, with the approval of the Chief Appraiser. [See the Vacation Cash Out Policy form on the SharePoint Site.](#)

8.7.6 Vacation Paid Upon Leaving TCAD

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

8.8 Sick Leave

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

8.9 Scheduled Holidays

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

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

8.10 Discretionary Holiday

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

8.10.1 Part time Holiday Benefit

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

8.10.2 Absence Affecting Holiday Pay

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

8.10.3 Personal Holiday

The personal holiday is an eight (8) hour day off that may be scheduled at a time of the employee's choosing with the approval of the Manager. A personal holiday cannot be used for less than a full eight (8) hour day. The personal holidays are earned the first pay period of the year and must be used by the close of the last pay period of the year or the time is forfeited. An

employee with a hire date equal to the first scheduled workday in January will be entitled to the personal holidays in the year hired. Employees starting work after the first scheduled workday in January will not earn personal holidays until January of the following year. Personal holidays are subject to the same scheduling requirements as vacation. Employees may not use personal holidays prior to completing ninety (90) days of employment. Personal holidays will not be paid at separation.

8.11 Court Leave

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

8.12 Bereavement Leave

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

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

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

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

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

LEAVE CHART

Use of accrued leave must be approved by the employee's time supervisor

*Employees are encouraged to take leave throughout the year, as business needs can change and leave approval is not guaranteed.

Type	Rate of Accrual	Max Accrual / Payout	Policy
Vacation	< 5 years = 4 hours per pay period	No limit / see separation and cash out policy	See section 8.7, 15.1
	5 to < 10 Years = 4.5 hours per pay period		
	10 to < 15 Years = 5 hours per pay period		
	15 to < 20 Years = 5.5 hours per pay period		
	20 + years = 6 hours per pay period		
Sick Leave	4 hours per pay period	No limit / see separation policy	May be required to provide documentation.
Personal Days	2 (8-hour) days per fiscal year (Does not roll over)	N/A (Not paid at termination)	Only available to full-time employees. Available to new hires as of the first pay period of the year. Must be used by the last pay period of the fiscal year.
Holiday	Full-time employees receive 8 hours	N/A (Not paid at termination)	Dates are established by the Chief Appraiser and are subject to change annually. Employee must work or be on approved paid leave the day before and after the holiday.
Bereavement Leave	3 (8-hour) days per request. Does not roll over.	N/A (Not paid at termination)	See section 8.12
Civil Leave	Includes jury duty, voting, work related court summons, military leave, and USERRA (Uniformed Services Employment & Re-employment Rights Act)	N/A	See section(s) 4.13, 8.11, 9.2
Emergency Closure or Modified Operations	As determined by the Chief Appraiser. Includes emergencies, bad weather, delayed opening, or early closure.	N/A	See section 12.7

9.1 Family Medical Leave Act

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

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

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

9.1.1 General Provisions

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

9.1.2 Eligibility

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

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

9.1.3 Type of Leave Covered

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

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

9.1.4 Amount of Leave

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

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

If a husband and wife both work for TCAD, each employee is entitled to the full amount of leave available under the Family and Medical Leave Act for qualifying events. TCAD does not apply the optional spousal limitation permitted under the FMLA.

9.1.5 Employee Status and Benefits During FMLA Leave

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

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

Under current TCAD policy, the employee pays a portion of the health care premium. While on paid leave, TCAD will continue to make payroll deductions to collect the employee's share of the premium. While on unpaid FMLA leave, TCAD may elect to maintain such benefits during the leave period and recover the employee's share of any premiums upon the employee's return to work.

If the employee contributes to a life insurance or disability plan, TCAD will continue making payroll deductions while the employee is on paid leave. While the employee is on unpaid leave, TCAD may elect to maintain such benefits during the leave period and recover the employee's share of any premiums upon the employee's return to work.

9.1.6 Employee Status After FMLA Leave

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

9.1.7 Use of Paid and Unpaid Leave

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

9.1.8 Intermittent Leave or a Reduced Work Schedule

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

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

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

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

9.1.9 Certification for the Employee's Serious Health Condition

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

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

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

9.1.10 Certification for Family Member's Serious Health Condition

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

TCAD may directly contact the employee's family member's health care provider for verification or clarification purposes using a health care professional, an HR professional, leave administrator or management official. TCAD will not use the employee's direct supervisor for this contact. Before TCAD makes this direct contact with the health care provider, the employee will

be given an opportunity to resolve any deficiencies in the medical certification. In compliance with HIPAA Medical Privacy Rules, TCAD will obtain the employee's family member's permission for clarification of individually identifiable health information.

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

9.1.11 Certification of Qualifying Exigency for Military Family Leave

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

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

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

9.1.13 Recertification

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

9.1.14 Procedure for Requesting FMLA Leave

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

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

9.1.15 Designation of FMLA Leave Type

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

9.1.16 Intent to Return to Work from FMLA Leave

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

9.2 Paid Leave for Military Service

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

In order to obtain a military leave of absence, the employee must give their supervisor notice of the dates of annual duty and provide a copy of the military orders. Please use the Employee Time off Request form located [on the SharePoint Site](#).

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

See Leave Chart in Section 8.

9.3 General Leave of Absence

In special cases and at the discretion of the Chief Appraiser, a general leave of absence may be granted without pay or benefits. Taking unpaid time off requires the explicit approval of the Chief Appraiser. Please use the Employee Time off Request form located [on the SharePoint Site](#).

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

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

FAMILY MEDICAL LEAVE CHART

As required by law, Travis Central Appraisal District will permit eligible employees to take family or medical leave (“FMLA leave”), in accordance with the terms of this policy. If this policy conflicts with the Family and Medical Leave Act (FMLA), eligible employees will be afforded the rights required by law.

ELIGIBILITY	<p>Worked for the District for at least 12 months. Worked a minimum of 1250 hours in the last 12 months.</p>
Basic FMLA	
<p>The Family and Medical Leave Act (FMLA) entitles eligible employees to take unpaid, job-protected leave for specified family and medical reasons with continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave.</p> <p>The FMLA only requires unpaid leave, however employees are required to use accrued paid leave, until accruals are exhausted, in accordance with this policy (see section on concurrent application of available leave accruals, below). Either continuous or intermittent FMLA leave may be granted to meet the needs of the employee, as medically certified by the healthcare provider. Employees are allotted a 15-day period for completion of certification forms by the healthcare provider. Therefore, the certification may be received by Human Resources after an employee is already taking leave for an unscheduled medical necessity. Work shall not be performed during continuous FMLA leave. All time worked during intermittent leave shall be reported in ADP. FMLA fraud or abuse will be investigated and may result in disciplinary action, up to and including termination.</p>	
ENTITLEMENT	Qualifying Reasons/Policy
<p>12 weeks (480 hours) job-protected leave, per rolling backward calendar year; if eligibility and qualifying reasons are met, including relationship rules.</p>	<p>Specified family and medical reasons:</p> <ul style="list-style-type: none"> • Employee’s own serious health condition, defined as an illness, injury, impairment, or physical or mental condition that involves either inpatient care or continuing treatment by a health care provider. An FMLA serious health condition generally involves a period of incapacity. • To care for employee’s spouse, child, or parent who has a serious health condition. <ul style="list-style-type: none"> ○ Employees requesting leave to care for an immediate family member with a serious health condition may be required to submit proof of the familial relationship, such as a birth certificate or marriage license. • The birth of a child. (Baby Bonding) • To care for a newborn child within one year from birth.* • The placement of a child with the employee for adoption or foster care within one year of placement.* <p>*Employees are not eligible to utilize sick leave without certification of the child having a serious medical condition.</p>
	<p>Use of available leave accruals:</p> <ul style="list-style-type: none"> • Eligible employees with accrued leave will have the leave applied in the following order when the leave is related to a serious medical condition: vacation, sick, holiday, floating holiday. • Eligible employees with accrued leave will have the leave applied in the following order when the leave is not related to a serious medical condition: vacation, sick, holiday, floating holiday. • Holiday leave will not bank, it will be utilized in the week earned. • In the event that all available time-off accruals become exhausted during FMLA leave, the employee will enter an unpaid leave status. Contact HR regarding possible options for continued benefits coverage and any applicable procedures for requesting an unpaid leave extension or alternative leave arrangements.

10 AMERICANS WITH DISABILITIES ACT

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

10.1 Disability

"Disability" refers to a physical or mental impairment that substantially limits one or more of the major life activities of an individual. A "qualified person with a disability" means an individual with a disability who, with or without reasonable accommodation, can perform the essential functions of the job. The ADA also protects as disabled those who have a record of a disability or are regarded as having a disability.

10.2 Reasonable Accommodation

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

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

10.3 Essential Job Functions

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

10.4 Requesting a Reasonable Accommodation

An employee with a disability is responsible for requesting an accommodation from Human Resources, or their supervisor, and engaging in an informal interactive process to clarify what the employee needs and to identify possible accommodations.

To initiate this process, please contact HR to request an accommodation form. This form will help document the request and begin the interactive process. If requested, the employee is responsible for providing medical documentation regarding the disability. The employee should describe the problem created by a workplace barrier so that an appropriate accommodation may be considered. Typically, Human Resources will work with the employee to identify possible reasonable accommodations and to assess the effectiveness of each in allowing the employee to perform the essential functions of the job.

In determining an appropriate reasonable accommodation through this interactive process, while an individual's preference will be considered, TCAD is free to choose between equally effective accommodations with consideration toward expense and impact on the rest of the organization. A request for reasonable accommodation may be denied if it would create an undue hardship for TCAD or pose a direct threat to the health or safety of the employee or others.

10.5 Safety

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

10.6 Confidentiality

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

11 PREGNANT WORKERS FAIRNESS ACT (PWFA)

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

11.1 Reasonable Accommodations

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

11.2 Essential Job Functions

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

11.3 Requesting Reasonable Accommodations

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

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

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

11.3.1 Medical Documentation

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

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

11.3.2 Determinations

TCAD makes determinations about reasonable accommodations on a case-by-case basis considering various factors and based on an individualized assessment in each situation. TCAD strives to make determinations on reasonable accommodation requests expeditiously and will inform the individual once it has made a determination. If you have any questions about a reasonable accommodation request you made, please contact Human Resources.

11.3.3 Interplay with FMLA and other Laws

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

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

11.3.4 Status After Leave or Accommodation

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

11.4 Safety

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

12 ACCESS, SECURITY AND EMERGENCY EVACUATION

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

12.1 Responsibility

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

12.2 Facility Hours and Closings

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

12.3 Entry Access Control

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

12.4 Identification Badges

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

12.5 Surveillance

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

12.6 Evacuation

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

12.7 Emergency Closure or Modified Hours of Operation

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

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

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

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

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

12.8 Medical Emergencies

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

13 HEALTH AND SAFETY

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

13.1 Personal Work Areas

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

13.2 First Aid

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

13.3 Medication

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

13.4 Drug Free Workplace

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

13.4.1 Alcohol

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

13.4.2 Definition of Illegal Drug

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

13.4.3 Violation of Policy

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

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

13.4.4 Drug and Alcohol Testing

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

13.4.5 Education and Training Programs

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

13.5 Firearms - Weapons

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

14 REDRESS OF GRIEVANCES

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

14.1 Immunity from Reprisal

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

14.2 Grievance Process Steps and Time Limits

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

14.3 Grievances against the Chief Appraiser

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

14.4 Grievance Submission Content

All grievances must include:

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

14.5 Right to Address the Board of Directors

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

15 SEPARATION PROCESS

15.1 Calculation of Accrued Pay

15.1.1 Vacation Leave Paid Upon Leaving TCAD

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

15.1.2 Sick Leave Paid Upon Leaving TCAD

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

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

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

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

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

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

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

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

15.2 Settlement

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

15.3 Continuation of Insurance Coverage

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

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

15.4 Insurance Coverage at Retirement

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

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

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

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

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

15.5 Release of Information

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

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

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



**Travis Central Appraisal District
Personnel Policy Manual Acknowledgement**

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

Employee Signature

Date

Summary of Comments

Vacation Accrual: I would like to suggest 10 years and up get 6 hours of vacation.

Administration reviewed this request, including internal feedback and a comparison of peer appraisal districts and local government entities. Based on this review, TCAD's current accrual structure remains competitive and aligned with the market.

No changes are recommended at this time.



TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

Item 5G: Chief Appraiser's Report

Presenter Leana Mann, Chief Appraiser

Background Information

The Chief Appraiser will provide an update on the current operations of the CAD, including:

- 2026 Mass Appraisal Report
- 2026 Protest Season
- 2026 Homestead Verification Program
- Community Outreach
- Taxpayer Experience Snapshot

Staff Recommendation & Motion Language

There are no staff recommendations for this item.

No board action is needed for this item.

**RESTRICTED REPORT OF
THE MASS APPRAISAL OF THE**

**MARKET VALUE
AND NET TAXABLE VALUE**

**OF THE REAL PROPERTY AND BUSINESS
PERSONAL PROPERTY LOCATED IN**

TRAVIS COUNTY, TEXAS

AS OF JANUARY 1, 2026



**By Leana Mann, RPA
Travis Central Appraisal District
850 E Anderson Lane
Austin, TX 78752**

TRAVIS CENTRAL APPRAISAL DISTRICT

BOARD OFFICERS
NICOLE CONLEY
CHAIRPERSON
DEBORAH CARTWRIGHT
VICE CHAIRPERSON
ELIZABETH MONTOYA
SECRETARY/TREASURER



LEANA MANN
CHIEF APPRAISER

BOARD MEMBERS
BRUCE ELFANT
JETT HANNA
CELIA ISRAEL
DICK LAVINE
AARON MORENO
SHENGHAO "DANIEL" WANG

April 6, 2026

Board of Directors
Travis Central Appraisal District
850 E. Anderson Lane
Austin, Texas 78752

RE: The mass appraisal report of the market value and the net taxable value of the real property and business personal property located in Travis County, Texas

Dear Board of Directors:

The appraisal records are hereby submitted to the Board of Directors for further submission to the Appraisal Review Board for their review and determination of protests. The market value expressed in the appraisal records as of April 6, 2026 is effective January 1, 2026 and the total is as follows:

\$484,995,664,905

(FOUR HUNDRED EIGHTY-FOUR BILLION, NINE HUNDRED NINETY-FIVE MILLION, SIX HUNDRED SIXTY-FOUR THOUSAND, NINE HUNDRED FIVE DOLLARS)

The value conclusions shown in this appraisal report are subject to the "Contingent and Limiting Conditions," which are located at the back of this report. For information concerning the supporting data and rationale of the conclusions, your attention is directed to the following report. Additional details of the steps involved in reaching the value conclusion are available for review in the files of the Travis Central Appraisal District that include, but are not limited to, the 2025-2026 reappraisal plan.

Respectfully submitted,

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



INTRODUCTION

The Travis Central Appraisal District is a political subdivision of the state, and the jurisdictional boundary covers approximately 1,023 square miles. The Constitution of the State of Texas, the Texas Property Tax Code, and the Rules of the Texas Comptroller’s Property Tax Assistance Division govern the operations of the appraisal district. Each year, through mass appraisal, the district determines the market value of all real and personal property within the county for ad valorem purposes.

This mass appraisal report was written in compliance with Standards 5-6 of the Uniform Standards of Professional Appraisal Practice (USPAP) as promulgated by the Appraisal Standards Board of The Appraisal Foundation. The 2026 mass appraisal was prepared under the provisions of the Texas Property Tax Code (hereafter “Tax Code”) 23.01(b). Taxing jurisdictions participating in the district must use the appraisals as the basis for imposing property taxes. The State of Texas allocates state funds to school districts based on the district’s appraisals, as tested and modified by the State Comptroller of Public Accounts. The 2026 mass appraisal results in an estimate of the market value of each taxable property within the district’s boundaries. Where required by law, the district also estimates value on several bases other than market value. These are described, where applicable, later in this report. The report provides general provisions applicable to all properties within the appraisal district and is then divided by individual appraisal divisions within the office. Individual appraisal records for each account within the county are stored in the CAMA system, and the appraisal roll is certified to each taxing entity in July.

GENERAL ASSUMPTIONS AND LIMITING CONDITIONS

The appraised value estimates provided by the district are subject to the following conditions:

- The appraisals were prepared exclusively for ad valorem tax purposes in compliance with the Texas Property Tax Code. The Code requires each property to be appraised at “market” value, but the value cannot exceed the equitable value.
- The property characteristics relied on in making each individual appraisal are assumed to be correct. Some properties are inspected by staff from the exterior, some from the interior and exterior, and most are not inspected annually. Pictures of many of the subject properties are in the appraisal district records, which are relied on in valuation.
- Physical inspections of the property appraised were performed as staff resources and time allowed.
- Sales transactions were validated through questionnaires to buyers and sellers, telephone surveys, field reviews, and internet research. In the absence of such confirmation, residential sales data obtained from vendors was considered reliable.
- The legal description for each property is assumed to be correct. TCAD assumes no responsibility for matters of a legal character, nor renders any opinion as to the title, which is assumed to be clear. The subject properties appraised are assumed to have knowledgeable ownership and competent management.



- TCAD has conducted no survey and assumes no responsibility in connection with such matters for each individual property.
- The construction and condition of the improvements that are the subject of this report are based on observation, and no engineering study has been conducted that would discover any latent defects. No certification regarding any physical aspects could be given unless a proper engineering study was prepared for an individual property or unless it was provided to the appraisal district by an individual owner.
- The allocation of the total valuation between land and improvements in this report applies only under the existing program of utilization. The separate estimates for land and improvements must not be used in conjunction with any other appraisal and are invalid if used in conjunction with any other appraisal.
- All property is appraised as if free and clear of any or all liens or encumbrances unless otherwise stated. All taxes are assumed to be current.
- All property is appraised as though under responsible, adequately capitalized ownership and competent property management.
- All engineering is assumed to be correct. Any plot plans and/or illustrative material contained within the appraisal records are included only to assist in visualizing the property.
- It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless noncompliance is stated, defined, and considered in this mass appraisal report.
- It is assumed that all applicable zoning and use regulations and restrictions have been complied with unless nonconformity has been stated, defined, and considered in this mass appraisal report.
- It is assumed that all required licenses, certificates of occupancy, consents, or other legislative or administrative authority from any local, state, or national government or private entity or organization have been obtained or can be obtained or renewed for any use on which the value estimate contained in this report is based.
- It is assumed that the utilization of the land and improvements of the properties described are within the boundaries or property lines and that there are no encroachments or trespasses unless noted on the appraisal record.
- Unless otherwise stated in this report, the existence of hazardous material, which may or may not be present on any property, may not have been observed by the appraisers. The appraisers have no knowledge of the existence of such materials on or in the properties unless notified of their existence. The appraisers are not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, lead-based paint, or other potentially hazardous materials may affect the value of the properties. The value estimates are predicated on the assumption that there is no such material on or in the properties that would cause a loss in value. No responsibility is assumed for any such conditions or for the expertise or engineering knowledge required to discover them. The client is urged to retain an expert in this field if desired.
- Unless otherwise stated in this report, to the best of the appraisers' knowledge, there are no rare, threatened, or endangered species or significant areas of potential habitat for rare, threatened, or endangered species included in the subject properties unless noted.



- The appraisers assume that there are no hidden or unapparent conditions of the properties, subsoil, or structures that would render them more or less valuable. The appraisers also assume no responsibility for such conditions or for engineering that might be required to discover such factors.
- Information, estimates, and opinions furnished to the appraisers were obtained from sources considered reliable and believed to be true and correct. However, the appraisers can assume no responsibility for the accuracy of such items furnished to them.
- The appraisers are not required to give testimony or attend court because of the appraisal with reference to the mass appraisal in question, unless arrangements have been made beforehand.
- In many cases, the subject properties were not inspected immediately before the appraisal, or the appraiser may have only inspected them from the exterior. It is assumed that the interiors of the improvements are in the same general condition as the exteriors and that the properties are functional for the use indicated in the records of the Travis Central Appraisal District, as reflected in this appraisal.

EFFECTIVE DATE OF APPRAISAL AND DATE OF THE REPORT

The most current value report is dated April 6, 2026, with the effective valuation date of January 1, 2026. This appraisal is considered to be retrospective in nature, as sales and data after the effective date of the appraisal were used in the valuation of some of the properties, and the report date is later than the effective date of the appraisal. This report was signed on April 7, 2026.

DEFINITION OF VALUE TO BE ESTIMATED

Except as otherwise provided by the Tax Code, all taxable property is appraised at its “market value” as of January 1. Under the Tax Code, “market value” means the price at which a property would transfer for cash or its equivalent under prevailing market conditions if:

- Exposed for sale in the open market with a reasonable time for the seller to find a purchaser;
- 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 of the enforceable restrictions on its use, and;
- Both the seller and purchaser seek to maximize their gains, and neither is in a position to take advantage of the exigencies of the other.

The Tax Code defines special appraisal provisions for the valuation of several different categories of property. Specially appraised property is taxed on a basis other than market value as defined above. These categories include residential homestead property (Sec. 23.23, Tax Code), agricultural property (Chapter 23, Subchapters C, D and E, Tax Code), real and personal property inventory (Sec. 23.12, Tax Code), certain types of dealer inventory (Sec. 23.121, 23.124, 23.1241 and 23.127, Tax Code), and nominal (Sec. 23.18, Tax Code) or



restricted use properties (Sec. 23.83, Tax Code) and property protected by a circuit breaker limitation (Sec. 23.231, Tax Code).

Final Values: The individual values that comprise the total “Mass Appraisal” can be changed from the original “Noticed Value” sent out by the Appraisal District. The values can be changed by an informal agreement with TCAD staff, by order of the Appraisal Review Board resulting from a formal hearing, by binding arbitration, mediation, SOAH hearing, by an agreed judgment, or by court order.

PROPERTIES APPRAISED

All taxable real and personal property known to the district is appraised as of the date of this report, with the exception of certain properties on which valuation was not complete as of the date of this report. These, by law, will be appraised and supplemented to the jurisdictions after equalization.

The property rights appraised were fee simple interests, with the exception of leasehold interests in property exempt to the holder of the property’s title. The latter is appraised under a statutory formula set forth in Sec. 25.07 of the Tax Code. The description and identification of each property appraised will be included in the appraisal records submitted to the Travis Appraisal Review Board (ARB) on May 15, 2026.

CLIENT AND INTENDED USER

This appraisal was completed for the client, who is identified as the Board of Directors of the Travis Central Appraisal District.

Travis Central Appraisal District (TCAD) is responsible for local property tax appraisal and exemption administration for 235 jurisdictions or taxing units in the county. Each taxing unit, such as the county, a city, school district, municipal utility district, and others, sets its own tax rate to generate revenue to pay for such things as police and fire protection, public schools, road and street maintenance, courts, water and sewer systems, and other public services. Property appraisals are values established by the appraisal district and used by the taxing units to calculate their annual tax revenues. Appraisals are based on each property's market value and equitable value. TCAD also administers and determines eligibility for property tax exemptions that are authorized by State and local governments, such as those for homeowners, the elderly, disabled persons, disabled veterans, low-income housing, charitable or religious organizations, and historic properties.

The intended use of this appraisal is to estimate the appraised market value and net taxable value of the real property and business personal property located in Travis County as of the effective date of the appraisal.



YEARLY SCOPE OF WORK TO DEVELOP THE APPRAISAL

Performance Analysis—Independent—Following the conclusion of the protest phase, the certified values for that valuation year are reanalyzed with ratio studies to examine the appraisal accuracy and uniformity on an overall basis, as well as by market area within property reporting categories. Ratio studies are conducted in compliance with the current Standard on Ratio Studies of the International Association of Assessing Officers (IAAO) and assist in preliminary planning of fieldwork and analysis areas for the upcoming valuation year.

Third Party—Section 5.10 of the Texas Property Tax Code requires the Comptroller to conduct a study at least once every two years to determine the degree of uniformity and the median level of appraisals by the appraisal district, within each major category of property. The School District Property Value Study (SDPVS) uses statistical analysis of sold properties and appraisals of unsold properties as a basis for assessment ratio reporting. The preliminary results of this study are released in January following the year for which the study is conducted. Final results are then certified to the Education Commissioner of the Texas Education Agency (TEA) in July. This outside (third-party) ratio study provides meaningful data to TCAD on the accuracy and uniformity of yearly appraisal work, while also helping identify potential areas requiring reanalysis in the following appraisal year.

Third Party—Section 5.102 of the Texas Property Tax Code requires the Comptroller to review at least once every two years the governance of each appraisal district, taxpayer assistance provided, and the operating and appraisal standards, procedures, and methodology to determine compliance with generally accepted standards, procedures, and methodology. This review, referred to as the Methods and Assistance Program (MAP), will be conducted during the year in which a Property Value Study is not undertaken. The Comptroller is required to deliver a written report on the MAP findings to the chief appraiser, the CAD board of directors, and each superintendent and board of trustees in CAD school districts. This review provides the appraisal district with the opportunity to ensure that the office policies and procedures and the appraisal standards and methodology comply with the Tax Code and USPAP requirements.

Analysis of Available Resources—Historic expenditures are reviewed following the completion of a fiscal year, and future projections and goals are also considered when the new year's budget process begins. Yearly trends in what is considered the top labor-driving activities of the district are utilized to develop benchmarks for categories within the budget. In addition to an annual budget review, existing office and appraisal practices and procedures are reviewed each September during a planning session utilized to determine the necessity of additions or changes to accommodate future plans, goals, and predicted market trends. Information Technology (IT) support is also reviewed with year-specific functions identified, and system updates are scheduled based on future plans and goals. Existing GIS resources are specified and reviewed for required updates and are scheduled as needed.



Planning and Organization—A calendar of key events is prepared yearly to memorialize important deadlines that correlate with Texas Property Tax Code requirements. Each division within the appraisal department organizes its workflow around these important dates to remain on schedule for the next tax year. Personnel requirements and reassignments are determined by September of each year in conjunction with managers' and directors' planning sessions. New CAD goals and projects born from the September planning session are also integrated into the various departmental calendars and departmental Project Status Reports to ensure tracking, maintenance, and completion.

Mass Appraisal System—Computer-Assisted Mass Appraisal (CAMA) system additions or revisions are specified and scheduled with IT and the CAMA software provider to research feasibility, costs, and completion timelines. All computer forms and IT procedures are reviewed and revised as required. Communication with key personnel for the CAMA provider is maintained throughout the year as various identified updates, projects, and goals are met.

Data Collection Requirements—Field and office procedures are reviewed and revised as required for data collection specific to individual properties and each appraisal division. Technological advances and opportunities are monitored routinely for potential cost-effective changes or additions to improve data collection efficiency. Activities scheduled for each tax year that involve data collection include new construction, demolition, remodeling, re-inspection of selected market areas, and field or office verification of sales data and relevant property characteristics. On-site inspections, aerial imagery, and sketch validation software and procedures are utilized each year to verify and/or update the recorded sketch characteristics of all improved properties in the district.

Sales data is acquired through various sources, including district questionnaires, field discovery, protest hearings, fee appraisals, third-party vendors, builders, and realtors. Sales analysis procedures are reviewed, and potential new sources of sales information are continually sought and researched to ascertain as much sales data as possible to ensure accurate and equitable appraisals. Renditions provided by business owners also provide additional information for the personal property division valuations.

Valuation Model Specification—New and/or revised mass appraisal models are tested each tax year using common statistical measures. Market areas, which are collections of properties with similar characteristics, locations, or both, are re-examined each year to determine whether they are still appropriate or need changes. Land, area, market, and highest and best use analysis are relied upon to determine the appropriate approach to value and models to apply to the properties within the county.

Valuation Model Calibration—Local market sales analysis and Marshall & Swift publications are used to set, test, and update cost tables as needed. Market analysis of comparable sales and locally tested cost data allows for the calibration of valuation models utilized in the market approach to value. Information acquired regarding local rental rates, occupancy, expenses, and capitalization rates is utilized to update and modify income valuation models. The calculated values are tested for accuracy and uniformity by comparing them to known sales information using common ratio study statistics.



Hearing Process—Evidence to be used by the appraisal district to meet its burden of proof for market value and equity in both informal meetings with appraisers and formal appraisal review board hearings is developed each year when value notices are mailed, and protests are filed. The appraisal departments maintain that information electronically in categorized files and utilize it throughout the protest phase of the appraisal calendar.

Mass Appraisal Report—In each tax year, the Mass Appraisal Report required by the Property Tax Code is prepared and certified by the chief appraiser at the start of the equalization phase of the ad valorem tax calendar. The Mass Appraisal Report is completed in compliance with STANDARDS RULE 6 of the Uniform Standards of Professional Appraisal Practice. The signed certification by the Chief Appraiser is also compliant with STANDARDS RULE 6 of USPAP.



REPORT BY APPRAISAL DIVISIONS

RESIDENTIAL DIVISION

The residential appraisal department is responsible for developing equal and uniform market values for improved residential property within the county. The staff generally values residential single-family homes, townhomes, condominiums, multifamily housing other than apartments, manufactured homes, residential inventory, affordable housing, and vacant residential land. The department comprises appraisers and support technicians. Data collected during the fieldwork and analysis phases of the appraisal calendar is stored in the CAMA database and utilized to provide market values each year.

Model Specification

- *Area Analysis*—Data on regional economic forces such as demographic patterns, regional location factors, employment and income patterns, general trends in real property prices and rents, interest rate trends, availability of vacant land, and construction trends and costs are collected from private vendors and public sources and provide the field appraiser with a current economic outlook on the real estate market. Information is gathered from real estate publications and other outside sources, including seminars, conferences, and continuing education courses.
- *Neighborhood and Market Analysis*—Neighborhood analysis examines how physical, economic, governmental, social forces, and other influences affect property values. The results of these forces are also used to identify, classify, and stratify comparable properties into smaller, manageable subsets of the universe of properties known as neighborhoods. Residential valuation and neighborhood analysis are conducted on these well-defined areas within the county. Analysis of comparable market sales data forms the basis for estimating market activity and the level of supply and demand affecting market prices for any given market area, neighborhood, or district. Market sales reflect the effects of these market forces and are interpreted by appraisers into an indication of market value ranges for all defined neighborhoods. Although all three approaches to value may be considered, residential sales can best be interpreted and applied using two generally accepted appraisal approaches known as the cost approach and the market, or comparable sales approach. For low-density, multiple-family properties, the income approach to value may also be utilized to develop gross rent multipliers in the absence of recent sales data.



The first step in neighborhood analysis is the identification of a group of properties that share certain common traits. A "neighborhood" for analysis purposes is defined as a geographic grouping of properties where the properties' physical, economic, governmental, and social forces are generally similar and uniform. Once a neighborhood with similar characteristics has been identified, the next step is to define its boundaries. This process is known as "delineation." Some factors used in neighborhood delineation include location, sales price range, lot size, age of dwelling, quality of construction and condition of dwellings, square footage of living area, and story height. Delineation can involve the physical drawing of neighborhood boundary lines on a map, but it can also involve statistical separation or stratification based on attribute analysis.

Neighborhood identification and delineation are the cornerstone of the residential valuation system at the district. Most residential analysis work is neighborhood-specific. Neighborhoods are visually inspected to verify delineations based on observable aspects of homogeneity. Neighborhood delineation is periodically reviewed to determine if further neighborhood specification is warranted. This process is also accomplished through the use of Geographical Information Systems (GIS) by appraisers in the office when reviewing data trends in existing residential values, quality, and age of construction components, and available sales data. Various GIS layers within digital maps are inspected each year when determining whether current delineation requires changes as a result of shifting market trends.

- *Highest and Best Use Analysis*—The highest and best use must be legally permissible, physically possible, financially feasible, and maximally productive. The highest and best use of residential property is generally its current use. This is due in part to the fact that residential development, in many areas, through the use of deed restrictions and zoning, precludes other land uses. In some instances, there are areas that transition over time from what was initially residential to another use. Appraisal standards require a property to be valued at its highest and best use; However, a Jurisdictional Exception is provided by USPAP when local law requires something contrary to the recognized standard. 23.01(d) of the Tax Code directs the valuation of residential properties with a homestead to be based on the residential value, even if that is not the current highest and best use of the property. Travis County has properties identified to meet the criteria of 23.01(d) and are coded for identification and valued as required.



Model Calibration

- *Cost Schedules*—Residential property within the county begins an initial valuation from cost schedules that utilize a comparative unit method. Cost schedules are developed using Marshall & Swift publications and tested by compiling known sale prices of new properties within each defined level of quality of construction and correlating the resulting value per square foot data into tables stored within the CAMA system. Tables are also developed to uniformly apply values for added exterior amenities of a home that have been identified to add value through statistical analysis.
- *Depreciation*—Physical depreciation is expressed as a percentage that is computed and subtracted from the estimated replacement cost new. The percentage rate is dependent on the class, condition, effective age, and economic life of an improvement. Depreciation tables are initially developed from Marshall & Swift publications, set up based on structure classifications, and observed each year through market sales for potential adjustments. The depreciation schedules ensure that all properties within the same quality and condition depreciate at the same level, which ultimately leads to uniformity within a market area. A critical element in depreciation is commonly referred to as the effective age and is the cornerstone on which the schedules are built. Initial construction dictates the actual age of a structure by establishing a base year on which the age can be calculated. Initially, the actual and effective ages are the same. However, over time, owners replace, change, or update a structure's deteriorating components, reducing the effective age of the property and the depreciation amount. Correlations of sales to effective ages of properties are utilized to trend and update depreciation schedules as necessary.
- *Income Models*—Income models are utilized if there is sufficient data to develop rent multipliers for residential property producing income and little or no sales information to rely on a market sales approach to value. Typically, there is substantial residential sales information in rental areas, and the income approach is not generally used.
- *Sales Information*—A sales file for the storage of sales data for improved properties is maintained for residential real property. Residential improved sales are collected from a variety of sources, including district survey letters sent to buyers and sellers, field discovery, protest hearings, builders, publications, third-party sources, and realtors or brokers. A system of type, source, validity, and verification codes has been established to define salient facts related to a property's purchase or transfer and to help determine relevant market sale price information. As a result of the Tax Code requirement of a January 1 valuation, the effect of time as an influence on price is studied by paired and resales analysis or forecast trending. Monthly time adjustments are illustrated through detailed analysis and applied in the ratio study to the sales as indicated within defined areas of study.



- *Statistical Analysis*—The residential appraisers perform statistical analysis annually to evaluate whether values are consistent with the market. Ratio studies are conducted on residential neighborhoods in the district to judge mass appraisal accuracy and uniformity of value. Appraisal statistics of central tendency and dispersion generated from sales ratios are available for each neighborhood and are summarized by year. These summary statistics provide the appraisers a tool by which to determine both the level and uniformity of appraised value on a neighborhood basis, and to consider whether appraised values require adjustments relative to changing market conditions. The level of appraised value is determined by calculating the median appraisal-to-sale ratio within each market area. The accuracy and uniformity of a market area are tested by the coefficient of dispersion for the same dataset.
- *Reconciliation and Valuation*—Neighborhood, or market adjustment factors, are developed from appraisal statistics provided from ratio studies and are used to ensure that calculated values are consistent with the market. The district’s approach to the valuation of residential properties is a market-modified cost approach. This approach accounts for neighborhood market influences not particularly specified in a purely cost model. The following equation denotes the hybrid model used:

$$MV = MA [RCN - D] + LV$$

The market value (MV) is calculated once the market adjustment factor (MA) is applied to the replacement cost new (RCN) less depreciation (D), and adding the land value (LV). During the valuation phase of the appraisal year, statistical analysis of current appraised values as compared with recent sales determines the appropriate market adjustment factor for each neighborhood. Market adjustments will be applied uniformly within individual neighborhood codes to account for location variances between market areas or across a jurisdiction. Thus, following analysis of recent sales appropriately adjusted for the effects of time, calculated values following the application of the determined market adjustment factor will reflect the market influences and conditions only for the specified market area.

Once sufficient verified sales are available, the residential department may deploy an automated sales-comparison model within the CAMA system. The model identifies comparable sales using a weighted matrix of physical and locational attributes, applies calibrated adjustments based on historical cost-and-sales relationships, and designates the median adjusted sale price as the subject property's indicated market value.

This methodology was first applied during the 2023 revaluation, when sufficient sales volume enabled its use across several neighborhoods in Alpha Area A, resulting in well-aligned ratio-study outcomes. The model has since been reimplemented across three residential alpha areas (C, H, and O) for 2026, resulting in approximately 45,000 properties being valued using the sales grid median.



Residential (Builder's) Inventory

The tax code allows a wholesale valuation of residential inventory if it is: 1) held for sale in the normal course of business for the owner; 2) has never been occupied as a residence; and 3) has never been rented and produces no income. This special valuation is given to the owners who request it and are typically builders and developers. Each year, known bulk sales of residential properties are analyzed to determine discount factors to apply based on supply in the area, current demand, typical holding periods, and typical build-out timeframes. Once factors are established, all single-family residential properties that are/were owned on the first of the year by a known builder or developer are identified, and the factors are applied to the selected properties.



COMMERCIAL DIVISION

The commercial appraisal department is responsible for developing the equal and uniform market values for commercial property within the county. The staff generally values apartments, offices, retail, warehouse/manufacturing, and various other categories of business-related facilities. The department is made up of appraisers and a support technician. Data collected during the fieldwork and analysis phases of the appraisal calendar is stored in the CAMA database and utilized to provide market values each year.

Model Specification

- *Area Analysis*—Data on regional economic forces such as demographic patterns, regional location factors, employment and income patterns, general trends in real property prices and rents, interest rates, discount rates, financing trends, availability of vacant land, and construction trends and costs are collected from private vendors and public sources. The commercial appraisers and managers analyze the data and meet regularly to discuss how these factors and trends could impact the local real estate market. More detailed analysis by property type and various categories is then undertaken to determine what model recalibration and specification will need to occur during the upcoming valuation cycle.
- *Neighborhood and Market Analysis*—A commercial neighborhood, submarket, or economic area comprises land and the commercial properties located within the boundaries of a specifically defined geographic location or a collection of land and the commercial properties defined by similar business functions within a defined geographic location. The school districts within the county provide the first basis of the geographic delineation of the commercial properties by location. Market area delineations can be based on man-made, political, or natural boundaries. Submarket analysis involves examining how physical, economic, governmental, and social forces at the local, national, and international levels influence or affect property values. The effects of these forces are used to determine the highest and best use for a property and to select the appropriate sale, income, and cost data in the valuation process. Economic area identification and delineation by each major property use type is a key component in a commercial mass appraisal valuation system. Economic areas are periodically reviewed to determine if a revised delineation is required.



- *Highest and Best Use Analysis*—The highest and best use is the most reasonable and probable use that generates the highest present value of the real estate as of the valuation date. Any given property's highest and best use must be legally permissible, physically possible, financially feasible, and maximally productive. It is that use that will generate the highest net return to the property over a period of time. The appraiser must consider the most probable use permitted under local administrative regulations and ordinances. While its current zoning regulation may restrict a property's use, the appraiser may also consider the probability that the zoning could be changed based on activity in the area. A property's current use is often the highest and best use as a result of zoning regulations. However, there are times when the market and zoning changes proposed and allowed by the governing jurisdiction have defined areas in transition where the highest and best use may not reflect the actual use of the property at the time of appraisal.

Model Calibration

- *Cost Schedules*—The cost approach to value is applied to all improved real property utilizing the comparative unit or square foot method to determine the replacement cost new. Replacement cost new should include all direct and indirect costs, including materials, labor, supervision, architect and legal fees, overhead, and a reasonable entrepreneurial profit. Development of a comparative cost unit for each building class involves the utilization of national cost data reporting services as well as consideration of actual cost information on comparable properties within the county. A base cost rate has been developed for each building class and represents the replacement cost per unit for a benchmark property for each class. Date and location modifiers are necessary to adjust cost data to reflect conditions in a specific market and changes in costs over a period of time. Because a national cost service is used as a basis for the cost models, location modifiers are necessary to adjust these base costs specifically for Travis County. The national cost services provide these modifiers, which are checked against any known local sales obtained by the appraisal district.
- *Depreciation*—Physical depreciation is expressed as a percentage computed and subtracted from the estimated replacement cost new. The percentage rate depends on the class, condition, effective age, and economic life of the improvement. Depreciation tables are derived from Marshall & Swift publications, set up based on structure classifications, and observed each year through market sales for potential adjustments.



- *Sales Information*—Sales files for the storage of sales data for improved properties are maintained for each type of commercial real property. Commercial improved sales are collected from a variety of sources, including: district survey letters sent to buyers and sellers, field discovery, protest hearings, builders, publications, third parties, and realtors and brokers. A system of type, source, validity, and verification codes has been established to define salient facts related to a property’s purchase or transfer and to help determine relevant market sale price information. The effect of time as an influence on price can be considered by paired and resale analysis, or forecast trending, and applied in the ratio study to the sales as indicated within each neighborhood area.
- *Sales Comparison*—Commercial sales models are derived by utilizing various comparison elements between properties within the same use type. Common elements include, but are not limited to, type, class, size, unit size, and number of units, age, and location. When sufficient sales data is adequate for a use type, a comparison grid is used to account for adjustments required for differences that may exist between the subject property and comparable properties, in order to get final adjusted values and reconcile a median sales comparison value.
- *Income Valuation*—Properties typically not owner-occupied, for which a rental, vacancy, and collection loss and expense data is available, are also valued via an income approach. Many national, regional, and local publications are used, in addition to TCAD surveys, research, and information provided during informal meetings and formal hearings, to derive the typical rental rates, operating expenses, vacancy and collection loss rates, lease terms, finish-out allowances, and concessions by property type and location. Overall capitalization rates are derived internally from known sales and also compared to local and national publications. The income approach parameters, including rental and vacancy and collection loss rates, operating expense ratios, and overall capitalization rates, are then developed into valuation models and inserted into the various income tables used to establish the final market value of a property.
- *Statistical Analysis*—The commercial appraisers perform statistical analysis annually to evaluate whether values are equitable and consistent with the market. Ratio studies are conducted on commercial market areas and/or property types in the district to judge mass appraisal accuracy and uniformity of value. Appraisal statistics of central tendency and dispersion generated from sales ratios are available for each neighborhood and are summarized by year. These summary statistics provide the appraisers a tool by which to determine both the level and uniformity of appraised value on a market area basis and to consider whether appraised values require adjustments relative to changing market conditions.



- *Reconciliation and Valuation*—Based on the market data analysis and the methodology described in the cost, sales, and income approaches, the various models are calibrated, and values are developed for each commercial property. The cost approach mass appraisal model is applied to every improved property. Additional valuation indicators may be developed and applied using the sales comparison and income approaches, depending on the property type and availability of data. The final valuation of a property type is finalized by reconciling these indications of value and considering the weight of the market information available for evaluation and analysis in these approaches to value.



AGRICULTURAL LAND

If property is devoted principally to agricultural use to the degree or intensity generally accepted in the area for five of the preceding seven years, it is eligible for special valuation, called productivity value. As such, the appraised value is determined to be what the property would sell for, only considering its value as an agricultural property (productivity). Agricultural valuation is based on net-to-land calculations, which take either rental rates and subtract typical expenses to arrive at an income to an investor, or they are computed by taking yields and crop prices typical of the county and subtracting expenses to arrive at income to a farmer. These calculations are done for several categories of improved and native pasture, dry crop, and wasteland. If a property is approved for productivity value, then the value per acre is applied by tables, depending on the quality and type of agricultural land it is. Rental rates per acre, if used, are derived from TCAD surveys. This approach is basically an income approach but is based on a predetermined (agricultural) highest and best use, which may or may not be the highest and best use for the land. Wildlife management is another sub-category that may receive productivity value based on criteria that the owner must maintain, including, but not limited to, erosion, habitat, and predator control. TCAD follows protocols established by the Tax Code to ensure proper correspondence and applications are sent to property owners with and without productivity valuation. Each year, an area is also selected for an audit of properties with current productivity valuation to ensure continued compliance with established guidelines.



BUSINESS PERSONAL PROPERTY DIVISION

The personal property appraisal department is responsible for developing equal and uniform market values for all business personal property, leased assets, vehicles, aircraft, and multi-location assets within the county. The department is made up of appraisers and support technicians. Data collected during the fieldwork and analysis phases of the appraisal calendar is stored in the CAMA database and utilized to provide market values each year.

Model Specification

- *SIC Code Analysis*—Standard Industrial Classification (SIC) codes were developed by the federal government to describe property and are used as the basis for classification and valuation of business personal property accounts. SIC code identification and delineation are a critical part of the business personal property valuation system. Analysis work done in association with the valuation process is SIC code-specific.

Model Calibration

- *Cost schedules*—The primary approach to the valuation of business personal property is by the cost approach, which is based on the value in use of items in a business as if it were to be sold to continue operation. Each year, the cost tables for each type of personal property are updated using information received from renditions during the protest season. The quality/density schedules derived from inventory and furniture and fixtures are then entered into the TCAD cost tables. Depreciation is also adjusted each year to reflect the passage of time. During the valuation season, final values may be based on TCAD cost and depreciation tables, renditions (actual depreciated costs), sale prices, if available, or state cost and depreciation schedules where TCAD may lack data.

Industrial Personal Property, Utilities, Railroad, and Pipeline

An independent appraisal company, Pritchard & Abbott, Inc. (P&A), values some unique industrial personal property, utilities, railroads, and pipelines. The following identifies P&A's yearly responsibilities for these unique properties.

- *Identifying properties to be appraised*—Each year, a meeting is held with P&A to establish the potential list of properties that the company will be responsible for appraising as defined by the agreed contract between P&A and TCAD. Properties on the list are identified as part of the appraiser's physical inspection process each year and through submitted data by the property owner. The appraiser may also refer to legal documents, photography, and other descriptive items.
- *Identifying and updating relevant characteristics of each property in the appraisal records*—The appraiser identifies and updates relevant characteristics through the inspection process. Confidential rendition, asset lists, and other confidential data provide additional information. Subject property data is verified through previously existing records and through published reports.



- *Defining market areas in the district*—Market areas for industrial properties, utilities, railroads, and pipelines tend to be regional, national, and sometimes international. Published information, such as prices, financial analysis, and investor services reports, is used to help define market areas.
- *Developing an appraisal approach that reflects the relationship among property characteristics affecting value and determines the contribution of individual property characteristics*—Among the three approaches to value (cost, income, and market), industrial properties are most commonly appraised using replacement/reproduction cost new less depreciation models because of readily available cost information. If sufficient income or market data are available, those appraisal models may also be used.
- *Comparison and Review*—The appraiser considers results that best address the individual characteristics of the subject property and that are based on the most reliable data when multiple models are used. Year-to-year property value changes for the subject property are examined using computer-assisted statistical review. Periodic reassignment of properties among appraisers or the review of appraisals by a more experienced appraiser also contributes to the review process.

Minerals – Oil and Gas

Minerals are valued by Pritchard & Abbott, Inc. (P&A). The following identifies PA&’s appraisal procedures for these properties:

- *Identification of new property and its situs*—As subsurface mineral properties lie within the earth, they cannot be physically identified by inspection like other real property. However, the inability to directly inspect does not appreciably affect the ability to identify and appraise these properties. To identify new properties, P&A obtains monthly oil and gas lease information from the Railroad Commission of Texas [RRC] to compare against oil and gas properties already identified. The situs of new properties is determined using plats and W-2/G-1 records from the RRC, as well as P&A’s in-house map resources.
- *Identifying and updating relevant characteristics of all oil and gas properties to be appraised*—Relevant characteristics necessary to estimate value of remaining oil or gas reserves are production volume and pattern, product prices, expenses borne by the operator of the property, and the rate at which the anticipated future income should be discounted to incorporate future risk. P&A obtains information to update these characteristics annually from regulatory agencies such as the RRC, the Comptroller of Public Accounts, submissions from property owners and operators, as well as from published investment reports, licensed data services, service for fee organizations, and through comparable properties, when available.



- *Defining market areas in the district and identifying property characteristics that affect property value in each market area*—Oil and gas markets are regional, national, and international. Therefore, they respond to market forces beyond defined market boundaries as observed among more typical real properties.
- *Developing an appraisal approach that best reflects the relationship among property characteristics affecting value and best determines the contribution of individual property characteristics.* Among the three approaches to value (cost, income, and market), the income approach to value is most commonly used in the oil and gas industry. Through the use of the discounted cash flow technique in particular, the appraiser is able to bring together relevant characteristics of production volume and pattern, product prices, operating expenses, and discount rate to determine an estimate of the appraised value of an oil or gas property.
- *Comparison and Review*—Use of the income approach is the first step in determining an estimate of market value. Thereafter, the appraiser reviews the estimated market value compared to its previous certified value and also compares it to industry-expected payouts and income indicators. The appraiser examines the model's value with its previous year's actual income, expecting value to typically vary within a range of 2-5 times actual annual income, provided all appropriate income factors have been correctly identified. Finally, periodic reassignment of properties among appraisers and review of appraisals by a more experienced appraiser further expands the review process.



CERTIFICATION-USPAP 6-9

I certify that, to the best of my knowledge and belief:

The statements of fact contained in this report are true and correct.

The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.

I have no present or prospective interest in the property that is the subject of this report, and I have no personal interest with respect to the parties involved.

I have performed appraisal-related services to the client for the subject properties each of the past three years in my role as Deputy Chief Appraiser and/or as the Chief Appraiser for the Travis Central Appraisal District.

I have no bias with respect to any property that is the subject of this report or to the parties involved with this assignment.

My engagement in this assignment was not contingent upon developing or reporting predetermined results.

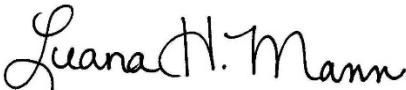
My compensation for completing this assignment is not contingent upon the reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.

My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.

I have not made a personal inspection of the properties that are the subject of this report. Various employees of the Travis Central Appraisal District made personal inspections of a sample of properties that are the subject of this report. The properties personally inspected by the appraisers would be many thousands of properties, and it would be impractical to identify and list those properties.

The entire staff of the Travis Central Appraisal District, as shown on the following pages, has provided significant mass appraisal assistance to the person signing this certification. Acknowledgement is also given to Capitol Appraisal Group for their valuation of special-purpose real property and some business personal property accounts.

Respectfully submitted,



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

April 7, 2026
Signature Date



CERTIFICATION-TAX CODE 25.22

I, Leana Mann, Chief Appraiser for Travis Central Appraisal District, solemnly swear that I have made or caused to be made a diligent inquiry to ascertain all property in the district subject to appraisal by me and that I have included in the records all property that I am aware of at an appraised value determined as required by law.



APPRAISAL CONTRACTOR PROVIDING MASS APPRAISAL ASSISTANCE

--- PRITCHARD & ABBOTT, INC.

Name	Title	TDLR #
Jason Diskell	Pritchard & Abbott, Inc.- Appraiser, District Manager	70598
Christer Palermo	Pritchard & Abbott, Inc.- Appraiser, Assistant District Manager	71361
Sandrillarreal	Pritchard & Abbott, Inc.- Appraiser, Mineral Director	71839
Shavans	Pritchard & Abbott, Inc.- Appraiser	74490
Joel Fisher	Pritchard & Abbott, Inc.- Appraiser, IUP Director	72810
Wesl Gilbert	Pritchard & Abbott, Inc.- Appraiser	72486
Jessic Treille	Pritchard & Abbott, Inc.- Appraiser	74017
Tonyelinoski	Pritchard & Abbott, Inc.- Appraiser	70386
Toni Cllar	Pritchard & Abbott, Inc.- Appraiser	75914
Danierakefield	Pritchard & Abbott, Inc.- Appraiser	76831
Gabrie Beaufeaux	Pritchard & Abbott, Inc.- Appraiser	77802
Miche Sifuentes	Pritchard & Abbott, Inc.- Appraiser	76956
Connieaymond	Pritchard & Abbott, Inc.- Appraiser	69293
Andreize	Pritchard & Abbott, Inc.- Appraiser, Director of Mineral Appraisals	72992
Rodn Kret	Pritchard & Abbott, Inc.- Board Chairman, Engineering Services Manager, Appraiser	63468
Karen	Pritchard & Abbott, Inc.- Appraiser, Director of Industrial & Utility Appraisals	76280



APPRAISAL STAFF PROVIDING MASS APPRAISAL SERVICES

--- TRAVIS CAD STAFF

Name	Title
Mann, Leana	Chief Appraiser
Mills, Michael	Deputy Chief of Appraisal
Ledbetter, Russell	Deputy Chief of Operations
Harvey, Kat	Director of Administration
Martinez, Cynthia	Chief Strategy Officer
Jennings-Doyle, Janet	Director of Internal Audit & Compliance
Threat, Devin	Director of Data Integration & Innovation
Albers, Adrienne	Cama Manager
Cortez, Oralia	Appeals Coordinator
Anderson, Nancy	Director of Finance
Barton, Davina	Executive Support & Facilities Coordinator
Alvarado, Liliانا	HR & Accounting Assistant
Arnold, Diana	Deputy Taxpayer Liaison Officer
Herrera, Amie	Printing & Mailing Manager
White, Blanche	Admin Support
Fisher, Edward	Facilities Support Specialist
Tran, Tony	Taxpayer Liaison Officer
Polanco, Cynthia	Compliance Spec Analyst
Banks, Dustin	Sr. In-House Counsel
Cox, Benjamin	Litigation Attorney
Harshbarger, Dustin	Litigation Appraiser
Angell, Howard	Litigation Appraiser
Gardner, Trey	Arbitration Appraiser
Kawazoe, Brian	Arbitration Appraiser
Rodgers, Glenn	Commercial Arbitration Specialist
Sanchez, Kim	Legal Assistant
Dangerfield-Bell, Trisha	Records Manager
Nickler, Antoinette	Legal Assistant
Bruce, Ambra	Legal Assistant
Hanslik, Tristina	Arbitration Clerk
Rokni, Roya	Paralegal
Johnson, Scott	Director of Information Technology
Blaylock, Tawnya	Network Manager
Martin, Matthew	IT Database Analyst
Hatfield, Stephen	Network Engineer
Yun, Adrian	Database Reporter Writer
Hueraca, Monica	Help Desk Team Lead
Jaimes, Anthony	Help Desk
Carranza, Kristina	Help Desk
Esteban, Luis	Director of GIS
Frey, Rachel	GIS Team Lead
Rangel, Nichole	GIS Technician
Bansal, Priya	GIS Technician
Cristofaro, Aaron	GIS Technician
Salazar, Hortencia	GIS Deed Clerk
Rios, Charlotte	GIS Deed Clerk
Brittner, Sterling	GIS Deed Clerk
Ybarra, Marisa	GIS Deed Clerk
Wong, Amy	GIS Technician
Lee, Catie	Director of Customer Service
Vela, Geraldine	Customer Service Team Lead
Hayden, Branda	Exemptions Team Lead
Sneed, Karlton	Appraisal Relations Specialist
Kissling, Camille	Exemptions Audit Specialist
Castelan, Esmeralda	Customer Service Representative
Harris, Yasmin	Customer Service Representative
Jackson, Aliza	Customer Service Representative
Love, Angelic	Customer Service Representative
North, Mary	Customer Service Representative
Avalos, Sabrina	Customer Service Representative
Hernandez, Idalia	Customer Service Representative
Cisneros, Mary	Customer Service Representative
Hite, Kristal	Exemptions Clerk
Paul, Tammy	Exemptions Clerk
Rodriguez, Eva	Exemptions Clerk
Norton, Valerie	Exemptions Clerk
Greer, Abigail	Exemptions Clerk
Calhoun, Lucy	Exemptions Clerk
Deleon, Tanya	Director of Appraisal Support
Candelas, Ashlyn	Appraisal Support Team Lead
Bailey, Cha'Ree	Appraisal Support Clerk
Castillo, Ruben	Appraisal Support Clerk
Conn, Carol	Appraisal Support Clerk
Edwards, Teresa	Appraisal Support Clerk
Cordone Gonzalez, Sofia	Appraisal Support Clerk
Mesa, Jacqueline	Appraisal Support Clerk
Nunez, Noelia	Appraisal Support Clerk
Milligan, Dawnnesha	Appraisal Support Clerk
Simmons, Ophelia	Appraisal Support Clerk
Wallace, Andrew	Appraisal Support Clerk

Name	Title
De La Fuente, Frances	Appraisal Support Clerk
Mendoza, Erica	Appraisal Support Clerk
Cobos, Bianca	Appraisal Support Clerk
Islas-McGaughy, Priscilla	Appraisal Support Clerk
Maldonado, Joshua	Director of Commercial & BPP
Mazziotti, Daniel	Assistant Director of Commercial & BPP
Lykins, Nichol	Commercial Team Lead
Wilson, Todd	Commercial Team Lead
Simon, Blesson	Commercial Appraiser
Kovalcik, Jana	Commercial Appraiser
Hackert, Sara	Commercial Appraiser
Garza, Juan	Commercial Appraiser
Garza, Nicholas	Commercial Appraiser
Randolph, Kristopher	Commercial Appraiser
Phillipose, Jubin	Commercial Appraiser
Surley, Traveler	Commercial Appraiser
Nguyen, Jennifer	Commercial Appraiser
Stone, Thomas	Commercial Appraiser
Cruces, Josue	Commercial Appraiser
Bradshaw, Phillip	Commercial Appraiser
Foye, Susan	Admin Commercial Support Specialist
Hopkins, Derrick	BPP Team Lead
McGaughy, Michael	Sr. BPP Appraiser
Perez, Denise	BPP Appraiser
Butler, Wendy	BPP Admin Assistant
Dye, Zachary	Director of Residential Appraisal
Gonzalez, Jazmin	Assistant Director of Residential Appraisal
Gower, Savannah	Residential Manager
Nino, Emiliano	Residential Manager
Stevens, Gretchen	Residential Manager
Fritz, Nickolas	Residential/Land Manager
Leija, Sonya	Residential Team Lead
Uzer, Dany	Residential Team Lead
Robertson, Sue	Residential Team Lead
Morales, Adam	Residential Team Lead
Osborn, Brian	Residential Team Lead
Lentz, Elizabeth	Residential Team Lead
May, William	Residential/Land Team Lead
Bonnett, Michael	SR. Residential Appraiser
Horsley, George	SR. Residential Appraiser
Samansareesak, Soraya	SR. Residential Appraiser
Sandoval, Orlando	Land Appraiser
Serpa, Steven	Land Appraiser
Swartout, Michael	Land Appraiser
Zett, John	Land Appraiser
Alumbaugh, Brandon	Residential Appraiser
Andrade, Jesus	Residential Appraiser
Benitez, Bryant	Residential Appraiser
Bromagen, Brody	Residential Appraiser
Crane, Diego	Residential Appraiser
Dering, Payton	Residential Appraiser
Era, John	Residential Appraiser
Esser, Sebastian	Residential Appraiser
Gould Jr., Bill	Residential Appraiser
Hamauei, Kailley	Residential Appraiser
Hixson, Conner	Residential Appraiser
Kotrla, Derek	Residential Appraiser
Landa, Ethan	Residential Appraiser
Langford, Kevin	Residential Appraiser
Martinez, Miguel	Residential Appraiser
Martorell, AJ	Residential Appraiser
Mata, Abraham	Residential Appraiser
McCarty, Robert	Residential Appraiser
Oh, Bryan	Residential Appraiser
Ortega, Susanna	Residential Appraiser
Permenter, Emma	Residential Appraiser
Pullen, Tammy	Residential Appraiser
Rhoden, Anna	Residential Appraiser
Ross, Janice	Residential Appraiser
Ross, Michelle	Residential Appraiser
Rutledge, JP	Residential Appraiser
Townley, Joshua	Residential Appraiser
Veillon, Lance	Residential Appraiser
Walker, Jeff	Residential Appraiser
Warren, Jaylyn	Residential Appraiser
Huynh, Myoanh	Administrative Assistant
Rodriguez, Rebecca	Administrative Assistant
Gil, Kathryn	Ag Admin
Easterling, Adrianna	Residential Support Specialist





Certification Status Report

Total Appeals
176,608

Protest Complete
5,710

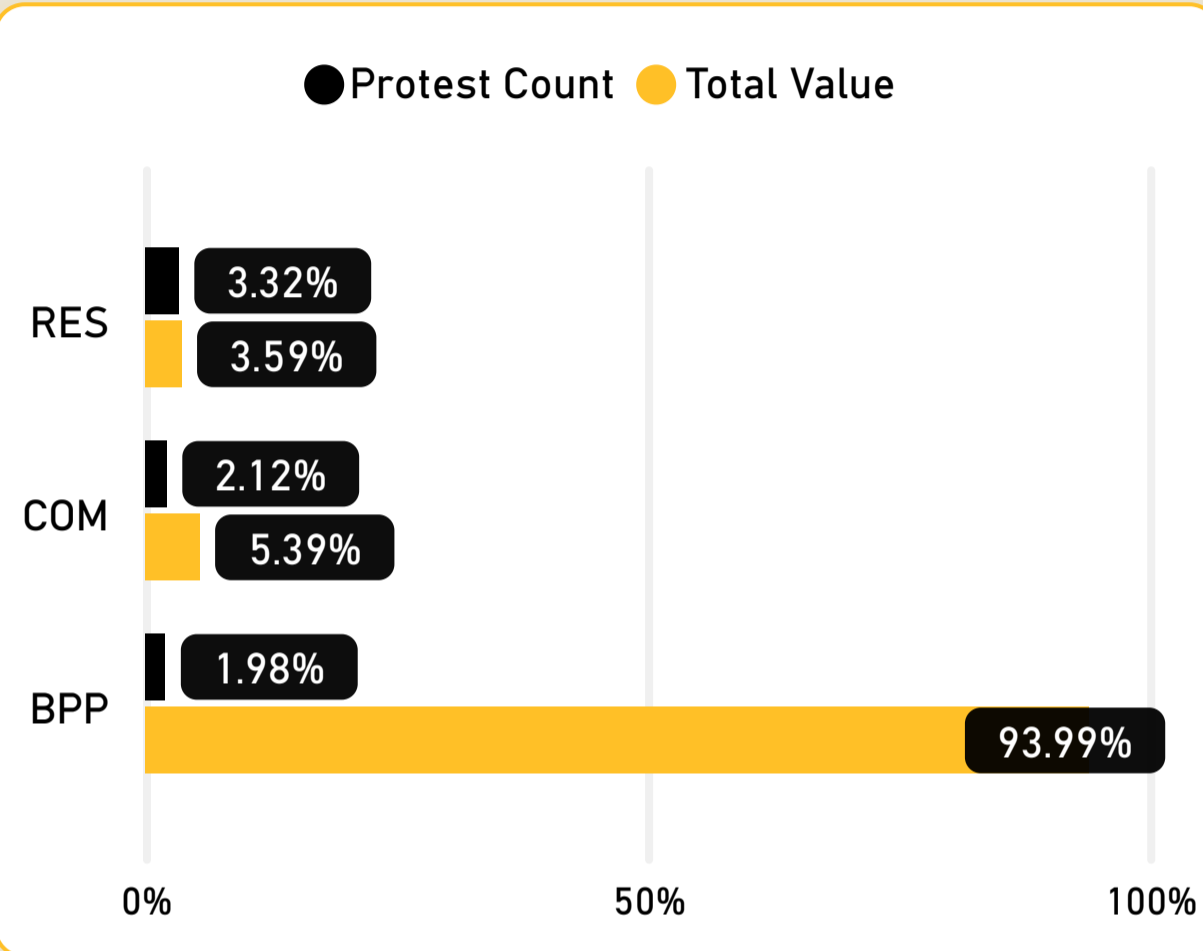
Percent Complete by Accounts
3.23%

Percent Complete by Value
6.95%

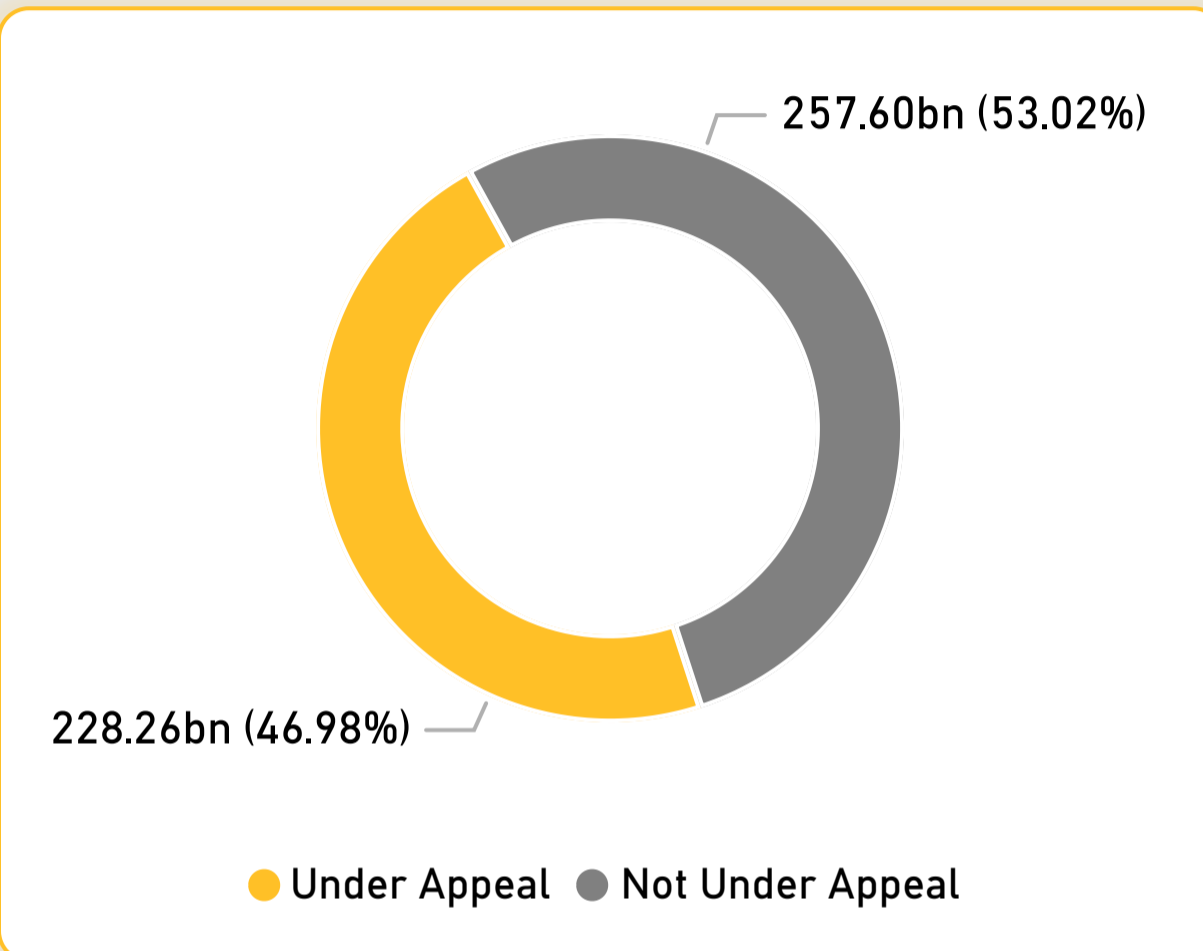
Working Days Until Certification
44

Projected Level at Certification
73.05%

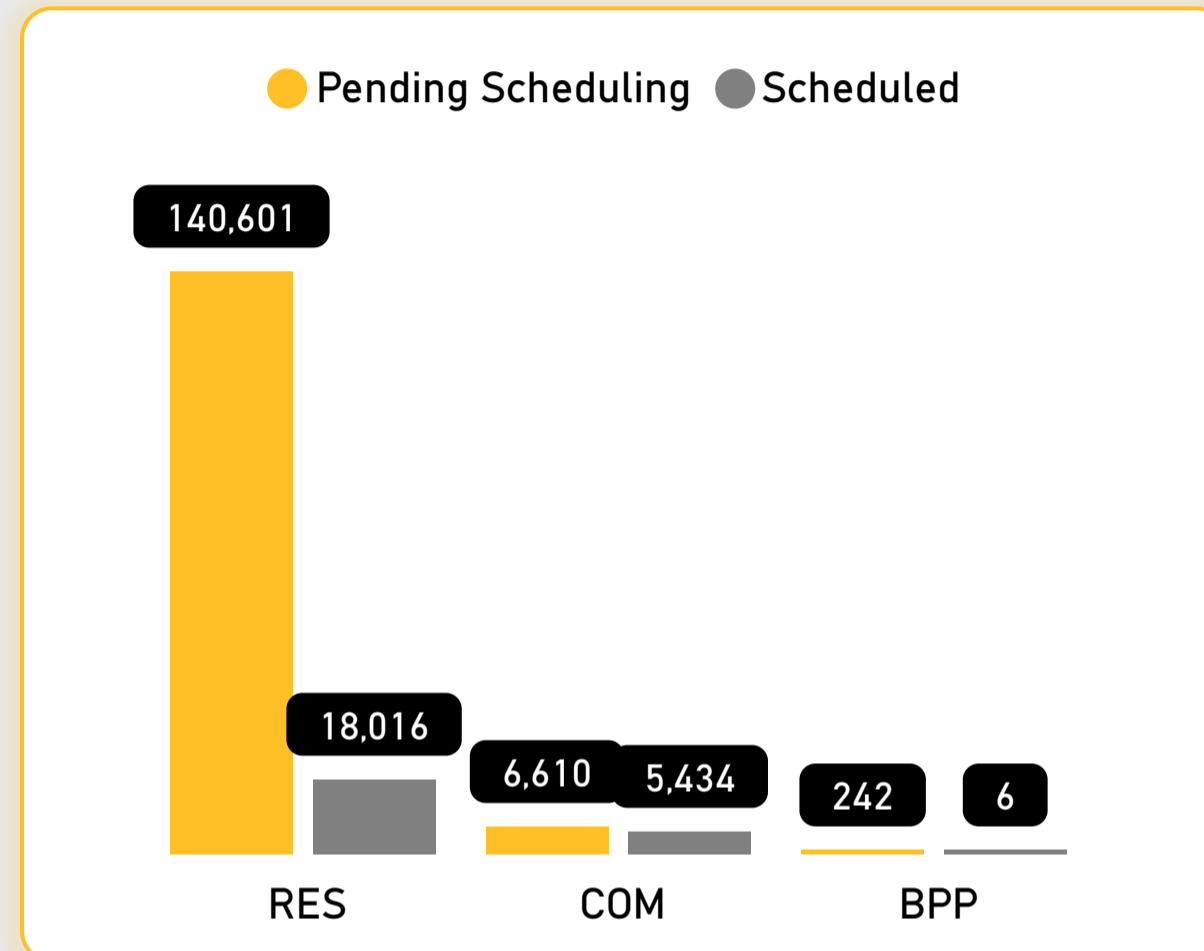
Percent Complete



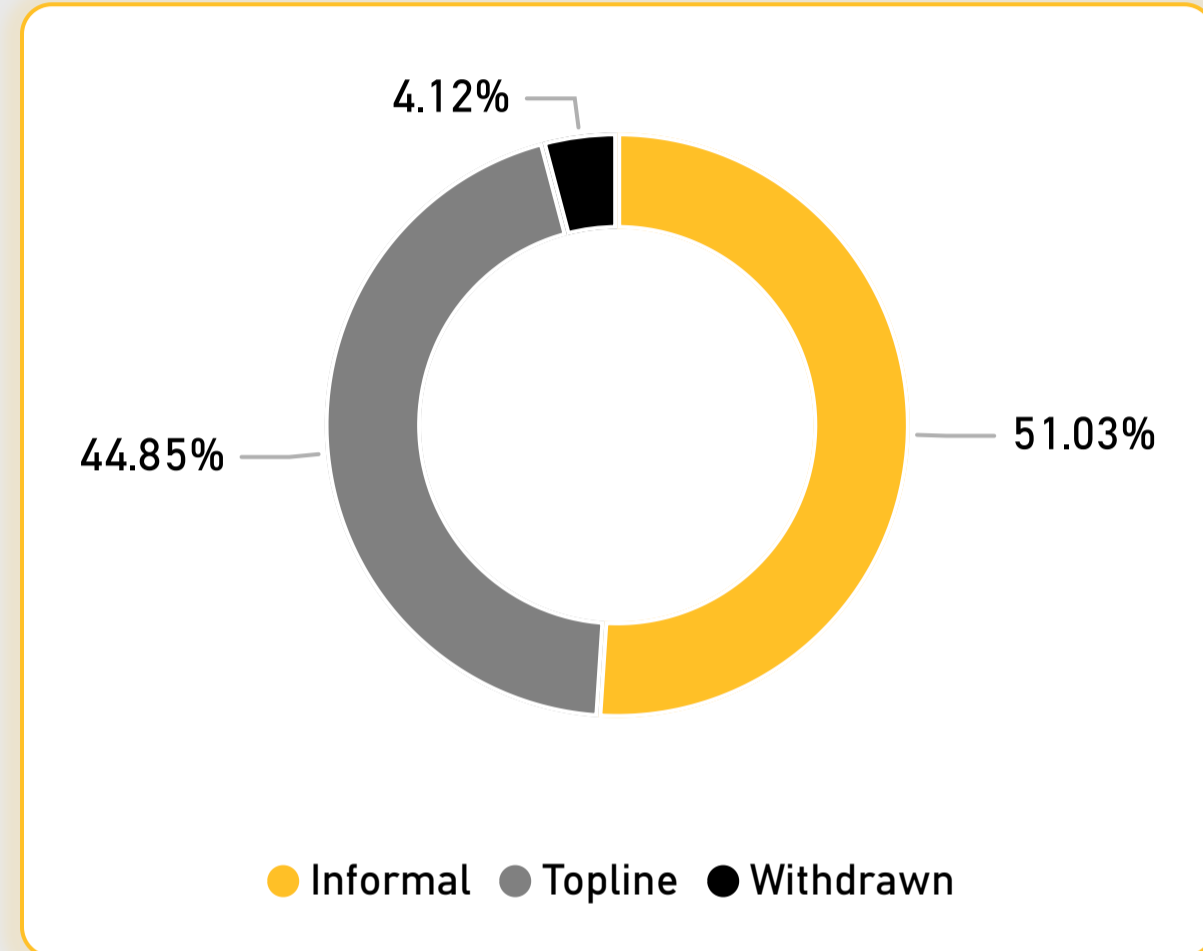
Value Totals



Scheduling



Resolution Type



Filing Statistics

91.42%
Agent Filed Protest

8.58%
Owner Filed Protest

93.47%
Electronically Filed Protest

6.53%
Paper Filed Protest

Top 5 Agents-Protest Count

Agent Name	Count	% of Total
OWNWELL	64,339	36.43%
FIVE STONE PROPERTY TAX	30,803	17.44%
TEXAS PROTAX	29,982	16.98%
OCONNOR & ASSOCIATES	6,635	3.76%
RESOLUTE PROPERTY TAX SOLUTIONS	3,726	2.11%

Top 5 Agents-Protest Value

Agent Name	Initial Value	% of Total
OWNWELL	40.40bn	16.59%
RYAN LLC FKA MORRISON & HEAD LP	37.95bn	15.59%
TEXAS PROTAX	36.78bn	15.11%
FIVE STONE PROPERTY TAX	24.89bn	10.22%
RYAN LLC - AUSTIN COMMERCIAL	20.03bn	8.23%

Select all

Agent

Owner

Deselect all

RES

COM

BPP

Not Under Appeal

Under Appeal

Count of pid
176,605

Informals Requested
7,746

Total Begin Market
\$243.45bn

Property ID
Export

Docket Group	Count	Total Begin Market	% of Total
BPP	254	\$6,814,057,757	0.14%
Commercial land	1,797	\$3,284,899,116	1.02%
Exempt Property	4	\$3,513,366	0.00%
Healthcare Properties	49	\$850,161,774	0.03%
Hotel Property	162	\$5,832,693,854	0.09%
Large Industrial	925	\$13,301,944,867	0.52%
Large Multifamily	847	\$40,606,371,896	0.48%
Large Office	833	\$20,678,079,146	0.47%
Large Retail	1,051	\$8,173,246,619	0.60%
Other	298	\$6,222,452,335	0.17%
Res. Affordable Housing	614	\$147,443,643	0.35%
Residential	155,883	\$117,533,636,377	88.27%
Residential High Rise	2,178	\$2,298,292,182	1.23%
Residential Inventory	3,315	\$1,717,831,274	1.88%
Residential Land	2,054	\$2,998,252,542	1.16%
Small Industrial	1,612	\$3,249,349,300	0.91%
Small Multifamily	607	\$2,836,247,359	0.34%
Small Office	2,771	\$4,085,982,628	1.57%
Small Retail	1,351	\$2,814,000,662	0.76%

Informal Requested



Resolution Type



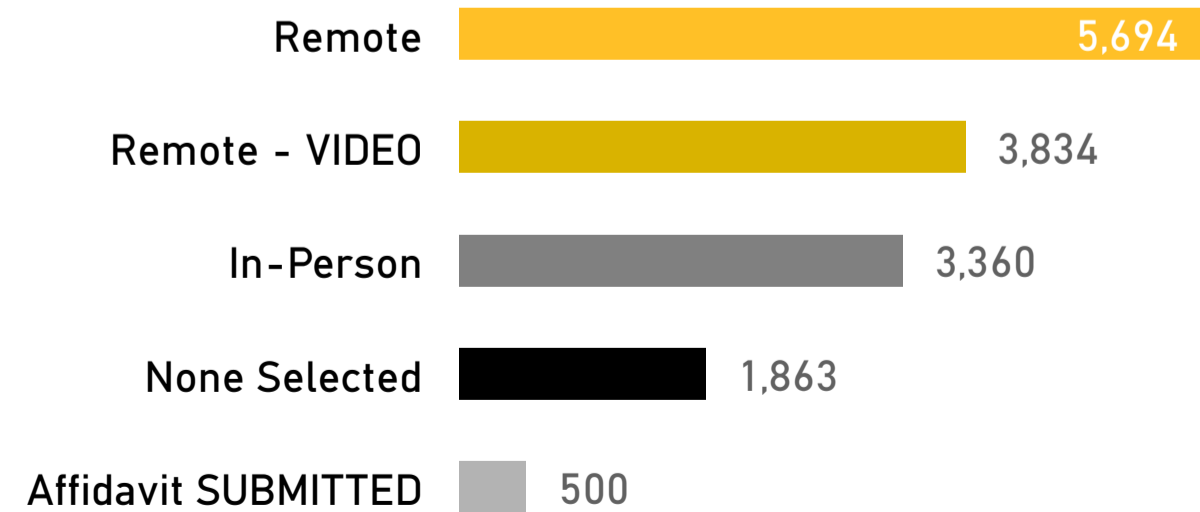
Informals Held



Offers Made



Hearing Type Requested



E-Filed Protest

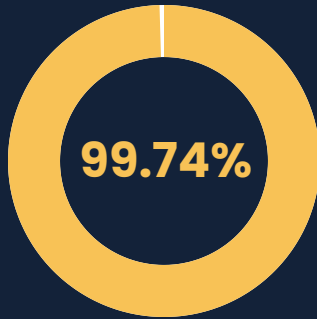




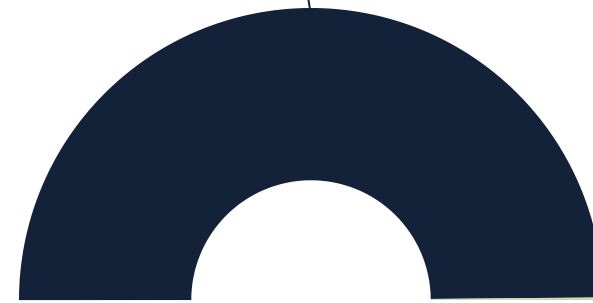
Travis Central Appraisal District

HOMESTEAD VERIFICATION PROGRAM STATUS- 2026

Percent Complete



Complete: 99.74%



Pending Review: 0.14%

● Complete
 ● Pending Additional Documentation
 ● Pending Review

78,222
Scope of Audit

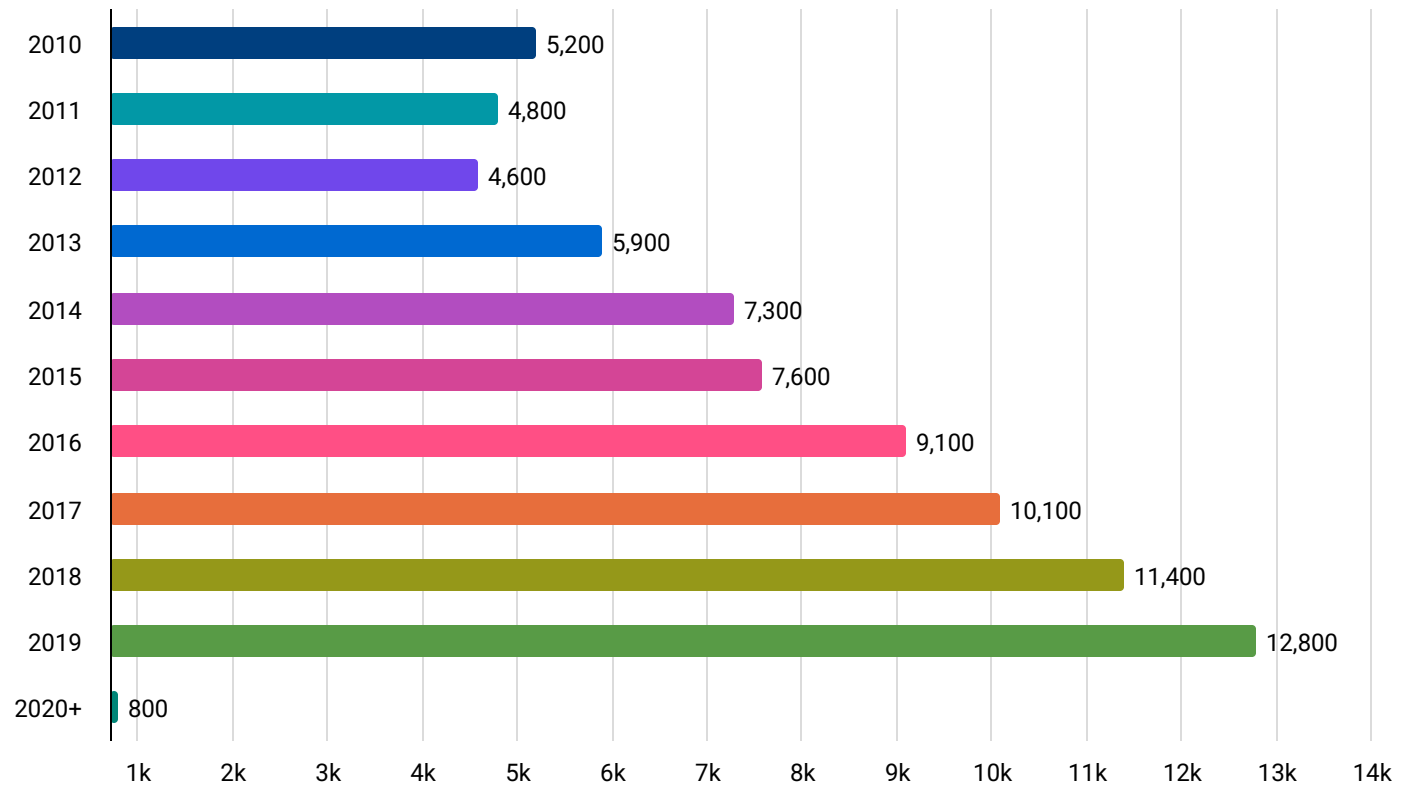
78,030
Verification Complete

91
Verifications Incomplete

101
Pending Additional Documents from Property Owner

5,121
Exemptions Removed

Audited Exemptions by Qualifying Year





TRAVIS CENTRAL APPRAISAL DISTRICT

COMMUNITY OUTREACH

COMMUNITY OUTREACH CALENDAR

JANUARY 2026

FEBRUARY 2026

- 7 Property Tax Townhall**
Circle C HOA
- 11 Get to Know Your Veteran Benefits**
Austin VA Clinic
- 11 Taxing Entities & Property Taxes**
River Ridge Neighborhood
- 21 Pflugerville Exemption Clinic**
Travis Central Appraisal District
- 25 Webinar: Renditions**
Travis Central Appraisal District
- 27 Del Valle Office Hours**
Travis Central Appraisal District

MARCH 2026

- 9 Del Valle Office Hours**
Travis Central Appraisal District
- 11 TCAD 101 for Property Owners**
Rotary Club of South Austin
- 19 Del Valle Office Hours**
Travis Central Appraisal District

APRIL 2026

- 1 Legislative Update**
Texas Realtors Taxation Committee
- 7 Webinar: Notices & Protests**
Travis Central Appraisal District

APRIL 2026 (CONTINUED)

- 8 Notices & Protests**
Patten Title
- 9 Notices & Protests**
Mueller Residential Group
- 15 How to Protest Your Appraisal**
Austin Board of Realtors
- 18 Sandy Creek Protest Seminar**
Travis Central Appraisal District
- 22 How to Protest Your Appraisal**
Austin Board of Realtors
- 25 Property Tax Townhall**
Austin Revitalization Authority
- 29 Notices & Protests**
City of Austin
- 30 Notices & Protests**
Del Valle Community Coalition

MAY 2026

- 2 Notices & Protests**
Del Valle Community Coalition
- 9 TCAD 101 for Property Owners**
Anderson Community Development Corp.
- 13 Get to Know Your Veteran Benefits**
Austin VA Clinic
- 20 Better Together Resource Fair**
Austin VA Clinic



TRAVIS CENTRAL APPRAISAL DISTRICT

COMMUNITY OUTREACH

COMMUNITY OUTREACH CALENDAR

JUNE 2026

- 5 TCAD 102 for Real Estate Professionals**
Stanberry Realtors

JULY 2026

AUGUST 2026

- 13 Budgets & Tax Rates**
Del Valle Community Coalition
- 15 Budgets & Tax Rates**
Del Valle Community Coalition
- TBD Webinar: Navigating TravisTaxes.com**
Travis Central Appraisal District
- TBD Last Minute Exemption Clinic**
Travis Central Appraisal District

SEPTEMBER 2026

OCTOBER 2026

- TBD Boo the Flu**
Sendero Health

NOVEMBER 2026

- TBD Veterans Day Celebration**
City of Austin
- TBD Community Connections Resource Fair**
Austin Energy

DECEMBER 2026

- 15 Property Taxes & Tax Bills**
Del Valle Community Coalition
- 19 Property Taxes & Tax Bills**
Del Valle Community Coalition





TRAVIS CENTRAL APPRAISAL DISTRICT

TAXPAYER EXPERIENCE SNAPSHOT

CUSTOMER SERVICE

Average In-Person Wait Time	3:47 minutes
Average Phone Wait Time	8:15 minutes
Average Exemption Processing Time	26 days
Yes, my inquiry was resolved.	94.8%
I am satisfied with the time it took to resolve my issue.	84.4%
My TCAD representative was professional and courteous.	93.9%



PROTESTS

It was easy to schedule my informal meeting.	88.4%
My appraiser was professional and courteous.	94.3%
My appraiser answered my questions about my property and its value.	93.2%
It was easy to accept my settlement offer.	88.4%



“ The person who I spoke did professional job and his patience to me was incredible. ”

“ [Appraiser] was fantastic. Very thoughtful and explained the whole process very well. ”

“ [Appraiser] was extremely helpful and courteous from beginning to the end. ”