



**REGULAR**  
**BOARD OF DIRECTORS MEETING**

**January 27, 2022**

# **MEETING NOTICE & AGENDA**

1/20/2022 11:30:15 AM

STACEY KEMP  
COUNTY CLERK  
COLLIN COUNTY, TEXAS  
BY : AB DEPUTY

## NOTICE OF REGULAR MEETING

### BOARD OF DIRECTORS of the COLLIN CENTRAL APPRAISAL DISTRICT

### (CONDUCTED ONSITE & TELEPHONICALLY)

Notice is hereby given that on the 27th day of January 2022, at 7:00 a.m., the Board of Directors of the Collin Central Appraisal District will hold a meeting at the Central Appraisal District Office, 250 Eldorado Pkwy., McKinney, Texas. The Board Chairman will direct the meeting from the District's office, in the Dr. Leo Fitzgerald board room. Board members and the public may attend in person or connect via the telephone number and conference ID below. The chief appraiser and selected staff will attend in person, with other members of the District's staff connecting from their individual offices or from a remote location. Board members, staff and the public will have telephonic access by dialing 1-833-304-4846, at which time they will be prompted to enter the Phone Conference ID: 796 747 619#. Telephonic access will be available at 7:00 a.m. until the meeting is adjourned by the Board Chairman. The subjects to be discussed are listed on the agenda which is attached to and made a part of this notice. The Board's agenda packet is available on the District's public website:

<https://collincad.org/boards/bod>

On this 20th day of January 2022, this notice was filed with the County Clerk of Collin County, Texas.



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Bo Daffin  
Chief Appraiser  
Phone: (469) 742-9200

**AGENDA**

**BOARD OF DIRECTORS  
COLLIN CENTRAL APPRAISAL DISTRICT**

**Thursday, January 27, 2022  
REGULAR MEETING - Conducted at  
CENTRAL APPRAISAL DISTRICT OFFICE  
250 Eldorado Parkway, Dr. Leo Fitzgerald Board Room  
McKinney, Texas 75069**

**I. REGULAR MEETING**

<b>ITEM #</b>	<b>SUB #</b>	<b>ITEM DESCRIPTION</b>
<b>A.</b>		<b>Call to order: 7:00 a.m.</b>
	1	Announcement by presiding officer whether the meeting has been posted in the manner required by law.
	2	Roll call: Announcement by presiding officer whether a quorum is present.
	3	Administer oath of office to Board of Directors.
	4	Introduction of new board members.
	5	Election of 2022 Officers.
<b>B.</b>		<b>Executive Session</b>
	1	Consultation with attorney regarding pending or contemplated litigation. Pursuant to Texas Open Meetings Act, Section 551.071.
	2	Deliberation regarding real property. Pursuant to Texas Open Meetings Act, Section 551.072.
	3	Personnel matters, including Customer Service staffing. Pursuant to Texas Open Meetings Act, Section 551.074.
<b>C.</b>		<b>Action on items discussed in executive session</b>
	1	Action on any items pertaining to litigation, if any.
	2	Action on any items pertaining to real property, if any.
	3	Action on any items pertaining to personnel, if any.

**AGENDA**  
**BOARD OF DIRECTORS**  
**COLLIN CENTRAL APPRAISAL DISTRICT**

**CONSENT AGENDA**

*The Consent Agenda will be acted upon in one motion and contains items which are routine and typically noncontroversial. Items may be removed from this agenda for individual discussion by a Board Member, the Chief Appraiser or any citizen.*

- D. Approval of minutes from December 16, 2021 special meeting.**
- E. Review of December 2021 bills.**
- F. Review of December 2021 financial reports.**
- G. Review and sign checks for approved purchases requiring Board signature.**
- H. Review report of December 2021 checks and electronic transfers greater than \$25,000.**

**END OF CONSENT AGENDA**

- I. Discuss conflict of interest filing requirements pursuant to the Government Code and CCAD Policy #118.**
- J. Receive chief appraiser's property owned report, per the requirements of CCAD Policy #118.**
- K. Discuss the District's open to the public hours of operation and vote on authorizing the chief appraiser to temporarily change the customer service lobby closing from 5:00 p.m. to 4:00 p.m.**
- L. Reports**
  - 1 Taxpayer Liaison Officer Report**
  - 2 4th Qtr 2021 Texas Department of Licensing & Regulation (TDLR) Report**
  - 3 4th Qtr 2021 Investment Report**

**AGENDA**  
**BOARD OF DIRECTORS**  
**COLLIN CENTRAL APPRAISAL DISTRICT**

**Reports Continued:**

- 4 4th Qtr 2021 Collateral Report
- 5 Vendor Report
- 6 4th Qtr 2021 Arbitration Report
- 7 Litigation Report
- 8 2021 Litigation Cost Report

**M. Chief Appraiser's Report**

- 1 General Comments

**II. AUDIENCE**

- A.** Receive public comments. Five minute limit per speaker, unless extended by Board vote.

**III. ANNOUNCEMENT OF NEXT REGULAR SCHEDULED MEETING**

**IV. ADJOURNMENT**

# CONSENT AGENDA

# **D. MINUTES**

**December 16, 2021**



## MINUTES

### BOARD OF DIRECTORS COLLIN CENTRAL APPRAISAL DISTRICT

Thursday, December 16, 2021

#### SPECIAL MEETING (REVISED AGENDA) - Conducted onsite and telephonically at

**MEETING LOCATION:** Central Appraisal District Office  
250 Eldorado Parkway, Dr. Leo Fitzgerald Board Room  
McKinney, Texas 75069

**MEMBERS PRESENT:** Ron Carlisle, Earnest Burke, Brian Mantzey, Ken Maun, and Gary Rodenbaugh

**MEMBERS ABSENT:**

**APPROVAL OF MINUTES:** \_\_\_\_\_  
Chairman Secretary

#### NATURE OF BUSINESS

##### I. SPECIAL MEETING

ITEM #	SUB #	ITEM DESCRIPTION
A.		<b>Call to Order 7:00 a.m.</b>
	1	Meeting was called to order by Chairman, Gary Rodenbaugh, and he announced that the meeting had been posted in the time and manner required by law.
	2	The Chairman announced that a quorum was present.
B.		<b>Executive Session</b> There was no need for an executive session.
C.		<b>Action on items discussed in executive session</b>
	1	N/A
	2	N/A
	3	N/A

#### CONSENT AGENDA

Motion by Ken Maun to accept reports and approve action items contained in consent agenda. Seconded by Earnest Burke. Motion carried.

**D.** Action taken: Board approved minutes from November 18, 2021 special meeting.

**E.** Action taken: Board reviewed the November 2021 bills.

## **MINUTES**

### **BOARD OF DIRECTORS COLLIN CENTRAL APPRAISAL DISTRICT**

- F.** Action taken: Board reviewed and accepted the November 2021 financial reports.
- G.** Action taken: There were no checks needing to be signed by Chairman, Gary Rodenbaugh.
- H.** Action taken: Board reviewed and accepted the November 2021 report of checks and electronic transfers greater than \$25,000.

#### **END OF CONSENT AGENDA**

- I.** The Board received Chief Appraiser, Bo Daffin's recommendation for authorization to contract for renovations of the District's office building. The renovations include expansion of Customer Service, Taxpayer Waiting area and relocation of Mapping/GIS. Motion made by Brian Mantzey. Seconded by Earnest Burke. Motion carried.
- J.** The Board received a report from Mr. Daffin regarding the District's retirement system liability, per Board Policy #1007. No action needed.
- K.** The Board received Mr. Daffin's recommendation and voted on amending Policy #1007 to change the Retiree Advisory Panel membership to an annual appointment. Motion made by Brian Mantzey. Seconded by Ron Carlisle. Motion carried.
- L.** Ron Carlisle motioned to accept Mr. Daffin's recommendation to appoint the following retirees to the Advisory Panel for 2022: Robert Burns; Kelly Lintner; Frank Price; Marcia Rohloff; and John Silverwise. Second motion by Brian Mantzey. Motion carried.
- M.** Ken Maun motioned to approve by Resolution #2021-1105, line-item transfers within the 2021 budget. Ron Carlisle seconded the motion. Motion carried.
- N.** The Board received Mr. Daffin's recommendation and voted to approve the ARB's independent legal counsel expense allocation for 2022 budget year funds as presented. Motion made by Ron Carlisle. Seconded by Earnest Burke. Motion carried.
- O.** A motion was made by Ken Maun to approve by Resolution #2021-67, amending Policy # 115 regarding the Taxpayer Liaison Officer (TLO). Motion seconded by Earnest Burke. Motion carried.

## MINUTES

### BOARD OF DIRECTORS COLLIN CENTRAL APPRAISAL DISTRICT

- P.** Mr. Daffin presented the Board with his recommendation to appoint Mr. Christopher Nickell as Taxpayer Liaison Officer (TLO) effective immediately, and to allow the Deputy Taxpayer Liaison Officer (DTLO) position to remain vacant for now. The Board received Mr. Daffin's recommendations. Brian Mantzey motioned to appoint Mr. Nickell as TLO for the remainder of 2021, continuing to serve during calendar year 2022, and to leave the DTLO position vacant for now. Ron Carlisle seconded the motion. Motion carried.
- Q.** Mr. Daffin and the Board discussed the Farmersville ISD 2020 Property Value Study (PVS) invalid findings notification from the Property Tax Assistance Division. No action was needed.
- R.** **Reports**
- 1 Chris Nickell, Taxpayer Liaison Officer, reported there have been no formal written complaints to be brought before the Board of Directors.
  - 2 Mr. Daffin presented the Litigation Cost Report YTD totals (as of 12/07/2021).
- S.** **Chief Appraiser's Report**
- 1 Mr. Daffin presented the entities distribution of votes and votes cast for the 2022-2023 Board Of Directors Election.
  - 2 General Comments

## II.

- A.** **AUDIENCE**  
There were no public comments.

### CCAD staff in attendance:

Bo Daffin  
Tamera Glass  
Toni Bryan  
Valerie Hyden  
Brad Richards  
Dana Wilson  
Elliot Bensed  
Marty Wright  
Paula Bensed  
Phil Greaux  
Ryan Matthews  
Stephanie Cave-Bernal  
Eric Grusendorf  
Cindy Smith

**MINUTES**  
**BOARD OF DIRECTORS**  
**COLLIN CENTRAL APPRAISAL DISTRICT**

Brian Swanson  
Tina Castillo  
Jamie Worth  
Jason Harris  
Shane Cheek  
Erin Van Gundy  
Robert Wood  
Pam Williams

**Public in attendance:**

Christopher Nickell, TLO  
Dean Soderstrom, ARB Chairman  
LaVeeta Hamilton, Executive Director of Family Promise

- III.** The next regular meeting is to be held on January 27, 2022 at 7:00 a.m., at 250 Eldorado Pkwy., Dr. Leo Fitzgerald Board Room, McKinney, Texas.
- IV.** Chairman, Gary Rodenbaugh announced the Board had concluded its business and the meeting was adjourned. The meeting adjourned at 8:30 a.m.

**E.**  
**BILLS**  
**PAID**

**December 2021**

BILLS PAID

BILLS PAID

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
December 2021

Num	Date	Name	Amount
<b>Dec 21</b>			
ACH	12/10/2021	ADP INC	-4,049.21
ACH	12/15/2021	TCDRS	-134,054.17
ACH	12/03/2021	NATIONWIDE RETIREMENT SOLUTIONS	-4,912.50
ACH	12/28/2021	TEXAS WORKFORCE COMMISSION	-3,074.00
ACH	12/17/2021	NATIONWIDE RETIREMENT SOLUTIONS	-4,902.50
ACH	12/09/2021	PITNEY BOWES RESERVE ACCOUNT	-20,000.00
ACH	12/03/2021	NATIONWIDE RETIREMENT SOLUTIONS	-5,792.50
ACH	12/31/2021	ADP INC	-3,960.22
ACH	12/30/2021	NATIONWIDE RETIREMENT SOLUTIONS	-5,022.50
8505	12/10/2021	VOID	0.00
8506	12/10/2021	VOID	0.00
8507	12/10/2021	VOID	0.00
8508	12/10/2021	VOID	0.00
8509	12/10/2021	VOID	0.00
8510	12/10/2021	VOID	0.00
8511	12/10/2021	VOID	0.00
8512	12/10/2021	VOID	0.00
8513	12/10/2021	VOID	0.00
8514	12/10/2021	VOID	0.00
8515	12/10/2021	VOID	0.00
8516	12/10/2021	VOID	0.00
8517	12/10/2021	VOID	0.00
8518	12/10/2021	VOID	0.00
8519	12/10/2021	VOID	0.00
8520	12/10/2021	VOID	0.00
8521	12/10/2021	VOID	0.00
8522	12/10/2021	VOID	0.00
8523	12/10/2021	VOID	0.00
8524	12/10/2021	VOID	0.00
8525	12/10/2021	VOID	0.00
8526	12/10/2021	VOID	0.00
8527	12/10/2021	VOID	0.00
8528	12/10/2021	VOID	0.00
8529	12/10/2021	VOID	0.00
8530	12/10/2021	VOID	0.00
8531	12/10/2021	VOID	0.00
8532	12/10/2021	VOID	0.00
8533	12/10/2021	VOID	0.00
8534	12/10/2021	VOID	0.00
8535	12/10/2021	VOID	0.00
8536	12/10/2021	VOID	0.00
8537	12/10/2021	VOID	0.00
52816	12/01/2021	MC PURE CLEANING, LLC	-6,950.00
52817	12/01/2021	VANGUARD CLEANING SERVICES	-1,000.00
52824	12/01/2021	AFFILIATED COM-NET, INC.	-1,526.28
52825	12/01/2021	ASSN TECHNOLOGY SERVICES, INC	-219.60
52826	12/01/2021	COPYNET	-10,333.47
52827	12/01/2021	TRUE PRODIGY TECH SOLUTIONS LLC	-1,025.00
52828	12/01/2021	MYPRINTCHOICE	-225.00
52829	12/06/2021	QUALITY PERSONNEL SERVICE	-945.00
52830	12/06/2021	RESCUE STAT (formerly STAT PADS)	-125.00
52831	12/06/2021	SAUNDERS & WALSH, PLLC	-104,005.62
52832	12/06/2021	TEXAS ARCHIVES	-90.76

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
December 2021

Num	Date	Name	Amount
52833	12/06/2021	WASTE CONNECTIONS OF TEXAS	-226.15
52834	12/07/2021	BLAYLOCK, GEAN KENT	-450.00
52835	12/07/2021	BORTON, BRIAN K	-450.00
52836	12/07/2021	HENRY, JAMES	-450.00
52837	12/07/2021	POLK, MATTHEW	-450.00
52838	12/07/2021	ZEGADLO, MARC	-450.00
52839	12/07/2021	CHEEK, SHANE	-375.00
52840	12/07/2021	HARRIS, JASON	-375.00
52841	12/07/2021	MATTHEWS, RYAN	-375.00
52842	12/07/2021	STANKOVIC, JADRANKO	-375.00
52843	12/07/2021	CHEEK, SHANE	-225.00
52844	12/07/2021	MATTHEWS, RYAN	-225.00
52845	12/07/2021	AT&T (MAIN LOCAL)	-196.85
52846	12/07/2021	AT&T (MAIN LOCAL)	-2,377.07
52847	12/07/2021	CDW-G	-1,118.55
52848	12/07/2021	CINTAS MAT SERVICE	-398.12
52849	12/07/2021	CINTAS SANI CLEAN	-2,477.00
52850	12/07/2021	COLORIT GRAPHICS SERVICES	-205.00
52851	12/07/2021	CROWE, ROBERT	-1,071.63
52852	12/07/2021	DIAZ, TIFFANY	-135.90
52853	12/07/2021	HAYNES LANDSCAPE & MAINTENANCE, INC	-1,261.63
52854	12/07/2021	HOLT CAT	-549.50
52855	12/07/2021	HOME DEPOT	-260.41
52856	12/07/2021	JOPLIN'S	-462.50
52857	12/07/2021	MB&B TROPHIES AND AWARDS	-255.00
52858	12/07/2021	MICHAEL'S KEYS, INC.	-150.50
52859	12/07/2021	NORTH TEXAS SIGN SHOP	-80.00
52860	12/10/2021	CHOLLAR JR, GEORGE W	-100.00
52861	12/10/2021	FALTYS, DIANNE	-240.00
52862	12/10/2021	FERRILL, LAWRENCE R	-100.00
52863	12/10/2021	GUCKES, FRANCIS	-460.00
52864	12/10/2021	HANSON, THOMAS D	-100.00
52865	12/10/2021	HARDIN, MARILYN CARLEEN	-30.00
52866	12/10/2021	HAWKINS, YOLANDA	-100.00
52867	12/10/2021	JAYE, OLIN	-100.00
52868	12/10/2021	JONES, JOHN B	-100.00
52869	12/10/2021	KLICKMAN, JOHN MICHAEL	-100.00
52870	12/10/2021	MAHER, KEVIN M	-100.00
52871	12/10/2021	MARTIN, BARRY K	-100.00
52872	12/10/2021	MCGEE, BEVERLY J	-30.00
52873	12/10/2021	MOLINA, ESTELA	-30.00
52874	12/10/2021	PARKER, CHRISTI CRUMP	-310.00
52875	12/10/2021	PHILLIPS, KATHRYN H	-100.00
52876	12/10/2021	PRYOR, JACK R	-100.00
52877	12/10/2021	ROBINSON, PATRICIA	-1,060.00
52878	12/10/2021	ROGERS, FLOYD E	-390.00
52879	12/10/2021	SMITH JR, FLOYD W	-100.00
52880	12/10/2021	SMITH, DELORES G	-490.00
52881	12/10/2021	SODERSTROM, DEAN C	-640.00
52882	12/10/2021	STAIF, CAROL LEE	-100.00
52883	12/10/2021	TRAN, HUONG (RACHEL)	-270.00
52884	12/10/2021	TURANO, LOUIS R	-385.00
52885	12/10/2021	TURNER, KENT M	-100.00
52886	12/10/2021	TWIGG, STEPHEN G	-100.00

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
December 2021

Num	Date	Name	Amount
52887	12/10/2021	WARD, FORREST	-100.00
52888	12/10/2021	WELBORN, JANET HOLBART	-100.00
52889	12/10/2021	WHITT, NORMAN J	-100.00
52890	12/10/2021	WOLFSON, LEWIS H	-100.00
52891	12/10/2021	WYSASKI, JOHN	-235.00
52892	12/10/2021	YARBOROUGH, DANA	-100.00
52893	12/15/2021	VOID	0.00
52894	12/15/2021	VOID	0.00
52895	12/14/2021	ARMSTRONG, WILLIAM	-900.00
52896	12/14/2021	KILHEFNER, CALEB M	-450.00
52897	12/14/2021	THIGPEN, LESLIE MICHAEL	-450.00
52898	12/14/2021	ZEGADLO, MARC	-450.00
52899	12/15/2021	CAMPBELL-WOOD, SHARON	-100.00
52900	12/15/2021	SENA, RANDAL	-100.00
52901	12/15/2021	DIAZ, TIFFANY	-584.37
52902	12/15/2021	ELKINS, LADONNA	-168.25
52903	12/15/2021	APPRAISAL INSTITUTE	-1,495.00
52904	12/15/2021	BATTERIES PLUS	-166.32
52905	12/15/2021	CARENOW	-80.00
52906	12/15/2021	CCIM INSTITUTE	-750.00
52907	12/15/2021	CINTAS FIRST AID	-68.64
52908	12/15/2021	COPYNET	-1,402.20
52909	12/15/2021	COSTAR REALTY INFORMATION INC	-5,134.00
52910	12/15/2021	DSS	-22,374.00
52911	12/15/2021	DSS	-12,965.00
52912	12/15/2021	DSS	-5,535.21
52913	12/15/2021	INSIGHTS	-12,925.84
52914	12/15/2021	IREM	-225.00
52915	12/15/2021	KERBY & KERBY PLLC	-250.00
52916	12/15/2021	LEGAL SHIELD / ID SHIELD	-1,313.90
52917	12/15/2021	MONA LISA MOVING CO	-603.26
52918	12/15/2021	MURLEY PLUMBING	-372.80
52919	12/15/2021	PLANO OFFICE SUPPLY	-19,081.54
52920	12/15/2021	QUALITY PERSONNEL SERVICE	-609.00
52921	12/15/2021	SAUNDERS & WALSH, PLLC	-39,300.00
52922	12/15/2021	SHI GOVERNMENT SOLUTIONS	-3,289.50
52923	12/15/2021	SOCIETY FOR HUMAN RESOURCE MGT	-219.00
52924	12/15/2021	WEST, SUBVET D	-450.00
52925	12/15/2021	WEST, SUBVET D	-400.00
52926	12/15/2021	WEX HEALTH INC	-156.25
52927	12/21/2021	BLAYLOCK, GEAN KENT	-450.00
52928	12/21/2021	BORTON, BRIAN K	-450.00
52929	12/21/2021	HENRY, JAMES	-450.00
52930	12/21/2021	NEVAREZ, ALEJANDRO	-450.00
52931	12/21/2021	POLK, MATTHEW	-450.00
52932	12/21/2021	AT&T MOBILITY	-1,504.61
52933	12/21/2021	BRYAN, TONI	-250.00
52934	12/21/2021	CITY OF MCKINNEY	-540.95
52935	12/21/2021	COPYNET	-675.00
52936	12/21/2021	DIAZ, TIFFANY	-570.78
52937	12/21/2021	ELKINS, LADONNA	-499.50
52938	12/21/2021	FISH WINDOW CLEANING	-193.00
52939	12/21/2021	HUMETRICS HOLDING INC	-475.00
52940	12/21/2021	MONA LISA MOVING CO	-879.35



**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
December 2021

Num	Date	Name	Amount
52941	12/21/2021	OLIVE, SAMUEL	-400.00
52942	12/21/2021	QUALITY PERSONNEL SERVICE	-1,512.00
52943	12/21/2021	SHI GOVERNMENT SOLUTIONS	-938.70
52944	12/21/2021	SMITH, CINDY	-120.00
52945	12/21/2021	UNUM LIFE INSURANCE CO OF AMERICA	-1,271.90
52946	12/29/2021	JOHNSTON, CURTIS	-450.00
52947	12/29/2021	KILHEFNER, CALEB M	-450.00
52948	12/29/2021	NEVAREZ, ALEJANDRO	-475.00
52949	12/29/2021	AT&T (FIBER)	-2,046.30
52950	12/29/2021	BARRETT, KATHRYN	-623.48
52951	12/29/2021	CARD SERVICE CENTER	-7,211.82
52952	12/29/2021	COPYNET	-24.98
52953	12/29/2021	DELL MARKETING	-5,864.69
52954	12/29/2021	DELL MARKETING	-7,092.73
52955	12/29/2021	DIAZ, TIFFANY	-407.70
52956	12/29/2021	ELKINS, LADONNA	-270.00
52957	12/29/2021	GSO ARCHITECTS	-21,111.64
52958	12/29/2021	INTEX ELECTRICAL CONTRACTORS, INC	-688.00
52959	12/29/2021	JOPLIN'S	-9,000.00
52960	12/29/2021	PROSTAR SERVICES, INC	-608.40
52961	12/29/2021	QUALITY PERSONNEL SERVICE	-1,008.00
52962	12/29/2021	QUALITY PERSONNEL SERVICE	-5,761.00
52963	12/29/2021	SAM'S CLUB	-167.62
52964	12/29/2021	SENA, RANDAL	-457.50
52965	12/29/2021	STAPLES BUSINESS CREDIT	-64.54
52966	12/29/2021	SWINGLE COLLINS & ASSOCIATES	-3,000.00
52967	12/29/2021	TEXAS DEPARTMENT OF PUBLIC SAFETY	-11.00
52968	12/29/2021	TIME WARNER CABLE	-2,059.76
52969	12/29/2021	VARIVERGE LLC	-2,612.25
52970	12/29/2021	PRICE, FRANK	-1,000.00
52971	12/31/2021	BORTON, BRIAN K	-900.00
52972	12/31/2021	JOHNSTON, CURTIS	-900.00
52973	12/31/2021	AFLAC	-3,957.73
52974	12/31/2021	AT&T (MAIN LOCAL)	-1,851.48
52975	12/31/2021	AT&T (MAIN LOCAL)	-196.69
52976	12/31/2021	AT&T (U-VERSE)	-147.30
52977	12/31/2021	CUSHMAN & WAKEFIELD	-3,600.00
52978	12/31/2021	DELL MARKETING	-22,346.00
52979	12/31/2021	DIAZ, TIFFANY	-203.85
52980	12/31/2021	ELKINS, LADONNA	-459.00
52981	12/31/2021	MONA LISA MOVING CO	-461.62
52982	12/31/2021	NICKELL, CHRISTOPHER	-1,120.00
52983	12/31/2021	PERDUE, BRANDON, FIELDER, COLLINS & MOTT	-500.00
52984	12/31/2021	PLANO OFFICE SUPPLY	-394.50
52985	12/31/2021	SAUNDERS & WALSH, PLLC	-60,899.31
52986	12/31/2021	SHI GOVERNMENT SOLUTIONS	-2,325.00
52987	12/31/2021	SOCIETY FOR HUMAN RESOURCE MGT	-219.00
52988	12/31/2021	STAPLES BUSINESS CREDIT	-91.36
52989	12/31/2021	VARIVERGE LLC	-786.47

Dec 21

**-652,484.73**

**F.**

**FINANCIAL  
REPORTS**

**December 2021**

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Assets, Liabilities And Fund Balance - Cash Basis**  
**December 31, 2021**

**ASSETS**

**CURRENT ASSETS**

American National Bank -Oper	\$ 22,303,543.44
American National Bank -ARB	8,786.99
Petty Cash - Admin	100.00
Petty Cash - Mapping	50.00
Prepaid Expenses	<u>84,000.00</u>

**TOTAL CURRENT ASSETS** **\$ 22,396,480.43**

**PROPERTY AND EQUIPMENT**

Furniture and Equipment-Assets	629,608.79
Telephone Equipment-Assets	215,174.23
Computer Equipment-Assets	895,816.01
Computer Software-Assets	651,788.39
Building-Assets	7,481,413.28
Land-Assets	<u>1,387,232.00</u>

**Total Property And Equipment** **11,261,032.70**  
Less Accumulated Depreciation (4,454,961.80)

**NET PROPERTY AND EQUIPMENT** **6,806,070.90**

**OTHER ASSETS**

Net Pension Asset	2,685,509.00
Deferred Resource Outflows	<u>2,000,344.00</u>

**TOTAL OTHER ASSETS** **4,685,853.00**

**TOTAL ASSETS** **\$ 33,888,404.33**

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Assets, Liabilities And Fund Balance - Cash Basis**  
**December 31, 2021**

**LIABILITIES AND FUND BALANCE**

**CURRENT LIABILITIES**

All Current Liabilities	\$ 7,112,578.83
Cobra Payable	264.24
Retiree Payable	<u>1,753.68</u>

**TOTAL CURRENT LIABILITIES** **\$ 7,114,596.75**

**LONG-TERM LIABILITIES**

Deferred Resources Inflows	<u>1,080,231.00</u>
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**TOTAL LONG-TERM LIABILITIES** **1,080,231.00**

**TOTAL LIABILITIES** **8,194,827.75**

**FUND BALANCE**

Fund Balance(CashBasisRelated)	(1,377,435.47)
Fund Balance-Designated	15,325,858.17
Fund Balance-Undesignated	4,258.00
Fund Bal-Cap Assets Less Debt	7,046,917.00
Year To Date Increase or Decrease	<u>4,693,978.88</u>

**TOTAL DESIGNATED / UNDESIGNATED FUND BALANCE** **25,693,576.58**

**TOTAL LIABILITIES AND FUND BALANCE** **\$ 33,888,404.33**

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Revenue, Expenses And Change In Fund Balance - Cash Basis**  
**1 And 12 Months Ended December 31, 2021**

	<b>2021 Budget</b>	<b>1 month ended Dec 31, 2021</b>	<b>Year to date ended Dec 31, 2021</b>	<b>% of Budget</b>
<b>REVENUE</b>				
Entity Support Revenue	\$ 21,759,400.00	\$ (1,149,799.00)	\$ 23,132,690.25	106.31 %
Interest-Bank Accts/Investments	0.00	13,696.24	138,287.72	
BPP Rendition Penalty Revenue	0.00	0.00	74,759.05	
Misc Revenue	0.00	488.00	5,823.04	
<b>TOTAL REVENUE</b>	<b>21,759,400.00</b>	<b>(1,135,614.76)</b>	<b>23,351,560.06</b>	<b>107.32 %</b>
<b>OPERATING EXPENSES</b>				
Salaries Full Time	10,742,400.00	1,079,639.23	8,765,316.14	81.60 %
Salaries Part Time/Temp	167,600.00	0.00	45,100.25	26.91 %
Overtime	114,794.00	1,241.50	98,160.12	85.51 %
Auto Allowance	768,000.00	71,077.97	722,749.17	94.11 %
Worker's Compensation	40,000.00	3,532.00	38,350.08	95.88 %
Employee Group Insurance	2,515,000.00	125,000.62	1,607,529.58	63.92 %
FICA Tax	159,000.00	16,346.26	142,638.46	89.71 %
Employee Retirement	1,425,100.00	122,351.17	1,125,408.90	78.97 %
Retirement-UAAL Buy Down	400,000.00	0.00	400,000.00	100.00 %
Unemployment Compensation	18,000.00	3,074.00	8,058.48	44.77 %
Legal	1,800,000.00	210,554.93	1,647,211.91	91.51 %
Accounting & Audit	16,000.00	250.00	12,800.00	80.00 %
Insurance	51,000.00	4,473.00	50,491.61	99.00 %
Legal Notices & Advertising	37,000.00	0.00	19,123.00	51.68 %
Appraisal Review Board	650,000.00	6,825.00	530,970.06	81.69 %
Telephone, Internet, Data Cloud	350,000.00	17,234.65	154,742.93	44.21 %
Utilities	160,900.00	914.40	77,703.09	48.29 %
Equipment Rent	95,000.00	2,358.47	62,202.29	65.48 %
Equipment Maintenance	45,000.00	752.18	36,282.16	80.63 %
Postage	450,000.00	22,635.50	364,442.81	80.99 %
Aerial Photography	430,000.00	0.00	369,600.00	85.95 %
Supplies	425,000.00	12,911.10	371,100.21	87.32 %
Registration & Dues	45,000.00	3,009.60	25,717.40	57.15 %
Travel & Education	175,000.00	2,415.11	66,120.73	37.78 %
Board of Directors Meetings	7,000.00	161.40	844.78	12.07 %
Miscellaneous Expenses	500.00	0.00	0.00	0.00 %
Contract Services	99,319.00	3,318.99	98,072.49	98.74 %
Professional Services	170,000.00	43,375.42	156,076.69	91.81 %
Security	165,000.00	9,925.00	95,747.50	58.03 %
Building Maintenance	156,787.00	12,829.25	148,977.82	95.02 %
Building Repair/Modifications	170,000.00	(3,872.81)	155,457.43	91.45 %
Depreciation	0.00	21,680.59	260,167.08	
Furniture & Equipment	65,000.00	18,058.22	53,605.03	82.47 %
ComputerHardware&Computer Equip	250,000.00	91,543.26	230,642.09	92.26 %
ComputerSoftwareLicens&Subscrip	600,000.00	15,160.69	482,407.27	80.40 %
Computer Hardware Maintenance	42,000.00	0.00	2,901.00	6.91 %
Software Development	300,000.00	0.00	0.00	0.00 %
Computer Software Maintenance	325,000.00	19,005.16	230,862.62	71.03 %
Contingency	90,100.00	0.00	0.00	0.00 %
<b>TOTAL OPERATING EXPENSES</b>	<b>23,520,500.00</b>	<b>1,937,781.86</b>	<b>18,657,581.18</b>	<b>79.32 %</b>
<b>EXCESS(DEFICIT) INCOME &amp; EXPENSES</b>	<b>\$ (1,761,100.00)</b>	<b>\$ (3,073,396.62)</b>	<b>4,693,978.88</b>	<b>(266.54)%</b>
<b>BEGINNING FUND BALANCE</b>			<b>20,999,597.70</b>	
<b>ENDING FUND BALANCE</b>			<b>\$ 25,693,576.58</b>	

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Supplemental Schedules**  
**December 31, 2021**

**ACCUMULATED DEPRECIATION**

Accum Depr-Furniture & Equip	\$ (563,543.92)
Accum Depr-Telephone Equipment	(195,766.74)
Accum Depr-Computer Equipment	(826,507.66)
Accum Depr-Computer Software	(621,151.39)
Accum Depr-Building	<u>(2,247,992.09)</u>

<b>TOTAL ACCUMULATED DEPRECIATION</b>	<b><u>\$ (4,454,961.80)</u></b>
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**OTHER CURRENT LIABILITIES**

Accounts Payable	\$ 89.00
Credit Card-TIB Mastercard	1,838.37
Credit Card-Home Depot	232.81
Employee Savings	7,736.24
Accrued Wages Payable	172,721.26
Retiree Payable	1,753.68
Cobra Payable	264.24
Retirement Payable	188,232.57
Compensated Absences Payable	423,076.08
Unearned Revenue-Entities	<u>6,318,652.50</u>

<b>TOTAL OTHER CURRENT LIABILITIES</b>	<b><u>\$ 7,114,596.75</u></b>
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**G.**

## **FUNDED ITEMS**

***BOARD OFFICER'S SIGNATURE REQUIRED***



# Collin Central Appraisal District

Date: 1/20/2022

To: Board of Directors

From: Bo Daffin, Chief Appraiser *Bo Daffin*

Subject: Budgeted expenditures requiring signature of Board Officer

ITEM	DESCRIPTION	\$ AMOUNT
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As of this date there are no budgeted expenditures that require the signature of a Board Officer.



**H.**  
**LARGE EXPENDITURES**  
**(GREATER THAN \$25,000)**

***APPROVED BY CHIEF APPRAISER, AS  
AUTHORIZED BY BOARD POLICY***

**December 2021**



# Collin Central Appraisal District

Date: 1/20/2022

To: Board of Directors

From: Bo Daffin, Chief Appraiser *Bo Daffin*

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser  
For: December 2021

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	12/2/21	ADP (payroll and taxes)	\$345,448.64
ACH	12/8/21	ADP (sick pay buy back and taxes)	\$101,468.07
ACH	12/15/21	TCDRS	\$134,054.17
ACH	12/16/21	ADP (payroll and taxes)	\$314,941.61
ACH	12/29/21	ADP (payroll and taxes)	\$322,354.46
CK #52795	12/6/21	Blue Cross and Blue Shield	\$90,697.45
CK #52831	12/17/21	Saunders & Walsh	\$104,005.62
CK #52921	12/23/21	Saunders & Walsh	\$39,300.00

# **I.**

## **Conflict of Interest**

### **Filing Forms and CCAD Policy**



# Collin Central Appraisal District

## **POLICY NUMBER: 118**

## **POLICY NAME: CONFLICT OF INTEREST**

It is the policy of the Board of Directors of the Collin Central Appraisal District (CCAD), due to the competitive nature of public purchasing and the expenditure of significant tax dollars, to require that ethical standards of conduct be followed in the District's purchasing practices and that such conduct is the foundation of all District functions. In addition to the specific requirements of Chapters 171 and 176 of the Texas Local Government Code for the officers of the District, this policy also establishes a general standard of disclosure, for all employees, where a personal business interest and/or financial interest and/or other interest or relationship creates a potential conflict of interest.

## **LOCAL GOVERNMENT CODE, CHAPTER 176 DISCLOSURE**

The intent of this policy section is to ensure that the Board, Chief Appraiser, and certain District staff, to which the disclosure requirements have been extended to include, comply with requirements of Chapter 176, Local Government Code.

### **1. MEMBERS OF THE BOARD OF DIRECTORS AND CHIEF APPRAISER (i.e. District's officers and district's local public officials):**

District officers shall file the disclosure statements required by Chapter 176, Local Government Code, in circumstances where Chapter 176 requires the filing of such a statement.

## **2. EXTENDING APPLICATION OF CHAPTER 176 TO CERTAIN STAFF:**

The Deputy Chief Appraiser and Purchasing Agent(s) as authorized under the *District's Purchasing Policy #117*, shall file the disclosure statements required by Chapter 176, Local Government Code, in circumstances where Chapter 176 requires the filing of such a statement.

## **3. CHAPTER 176 REQUIREMENT:**

With exceptions, Chapter 176 requires a District officer, and other district staff to which this policy extends the requirement, to file a disclosure statement (form CIS – conflict of interest statement) when the District considers or makes a contract with a person/business and

- the officer or the officer's family member has received at least \$2,500 in income (other than dividends) from the employment or other business relationship with the vendor in the previous 12 months; or
- the vendor has given the officer or the officer's family members gift(s) with a total value of more than \$250 in the previous 12 months.

Chapter 176 does not require the officer or other District staff to which the policy extends to file a disclosure statement covering gifts from family members, political contributions, or food, lodging, or entertainment accepted as a gift. A disclosure statement must be filed within 7 days of the date the officer or other District staff to which the policy extends becomes aware that a statement should be filed with respect to an existing or prospective vendor.

In any circumstance that would require an officer or other District staff to which the policy extends to file a disclosure statement (Form CIS), the vendor must also file a conflict of interest questionnaire (Form CIQ) with the District. This questionnaire must be filed by the 7<sup>th</sup> business day after the vendor begins contract negotiations with CCAD, submits an application, bid, RFP request, or similar document related to a

potential conflict with CCAD. It must also be filed by the 7<sup>th</sup> business day after the vendor becomes aware of a business relationship or gift that triggers the requirement for a disclosure statement.

#### **4. PUBLICATION OF FILED DISCLOSURE STATEMENTS OR QUESTIONNAIRES REQUIRED BY CHAPTER 176:**

The chief appraiser shall ensure that the District complies with Chapter 176 in publishing any filed statements or questionnaires on the District's website in the manner required by Chapter 176.

#### **5. CUSTODIAN OF FILED DISCLOSURE FORMS:**

The District's records management officer (RMO) shall serve as the custodian of filed disclosure forms.

#### **6. TEXAS ETHICS COMMISSION FORMS:**

Texas Ethic Commission forms CIQ and CIS are adopted by reference.

### **LOCAL GOVERNMENT CODE, CHAPTER 171 AFFIDAVIT, ABSTENTION FROM VOTING AND VOTING ON BUDGET**

The intent of this policy section is to ensure that the Board and Chief Appraiser comply with requirements of Chapter 171, Local Government Code.

#### **7. MEMBERS OF THE BOARD OF DIRECTORS AND CHIEF APPRAISER (i.e. District's officers and District's local public officials):**

District officers shall file the affidavit required by Chapter 171, Local Government Code, in circumstances where Chapter 171 requires the filing of such an affidavit.

## 8. BUSINESS ENTITY DEFINITION:

171.001:

"Business entity" means a sole proprietorship, partnership, firm, corporation, holding company, joint-stock company, receivership, trust, or any other entity recognized by law.

## 9. SUBSTANTIAL INTEREST IN BUSINESS ENTITY DEFINITION:

"171.002:

(a) For purposes of this chapter, a person has a substantial interest in a business entity if:

(1) the person owns 10 percent or more of the voting stock or shares of the business entity or owns either 10 percent or more or \$15,000 or more of the fair market value of the business entity; or

(2) funds received by the person from the business entity exceed 10 percent of the person's gross income for the previous year.

(b) A person has a substantial interest in real property if the interest is an equitable or legal ownership with a fair market value of \$2,500 or more.

(c) A local public official is considered to have a substantial interest under this section if a person related to the official in the first degree by consanguinity or affinity, as determined under Chapter 573, Government Code, has a substantial interest under this section."

### Relationship of Close Family Members

A District officer is considered to have the same interest in a business entity and/or real estate that his close relatives have in that business entity and/or real estate. As defined in Chapter 573, related in the **first degree** by consanguinity (blood) or affinity (marriage) includes the District officer's spouse, father, father-in-law, mother, mother-in-law, daughter, daughter-in-law, son and son-in-law.

**10. DISTRICT'S OFFICERS (i.e. local public officials)  
REQUIREMENT TO FILE AFFIDAVIT AND ABSTAIN FROM  
VOTE:**

"If a local public official has a substantial interest in a business entity or in real property, the official shall file, before a vote or decision on any matter involving the business entity or the real property, an affidavit stating the nature and extent of the interest and shall abstain from further participation in the matter", pursuant to Chapter 171.004.

**11. VOTING ON DISTRICT'S ANNUAL BUDGET:**

"The governing body of a governmental entity shall take a separate vote on any budget item specifically dedicated to a contract with a business entity in which a member of the governing body has a substantial interest", pursuant to Chapter 171.005.

**12. CUSTODIAN OF FILED AFFIDAVITS:**

The District's administrative staff, assigned to act as the recorder at the Board of Director's meetings and assigned to act in a clerical capacity in the creation/maintenance of the Board's meeting minutes, shall maintain a copy of filed affidavits in the official Board meeting minutes file.

**DISCLOSURE REQUIREMENTS FOR ALL EMPLOYEES**

The intent of this policy section is to ensure that all employees properly discharge their assigned duties and responsibilities in the best interest of the District.



### **13. GENERAL DISCLOSURE:**

An employee shall disclose to his or her immediate supervisor a personal financial interest, a business interest, or any other obligation or relationship that in any way creates a potential conflict of interest with the proper discharge of assigned duties and responsibilities or that creates a potential conflict of interest with the best interest of the District.

### **14. SPECIFIC DISCLOSURE:**

#### Chief Appraiser:

The Chief Appraiser shall file an affidavit with the Board Chairman disclosing a substantial interest, as defined by the Local Government Code 171.002, in any business or real property that the Chief Appraiser or any of his or her relatives in the first degree may have. The affidavit will be maintained in the chief appraiser's personnel file.

#### Licensed Fee Appraisers, Real Estate Brokers, Real Estate Agents, Property Tax Consultants and other Real Estate and/or Business License Holders:

Any employee that holds, or is a candidate for, a license or designation related to the appraisal, inspection, construction, listing, sale, lease, management or consulting of real estate and/or business personal property, not required by the Texas Property Tax Code to perform his or her job duties at the District, shall file an affidavit with the Chief Appraiser disclosing the license or designation. The affidavit will be maintained in the employee's personnel file.

### **15. OUTSIDE EMPLOYMENT:**

#### **a. CCAD '*Personnel Policies & Practices Handbook*'**

- i. Included by reference, the same as being fully copied and include herein.

**b. SPECIFIC PROHIBITION, UNDER THIS POLICY,  
REGARDING OUTSIDE EMPLOYMENT:**

- i. This policy and the District's outside employment policy in its personnel handbook are intended to be read in unison. This policy strengthens the mandate against conflicts of interest, by the outright prohibition of employment in sectors/areas of employment that can clearly be, or could easily be perceived as conflicts, based on the nature of CCAD's primary role in the appraisal/property tax process.
- ii. No employee, including the chief appraiser, fulltime staff, part-time staff and temporary staff shall engage in any phase of fee appraisal, inspection, listing, sale, lease, management or consulting of real estate and/or business personal property. This prohibition includes employment by others and self-employment. The holder of a license or designation shall not sponsor, employ or hang the license or designation of anyone with and/or under their license or designation. With emphasis added, the prohibitions in this policy regarding outside employment include all employment activities in and out of Collin Central Appraisal District geographic boundaries.
- iii. Single exception to ii. An employee that is a licensed real estate broker or agent may represent them self, strictly limited as follows:
  1. Real estate being purchased, listed, sold or rented is not located within Collin CAD boundary.
  2. Activity is an isolated event that will not negatively affect the performance of the employee as it relates to his or her job at CCAD and does not cause issues in the employee's work schedule at CCAD.
  3. The employee can only represent them self in a personal real estate transaction that is not part of an ongoing real estate investing, marketing,

inspection or management business that the employee is involved in. Such business activity/employment is strictly prohibited by this policy and the aforementioned employment policy in CCAD's *'Personnel, Policies & Practices Handbook'*.

4. The employee shall file an affidavit with his or her immediate supervisor, to be maintained in the employee's personnel file, identifying the property and affirming that the employee's activity complies with the exclusion approved by this subsection iii.

Texas Local Government Code: Chapters 171 & 176

Date Adopted: September 22, 2011

Resolution #: 2011-22

# LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT

**FORM CIS**

(Instructions for completing and filing this form are provided on the next page.)

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

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.

## 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 \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.  
(street) (city) (state) (zip code) (country)

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.  
(month) (year)

\_\_\_\_\_  
Signature of Local Government Officer (Declarant)

## LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT

Section 176.003 of the Local Government Code requires certain local government officers to file this form. A "local government officer" is defined as a member of the governing body of a local governmental entity; a director, superintendent, administrator, president, or other person designated as the executive officer of a local governmental entity; or an agent of a local governmental entity who exercises discretion in the planning, recommending, selecting, or contracting of a vendor. This form is required to be filed with the records administrator of the local governmental entity not later than 5 p.m. on the seventh business day after the date on which the officer becomes aware of the facts that require the filing of this statement.

A local government officer commits an offense if the officer knowingly violates Section 176.003, Local Government Code. An offense under this section is a misdemeanor.

Refer to chapter 176 of the Local Government Code for detailed information regarding the requirement to file this form.

### INSTRUCTIONS FOR COMPLETING THIS FORM

*The following numbers correspond to the numbered boxes on the other side.*

- 1. Name of Local Government Officer.** Enter the name of the local government officer filing this statement.
- 2. Office Held.** Enter the name of the office held by the local government officer filing this statement.
- 3. Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code.** Enter the name of the vendor described by Section 176.001(7), Local Government Code, if the vendor: a) has an employment or other business relationship with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code; b) has given to the local government officer or a family member of the officer one or more gifts as described by Section 176.003(a)(2)(B), Local Government Code; or c) has a family relationship with the local government officer as defined by Section 176.001(2-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.** Describe the nature and extent of the employment or other business relationship the vendor has with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code, and each family relationship the vendor has with the local government officer as defined by Section 176.001(2-a), Local Government Code.
- 5. List gifts accepted, if the aggregate value of the gifts accepted from vendor named in item 3 exceeds \$100.** List gifts accepted during the 12-month period (described by Section 176.003(a)(2)(B), Local Government Code) by the local government officer or family member of the officer from the vendor named in item 3 that in the aggregate exceed \$100 in value.
- 6. Signature.** Signature of local government officer. Complete this section after you finish the rest of this report. You have the option to either: (1) take the completed form to a notary public where you will sign above the first line that says "Signature of Local Government Officer" (an electronic signature is not acceptable) and your signature will be notarized, or (2) sign above both lines that say "Signature of Local Government Officer (Declarant)" (an electronic signature is not acceptable), and fill out the unsworn declaration section.

---

**Local Government Code § 176.001(2-a):** "Family relationship" means a relationship between a person and another person within the third degree by consanguinity or the second degree by affinity, as those terms are defined by Subchapter B, Chapter 573, Government Code.

**Local Government Code § 176.003(a)(2)(A):**

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

\*\*\*

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

# CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

**This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.**

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

## OFFICE USE ONLY

Date Received

**1 Name of vendor who has a business relationship with local governmental entity.**

**2** ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3 Name of local government officer about whom the information is being disclosed.**

\_\_\_\_\_  
Name of Officer

**4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

**5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

**6** ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

## **CONFLICT OF INTEREST QUESTIONNAIRE**

### **For vendor doing business with local governmental entity**

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

\*\*\*

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;  
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

**J.**

**Chief Appraiser's  
Property Owned Report**





# Collin Central Appraisal District

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## **CHIEF APPRAISER'S AFFIDAVIT REQUIRED BY BOARD POLICY #118**

### **THE STATE OF TEXAS COUNTY OF COLLIN**

I, Eugene “Bo” Daffin, as chief appraiser of the Collin Central Appraisal District, make this affidavit and hereby under oath state the following:

I have a substantial ownership interest in a business entity or real property, as defined by the Local Government Code 171.002, that **does not** require an affidavit under Chapter 171, since the business interest or real estate **is not** the subject of discussion, vote or decision of the Collin Central Appraisal District. What constitutes a “substantial interest,” “business entity,” and “real property” are terms defined in chapter 171 of the Texas Local Government Code.

This affidavit is filed in accordance with Board Policy #118, section 14 to provide full disclosure and transparency, even above the requirements of chapter 171 Texas Local Government Code, regarding any business entity or real property that the chief appraiser, or chief appraiser’s close relatives have that are subject to appraisal for property tax purposes in Collin county.

I affirm that the business entity or real property referred to above is:

**A single family residence owned by Eugene and Linda Daffin.  
2262 E. Brown St., Wylie, TX.  
Legal: Meadow Heights Estates, Blk B, Lot 2, 1.846 acres.  
Property ID 1564612**

**A single family residence (homestead), owned by Eugene and Linda Daffin  
673 Crockett Drive, Lavon, TX.  
Legal: Grand Heritage Club (CLA), Blk A, Lot 78**

The nature of my substantial interest in this business entity or real property is:

- ☐ an ownership interest of 10 percent or more of the voting stock or shares of the business entity;
- ☐ an ownership interest of 10 percent or \$15,000 or more of the fair market value of the business entity;
- ☐ funds received from the business entity exceed 10 percent of \_\_\_\_\_ (my, his, her) gross income For the previous year;
- ☒ real property is involved and I have an equitable or legal ownership with a fair market value of at least \$2500;
- ☐ a person who is related to me within the first degree of consanguinity (blood) or affinity (marriage) has a substantial interest in the involved real property or business entity. I have also checked which of the above types of interests my relative has in the item.

Upon the filing of this affidavit with the Collin Central Appraisal District, I affirm that I shall replace this filing with the appropriate affidavit required by chapter 171 and abstain from any future discussion, vote, or decision involving this business entity or real property whatsoever, should an affidavit under chapter 171 become necessary.

Signed this the 18<sup>th</sup> day of January, 2022.

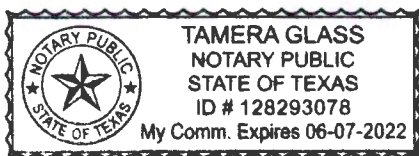
Bo Daffin  
Signature of Chief Appraiser

BEFORE ME, the undersigned authority, this day personally appeared

Bo Daffin  
(Name of affiant) and by oath swore that the facts herein above

stated are true and correct to the best of his/her knowledge or belief.

Sworn to and subscribed before me on this the 18 day of January, 2022.



Tamera Glass

Notary Public in and for the State of Texas

My commission expires: 06/07/2022



# Collin Central Appraisal District

---

## **CHIEF APPRAISER'S AFFIDAVIT REQUIRED BY BOARD POLICY #118**

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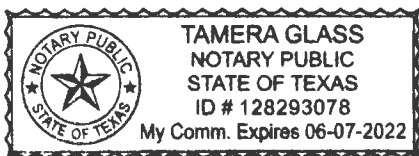
Bo Daffin  
Signature of Chief Appraiser

BEFORE ME, the undersigned authority, this day personally appeared

Bo Daffin  
(Name of affiant) and by oath swore that the facts herein above

stated are true and correct to the best of his/her knowledge or belief.

Sworn to and subscribed before me on this the 18 day of January, 2022.



Tamera Glass

Notary Public in and for the State of Texas

My commission expires: 06/07/2022

**K.**

**Hours of Operations  
Customer Service Lobby**



# Collin Central Appraisal District

January 20, 2022

TO: Board of Directors

FROM: Bo Daffin, Chief Appraiser *Bo Daffin*

RE: Temporary change to hours of public operation

It is imperative that I advise you upfront that I do not prefer the mode of operation that I'm requesting your authorization to implement.

## Summary of Tax Code changes:

1. SB63, as passed in the 2021 legislative session, placed two very difficult deadlines on Appraisal Districts regarding action on exemption applications.
  - a. If additional information is needed by the District regarding an application, the owner must be notified within 30 days of receipt of their application.
    - i. It appears that the only course of action, should we find that we need additional information after the 30-day period, is to deny the application and proceed through the protest process to seek the additional information.
  - b. Action to deny or approve application must be done within 90 days of receipt of the application.
    - i. If an application is denied, the chief appraiser must provide a notice that "states and fully explains each reason the chief appraiser denied or modified the application."

## Summary of Impacts:

2. These Tax Code changes impact multiple application types, including homestead, senior citizen, disabled persons, ag-use and 11.35 natural disasters.
  - a. It should be noted that the change will impact us regardless of the application type, but by far the most pressing issue will be with homestead and senior citizen applications. The volume of homestead applications and the concentrated time frame of their receipt will make it almost impossible to meet the new processing deadlines.
  - b. If we deny an exemption and a protest is heard by the ARB, only the reasons stated in the timely denial can be introduced by the District as evidence at the hearing.

### **3. Summary actions to date:**

- a. We are having great difficulty in filling vacant positions; therefore, we are utilizing temporary staff through a personnel firm. We continue to advertise and interview potential candidates, but on many occasions they cancel the interview or “no show”.
- b. We are utilizing staff from other departments to assist with processing but with the workload on every department it is difficult to borrow staff for extended periods.
- c. We are utilizing overtime scheduling.
- d. When possible we pull some staff members from the phones and counter assistance, but the volume of both makes this option less available than is needed.
- e. The new Customer Service management team, Customer Service staff, with assistance from I.T. management, are reviewing all processing procedures.
- f. We have installed, completed initial configuration and initial testing of an online applications module for homestead and senior citizen exemptions. We are planning to begin public use of the module after we certify the 2022 Appraisal Roll and begin our 2023 appraisal project.
- g. As required by the Tax Code, we have mailed 47,000 applications where the owner of the property could be eligible for the homestead and/or senior citizen exemption. A volume mailing will mean thousands of applications within a short period of time.

### **4. My request to the Board:**

- a. Effective February 1, 2021, allow us to close public access to the office at 4:00 p.m.
  - i. Our work hours would not be altered.
- b. When the doors are open to the public for the full workday schedule, it is difficult for staff to focus on processing the large volume of applications already received.
- c. An hour of uninterrupted processing by the entire Customer Service team will allow us to process more exemptions to better meet the new deadlines.



**5. Likely downside to recommended action:**

- a. The public is accustomed to our current 5:00 p.m. closing schedule and some, or maybe many, will be upset if they cannot gain in-person access to Customer Service between 4:00 p.m. and 5:00 p.m.
  - i. Applications or other documents are considered timely if they are mailed or placed in our door side drop box by midnight of the deadline day.
- b. The public, even if we explain the reasons for closing the lobby an hour early, may perceive that a governmental office supported by tax dollars has “shortened its workday”. This certainly would not be true, but perception is often stronger than the reality of what is occurring.
- c. Our lobby closing time would not match the County Tax Office. If they refer a taxpayer to us during the last hour of the day our lobby would not be open for the taxpayer to come directly to the District from the Tax Office.
  - i. We would be available, as usual, to assist the Tax Office telephonically or by email.



# REPORTS

REPORTS

REPORTS



# Collin Central Appraisal District Taxpayer Liaison Officer

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## Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly Status Report

DATE: January 27, 2022

As of this date there have been no new written complaints filed to be brought before the Board of Directors.



# Collin Central Appraisal District Taxpayer Liaison Officer

Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly Status Report

DATE: January 27, 2022

There were no new complaints received from TDLR during the 4th quarter of 2021.

A letter was mailed to Chief Appraiser, Bo Daffin, on November 15, 2021, regarding no change to the status of the complaint that was filed by Justin Jinright and presented to the Board of Directors at the October 8, 2020 meeting. At this time the case is open and under review. Letters will continue to be mailed quarterly to the Chief Appraiser until the case is resolved.

Regards,

Chris Nickell  
Taxpayer Liaison Officer

## COLLIN CENTRAL APPRAISAL DISTRICT INVESTMENT REPORT

### CERTIFICATES OF DEPOSIT DETAIL (ALL CDs HAVE MATURED IN 2021)

BANK	CD #	OPEN DATE	TERM (DAYS)	MATURITY DATE	AMOUNT DEPOSITED	INTEREST RATE	INTEREST INCOME	YTD CD INTEREST INCOME
Prosperity	5970001022	6/2/2020	365	06/03/21	\$ 500,000.00	0.60%	\$ 3,003.58	\$ 3,003.58

\*US Treasury rate as of 12/31/21 was .19% for 26 weeks, and .39% for 52 weeks.  
 \*\* The Interest Income is reported on a Cash Basis on this report and on an Accrual Basis on the audit.

### American National Bank Checking: .75% interest

MONTH	MONTHLY INTEREST INCOME	YTD INTEREST INCOME
JANUARY	\$ 9,877.26	\$ 9,877.26
FEBRUARY	\$ 8,948.64	\$ 18,825.90
MARCH	\$ 10,829.57	\$ 29,655.47
APRIL	\$ 11,367.48	\$ 41,022.95
MAY	\$ 10,033.62	\$ 51,056.57
JUNE	\$ 11,674.17	\$ 62,730.74
JULY	\$ 12,786.88	\$ 75,517.62
AUGUST	\$ 11,546.51	\$ 87,064.13
SEPTEMBER	\$ 12,323.71	\$ 99,387.84
OCTOBER	\$ 12,309.01	\$ 111,696.85
NOVEMBER	\$ 11,356.07	\$ 123,052.92
DECEMBER	\$ 13,696.24	\$ 136,749.16

### Prosperity Checking: .15% interest

MONTH	MONTHLY INTEREST INCOME	YTD INTEREST INCOME
JANUARY	\$ 1.88	\$ 1.88
FEBRUARY	\$ 1.70	\$ 3.58
MARCH	\$ 1.88	\$ 5.46
APRIL	\$ 1.82	\$ 7.28
MAY	\$ 1.87	\$ 9.15
JUNE	\$ 27.84	\$ 36.99
JULY	\$ -	\$ 36.99
AUGUST	\$ -	\$ 36.99
SEPTEMBER	\$ -	\$ 36.99
OCTOBER	\$ -	\$ 36.99
NOVEMBER	\$ -	\$ 36.99
DECEMBER	\$ -	\$ 36.99

### SUMMARY OF TOTALS:

<b>TOTAL YEAR-TO-DATE INVESTMENT INCOME</b>	<b>\$ 139,789.73</b>
<b>AMERICAN NATIONAL BANK TOTALS AS OF 12/31/21:</b>	
Operating and ARB account totals	\$ 22,471,684.88
CD account totals (including accrued interest)	\$ -
Total Funds Available	\$ 22,471,684.88
Required Collateral Balance **	\$ 22,888,335.43
Total Collateral Provided by ANB	\$ 25,265,154.88
<b>PROSPERITY BANK AS OF 6/30/21, all accounts closed:</b>	
Operating account total	\$ -
CD account totals (including accrued interest)	\$ -
Total Funds Available	\$ -
Required Collateral Balance **	\$ -
Total Collateral Provided by PB	\$ -

\*\* (Total Funds Available - \$250,000 FDIC per bank) x 103% = Collateralized Amount

I certify that I have reviewed this quarterly investment report, as of and for the period stated above, that is being submitted for acceptance by the Board of Directors of the Collin Central Appraisal District. To the best of my knowledge and belief, in all material respects the Investment Report was prepared in accordance with the guidelines presented in Government Code, Chapter 2256 (Public Funds Investment Act) and the Investment Policy adopted by the Board of Directors of the Collin Central Appraisal District. There have been no material misrepresentations in the report by the inclusion or exclusion of information. An effective system of internal controls has been established to ensure that material financial information is recorded in the accounting system and reported in this report. There were no material weaknesses in internal control during this period covered by the report or thereafter.

  
 Toni Bryan  
 Director of Operations

12/31/2021  
 DATE

# Pledge Security Listing

December 31, 2021

ID	CUSIP	Description	Safekeeping Location	Safekeeping Receipt	Coupon	Maturity Date	Call Date	Moody	S&P	Fitch	ASC 320	Face Amount	Current Par	Current Book Value	Market Value	Gain(Loss)
COLLIN CAD																
1821	227381RY8	CROSBY TX ISD	FHLB - Dalla	1021001537	4.00	02/15/2024		AAA	AAA	AAA	AFS	1,495,000	1,495,000.00	1,563,477.13	1,598,158.17	34,681.04
1834	932493FR5	WALLER TX ISD	FHLB - Dalla	1021001556	4.00	02/15/2026	02/15/2025	AAA	AAA	AAA	AFS	1,755,000	1,755,000.00	1,859,599.95	1,920,308.50	60,708.55
2000	116079GB4	BROWNSWOOD TX ISD	FHLB - Dalla	1021001774	4.00	08/15/2028	02/15/2027	AAA	AAA	AAA	AFS	1,425,000	1,425,000.00	1,542,829.88	1,620,997.51	78,167.63
2047	31418CSD7	FN #MA3215	FHLB - Dalla	1021001838	3.50	11/01/2037		AAA	AA+	AAA	AFS	3,000,000	806,756.19	832,456.62	850,809.19	18,352.57
2141	38376MRL3	GNR 2017-36 QD	FHLB - Dalla	954091703	2.50	10/20/2045		AAA	AA+	AAA	AFS	5,000,000	12,007.46	11,995.31	12,008.32	13.00
2144	3137FN3Q1	FHR 4903 A9	FHLB - Dalla	963791638	2.00	08/25/2049		AAA	AA+	AAA	AFS	3,100,000	1,981,951.03	1,940,136.71	1,994,319.23	54,182.52
2147	38381WV96	GNR 2019-92 DB	FHLB - Dalla	968858208	2.25	01/20/2048		AAA	AA+	AAA	AFS	8,000,000	1,407,316.50	1,406,115.94	1,432,209.98	26,094.04
2166	3140HRC92	FN BL0095	FHLB - Dalla	1013127792	3.87	10/01/2030		AAA	AA+	AAA	AFS	1,900,000	1,867,252.95	2,034,347.98	2,018,821.89	(15,526.09)
2177	726719HX8	PLAINVIEW TX	FHLB - Dalla	1093348715	4.00	03/01/2030	03/01/2028	NR	AA-	NR	AFS	600,000	600,000.00	688,005.54	690,909.37	2,903.83
2179	726719HV2	PLAINVIEW TX	FHLB - Dalla	1093332089	4.00	03/01/2028	03/01/2028	NR	AA-	NR	AFS	555,000	555,000.00	638,878.72	652,528.87	13,650.15
2283	382604Z90	GOOSE CREEK TX CISD TAX	FHLB - Dalla	1180748270	2.00	02/15/2030	02/15/2030	AAA	AAA	AAA	AFS	3,000,000	3,000,000.00	3,000,000.00	3,005,970.00	5,970.00
2379	572682SD5	MARSHALL TX ISD TAXABLE	FHLB - Dalla	21166096199	1.74	02/15/2033	08/15/2030	AAA	AAA	AAA	AFS	1,000,000	1,000,000.00	1,000,000.00	974,770.00	(25,230.00)
2415	504102U36	LA PORTE TX ISD TAXABLE	FHLB - Dalla	21166096275	1.50	02/15/2032	08/15/2030	AAA	AAA	AAA	AFS	1,170,000	1,170,000.00	1,170,000.00	1,129,482.90	(40,517.10)
2482	582188LD8	MCLENNAN CNTY TX JNR CL	FHLB - Dalla	21242077660	4.00	08/15/2030		NR	AA	NR	AFS	1,365,000	1,365,000.00	1,589,180.27	1,601,131.35	11,951.08
2546	349426EL6	FORT WORTH TX TAXABLE	FHLB - Dalla	21333073349	1.94	03/01/2033	03/01/2030	NR	AA	AA	AFS	1,690,000	1,690,000.00	1,690,000.00	1,696,489.60	6,489.60
2593	349461CJ0	FORT WORTH TX ISD TAXAB	FHLB - Dalla	21340100103	2.59	02/15/2039	02/15/2031	AAA	AAA	NR	AFS	4,000,000	4,000,000.00	4,000,000.00	4,066,240.00	66,240.00
Total for COLLIN CAD												39,055,000	24,130,284.13	24,967,024.05	25,265,154.88	298,130.82



## HOLDINGS BY THIRD PARTY

STATEMENT OF ACCOUNT WITH:

Federal Home Loan Bank of Dallas  
8500 Freeport Parkway South  
Suite 100  
Irving, TX - 75063-2547

FHFA ID: 10993

COLLIN CENTRAL APPRAISAL  
DISTRICT  
250 ELDORADO PKWY  
MCKINNEY TX 75069

Pledge Code: 23931

Stmnt As Of: 12/31/2021 4:04:05 AM

Date Priced: 01/04/2022

CUSIP	Issue Description	Pledge Date	Par	Current Face	Rate	Maturity Date	Market Value
116079GB4	BROWNSBORO TEX INDPT SCH DIST ULTD	01/29/2020	1,425,000	1,425,000.00	4.00	08/15/2028	1,644,891.75
227381RY8	CROSBY TEX INDPT SCH DIST ULTD TAX	09/13/2019	1,495,000	1,495,000.00	4.00	02/15/2024	1,606,676.50
3137FN3Q1	FEDERAL HOME LN MTG CORP	09/27/2021	3,100,000	1,981,951.02	2.00	07/25/2049	1,997,516.87
3140HRC92	FEDERAL NATL MTG ASS GTD MTG	09/27/2021	1,900,000	1,867,252.95	3.87	10/01/2030	2,125,942.17
31418CSD7	FEDERAL NAT MTG ASSN	09/27/2021	3,000,000	806,756.19	3.50	12/01/2037	859,534.18
349426EL6	FORT WORTH TEX TAXABLE GEN PURP	11/29/2021	1,690,000	1,690,000.00	1.94	03/01/2033	1,691,115.40
349461CJ0	FORT WORTH TEX INDPT SCH DIST	12/06/2021	4,000,000	4,000,000.00	2.59	02/15/2039	4,000,040.00
382604Z90	GOOSE CREEK TEX CONS INDPT SCH	12/15/2020	3,000,000	3,000,000.00	2.00	02/15/2033	2,932,050.00
38376MRL3	GOVT NAT MTG ASSN REMIC	10/20/2021	5,000,000	12,007.47	2.50	10/20/2045	12,025.92
38381WV96	GOVT NAT MTG ASSN REMIC	10/20/2021	8,000,000	1,407,316.50	2.25	01/20/2048	1,431,169.25
504102U36	LA PORTE TEX INDPT SCH DIST	06/15/2021	1,170,000	1,170,000.00	1.50	02/15/2032	1,104,398.10
572682SD5	MARSHALL TEX INDPT SCH DIST	06/15/2021	1,000,000	1,000,000.00	1.74	02/15/2033	956,530.00
582188LD8	MC LENNAN CNTY TEX JR COLLEGE DIST	08/30/2021	1,365,000	1,365,000.00	4.00	08/15/2030	1,593,228.00
726719HV2	PLAINVIEW TEX GO REF BDS 2020	06/11/2020	555,000	555,000.00	4.00	03/01/2028	655,377.30
726719HX8	PLAINVIEW TEX GO REF BDS 2020	06/01/2020	600,000	600,000.00	4.00	03/01/2030	699,948.00
932493FR5	WALLER TEX INDPT SCH DIST ULTD TAX	10/10/2019	1,755,000	1,755,000.00	4.00	02/15/2026	1,942,978.05
				<b>Current Face Total:</b>	24,130,284.13	<b>Market Value Total:</b>	25,253,421.49

\* The information included on this statement is based upon settlement date rather than entered date.

FHLB Member Services: 1-844-FHLBANK (345-2265)

Page 30 of 75



**COLLIN CENTRAL APPRAISAL DISTRICT**  
**ACTIVE VENDOR LIST**  
**FOR 4TH QUARTER 2021**

Vendor		Vendor	
1	ADP INC	51	DELL MARKETING
2	ADVANCED TREE & SHRUB CARE	52	DISCOVERY BENEFITS
3	<b>AFFILIATED COMMUNICATIONS (Add'l name)</b>	53	DLT SOLUTIONS LLC
4	AFFILIATED COM-NET, INC.	54	DMNMEDIA
5	AFLAC	55	DSS
6	AIRPAC, INC	56	DSS FIRE INC
7	AMERICAN FIRE PROTECTION GROUP	57	DSS FIREGUARD, INC.
8	AMERICAN HOSPITAL DIRECTORY	58	ELLIOTT ELECTRIC SUPPLY
9	AMERICAN LANGUAGE TECHNOLOGIES	59	ESRI INC
10	AMERICAN MANAGEMENT ASSOCIATION	60	EXPERIAN MARKETING SOLUTIONS
11	APPLIED LITHO RESOURCE INC	61	<b>FASTVUE, INC. (NEW)</b>
12	APPRAISAL INSTITUTE	62	FEDEX OFFICE
13	ARMSTRONG & ARMSTRONG, P.C.	63	FERRELLGAS
14	ASSN TECHNOLOGY SERVICES, INC	64	FIRST STOP HEALTH
15	AT&T (FIBER)	65	FISH WINDOW CLEANING
16	AT&T (MAIN LOCAL)	66	FISHER PHILLIPS
17	AT&T (U-VERSE)	67	FITCORP USA
18	AT&T MOBILITY	68	FULLY INVOLVED PRESSURE WASHING
19	BATTERIES PLUS	69	GLOBAL INDUSTRIAL
20	BCC SOFTWARE	70	GREEN MOUNTAIN ENERGY
21	BEE LINE SERVICES	71	GSO ARCHITECTS
22	BELO + COMPANY	72	HAND, MICHAEL L
23	BERRY, DANIEL K	73	HARRIS GOVERN
24	BETSY ROSS FLAG GIRLS INC	74	HAVEN TECHNOLOGY CORP
25	BIS CONSULTING	75	HAYNES LANDSCAPE & MAINTENANCE, INC
26	BLUECROSS BLUESHIELD (LIFE&STLT)	76	HBS REAL ESTATE
27	BLUECROSS BLUESHIELD OF TEXAS	77	HEXAGON GEOSPATIAL
28	BUSINESS & LEGAL RESOURCES	78	HOLT CAT
29	CARD SERVICE CENTER	79	HOME DEPOT
30	CARENOW	80	HUMETRICS HOLDING INC
31	CCIM INSTITUTE	81	HUTCHINS BBQ
32	CDW-G	82	IAAO
33	CINTAS CORPORATION #0487	83	IDERA
34	CINTAS FIRST AID	84	IN BLOOM
35	CINTAS MAT SERVICE	85	INSIGHTS
36	CINTAS SANI CLEAN	86	INSURICA EXPRESS
37	CITY OF MCKINNEY	87	INTEGRA REALTY RESOURCES-DFW
38	CITY OF MCKINNEY POLICE DEPARTMENT	88	INTEX ELECTRICAL CONTRACTORS, INC
39	COLE INFORMATION SVC	89	IRELAND, MICHAEL
40	COLLIN COUNTY CHAPTER TAAO	90	IREM
41	COLORIT GRAPHICS SERVICES	91	ISI COMMERCIAL REFRIGERATION
42	CONSTRUCTION JOURNAL, LTD	92	J.D. POWER
43	COPYNET	93	J.D. POWER VALUATION SERVICES
44	CORNELL CONSULTANTS, LLC	94	JONES, MICHAEL R
45	COSTAR REALTY INFORMATION INC	95	JOPLIN'S
46	COWTOWN MATERIALS, INC.	96	JUST APPRAISED INC
47	CUSHMAN & WAKEFIELD	97	JUST TEXAS
48	DALLAS BUSINESS JOURNAL	98	K. EVANS & ASSOCIATES, PLLC
49	DALLAS MORNING NEWS	99	KERBY & KERBY PLLC
50	DEARBORN NATIONAL LIFE INSURANCE COMPANY	100	LBJ SCHOOL OF PUBLIC AFFAIRS

**COLLIN CENTRAL APPRAISAL DISTRICT  
ACTIVE VENDOR LIST  
FOR 4TH QUARTER 2021**

Vendor		Vendor	
101	LEGAL SHIELD / ID SHIELD	151	SOUND PRODUCTIONS LLC
102	LONE STAR OVERNIGHT	152	SOURCE STRATEGIES INC
103	LOOPNET	153	SPRADLIN, TERRY
104	M&M FENCING AND WELDING, INC.	154	STAPLES BUSINESS CREDIT
105	MALIN GROUP, THE	155	STAR LOCAL MEDIA
106	MANAGEMENT SKILLS RESOURCES, INC	156	STRATEGIC EQUIPMENT LLC
107	MARSHALL & SWIFT	157	SUPERIOR VISION OF TEXAS
108	MB&B TROPHIES AND AWARDS	158	SWINGLE COLLINS & ASSOCIATES
109	MC PURE CLEANING, LLC	159	TAAD
110	MCROBERTS & COMPANY	160	TAAO
111	METRO COUNCIL OF APPRAISAL DISTRICTS	161	TALCB
112	MICHAEL'S KEYS, INC.	162	TARRANT APPRAISAL DISTRICT
113	MIDDLE, LLC (NEW)	163	TASB, INC.
114	MISTER SWEEPER	164	TCDRS
115	MODERNFOLD DOOR & SPECIALTIES OF DFW	165	TDLR
116	MONA LISA MOVING CO (NEW)	166	TEXAS ARCHIVES
117	MOONSHADOW, INC.	167	TEXAS COMPTROLLER OF PUBLIC ACCOUNTS
118	MURLEY PLUMBING	168	TEXAS DEFENSIVE DRIVING SCHOOL
119	MYPRINTCHOICE	169	TEXAS DEPARTMENT OF PUBLIC SAFETY
120	NATIONAL SECURITY & TRUST / IVS	170	TEXAS REAL ESTATE COMMISSION
121	NATIONWIDE RETIREMENT SOLUTIONS	171	TEXAS SDU CHILDSUPP
122	NEW BENEFITS	172	TEXAS SECRETARY OF STATE
123	NORTH CENTRAL TX COG	173	THE CAMBRIAN GROUP
124	NORTH TEXAS SIGN SHOP (NEW)	174	THOMAS GALLAWAY CORP dba TECHNOLOGENT
125	ONE SOURCE COMMERCIAL FLOORING, INC	175	TIME WARNER CABLE
126	PAPERTONE ENTERPRISES LLC	176	TML-IRP
127	PERDUE, BRANDON, FIELDER, COLLINS & MOTT	177	TRABOLD COMPANY
128	PHILLIPS MURRAH, PC	178	TRANE US INC
129	PICTOMETRY	179	TRELLIS COMPANY
130	PITNEY BOWES RESERVE ACCOUNT	180	TREPP, LLC
131	PITNEY LEASE	181	TRUE PRODIGY TECH SOLUTIONS LLC
132	PITNEY SUPPLIES	182	UNUM LIFE INSURANCE CO OF AMERICA
133	PLANO OFFICE SUPPLY	183	URUBEK ENTERPRISES, INC.
134	PLANO PEST CONTROL	184	USER SCAPE
135	PRICE, FRANK	185	VALBRIDGE PROPERTY ADVISORS
136	PRICEWATERHOUSECOOPERS	186	VALLEY VIEW CONSULTING, LLC
137	PRINT MAIL PRO	187	VANGUARD CLEANING SERVICES
138	PROPERTY TAX EDUCATION COALITION, INC	188	VARI
139	PROSTAR SERVICES, INC	189	VARIVERGE LLC
140	QUALITY PERSONNEL SERVICE	190	VORTEX
141	RESCUE STAT (formerly STAT PADS)	191	VREF PUBLISHING INC
142	ROCKIN G DRYWALL & CONSTRUCTION	192	WASTE CONNECTIONS OF TEXAS
143	SAM'S CLUB	193	WELLSPRING INSURANCE AGENCY, INC
144	SAUNDERS & WALSH, PLLC	194	WEX HEALTH INC
145	SHAREGATE GROUP INC	195	ZOHO CORP
146	SHERWIN-WILLIAMS		
147	SHI GOVERNMENT SOLUTIONS		
148	SHRED-IT USA LLC		
149	SIGNARAMA		
150	SOCIETY FOR HUMAN RESOURCE MGT		

**NOTES:**

New vendors are highlighted in bright yellow.

Changes in A/P that affected the vendor count from last quarter have been highlighted in light yellow.

This list EXCLUDES employees, deputy sheriffs, arbitrators, and ARB members.





# Collin Central Appraisal District

January 19, 2022

TO: Board of Directors

FROM: Stephanie Cave-Bernal, Deputy Chief Appraiser, ARB, Customer Service & Research

RE: 4<sup>th</sup> Quarter 2021- Arbitration Report

The Texas Property Tax Code Section 41A gives property owners the right to appeal an Appraisal Review Order through binding arbitration.

- There have been 113 Requests for Binding Arbitration filed for 2021. This is approximately a 35% decrease from 2020.
- The total certified market value of the properties under appeal is \$195,963,560. The difference between the certified value of the properties and the requestor opinion of value is \$64,089,805.
- Residential, Commercial and BPP Requests for Binding Arbitration are slightly down, while Land shows a small increase.
- Below is a representation of the current 2021 arbitration case load, along with the 2020 statistics, as reference.

ARBITRATION STATUS	2021	ARBITRATION STATUS	2020
Active	36	Active	1
Rejected	1	Rejected	5
Withdrawn	6	Withdrawn	11
Dismissed	0	Dismissed	0
Settled	51	Settled	101
District	11	District	30
Taxpayer/Agent	7	Taxpayer/Agent	24
<b>TOTAL</b>	<b>113</b>	<b>TOTAL</b>	<b>172</b>

<b>ARBITRATED BY</b>	<b>2021</b>	<b>ARBITRATED BY</b>	<b>2020</b>
Agent	75	Agent	123
Taxpayer	38	Taxpayer	49
<b>TOTAL</b>	<b>113</b>	<b>TOTAL</b>	<b>172</b>

<b>PROPERTY TYPE</b>	<b>2021</b>	<b>PROPERTY TYPE</b>	<b>2020</b>
Residential	55	Residential	72
Land	15	Land	10
Commercial	32	Commercial	52
BPP	11	BPP	38
<b>TOTAL</b>	<b>113</b>	<b>TOTAL</b>	<b>172</b>



# Collin Central Appraisal District

January 20, 2022

TO: Board of Directors

FROM: Brian Swanson, Litigation Director

RE: 2021 4Q Litigation Report

As of the date of this report, we have the following litigation statistics:

- For the 2021 tax year there are 364 lawsuits that have been filed with a total certified value of \$11,219,281,960. We have been successful in settling 96, or 26% of the 2021 cases thus far. We continue to work on the prior years with 2017-2019 having very few left.
- The chart below illustrates the number of records, citations, current status, and certified values over the last five years:

YEAR	STATUS	RECORDS	CITATIONS	CERTIFIED VALUE
2017	IN PROGRESS	4	1	\$ 49,840,102
	LITIGATION FINALIZED	415	279	\$ 9,021,146,742
TOTAL		419	280	\$ 9,070,986,844

2018	IN PROGRESS	9	8	\$ 236,768,411
	LITIGATION FINALIZED	851	283	\$ 9,861,964,011
TOTAL		860	291	\$ 10,098,732,422

2019	IN PROGRESS	49	6	\$ 174,194,968
	LITIGATION FINALIZED	646	290	\$ 8,853,508,018
TOTAL		695	296	\$ 9,027,702,986

2020	IN PROGRESS	106	56	\$ 2,235,872,725
	LITIGATION FINALIZED	590	372	\$ 10,493,179,619
TOTAL		696	428	\$ 12,729,052,344

2021	IN PROGRESS	473	268	\$ 8,340,907,270
	LITIGATION FINALIZED	170	96	\$ 2,878,374,690
TOTAL		643	364	\$ 11,219,281,960

2017 - 2021	IN PROGRESS	641	339	\$ 11,037,583,476
	LITIGATION FINALIZED	2672	1320	\$ 41,108,173,080
	GRAND TOTALS>>>>	3313	1659	\$ 52,145,756,556

**Legal Expense Summary (by expense code and vendor)**  
**YTD Totals (as of 1/5/22) FINAL 2021 TOTALS**

**LEGAL EXPENSE BY EXPENSE CODE**

Name	2021 YTD Total	2021 Budget	2020 Total	2019 Total	2018 Total	2017 Total	2016 Total	2015 Total	2014 Total
LITIGATION	\$1,282,281		\$1,105,332	\$1,053,772	\$970,198	\$571,848	\$451,679	\$367,360	\$546,639
EXPERT/APPRaisal	\$266,111		\$355,794	\$322,846	\$459,799	\$235,102	\$72,545	\$123,219	\$134,619
GENERAL	\$45,039		\$62,511	\$50,107	\$72,190	\$67,453	\$40,736	\$51,384	\$24,185
PERSONNEL	\$23,216		\$12,750	\$647	\$2,058	\$975	\$2,831	\$1,015	\$2,456
ARBITRATION	\$15,050		\$18,500	\$7,300	\$13,450	\$22,400	\$3,850	\$2,250	\$2,716
SUBTOTAL	\$1,631,697	\$1,770,000	\$1,554,886	\$1,434,671	\$1,517,696	\$897,777	\$571,641	\$545,228	\$710,615
ARB RELATED	\$15,015	\$30,000	\$7,574	\$8,311	\$17,433	\$16,398	\$13,291	\$11,172	\$11,895
<b>TOTAL</b>	<b>\$1,646,712</b>	<b>\$1,800,000</b>	<b>\$1,562,460</b>	<b>\$1,442,981</b>	<b>\$1,535,128</b>	<b>\$914,175</b>	<b>\$584,933</b>	<b>\$556,401</b>	<b>\$722,510</b>
	3,600								

**LEGAL EXPENSE BY VENDOR**

Name	2021 YTD Total	2020 Total	2019 Total	2018 Total	2017 Total	2016 Total	2015 Total	2014 Total
1 ARBITRATION&SUBPOENA RELATED	\$15,050	\$18,500	\$7,300	\$13,450	\$22,710	\$4,155	\$2,870	\$3,074
2 ARMSTRONG & ARMSTRONG	\$15,015	\$7,574	\$8,311	\$11,080	\$15,898	\$13,291	\$11,172	\$11,605
3 BATEMANWELLS	\$0	\$0	\$0	\$0	\$500	\$0	\$0	\$0
4 BRAXTON HILTON	\$0	\$0	\$0	\$0	\$12,935	\$0	\$0	\$0
5 CAMERON APPRAISAL GROUP	\$0	\$0	\$0	\$0	\$0	\$0	\$5,750	\$1,350
6 COLLATERAL EVALUATION ASSC	\$0	\$0	\$0	\$0	\$0	\$0	\$3,198	\$0
7 CUSHMAN & WAKEFIELD	\$34,000	\$56,500	\$97,900	\$13,500				
8 FANNING & ASSOCIATES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,525
9 FISHER & PHILLIPS LLC	\$209	\$203	\$197	\$2,058	\$975	\$2,831	\$1,015	\$2,456
10 FRANK PRICE	\$10,000							
11 GAY, MCCALL, ISAACKS	\$0	\$0	\$0	\$69,603	\$573,737	\$440,692	\$391,580	\$526,213
12 GENE RHODES & ASSOCIATES	\$0	\$0	\$0	\$3,300	\$0	\$0	\$5,000	\$5,000
13 GL ADJUSTMENT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$7,085
14 HBS REAL ESTATE	\$104,050	\$4,700	\$20,450	\$14,850	\$0	\$0	\$0	\$0
15 INTEGRA REALTY RESOURCES	\$0	\$0	\$14,146	\$12,000	\$0	\$0	\$51,150	\$9,925
16 JLL VALUATION & ADVISORY	\$0	\$0	\$0	\$0	\$25,225	\$0	\$0	\$0
17 KARVEL-HAMILTON	\$0	\$0	\$0	\$0	\$0	\$11,000	\$0	\$0
18 KORY RYAN	\$0	\$0	\$0	\$6,353	\$0	\$0	\$0	\$0
19 MALIN GROUP, THE	\$38,461	\$99,919	\$71,494	\$206,122	\$157,477	\$25,545	\$52,621	\$44,602
20 MCROBERTS AND COMPANY	\$74,500	\$151,175	\$88,856	\$185,019	\$15,000	\$36,000	\$5,500	\$0
21 MICHAEL S COOK & ASSOC, INC	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,000
22 NPV ADVISORS	\$0	\$0	\$0	\$0	\$18,000	\$0	\$0	\$6,478
23 PAUL HORNSBY & CO	\$0	\$0	\$0	\$36,000				
24 PERDUE, BRANDON, FIELDER	\$2,536	\$2,814	\$3,930	\$3,237	\$2,950	\$3,270	\$3,522	\$3,942
25 PHILLIPS MURRAH PC	\$384	\$540	\$450					
26 SAUNDERS & WALSH, PLLC	\$1,337,407	\$1,177,036	\$1,099,948	\$950,502	\$49,368	\$48,148	\$23,022	\$31,804
27 STACY JACKSON	\$0	\$0	\$0	\$0	\$19,400	\$0	\$0	\$0
28 STERLING REPORTING SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,226
29 VALBRIDGE PROPERTY ADVISORS	\$11,500	\$43,500	\$30,000					
30 TED WHITMER ATTORNEY	\$0	\$0	\$0	\$8,054	\$0	\$0	\$0	\$0
31 THE JAY MASSEY COMPANY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$43,450
32 TML-IRP	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$474
33 TNT VALUATION GROUP, LLC	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$12,300
<b>TOTAL</b>	<b>\$1,643,112</b>	<b>\$1,562,460</b>	<b>\$1,442,981</b>	<b>\$1,535,128</b>	<b>\$914,175</b>	<b>\$584,933</b>	<b>\$556,401</b>	<b>\$722,510</b>