



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

**October 26, 2023**

# **MEETING NOTICE & AGENDA**

NOTICE & AGENDA

NOTICE & AGENDA

**FILED**

10/19/2023 11:18:28 AM

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

# **NOTICE OF REGULAR MEETING**

## **BOARD OF DIRECTORS of the COLLIN CENTRAL APPRAISAL DISTRICT (CONDUCTED ONSITE & TELEPHONICALLY)**

Notice is hereby given that on the 26th day of October 2023, 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: 555 269 168#. 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 19th day of October 2023, this notice was filed with the County Clerk of Collin County, Texas.



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Marty Wright  
Chief Appraiser  
Phone: (469) 742-9200

**AGENDA**

**- 2 of 5 -**

**BOARD OF DIRECTORS  
COLLIN CENTRAL APPRAISAL DISTRICT**

**Thursday, October 26, 2023  
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.
<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. Discuss pending Litigation with attorney Mark Walsh.
	2	Deliberation regarding real property. Pursuant to Texas Open Meetings Act, Section 551.072.
	3	Personnel matters. Pursuant to Texas Open Meetings Act, Section 551.074.
<b>C.</b>		<b>Action on items discussed in executive session</b>
	1	Action on items pertaining to litigation, if any.
	2	Action on items pertaining to real property, if any.
	3	Action on items pertaining to personnel, if any.



## AGENDA

- 3 of 5 -

### 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 September 28, 2023 regular meeting.**
- E. **Review of September 2023 bills.**
- F. **Review of September 2023 financial reports.**
- G. **Review and sign checks for approved purchases requiring Board signature.**
- H. **Review report of September 2023 checks and electronic transfers greater than \$25,000.**

#### END OF CONSENT AGENDA

- I. **2024 Group Insurance**
  - 1 **Receive recommendation and vote on the District's 2024 health insurance carrier, including option for employees to select from either a High Deductible Health Plan (HDHP), with a Health Savings Account (HSA) or traditional PPO medical plan, with medical reimbursement.**
  - 2 **Receive recommendation and vote on the District's 2024 insurance carriers for ancillary coverages (dental, vision, term life, long-term care and disability).**
  - 3 **Review and vote on the District's HSA Contribution, Policy #1005 for 2024, for employees selecting HDHP with Health Savings Account.**

**AGENDA**

**BOARD OF DIRECTORS  
COLLIN CENTRAL APPRAISAL DISTRICT**

- 4 **Review and vote on Medical Reimbursement, Policy #1001 for 2024, for employees selecting traditional PPO medical plan.**
  
- J. Computer hardware and equipment purchases funded in the 2023 Budget for general ongoing operations requiring Board action.**
  - 1 **Receive recommendation and vote on purchasing workstations, tablets, monitors, printers, projectors, scanners and servers.**
  
- K. Receive recommendation and vote on executing fourth year option under existing contract with VariVerge for 2024 printing and mailing services.**
  
- L. Receive recommendation and vote on new contract with TrueRoll for homestead exemption audit and production solution.**
  
- M. Receive recommendation and vote on appointing the District's 2024 Taxpayer Liaison Officer (TLO).**
  
- N. Reports**
  - 1 Taxpayer Liaison Officer Report
  - 2 2023 ARB Chairman Report
  - 3 Phone System Report
  - 4 3rd Qtr 2023 Investment Report
  - 5 3rd Qtr 2023 Collateral Report
  - 6 3rd Qtr 2023 Vendor Report
  - 7 ARB Protest Report
  - 8 3rd Qtr 2023 Binding Arbitration Report
  - 9 3rd Qtr 2023 Litigation Report
  - 10 Litigation Cost Report
  
- O. Chief Appraiser's Report**
  - 1 General Comments

**AGENDA**

**- 5 of 5 -**

**BOARD OF DIRECTORS  
COLLIN CENTRAL APPRAISAL DISTRICT**

- 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**

CONSENT AGENDA

CONSENT AGENDA

**D.**  
**MINUTES**

**September 28, 2023**

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

**Thursday, September 28, 2023**

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

**MEMBERS PRESENT:** Ron Carlisle, Brian Mantzey, Ken Maun, Gary Rodenbaugh and  
Carson Underwood

**MEMBERS ABSENT:** Ronald Kelley

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

**NATURE OF BUSINESS**

**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 | 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.</b> |  | <b>Executive Session</b><br>There was no need for an executive session. |
|-----------|--|---|

- |           |   |   |
|-----------|---|---|
| <b>C.</b> |   | <b>Action on items discussed in executive session</b> |
|           | 1 | N/A   |
|           | 2 | N/A   |
|           | 3 | N/A   |

**CONSENT AGENDA**

Motion by Brian Mantzey to accept reports and approve action items contained in consent agenda. Seconded by Carson Underwood.  
Motion carried.

- |           |  |  |
|-----------|--|--|
| <b>D.</b> |  | Action taken: Board approved minutes from August 31, 2023 special meeting. |
| <b>E.</b> |  | Action taken: Board reviewed the August 2023 bills.                        |

## MINUTES

### BOARD OF DIRECTORS COLLIN CENTRAL APPRAISAL DISTRICT

- F. Action taken: Board reviewed and accepted the August 2023 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 report of checks and electronic transfers greater than \$25,000.

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

- I. Deputy Chief of Operations & Compliance, Brian Swanson, addressed the Board presenting amendments to Policy #110 Investment of Public Funds. Mr. Swanson introduced Richard Long of Valley View Consulting, LLC. Mr. Long presented the amendments to the Board. Carson Underwood motioned to approve by Resolution #2023-80 to accept amendments to Policy #110. Ron Carlisle seconded the motion. Motion passed.
- J. The Board received report regarding Policy #1007 and the District's 2024 retirement plan with the Texas County District Retirement System (TCDRS), presented by Mr. Swanson. No action was needed.

#### **K. Reports**

- 1 Chris Nickell, Taxpayer Liaison Officer, presented the TLO Monthly Status Report. There were no complaints to be brought before the Board. He gave a summary of the Customer Service Survey card responses for August. He noted there was one email to Mr. Wright from a taxpayer commending Lauri on the customer service she provided.
- 2 Mr. Nickell also presented the Monthly TDLR Report. The TDLR complaint reported to the Board at the June 22, 2023 Board meeting is still open. He is waiting for a reply and will continue to bring updates before the Board.
- 3 Chief Appraiser, Marty Wright, addressed the Board with a review of the calendar of events for the 2024-2025 Board of Directors Election.

#### **L. Chief Appraiser's Report**

- 1 General Comments

## II.

### **AUDIENCE**

- A. There were no public comments.



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

**CCAD staff in attendance:**

Marty Wright  
Tamera Glass  
Toni Bryan  
Valerie Hyden  
Nalia Rivera  
Ryan Matthews  
Stephanie Cave-Bernal  
Brian Swanson  
Dana Wilson  
Elliot Bensed  
Jason Harris  
Paula Bensed  
Phil Greaux  
Shane Cheek  
Tina Castillo  
Wendy Gilliland  
Cindy Smith  
Eric Grusendorf  
Erin Van Gundy  
Jamie Worth  
Robert Wood  
Chris Nickell  
Teresa Justus  
Taylor Hamilton  
Troy Ingold  
Sam Tharp

**Public in attendance:**

Richard Long, Valley View Consults LLC, Managing Partner

- III.** The next meeting is to be held on the date and at the time listed below. The meeting will be held at 250 Eldorado Pkwy., Dr. Leo Fitzgerald Board Room, McKinney, Texas.  
Thursday, October 26, 2023  
7:00 a.m.
- IV.** Chairman, Gary Rodenbaugh announced the Board had concluded its business and the meeting was adjourned. The meeting adjourned at 7:25 a.m.

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

**September 2023**

BILLS PAID

BILLS PAID

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
September 2023

Num	Date	Name	Amount
<b>Sep 23</b>			
ACH	09/08/2023	ADP INC	-3,573.00
ACH	09/15/2023	TCDRS	-149,438.52
ACH	09/25/2023	PITNEY BOWES RESERVE ACCOUNT	-20,000.00
55529	09/06/2023	BORTON, BRIAN K	-400.00
55530	09/06/2023	GILLESPIE, DANIEL	-475.00
55531	09/06/2023	HENRY, JAMES	-800.00
55532	09/06/2023	ZEGADLO, MARC	-400.00
55533	09/06/2023	AFFILIATED COM-NET, INC.	-1,528.50
55534	09/06/2023	CAPITOL APPRAISAL GROUP, LLC	-5,635.00
55535	09/06/2023	CASTILLO, TINA	-587.65
55536	09/06/2023	DIAZ, TIFFANY	-448.47
55537	09/06/2023	GREAT AMERICA FINANCIAL SERVICES	-1,963.00
55538	09/06/2023	GREAUX, PHILLIP	-242.64
55539	09/06/2023	HAYNES LANDSCAPE & MAINTENANCE, INC	-1,379.92
55540	09/06/2023	JOPLIN'S	-7,500.00
55541	09/06/2023	MC PURE CLEANING, LLC	-7,175.00
55542	09/06/2023	PLANO PEST CONTROL	-450.00
55543	09/06/2023	QUALITY PERSONNEL SERVICE	-7,339.60
55544	09/06/2023	RICHARDS, BRAD	-1,116.63
55545	09/06/2023	SAUNDERS & WALSH, PLLC	-254,839.72
55546	09/06/2023	SHI GOVERNMENT SOLUTIONS	-1,675.00
55547	09/06/2023	TEXAS ARCHIVES	-98.02
55548	09/06/2023	TRUE PRODIGY TECH SOLUTIONS LLC	-1,025.00
55549	09/06/2023	UBISTOR, INC.	-4,942.40
55550	09/06/2023	WASTE CONNECTIONS OF TEXAS	-310.74
55551	09/06/2023	WEST, SUBVET D	-400.00
55552	09/07/2023	HOME DEPOT	-489.47
55553	09/11/2023	BORTON, BRIAN K	-400.00
55554	09/11/2023	DAVIS, MARISA	-812.50
55555	09/11/2023	THIGPEN, LESLIE MICHAEL	-425.00
55556	09/11/2023	AT&T (MAIN LOCAL)	-1,952.92
55557	09/11/2023	AT&T (MAIN LOCAL)	-243.07
55558	09/11/2023	CINTAS FIRST AID	-104.63
55559	09/11/2023	COLORIT GRAPHICS SERVICES	-81.00
55560	09/11/2023	DIAZ, TIFFANY	-679.50
55561	09/11/2023	MCRBERTS & COMPANY	-6,500.00
55562	09/11/2023	SHAREGATE	-8,491.50
55563	09/11/2023	TRANE US INC	-1,860.15
55564	09/12/2023	QUALITY PERSONNEL SERVICE	0.00
55565	09/12/2023	QUALITY PERSONNEL SERVICE	-5,859.48
55566	09/14/2023	COSTAR REALTY INFORMATION INC	-6,144.72
55567	09/14/2023	DEX IMAGING	-1,090.45
55568	09/14/2023	DSS	-1,394.00
55569	09/14/2023	HARRIS GOVERN	-250.87
55570	09/14/2023	JOPLIN'S	-187.50
55571	09/14/2023	KERBY & KERBY PLLC	-250.00
55572	09/14/2023	MYPRINTCHOICE	-180.00
55573	09/14/2023	NICKELL, CHRISTOPHER	-2,120.00
55574	09/14/2023	ROCKIN G DRYWALL & CONSTRUCTION	-10,779.74
55575	09/14/2023	SERVICE FIRST	-210.00
55576	09/14/2023	VARIVERGE LLC	-10,502.08
55577	09/14/2023	WEX HEALTH INC	-160.75
55578	09/14/2023	HERITAGE BROKERAGE SERVICES	-3,250.00

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
September 2023

Num	Date	Name	Amount
55579	09/18/2023	DECK, RANDALL	-400.00
55580	09/18/2023	DIAZ, STEPHEN ERIK	-400.00
55581	09/18/2023	JEFFCOAT, JARROD	-400.00
55582	09/18/2023	POLK, MATTHEW	-400.00
55583	09/18/2023	THIGPEN, LESLIE MICHAEL	-425.00
55584	09/18/2023	AT&T (FIBER)	-52.40
55585	09/18/2023	DIAZ, TIFFANY	-679.50
55586	09/18/2023	HARRIS GOVERN	-51,495.98
55587	09/18/2023	PERDUE, BRANDON, FIELDER, COLLINS & MOTT	-250.00
55588	09/18/2023	PITNEY SUPPLIES	-1,380.00
55589	09/18/2023	PROPERTY TAX EDUCATION COALITION, INC	-100.00
55590	09/18/2023	SERVICE FIRST	-1,867.00
55591	09/18/2023	SHI GOVERNMENT SOLUTIONS	-1,428.00
55592	09/18/2023	SUPERIOR VISION OF TEXAS	-1,492.20
55593	09/18/2023	VALBRIDGE PROPERTY ADVISORS	-16,000.00
55594	09/19/2023	AT&T MOBILITY	-1,284.66
55595	09/19/2023	BLUECROSS BLUESHIELD (LIFE&STLT)	-10,170.17
55596	09/19/2023	CHEEK, SHANE	-120.81
55597	09/19/2023	CINTAS FIRST AID	-51.28
55598	09/19/2023	INTEX ELECTRICAL CONTRACTORS, INC	-516.00
55599	09/19/2023	LEGAL SHIELD / ID SHIELD	-1,512.80
55600	09/19/2023	TAAO	-5,800.00
55601	09/19/2023	UNUM LIFE INSURANCE CO OF AMERICA	-1,178.50
55602	09/19/2023	QUALITY PERSONNEL SERVICE	-4,212.34
55603	09/21/2023	CARENOW	-300.00
55604	09/21/2023	COOMER, KANDY LYNN	-115.00
55605	09/21/2023	FIRST STOP HEALTH	-1,288.00
55606	09/21/2023	FISH WINDOW CLEANING	-209.00
55607	09/21/2023	INDECO SALES, INC.	-37,122.00
55608	09/21/2023	MEDIUM GIANT COMPANY, INC	-5,400.00
55609	09/21/2023	ONE SOURCE COMMERCIAL FLOORING, INC	-2,458.54
55610	09/21/2023	PROSTAR SERVICES, INC	-532.47
55611	09/21/2023	SMITH, CINDY	-174.00
55612	09/21/2023	TAAO	-100.00
55613	09/22/2023	OPTUM BANK	-320.83
55614	09/25/2023	DAVIS, MARISA	-412.50
55615	09/25/2023	HENRY, JAMES	-400.00
55616	09/25/2023	JEFFCOAT, JARROD	-400.00
55617	09/25/2023	VENABLE, JOHNATHAN	-475.00
55618	09/25/2023	BLUECROSS BLUESHIELD OF TEXAS	-123,983.45
55619	09/25/2023	CITY OF MCKINNEY	-798.55
55620	09/25/2023	DEX IMAGING	-1,151.21
55621	09/25/2023	DIAZ, TIFFANY	-679.50
55622	09/25/2023	MYPRINTCHOICE	-200.00
55623	09/25/2023	QUALITY PERSONNEL SERVICE	-4,415.07
55624	09/25/2023	RICHARD D. NGUYEN & ASSOCIATES, PLLC	-750.00
55625	09/25/2023	VARIERGE LLC	-3,338.18
55626	09/25/2023	SHELL ENERGY SOLUTIONS	-7,825.23
55627	09/29/2023	CINTAS MAT SERVICE	-453.28
55628	09/29/2023	CINTAS SANI CLEAN	-3,956.35
55629	09/29/2023	PLANO OFFICE SUPPLY	-3,829.54
55630	09/29/2023	SAM'S CLUB	-126.24
55631	09/29/2023	UNITED STATES DEPT OF TREASURY	-12.01
55632	09/29/2023	UNITED STATES DEPT OF TREASURY	-20.33

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**Board of Directors Check Detail Report**  
September 2023

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<u>Num</u>	<u>Date</u>	<u>Name</u>	<u>Amount</u>
55633	09/29/2023	UNITED STATES DEPT OF TREASURY	-28.91
55634	09/29/2023	AFLAC	-5,026.54
55635	09/29/2023	CAPITOL BLIND AND DRAPERY CO.	-444.00
55636	09/29/2023	GREAU, PHILLIP	-1,327.05
55637	09/29/2023	SODERSTROM, DEAN C	-49.23
55638	09/29/2023	TILLEY, SHAWN	-550.00
55639	09/29/2023	CROWE, ROBERT	-100.00
55640	09/29/2023	CARD SERVICE CENTER	-7,308.19
55641	09/29/2023	SPECTRUM ENTERPRISE	-2,059.76
55642	09/29/2023	STAPLES BUSINESS CREDIT	-2,813.41
			<hr/>
<b>Sep 23</b>			<b>-860,733.15</b>
			<hr/> <hr/>

**F.**

**FINANCIAL  
REPORTS**

**September 2023**

# Kerby & Kerby PLLC

## CERTIFIED PUBLIC ACCOUNTANTS

Frank Kerby, CPA  
John W. Kerby, CPA

### ACCOUNTANTS' COMPILATION REPORT

BOARD OF DIRECTORS  
CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY  
250 ELDORADO PKWY  
MCKINNEY, TX 75069-8023

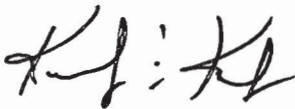
Management is responsible for the accompanying financial statements of the business-type activities of CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY (a political subdivision of the State of Texas), which comprise the statement of net position as of September 30, 2023 and the related statement of revenue, expenses, and changes in fund net position and supplemental schedule for the year then ended. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

Management has elected to omit substantially all of the disclosures ordinarily included in financial statements prepared in accordance with accounting principles generally accepted in the United States of America. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the District's assets, liabilities, fund balance, revenues, and expenses. Accordingly, the financial statements are not designed for those who are not informed about such matters.

The supplementary budget information is presented for purposes of additional analysis and is not a required part of the basic financial statements. This information is the representation of management. The supplementary budget information was not subject to our compilation engagement; therefore, we have not audited or reviewed the supplementary budget information and, accordingly, do not express an opinion, a conclusion, nor provide any form of assurance on such supplementary budget information.

The Central Appraisal District is exempt from taxes as a political subdivision of the State of Texas and, accordingly, these financial statements do not reflect a provision or liability for income taxes.

We are not independent with respect to the Central Appraisal District of Collin County.



Kerby & Kerby PLLC  
McKinney, TX 75070  
October 11, 2023



**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Assets, Liabilities And Fund Balance - Cash Basis**  
**September 30, 2023**

**ASSETS**

**CURRENT ASSETS**

ANB - all accts	\$	798,748.75
Independent Bank - all accts		11,605,701.11
Texas Capital Bank - Money Mkt		2,000,625.08
Accounts Receivable - Retirees		(617.48)
Certificates of Deposit		15,224,897.81
Prepaid Expenses		2,291.99
Right of Use Assets (lease)		186,909.00
ROU Assets - Accum Depreciation		<u>(38,726.00)</u>

**TOTAL CURRENT ASSETS** \$ 29,779,830.26

**PROPERTY AND EQUIPMENT**

Furniture and Equipment-Assets		431,834.09
Accum Depr-Furniture & Equip		(314,573.61)
Telephone Equipment-Assets		92,016.23
Accum Depr-Telephone Equipment		(85,344.36)
Computer Equipment-Assets		972,063.88
Accum Depr-Computer Equipment		(654,235.85)
Computer Software-Assets		797,859.15
Accum Depr-Computer Software		(625,581.39)
Building-Assets		8,022,172.86
Accum Depr-Building		(2,612,281.98)
Land-Assets		<u>1,387,232.00</u>
<b>Total Property And Equipment</b>		<b>7,411,161.02</b>

**NET PROPERTY AND EQUIPMENT** 7,411,161.02

**OTHER ASSETS**

Net Pension Asset		10,231,137.00
Deferred Resource Outflows		<u>3,689,443.00</u>

**TOTAL OTHER ASSETS** 13,920,580.00

**TOTAL ASSETS** \$ 51,111,571.28

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Assets, Liabilities And Fund Balance - Cash Basis**  
**September 30, 2023**

**LIABILITIES AND FUND BALANCE**

**CURRENT LIABILITIES**

All Current Liabilities \$ 936,741.14

**TOTAL CURRENT LIABILITIES** \$ 936,741.14

**LONG-TERM LIABILITIES**

Deferred Resources Inflows 7,318,193.00

**TOTAL LONG-TERM LIABILITIES** 7,318,193.00

**TOTAL LIABILITIES** 8,254,934.14

**FUND BALANCE**

Fund Balance(CashBasisRelated) (373,619.00)

Fund Balance-Designated 25,747,000.00

Fund Balance-Undesignated 47,441.50

Fund Bal-Cap Assets Less Debt 7,606,287.00

Year To Date Increase or Decrease 9,829,527.64

**TOTAL DESIGNATED / UNDESIGNATED FUND BALANCE** 42,856,637.14

**TOTAL LIABILITIES AND FUND BALANCE** \$ 51,111,571.28

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**  
**Statement Of Revenue, Expenses And Change In Fund Balance - Cash Basis**  
**1 And 9 Months Ended September 30, 2023**

	2023 Budget	1 month ended Sep 30, 2023	Year to date ended Sep 30, 2023	% of Budget	Remaining Budget
<b>REVENUE</b>					
Entity Support Revenue	\$ 25,299,000.00	\$ 3,632,417.00	\$ 25,672,293.75	101.48 %	(373,293.75)
Interest-Bank Accts/Investments	0.00	126,557.54	446,442.38		(446,442.38)
BPP Rendition Penalty Revenue	0.00	0.00	61,591.70		(61,591.70)
Misc Revenue	0.00	222.20	4,916.12		(4,916.12)
<b>TOTAL REVENUE</b>	<b>25,299,000.00</b>	<b>3,759,196.74</b>	<b>26,185,243.95</b>	<b>103.50 %</b>	<b>(886,243.95)</b>
<b>OPERATING EXPENSES</b>					
Salaries Full Time	12,815,600.00	753,332.70	7,063,547.76	55.12 %	5,752,052.24
Salaries Part Time/Temp	469,500.00	21,259.05	399,092.78	85.00 %	70,407.22
Overtime	120,000.00	3,041.73	85,466.29	71.22 %	34,533.71
Auto Allowance	822,800.00	59,533.20	539,583.39	65.58 %	283,216.61
Worker's Compensation	70,000.00	3,358.05	26,342.45	37.63 %	43,657.55
Employee Group Insurance	3,016,000.00	167,111.00	1,633,388.11	54.16 %	1,382,611.89
FICA Tax	192,400.00	11,874.48	111,752.00	58.08 %	80,648.00
Employee Retirement	1,757,800.00	100,737.14	948,061.95	53.93 %	809,738.05
Retirement-UAAL Buy Down	400,000.00	0.00	0.00	0.00 %	400,000.00
Unemployment Compensation	50,000.00	0.00	4,028.80	8.06 %	45,971.20
Legal	2,100,000.00	281,989.72	1,339,779.08	63.80 %	760,220.92
Accounting & Audit	22,000.00	250.00	21,078.65	95.81 %	921.35
Insurance	60,000.00	4,345.16	39,447.25	65.75 %	20,552.75
Legal Notices & Advertising	37,000.00	5,400.00	18,186.00	49.15 %	18,814.00
Appraisal Review Board	810,000.00	0.00	729,735.01	90.09 %	80,264.99
Telephone, Internet, Data Cloud	350,000.00	9,615.71	125,831.09	35.95 %	224,168.91
Utilities	141,900.00	9,114.91	73,001.51	51.45 %	68,898.49
Equipment Rent	115,000.00	1,963.00	35,782.98	31.12 %	79,217.02
Equipment Maintenance	52,000.00	2,241.66	22,739.37	43.73 %	29,260.63
Postage	520,000.00	(16,185.76)	423,618.88	81.47 %	96,381.12
Aerial Photography	445,000.00	0.00	383,460.00	86.17 %	61,540.00
Supplies	570,000.00	27,919.71	348,328.42	61.11 %	221,671.58
Registration & Dues	45,000.00	6,740.00	12,935.32	28.75 %	32,064.68
Travel & Education	175,000.00	5,380.07	42,953.25	24.54 %	132,046.75
Board of Directors Meetings	7,000.00	45.20	681.90	9.74 %	6,318.10
Contract Services	150,000.00	5,163.92	60,610.48	40.41 %	89,389.52
Professional Services	250,000.00	14,816.29	219,999.87	88.00 %	30,000.13
Security	165,000.00	7,425.00	87,102.50	52.79 %	77,897.50
Building Maintenance	240,000.00	16,519.55	123,657.37	51.52 %	116,342.63
Building Repair/Modifications	400,000.00	24,320.93	189,037.01	47.26 %	210,962.99
ARB Remodel	0.00	0.00	505,511.04		(505,511.04)
Depreciation	0.00	21,680.59	195,125.31		(195,125.31)
Furniture & Equipment	75,000.00	37,122.00	51,777.00	69.04 %	23,223.00
ComputerHardware&Computer Equip	350,000.00	0.00	44,123.01	12.61 %	305,876.99
ComputerSoftwareLicens&Subscrip	650,000.00	69,451.79	240,228.64	36.96 %	409,771.36
Computer Hardware Maintenance	50,000.00	0.00	20,064.60	40.13 %	29,935.40
Software Development	200,000.00	0.00	10,333.75	5.17 %	189,666.25
Computer Software Maintenance	325,000.00	2,292.00	179,323.49	55.18 %	145,676.51
Contingency	80,000.00	0.00	0.00	0.00 %	80,000.00
<b>TOTAL OPERATING EXPENSES</b>	<b>28,099,000.00</b>	<b>1,657,858.80</b>	<b>16,355,716.31</b>	<b>58.21 %</b>	<b>11,743,283.69</b>
<b>EXCESS(DEFICIT) INCOME &amp; EXPENS</b>	<b>\$ (2,800,000.00)</b>	<b>\$ 2,101,337.94</b>	<b>9,829,527.64</b>	<b>(351.05)%</b>	<b>(12,629,527.64)</b>
<b>BEGINNING FUND BALANCE</b>			<b>33,027,109.50</b>		
<b>ENDING FUND BALANCE</b>			<b>\$ 42,856,637.14</b>		

**CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY**

**Supplemental Schedules**

**September 30, 2023**

**ACCUMULATED DEPRECIATION**

Accum Depr-Furniture & Equip	\$	(314,573.61)
Accum Depr-Telephone Equipment		(85,344.36)
Accum Depr-Computer Equipment		(654,235.85)
Accum Depr-Computer Software		(625,581.39)
Accum Depr-Building		<u>(2,612,281.98)</u>

**TOTAL ACCUMULATED DEPRECIATION**

**\$ (4,292,017.19)**

**OTHER CURRENT LIABILITIES**

Accounts Payable	\$	145.76
Credit Card-TIB Mastercard		4,119.52
Credit Card-Sam's Wholesale		207.44
Employee Savings		8,665.86
Lease Liability		148,183.00
Accrued Wages Payable		198,353.06
Accrued Other Curr Liabilities - Other		72,500.00
Employee Payable		(8,410.38)
Retiree Payable		88.36
Retirement Payable		153,956.76
Compensated Absences Payable		<u>358,931.76</u>

**TOTAL OTHER CURRENT LIABILITIES**

**\$ 936,741.14**

**G.**

**FUNDED ITEMS**

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

**September 2023**



# Collin Central Appraisal District

Date: 10/19/23

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

Subject: Budgeted expenditures requiring signature of Board Officer

ITEM	DESCRIPTION	\$ AMOUNT
Ck #60045	Texas Municipal League - Intergovernmental Risk Pool (TML-IRP)	\$103,564.44

**H.**

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

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

**September 2023**





# Collin Central Appraisal District

Date: 10/18/23

To: Board of Directors

From: Marty Wright, Chief Appraiser

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

For: September 2023

ITEM	DATE	DESCRIPTION	\$ AMOUNT
Ck #55545	9/6/23	Saunders & Walsh	\$254,839.72
ACH	9/8/23	ADP (payroll and taxes)	\$414,853.82
ACH	9/15/23	TCDRS	\$149,438.52
Ck #55586	9/18/23	Harris Govern (True Automation)	\$51,495.98
Ck #55607	9/21/23	Indeco Sales, Inc.	\$37,122.00
ACH	9/22/23	ADP (payroll and taxes)	\$380,991.69
Ck #55618	9/25/23	Blue Cross and Blue Shield	\$123,983.45

**I.**

## **2024 Group Insurance**

**Agenda Item Reference: I**

**Report**

**2024 Employee Insurance  
Summary Recommendation**



# Collin Central Appraisal District

October 17, 2023

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

RE: 2024 Employee Insurance

This document is a summary of the 2024 employee insurance recommendation from Mr. Ryan Hanratty, with Swingle, Collins & Associates.

- Remain with our 2023 current insurance carriers for 2024.
  - Blue Cross Blue Shield of Texas for medical
  - Blue Cross Blue Shield of Texas for dental
  - Superior Vision for vision
  - Blue Cross Blue Shield of Texas for life & disability
  - First Stop Health for Teladoc
  - Unum for long-term care
  - ID Shield for identity protection

Increase Health Savings Account (HSA) and medical reimbursement from \$3,850 annually to \$4,150 annually, based on increased contribution amount allowed by the IRS.

Mr. Hanratty will report to the Board regarding the renewal proposal process and negotiations.

Attachment: Spreadsheet showing 2023 costs, 2024 renewal proposal and 2024 projected cost after negotiations.

**Agenda Item Reference: I**

**Report**

**Swingle Collins & Associates**

**Ryan Hanratty**

**2024 Insurance**

# SwingleCollins & Associates

*Collin Central Appraisal District*

*Marketing Review*

Presented by: Swingle Collins and Associates

Presented: October 2023

## Premium vs Claims

MONTH	TOTAL EMPLOYEES	TOTAL MEMBERS	BILLED PREMIUMS	BILLED PREMIUMS PEPM	TOTAL PAID CLAIMS	TOTAL PAID CLAIMS PEPM	RATIO
Sep-21	137	162	\$97,026	\$708	\$121,573	\$887	125%
Oct-21	132	155	\$92,923	\$704	\$126,459	\$958	136%
Nov-21	134	158	\$93,116	\$695	\$77,623	\$579	83%
Dec-21	132	153	\$91,628	\$694	\$95,292	\$722	104%
Jan-22	130	150	\$118,482	\$911	\$136,733	\$1,052	115%
Feb-22	130	150	\$118,482	\$911	\$79,306	\$610	67%
Mar-22	132	152	\$120,383	\$912	\$64,221	\$487	53%
Apr-22	133	152	\$120,382	\$905	\$65,178	\$490	54%
May-22	135	155	\$123,400	\$914	\$26,598	\$197	22%
Jun-22	137	157	\$125,003	\$912	\$50,343	\$367	40%
Jul-22	136	156	\$124,065	\$912	\$92,913	\$683	75%
Aug-22	136	159	\$124,745	\$917	\$95,382	\$701	76%
Sep-22	137	157	\$124,874	\$911	\$92,353	\$674	74%
Oct-22	139	159	\$126,661	\$911	\$92,632	\$666	73%
Nov-22	142	159	\$128,916	\$908	\$31,104	\$219	24%
Dec-22	143	160	\$129,810	\$908	\$78,582	\$550	61%
Jan-23	146	161	\$122,670	\$840	\$90,540	\$620	74%
Feb-23	145	160	\$119,971	\$827	\$118,064	\$814	98%
Mar-23	148	163	\$122,479	\$828	\$81,912	\$553	67%
Apr-23	147	162	\$121,643	\$828	\$267,282	\$1,818	220%
May-23	144	159	\$118,896	\$826	\$99,789	\$693	84%
Jun-23	148	163	\$122,718	\$829	\$41,930	\$283	34%
Jul-23	147	162	\$121,882	\$829	\$162,344	\$1,104	133%
Aug-23	147	162	\$121,092	\$824	\$133,576	\$909	110%
<b>Total 24 Months</b>	<b>3337</b>	<b>3786</b>	<b>\$2,831,247</b>	<b>\$848</b>	<b>\$2,321,729</b>	<b>\$696</b>	<b>82%</b>
<b>Total 12 Months</b>	<b>1733</b>	<b>1927</b>	<b>\$1,481,612</b>	<b>\$855</b>	<b>\$1,290,108</b>	<b>\$744</b>	<b>87%</b>



Plan Design:				Blue Cross Blue Shield of Texas						
				Current/Renewal						
				HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP038		
				In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	
1	Office Visit Co-Pay (Primary/Premium)			Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$45 Co-Pay	Ded + 50%	
4	Specialist Co-Pay			Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$90 Co-Pay	Ded + 50%	
5	Virtual Visits			Up to \$50	N/A	\$0	N/A	\$0	N/A	
6	Individual Deductible			\$5,000	\$10,000	\$5,000	\$10,000	\$5,000	\$10,000	
7	Family Deductible			\$10,000	\$20,000	\$10,000	\$20,000	\$14,700	\$29,400	
8	Co-Insurance (Member Pays)			0%	30%	30%	30%	30%	50%	
9	OOP Max Individual			\$5,000	Unlimited	\$5,600	\$20,000	\$5,600	Unlimited	
10	OOP Max Family			\$10,000	Unlimited	\$10,200	\$60,000	\$14,700	Unlimited	
11	<b>Deductible Included in OOP</b>			<b>Included</b>		<b>Included</b>		<b>Included</b>		
12	Emergency Room			Deductible + 0%		\$100 Co-Pay/Visit + Ded + 30%		\$500 Co-Pay/Visit + Ded + 30%		
13	Preventive Care			\$0	Ded + 30%	\$0	Ded + 30%	\$0	Ded + 50%	
14	Urgent Care Co-Pay			Ded + 0%	Ded + 30%	\$65 Co-Pay	Ded + 30%	\$75 Co-Pay	Ded + 50%	
15	<b>Pharmacy Co-Pay (In-Network)</b>			<b>In-Network</b>		<b>In-Network</b>		<b>In-Network</b>		
16	Pharmacy OOP			N/A		\$1,000 Ind / \$3,000 Family		N/A		
17	Preferred Generic Drugs (30-Day Supply)			Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$0 / \$10 Co-Pay		
18	Non-Preferred Generic Drugs (30-Day Supply)			Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$10 Co-Pay / \$20 Co-Pay		
19	Preferred Brand Drugs (30-Day Supply)			Deductible + 0%		\$40 Co-Pay / \$50 Co-Pay		\$50 Co-Pay / \$70 Co-Pay		
20	Non-Preferred Brand Drugs (30-Day Supply)			Deductible + 0%		\$60 Co-Pay / \$70 Co-Pay		\$100 Co-Pay / \$120 Co-Pay		
21	Preferred Specialty Drugs (30-Day Supply)			Deductible + 0%		\$20 / \$40 / \$60		\$150 Co-Pay		
22	Non-Preferred Specialty Drugs (30-Day Supply)			Deductible + 0%		\$20 / \$40 / \$60		\$250 Co-Pay		
23	<b>Billed Monthly Premium</b>									
24	<b>Enrollment</b>			HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP038		
25		<b>Base</b>	<b>Core</b>	<b>Buy-Up</b>	<u>Current</u>	<u>Renewal</u>	<u>Current</u>	<u>Renewal</u>	<u>Current</u>	<u>Renewal</u>
26	Employee Only	115	1	14	\$789.98	\$811.72	\$911.06	\$935.51	\$1,028.47	\$1,076.03
27	Employee + Spouse	0	0	0	\$1,816.94	\$1,866.87	\$2,095.44	\$2,151.56	\$2,365.46	\$2,474.73
28	Employee + Child(ren)	3	0	0	\$1,421.96	\$1,461.01	\$1,639.91	\$1,683.81	\$1,851.24	\$1,936.71
29	Employee + Family	0	0	0	\$2,448.92	\$2,516.26	\$2,824.29	\$2,899.95	\$3,188.24	\$3,335.54
30	<b>Total Employees</b>	<b>118</b>	<b>1</b>	<b>14</b>						
31	Total Monthly Premium			\$95,114	\$97,731	\$911	\$936	\$14,399	\$15,064	
32	Current Annual Renewal Premium			\$1,325,079						
33	Renewal Annual Premium			\$1,364,769						
34	Change vs Current \$			\$39,690						
35	Change vs Current %			3%						
36	<b>Company Monthly Costs</b>									
37					HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP038	
38	<b>% of Premium</b>	<b>Base</b>	<b>Core</b>	<b>Buy-Up</b>	<u>Current</u>	<u>Renewal</u>	<u>Current</u>	<u>Renewal</u>	<u>Current</u>	<u>Renewal</u>
39	Employee	100%	100%	100%	\$789.98	\$811.72	\$911.06	\$935.51	\$1,028.47	\$1,076.03
40	Employee + Spouse	0%	0%	0%	\$789.98	\$811.72	\$911.06	\$935.51	\$1,028.47	\$1,076.03
41	Employee + Child(ren)	0%	0%	0%	\$789.98	\$811.72	\$911.06	\$935.51	\$1,028.47	\$1,076.03
42	Employee + Family	0%	0%	0%	\$789.98	\$811.72	\$911.06	\$935.51	\$1,028.47	\$1,076.03
43	Total Monthly Premium			\$93,218	\$95,783	\$911	\$936	\$14,399	\$15,064	
44	Current Annual Cost to Company			\$1,302,327						
45	Renewal Annual Cost to Company			\$1,341,395						
46	Change vs Current \$			\$39,067						
47	Change vs Current %			3%						
48	<b>Employee Monthly Deductions</b>									
49	Employee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
50	Employee + Spouse	\$1,026.96	\$1,055.15	\$1,184.38	\$1,216.05	\$1,336.99	\$1,398.70			
51	Employee + Child(ren)	\$631.98	\$649.29	\$728.85	\$748.30	\$822.77	\$860.68			
52	Employee + Family	\$1,658.94	\$1,704.54	\$1,913.23	\$1,964.44	\$2,159.77	\$2,259.51			
53	<b>Employee Semi-Monthly Deductions</b>									
54	Employee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
55	Employee + Spouse	\$513.48	\$527.58	\$592.19	\$608.03	\$668.50	\$699.35			
56	Employee + Child(ren)	\$315.99	\$324.65	\$364.43	\$374.15	\$411.39	\$430.34			
57	Employee + Family	\$829.47	\$852.27	\$956.62	\$982.22	\$1,079.89	\$1,129.76			

\$4,150 HSA Contribution

Up to \$4,150 HRA

# Dental

Plan Design:		Blue Cross Blue Shield of Texas Current/Renewal	
1	Plan Name	DTNHR01	
2	Contributory Status	Contributory	
3	Calendar Year Deductible	\$25 Individual / \$75 Family	
4	Annual Maximum Per Individual	\$3,000	
5	Out-of-Network Reimbursement	90% U&C	
6	Deductible Waived for Preventive	Yes	
7	Preventive & Diagnostic	100%	
8	Basic	80%	
9	Major	50%	
10	Waiting Periods	None	
11	Endodontics/ Periodontics	Basic	
12	Orthodontia	50% to \$2,000 Lifetime Max	
13	Rate Guarantee	1 Year	
<b>Billed Monthly Premiums</b>			
15	<b>Enrollment</b>	<u>Current</u>	<u>Renewal</u>
16	Employee 112	\$46.24	\$46.24
17	Employee + Spouse 10	\$92.52	\$92.52
18	Employee + Child(ren) 10	\$118.63	\$118.63
19	Employee + Family 14	\$181.55	\$181.55
20	<b>Total Employees 146</b>		
21	<b>Total Monthly Premium</b>	\$9,832	\$9,832
22	<b>Annual Premium</b>	\$117,985	
23	<b>Renewal Annual Premium</b>	\$117,985	
24	Change vs Current \$	\$0	
25	Change vs Current %	0%	
<b>Company Monthly Costs</b>			
27	<b>% of Premium</b>	<u>Current</u>	<u>Renewal</u>
28	Employee 100%	\$46.24	\$46.24
29	Employee + Spouse 50%	\$46.24	\$46.24
30	Employee + Child(ren) 39%	\$46.24	\$46.24
31	Employee + Family 25%	\$46.24	\$46.24
32	<b>Total Monthly Premium</b>	\$6,751	\$6,751
33	<b>Annual Premium</b>	\$81,012	
34	<b>Renewal Annual Premium</b>	\$81,012	
35	Change vs Current \$	\$0	
36	Change vs Current %	0%	
<b>Employee Monthly Costs</b>			
38		<u>Current</u>	<u>Renewal</u>
39	Employee	\$0.00	\$0.00
40	Employee + Spouse	\$46.28	\$46.28
41	Employee + Child(ren)	\$72.40	\$72.39
42	Employee + Family	\$135.32	\$135.31
<b>Employee Semi-Monthly Costs</b>			
44		<u>Current</u>	<u>Renewal</u>
45	Employee	\$0.00	\$0.00
46	Employee + Spouse	\$23.14	\$23.14
47	Employee + Child(ren)	\$36.20	\$36.20
48	Employee + Family	\$67.66	\$67.66

# Vision

Plan Design:		Superior Vision Current/Renewal	
1	Network	Superior Select Southwest Network	
2	Contributory Status	Contributory	
3	<b>EXAMINATION</b>		
4	Eye Exam	\$10 Co-Pay	Up to \$35
5	<b>MATERIALS</b>		
6	Frames (Subject to Plan Allowance)	Up to \$200 + 20%	Up to \$70
7	Single Vision Lenses	100% after \$25 Co-Pay	Up to \$25
8	Bifocal Lenses	100% after \$25 Co-Pay	Up to \$40
9	Trifocal Lenses	100% after \$25 Co-Pay	Up to \$45
10	<b>CONTACT LENSES (In Lieu of Frames)</b>		
11	Elective	Up to \$200 + 10%/20%	Up to \$80
12	Medical Necessary	100% after \$25 Co-Pay	Up to \$150
13	<b>FREQUENCY</b>		
14	Exam/Frames/Lenses/Contacts	12/12/12/12	
15	Participation Requirements	-	
16	Rate Guarantee	1 Year	
17		Billed Monthly Premiums	
18	<b>Enrollment</b>	<u>Current</u>	<u>Renewal</u>
19	Employee 112	\$7.82	\$7.82
20	Employee + Spouse 9	\$14.77	\$14.77
21	Employee + Child(ren) 11	\$15.69	\$15.69
22	Employee + Family 12	\$24.60	\$24.60
23	<b>Total Employees</b> 144		
24	<b>Total Monthly Premium</b>	\$1,477	\$1,477
25	<b>Current Annual Premium</b>	\$17,719	
26	<b>Renewal Annual Premium</b>	\$17,719	
27	Change vs Current \$	\$0	
28	Change vs Current %	0%	
29		Company Monthly Costs	
30	<b>% of Premium</b>	<u>Current</u>	<u>Renewal</u>
31	Employee 100%	\$7.82	\$7.82
32	Employee + Spouse 53%	\$7.81	\$7.81
33	Employee + Child(ren) 50%	\$7.81	\$7.81
34	Employee + Family 32%	\$7.82	\$7.82
35	<b>Total Monthly Premium</b>	\$1,126	\$1,126
36	<b>Current Annual Premium</b>	\$13,511	
37	<b>Renewal Annual Premium</b>	\$13,511	
38	Change vs Current \$	\$0	
39	Change vs Current %	0%	
40		Employee Monthly Costs	
41		<u>Current</u>	<u>Renewal</u>
42	Employee	\$0.00	\$0.00
43	Employee + Spouse	\$6.96	\$6.96
44	Employee + Child(ren)	\$7.88	\$7.88
45	Employee + Family	\$16.78	\$16.78
46		Employee Semi-Monthly Costs	
47		<u>Current</u>	<u>Renewal</u>
48	Employee	\$0.00	\$0.00
49	Employee + Spouse	\$3.48	\$3.48
50	Employee + Child(ren)	\$3.94	\$3.94
51	Employee + Family	\$8.39	\$8.39

### Basic Life and ADD

Plan Design:	Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1 Benefit Amount	2X Annual Salary up to \$300,000	
2 Accidental Death & Dismemberment (AD&D)	Same as Basic Life Amount	
3 Waiver of Premium	To 65, if disabled prior to age 60	
4 Guarantee Issue	\$300,000	
5 Conversion	Included	
6 Portability	Included	
7 Accelerated Life Benefit	Lesser of 75% up to \$250,000	
8 <b>Age Reduction</b>		
9 Age 65	65%	
10 Age 70	55%	
11 Age 75	70%	
12 Age 80	80%	
13 Rate Guarantee	1 Year	
14	Billed Premium	
15	<u>Current</u>	<u>Renewal</u>
16 Basic Life Rate / \$1,000	\$0.127	\$0.127
17 Basic AD&D Rate / \$1,000	\$0.016	\$0.016
18 Total Rate / \$1,000	\$0.143	\$0.143
19 Change vs Current \$	\$0	
20 Change vs Current %	0%	

### Voluntary Life and ADD

Plan Design:		Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1	Employee - Benefit Amount	Increments of \$10,000	
2	Maximum Benefit	The lesser of 5X Annual Salary or \$500,000	
3	Accelerated Life Benefit	Lesser of 75% up to \$250,000	
4	Portability	Available	
5	Conversion	Available	
6	Waiver of Premium	To age 65, if disabled prior to 60	
7	Guaranteed Issue (GI)	\$100,000	
8	Minimum Participation Requirements	25% of Eligible Employees	
9	Age Reductions	Same as Basic Life	
10	Suicide Exclusion	1 Year	
11	Spouse - Benefit Amount	Increments of \$5,000	
12	Maximum Benefit	\$500,000 (Not to exceed 100% of EE Benefit)	
13	Guaranteed Issue (GI)	\$25,000	
14	Children: Birth to 14 Days	\$1,000	
15	Children: Age 15 Days to 6 Months	\$1,000	
16	Children: Age 6 Months to 26 Years	Increments of \$2,000	
17	Maximum Benefit	\$10,000	
18	Guaranteed Issue (GI)	\$10,000	
19	<b>Employee Age Brackets</b>	<b>Rate per \$1,000 (Excludes AD&amp;D)</b>	
20		<u>Current</u>	<u>Renewal</u>
21	< 30	\$0.093	\$0.093
22	30 - 34	\$0.112	\$0.112
23	35 - 39	\$0.122	\$0.122
24	40 - 44	\$0.134	\$0.134
25	45 - 49	\$0.186	\$0.186
26	50 - 54	\$0.279	\$0.279
27	55 - 59	\$0.445	\$0.445
28	60 - 64	\$0.663	\$0.663
29	65 - 69	\$1.243	\$1.243
30	70 +	\$2.102	\$2.102
31	<b>Spouse Age Brackets</b>	<b>Rate per \$1,000 (Excludes AD&amp;D)</b>	
32		<u>Current</u>	<u>Renewal</u>
33	< 30	\$0.108	\$0.108
34	30 - 34	\$0.127	\$0.127
35	35 - 39	\$0.137	\$0.137
36	40 - 44	\$0.149	\$0.149
37	45 - 49	\$0.201	\$0.201
38	50 - 54	\$0.294	\$0.294
39	55 - 59	\$0.460	\$0.460
40	60 - 64	\$0.678	\$0.678
41	65 - 69	\$1.258	\$1.258
42	70 +	\$2.117	\$2.117
43	<b>Accidental Death &amp; Dismemberment (AD&amp;D)</b>	<b>AD&amp;D Rate per \$1,000</b>	
44	Employee AD&D Rate	\$0.018 per \$1,000	\$0.018 per \$1,000
45	AD&D Benefit Amount	Same as Basic Life	
46	<b>Spouse Rate Information</b>	<b>Rate per \$1,000</b>	
47		<u>Current</u>	<u>Renewal</u>
48	Spouse AD&D Rate	\$0.033 per \$1,000	\$0.033 per \$1,000
49	Spouse Life Rate	Based on Employee's Age	
50	Spouse Benefit Termination	Spouse benefit terminates at Employee retirement	
51	<b>Dependent Rate Information</b>	<b>Rate per \$1,000</b>	
52		<u>Current</u>	<u>Renewal</u>
53	Child Life Rate / \$1,000	\$0.120 per \$1,000	\$0.120 per \$1,000
54	Child AD&D Rate / \$1,000	\$0.022 per \$1,000	\$0.022 per \$1,000

## Long-Term Disability

Plan Design:	Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1 Contribution Status	Employer Paid	
2 Tax Free Benefit	No	
3 Bonus & Commissions	Excluded	
4 Benefit Amount	60% of your Monthly Earnings	
5 Benefit Maximum	\$8,000	
6 Elimination Period	90 Days	
7 Pre-Existing Exclusion	3/12	
8 Survivor Benefit	3X Last Monthly Benefit	
9 Partial Disability Test	80%/60%	
10 Rehabilitation	Incentivized	
11 Own Occupation Period	24 Months	
12 Duration	To SSNRA	
13 Definition of Disability	And	
14 Rate Guarantee	1 Year	
15	Billed Premium	
16	<u>Current</u>	<u>Renewal</u>
17 Total Rate / \$100	\$0.351	\$0.351
18 Change vs Current \$	\$0	
19 Change vs Current %	0%	

## Short-Term Disability

Plan Design:	Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1 Contribution Status	Employer Paid	
2 Tax Free Benefit	No	
3 Bonus & Commissions	Excluded	
4 Benefit Amount	60% of your Weekly Earnings	
5 Benefit Maximum	\$2,000	
6 Elimination Period - Accident	14 Days	
7 Elimination Period - Sickness	14 Days	
8 Pre-Existing Exclusion	None	
9 Duration	11 Weeks	
10 Rate Guarantee	1 Year	
11	Billed Premium	
12	<u>Current</u>	<u>Renewal</u>
13 Total Rate / \$10	\$0.240	\$0.240
14 Change vs Current \$	\$0	
15 Change vs Current %	0%	



**Amendment #1 to Virtual Care Services Agreement**

This Amendment #1 (“Amendment”) is signed as of the signature date(s) below and made effective as of January 1, 2023 (“Amendment Effective Date”) by and between First Stop Health, LLC (“FSH”) and Collin Central Appraisal District (“CLIENT”). On October 27, 2020, the Parties entered into a Virtual Care Services Agreement that was automatically renewed as of January 1, 2022 (“Agreement”). All terms not otherwise defined herein shall have the meanings ascribed to such terms in the Agreement.

WHEREAS, FSH and CLIENT find it in their respective interests to extend the current Term of the Agreement and increase the PEPM for the Telemedicine Services.

NOW, THEREFORE, in consideration of the premises and of the mutual promises and covenants herein contained, the Parties hereto agree as follows:

1. **The current renewal Term is hereby extended through December 31, 2024.**
2. **Pricing.** As of the Amendment Effective Date, **the PEPM Price for the Telemedicine Services will increase from \$6.45 to \$7.45.**
3. Except as specifically amended hereby, all terms of the Agreement remain in full force and effect. In the event of any conflict between the Agreement and this Amendment, the provisions of this Amendment shall prevail.
4. This Amendment may be executed in counterparts, including electronically, and by different Parties on separate counterparts, and each counterpart shall be deemed an original, but all of which together shall constitute one and the same Amendment.

IN WITNESS WHEREOF, the Parties have caused this Amendment to be executed by their duly authorized representatives.

**First Stop Health, LLC**

**Collin Appraisal District**

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_



**COLLIN CENTRAL APPRAISAL DISTRICT  
2024 GROUP INSURANCE SUMMARY CALCULATIONS**

2023 CALCULATED INSURANCE COST:			2024 PROJECTED COST AT RENEWAL:			2024 PROJECTED COST, AS NEGOTIATED:		
ITEM	MONTHLY	ANNUAL	RENEW FACTOR	PROJ. MONTHLY	PROJ. ANNUAL	RENEW FACTOR	PROJ. MONTHLY	PROJ. ANNUAL
Medical (BCBS)	\$815.95	\$9,791.40	14.00%	\$930.18	\$11,162.20	3.00%	\$840.43	\$10,085.14
Dental (BCBS)	\$46.24	\$554.88	5.00%	\$48.55	\$582.62	0.00%	\$46.24	\$554.88
Vision (SUPERIOR)	\$7.82	\$93.84	0.00%	\$7.82	\$93.84	0.00%	\$7.82	\$93.84
Long-term care (Unum)*	\$11.37	\$136.44	0.00%	\$11.37	\$136.44	0.00%	\$11.37	\$136.44
First Stop Health, Teledoc	\$7.45	\$89.40	0.00%	\$7.45	\$89.40	0.00%	\$7.45	\$89.40
*Life / Disability (BCBS)	\$72.59	\$871.10	0.00%	\$72.59	\$871.10	0.00%	\$72.59	\$871.10
IDSshield	<u>\$9.95</u>	<u>\$119.40</u>	<u>0.00%</u>	<u>\$9.95</u>	<u>\$119.40</u>	<u>0.00%</u>	<u>\$9.95</u>	<u>\$119.40</u>
Subtotal	\$971.37	\$11,656.46		\$1,087.92	\$13,055.00		\$995.85	\$11,950.21
HSA/Medical Reimbursements	<u>\$304.16</u>	<u>\$3,650</u>		<u>\$345.83</u>	<u>\$4,150</u>		<u>\$345.83</u>	<u>\$4,150</u>
Grand Total (Per Employee)	\$1,275.53	\$15,306.38		\$1,433.75	\$17,204.96		\$1,341.68	\$16,100.17
Number of Employees Budgeted	158	158		165	165		165	165
Projected Grand Total Cost	\$201,534.06	\$2,418,408.72		\$236,568.26	\$2,838,819.11		\$221,377.29	\$2,656,527.44
Line-Item Budget (less Agent & Wellness)		<u>\$2,951,000.00</u>			<u>\$2,812,000.00</u>			<u>\$2,812,000.00</u>
Projected Line-Item Balance Y.E.		\$532,591.28	Projected Line-Item Balance Y.E.	-\$26,819.11		Projected Line-Item Balance Y.E.		\$155,472.56
Annual Budget Per Employee		\$18,677.22	Annual Budget Per Employee	\$17,042.42		Annual Budget Per Employee		\$17,042.42

Color Codes: Yellow = Current 2023 Projected Cost. Gray = 2024 Initial Renewal Rates. Green = Negotiated Rates Being Recommended for 2024.

*\* The Texas Department of Insurance has approved the Unum request for a rate adjustment for employee purchased plans with inflation adjustments to benefits to be paid. The plan premium was changed on all clients that selected the inflation adjusted benefits at their initial enrollment. The employee can choose to avoid their premium increase by waiving the inflation adjustment to their benefit. The District's cost per employee will not change, since it is a fixed benefit, without inflation adjustment. Our initial coverage began in 2009 and our premiums have not changed since our initial enrollment.*

**Agenda Item Reference: I**

**Report**

**2024 Employee Insurance**

**Policies #1001 & #1005**



# Collin Central Appraisal District

**POLICY NUMBER: 1001**

**POLICY NAME: MEDICAL REIMBURSEMENT POLICY**

All full-time active employees on the District's non-HSA Medical Plan, Blue Cross MTBCP038, are eligible to participate in the District's medical reimbursement program. The reimbursement program is applicable to medical deductible and prescription co-pay expenses for the employee only. Medical copays are not eligible for reimbursement. Vision and Dental deductibles and copays are not eligible for reimbursement.

Eligible employees can receive a maximum of ~~\$3,850~~ **\$4,150** in reimbursements per budget year. Any unused portion of the ~~\$3,850~~ **\$4,150** annual reimbursement allowance cannot be carried forward, in part or whole, to any future budget year, or retroactively applied to a prior budget year. This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the medical reimbursement program as they deem appropriate. The Chief Appraiser shall develop and implement a medical reimbursement procedure that adheres to this policy.

This policy has been reviewed by the Board of Directors and is hereby continued through the end of budget year ~~2023~~ **2024**.

**Adopted: January 22, 2009**

**Board Minutes: 1-22-2009**

**Amended: November 19, 2020**

**Resolution #: 2020-1093**

**Amended: November 18, 2021**

**Resolution #: 2021-1102**

**Amended: October 27, 2022**

**Resolution #: 2022-1116**

**Amended: October 26, 2023**

**Resolution #: 2023-1130**



# Collin Central Appraisal District

**POLICY NUMBER: 1005**

**POLICY NAME: HEALTH SAVINGS ACCOUNT (HSA)**

All full-time active employees on the District's High Deductible Health Plan (HDHP), Blue Cross MTBCPOO7H HSA, are eligible for contributions to their HSA by the District. The District will contribute monthly to each eligible employee's HSA, based on a ~~\$3,850~~ **\$4,150** annual maximum. The District will make a reasonable effort to deposit contributions for the current month within the first fifteen calendar days of the current month.

For employees new to the District during calendar year ~~2023~~ **2024**, the District will make a one-time initial contribution of \$300 to establish the employee's HSA account. Thereafter, the District will make monthly contributions, as outlined above.

This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the High Deductible Health Plan (HDHP), and/or alter or eliminate contributions to the Health Savings Account (HSA), as they deem appropriate.

The Chief Appraiser shall develop and implement a Health Savings Account (HSA) contribution procedure that adheres to this policy.

This policy has been reviewed by the Board of Directors and is hereby adopted through the end of budget year ~~2023~~ **2024**.

**Adopted: October 27, 2011**

**Resolution #: 2011-1019**

**Adopted: November 18, 2021**

**Resolution #: 2021-1101**

**Amended: November 19, 2020**  
**Resolution #: 2020-1092**

**Amended: October 27, 2022**  
**Resolution #: 2022-1115**

**Amended: October 26, 2023**  
**Resolution #: 2023-1131**

**Agenda Item Reference: I**

**Report**

**2024 Employee Insurance**

**Resolutions**

**2024 Insurance Carriers**

**2024 Medical Reimbursements**

**2024 HSA Contributions**



# Collin Central Appraisal District

## BOARD OF DIRECTORS

Gary Rodenbaugh, Chairman  
Brian Mantzey, Secretary  
Ronald Carlisle  
Ronald Kelley  
Kenneth Maun  
Carson Kincaid Underwood

## CHIEF APPRAISER

Marty Wright

### BOARD OF DIRECTORS RESOLUTION # 2023-81

The Collin Central Appraisal District Board of Directors met in open session on October 26, 2023. The Board, with a quorum present, by a vote of \_\_\_\_\_ (for) and \_\_\_\_\_ (against) adopted the following resolution:

***Be it resolved that the Collin Central Appraisal District Board of Directors hereby approves the following group insurance carriers for 2024, as listed below, based on details presented in public session on October 26, 2023.***

CARRIER	COVERAGE TYPE
BCBS	Medical
BCBS	Dental
Superior Vision	Vision
BCBS	Life, Short-Term Disability and Long-Term Disability
Unum	Long-term Care
First Stop Health	Online Doctor Care and Online Mental Health Counselors
IDShield	Identity Theft Protection

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

\_\_\_\_\_  
Brian Mantzey, Secretary

(and/or)

\_\_\_\_\_  
Gary Rodenbaugh, Chairman



# Collin Central Appraisal District

## BOARD OF DIRECTORS

Gary Rodenbaugh, Chairman  
Brian Mantzey, Secretary  
Ronald Carlisle  
Ronald Kelley  
Kenneth Maun  
Carson Kincaid Underwood

## CHIEF APPRAISER

Marty Wright

### **BOARD OF DIRECTORS RESOLUTION # 2023-1130**

The Collin Central Appraisal District Board of Directors met in open session on October 26, 2023. The Board, with a quorum present, by a vote of \_\_\_\_\_ (for) and \_\_\_\_\_ (against) adopted the following resolution:

***Be it resolved that the Collin Central Appraisal District Board of Directors hereby continues Board Policy #1001 through calendar year 2024, regarding reimbursements of medical deductible expenses and prescription co-pay expenses to employees, not to exceed \$4,150 annually, from the 2024 adopted Budget, pursuant to Board Policy #1001.***

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

\_\_\_\_\_  
Brian Mantzey, Secretary

(and/or)

\_\_\_\_\_  
Gary Rodenbaugh, Chairman





# Collin Central Appraisal District

## BOARD OF DIRECTORS

Gary Rodenbaugh, Chairman  
Brian Mantzey, Secretary  
Ronald Carlisle  
Ronald Kelley  
Kenneth Maun  
Carson Kincaid Underwood

## CHIEF APPRAISER

Marty Wright

### **BOARD OF DIRECTORS RESOLUTION # 2023-1131**

The Collin Central Appraisal District Board of Directors met in open session on October 26, 2023. The Board, with a quorum present, by a vote of \_\_\_\_\_ (for) and \_\_\_\_\_ (against) adopted the following resolution:

***Be it resolved that the Collin Central Appraisal District Board of Directors hereby continues Board Policy #1005 through calendar year 2024, regarding contributions to employees' Health Savings Accounts in the amount of \$4,150 annually, from the 2024 adopted Budget, pursuant to Board Policy #1005.***

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

\_\_\_\_\_  
Brian Mantzey, Secretary

(and/or)

\_\_\_\_\_  
Gary Rodenbaugh, Chairman

**J.**

**Computer Hardware  
&  
Equipment Purchases**



# Collin Central Appraisal District

October 12, 2023

## 2023 October Hardware Purchases

This is our end-of-year hardware purchase for 2023 which is primarily driven by the Board of Directors approved replacement cycle. All hardware that is to be replaced has passed their approved life cycle and their roles are still utilized in our production environment.

All purchases are fully funded in the 2023 capital expenditure computer equipment line item and are scheduled or past schedule per the Board approved hardware replacement cycle:

Item	2023 Budget Line Item	Quantity	Total Amount
Surface Pro 9 Tablets	5700 - Computer Equipment	4	\$4,400
Dell Monitors	5700 - Computer Equipment	30	\$6,000
Desktop Printers	5700 - Computer Equipment	2	\$3,000
System Printer	5700 - Computer Equipment	1	\$5,000
Projectors	5700 - Computer Equipment	1	\$4,000
Desktop Scanners	5700 - Computer Equipment	13	\$13,000
Pelco DVR Server (48TB)	5700 - Computer Equipment	1	\$12,000
Dell NAS Server	5700 - Computer Equipment	1	\$12,000
Dell Workstations All-in-One	5700 - Computer Equipment	10	\$12,000
Dell Workstations Towers	5700 - Computer Equipment	10	\$15,000
<b>Total Computer Equipment:</b>			<b><u>\$86,400</u></b>

The above pricing is the most competitive of three vendors or via state contract/DIR/HUB. We are requesting permission to purchase the above items fully funded in the 2023 budget not to exceed the **Total Amount of \$87,000**.

Thank you in advance for your consideration and as always let me know if you have any questions or concerns regarding the above hardware/software. I have included the current approved hardware replacement cycle to this summary for reference.

**Ryan Matthews**

Deputy Chief Appraiser - Technology



# Collin Central Appraisal District

## CCAD Hardware Replacement Cycle

Desktop Replacement 5 years

- Standard PC
- Laptop
- Workstation
- Thin client

Printer Replacement 7 years

- Ink
- Laser (standard duty)

Scanner Replacement 5 years

- Flatbed (standard duty)
- Flatbed with document feeder
- Multifunction scanners

System Printer Replacement 3 years

- Laser (large capacity)
- Color Laser

System Scanner Replacement 7 years

- Flatbed (large capacity)
- Mass lift scanners

Plotter Replacement 3 years

- Standard laser/Ink 14" width printing and above
- Multifunction laser/Ink 14" width printing and above

Server Replacement 3 years

- All machines loaded with server OS software

Network Device Replacement 3 years

- Switches
- Hubs
- Wireless Access Points
- Routers
- Bridges
- Tape libraries
- UPS batteries
- Projectors

### Hardware Recycle

In the event that hardware is still in good working condition, can handle its future capacity and parts are still stocked, we will pursue a hardware upgrade or defer replacement.

**K.**

**2024 Printing & Mailing Services**



# Collin Central Appraisal District

October 11, 2023

## 2024 Printing & Mailing Services Contract

The District wishes to exercise its option, as stated in the RFP "IST-2021-PM" on page 10, to extend the Printing & Mailing Services contract with VariVerge for another year. The Contract Period regarding this fourth-year option is being extended to include services from January 1, 2024, through December 31, 2024.

Attached is the RFP Addendum #3 which includes the notice of contract extension, project dates, and price quote form. The current 2023 contract was \$105,997. For 2024, like years prior, there has been an increase in the cost of paper; however, Project #6 (Tax Transparency Postcards), which was \$24,320 last year, has been removed as it is no longer required by the Texas Property Tax Code. These changes bring the **2024 grand total to \$92,837**.

Please note that there have been no labor or service price increases since the original 2021 RFP proposal.

Thank you in advance for your consideration in allowing us to move forward with this RFP 4<sup>th</sup> year option for 2024.

A digital signature of Ryan Matthews in black ink, written over a white background with a slight shadow effect. To the right of the signature is a small, square portrait photo of Ryan Matthews, a man with short brown hair and a beard, wearing a blue shirt.

**Ryan Matthews**

Deputy Chief Appraiser - Technology

REQUEST FOR PROPOSAL  
RFP No. IST-2021-PM  
PRINTING & MAILING SERVICES  
(RFP Addendum #3)

**NOTICE OF CONTRACT EXTENSION**

October 10, 2023



**COLLIN CENTRAL APPRAISAL DISTRICT**  
250 Eldorado Pkwy  
McKinney, Texas 75069

The Collin Central Appraisal District wishes to exercise our option, as stated on page 10 of the RFP, to extend the "Printing & Mailing Services" contract that was previously awarded to your company in 2021 and then extended for 2022 & 2023. This new extension would include services from January 1, 2024 through December 31, 2024.

By signing below the vendor agrees to this addendum and contract extension. Attached is a copy of the original contract, the new "Project Period & Dates" and copy of your original "Price Quote" for the extended contract period, please initial each page attached.

Please contact me should you have any questions.

Sincerely,

A handwritten signature in black ink that reads "Shane Cheek".

Shane Cheek  
Director of Information Services

Vendor Name: VariVerge, LLC

Address: 8949 Diplomacy Row, Dallas TX 75247

Printed Name: McKenzie Parker Title: Director of Sales & Marketing

Signature: McKenzie Parker Date: 10/11/2023  
McKenzie Parker (Oct 11, 2023 15:30 CDT)



REQUEST FOR PROPOSAL  
RFP No. IST-2021-PM  
PRINTING & MAILING SERVICES  
(RFP Addendum #3)

Vendor Initials: MP  
MP

Original Contract/Services Agreement:

**SERVICES AGREEMENT**

RFP No.: IST-2021-PM  
Description: 2021 Printing and Mailing Services  
Term of Contract: January 1, 2021 through December 31, 2021

**THIS IS AN AGREEMENT made on  
BETWEEN**

December 21, 2020

- 1) Collin Central Appraisal District (the "Buyer"); and
- 2) VariVerge, LLC (the "Service Provider"),

collectively referred to as the "Parties".

The Buyer wishes to be provided with the Services (defined in the RFP mentioned above) by the Service Provider and the Service Provider agrees to provide the Services to the Buyer on the terms and conditions of this Agreement.

As specified in the RFP, the Service Provider warrants that all articles, materials and work supplied by you under this contract conform to specifications, samples, or other descriptions and sensitive time constraints provided to you by the Buyer.

All terms and conditions set forth in the RFP are made part of this contract. Only those assumptions or exceptions specifically noted in this Services Agreement have been considered and granted by Buyer to the Service Provider. Any other assumptions or exceptions are specifically denied. Any oral accommodations to grant Respondent's assumptions or exceptions are specifically disclaimed.

AS WITNESS the hands of the Parties hereto or their duly authorized representatives.

BUYER

SERVICE PROVIDER

**COLLIN CENTRAL APPRAISAL DISTRICT**

**VARIVERGE, LLC**

Bo Daffin

McKenzie Parker

Printed Name

Printed Name

Chief Appraiser

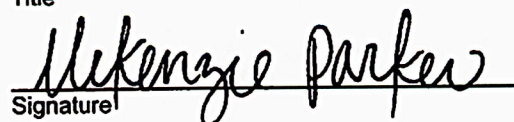
Sales & Marketing

Title

Title



Digitally signed by Bo Daffin  
Date: 2021.01.20 16:46:15  
-06'00'



Signature

Signature

January 20, 2021

1/19/2021

Date

Date



**REQUEST FOR PROPOSAL  
RFP No. IST-2021-PM  
PRINTING & MAILING SERVICES  
(RFP Addendum #3)**

Vendor Initials: MP

**PROJECT PERIOD & DATES:**

The contract extension to this RFP is for services from January 1, 2024 through December 31, 2024.

The following is a list of project dates listing the date the District is to deliver the data to the vendor and then the date the vendor is required to have all mail pieces delivered to the USPS for mailing. All postmark dates must be the same date as the day the mail is delivered to the USPS for mailing. These dates are "projected" dates and are subject to change.

- 1) Homestead Applications (split into two mailings, 1a & 1b)
  - Data to Vendor ..... January 8, 2024
  - Vendor Mail Date ..... January 12, 2024
- 2) BPP Renditions
  - Data to Vendor ..... January 18, 2024
  - Vendor Mail Date ..... January 24, 2024
- 3) Real Property Appraisal Notices
  - Data to Vendor ..... April 2, 2024
  - Vendor Mail Date ..... April 15, 2024
- 4) BPP Appraisal Notices #1 (Regular)
  - Data to Vendor ..... May 2, 2024
  - Vendor Mail Date ..... May 8, 2024
- 5) BPP Appraisal Notices #2 (Late/Penalty)
  - Data to Vendor ..... May 23, 2024
  - Vendor Mail Date ..... May 29, 2024
- ~~6) Property Tax Transparency Postcards~~
  - ~~• Data to Vendor ..... \*no longer required\*~~
  - ~~• Vendor Mail Date ..... \*no longer required\*~~
- 7) Homestead Re-File Applications
  - Data to Vendor ..... September 5, 2024
  - Vendor Mail Date ..... September 12, 2024
- 8) Homestead Postcards
  - Data to Vendor ..... December 12, 2024
  - Vendor Mail Date ..... December 18, 2024

**REQUEST FOR PROPOSAL**  
**RFP No. IST-2021-PM**  
**PRINTING & MAILING SERVICES**  
**(RFP Addendum #3)**

Vendor Initials: MP  
MP

**PRICE QUOTE FORM**

*(as submitted by bidder)*

Project No.	Item No.	Estimated Volume	Description	Unit Price	Total for Item
1.	1.1.1	45,000	Laser Printed Cover Letter page 1 w/ variable data. (back is blank)	0.040	\$1,800.00
	1.1.2		Laser Printed HS App pages 2 & 3 w/ variable data. (duplex)	0.045	\$2,025.00
	1.1.3		Laser Printed HS App pages 3 & 4 w/ variable data. (duplex)	0.045	\$2,025.00
	1.1.4		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$1,350.00
			<b>Project Total → →</b>	<b>0.160</b>	<b>\$7,200.00</b>
2.	2.1.1	30,000	Laser Printed BPP Rend pages 1 & 2 w/ variable data. (duplex)	0.045	\$1,350.00
	2.1.2		Laser Printed BPP Rend pages 3 & 4 w/ variable data. (duplex)	0.045	\$1,350.00
	2.1.3		Two page Rendition Info & Definitions insert. (duplex)	0.030	\$ 900.00
	2.1.4		Offset Printed one page BPP Affidavit insert.	0.040	\$1,200.00
	2.1.5		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$ 900.00
			<b>Project Total → →</b>	<b>0.1900</b>	<b>\$5,700.00</b>
3.	3.1.1	380,000	Laser Printed Real NOAV pages 1 & 2 w/ variable data. (duplex)	0.045	\$17,100.00
	3.1.2		Two page Informal Procedures insert. (duplex)	0.030	\$11,400.00
	3.1.3		Two page Rights & Remedies insert. (duplex)	0.030	\$11,400.00
	3.1.4		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$11,400.00
	3.2		Print each Appraisal Notice image to separate PDF files as detailed.	0.005	\$1,900.00
			<b>Project Total → →</b>	<b>0.140</b>	<b>\$53,200.00</b>



**REQUEST FOR PROPOSAL  
RFP No. IST-2021-PM  
PRINTING & MAILING SERVICES  
(RFP Addendum #3)**

Vendor Initials: MP  
MP

<b>4.</b>	4.1.1	18,000	Laser Printed BPP NOAV pages 1 & 2 w/ variable data. (duplex)	0.045	\$ 810.00
	4.1.2		Two page Informal Procedures insert. (duplex)	0.030	\$ 540.00
	4.1.3		Two page Rights & Remedies insert. (duplex)	0.030	\$ 540.00
	4.1.4		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$ 540.00
	4.2		Print each Appraisal Notice image to separate PDF files as detailed.	0.005	\$ 90.00
			<b>Project Total → →</b>	<b>0.140</b>	<b>\$2,520.00</b>
<b>5.</b>	5.1.1	14,000	Laser Printed BPP NOAV pages 1 & 2 w/ variable data. (duplex)	0.045	\$ 630.00
	5.1.2		Two page Rendition Penalty Letter insert. (duplex)	0.030	\$ 420.00
	5.1.2		Two page Informal Procedures insert. (duplex)	0.030	\$ 420.00
	5.1.4		Two page Rights & Remedies insert. (duplex)	0.030	\$ 420.00
	5.1.5		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$ 420.00
	5.2		Print each Appraisal Notice image to separate PDF files as detailed.	0.005	\$ 70.00
			<b>Project Total → →</b>	<b>0.170</b>	<b>\$2,380.00</b>
<b>6.</b>	6.1.1	0	Property Tax Transparency Postcards w/ laser printed variable data on front and generic back	0.046	<del>\$ 0.00</del>
	6.1.2		Cut, Sort, Meter, Tray & Deliver to USPS	0.030	<del>\$ 0.00</del>
			<b>Project Total → →</b>	<b>-0.076</b>	<b>\$ 0.00</b>

**REQUEST FOR PROPOSAL  
RFP No. IST-2021-PM  
PRINTING & MAILING SERVICES  
(RFP Addendum #3)**

Vendor Initials: MP

7.	7.1.1	15,000	Laser Printed Cover Letter w/ variable data. (1 page)	0.040	\$ 600.00	
	7.1.2		Laser Printed HS App pages 2 & 3 w/ variable data. (duplex)	0.045	\$ 675.00	
	7.1.3		Laser Printed HS App pages 4 & 5 w/ variable data. (duplex)	0.045	\$ 675.00	
	7.1.4		#9 Self Addressed Return Envelope (no postage/permit)	0.040	\$ 600.00	
	7.1.5		Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS	0.030	\$ 450.00	
			<b>Project Total → →</b>	<b>0.200</b>	<b>\$3,000.00</b>	
8.	8.1.1	50,000	Homestead Postcards w/ laser printed variable data on front and generic back	0.03425	\$1,712.50	
	8.1.2		Cut, Sort, Meter, Tray & Deliver to USPS	0.02000	\$1,000.00	
			<b>Project Total → →</b>	<b>0.05425</b>	<b>\$2,712.50</b>	
<i>Use the below rows to add in any miscellaneous items not listed in project items above.</i>						
9.	9.1	-	Forms Design / Programming Cost	→→→→→	0	
	9.2	6	Delivery - Express Overnight	10.00	\$ 60.00	
		502,000	#10 Window Envelopes	0.032	\$16,064.00	
			<b>Misc Items Total → →</b>	<b>→→→→→</b>	<b>\$16,124.00</b>	
<i>Prices indicated must include all envelopes, paper, printing supplies, labor, developer, form design, delivery and any other expenses required to meet the enclosed bid specifications.</i>					<b>GRAND TOTAL</b>	<b>\$92,836.50</b>

**Bidder Notes:**

*Paper cost is included in laser unit prices of \$0.015 per sheet.*

*2022 – Paper and envelope prices must increase due to paper shortages and supply chain issues.*

*2023 – Envelope price increased due to shortages in the paper industry.*

*2024 – Taxpayer Remedies and paper cost increased.*



**L.**

**Homestead Exemption Audit  
and Production Solution**



# Collin Central Appraisal District

October 16, 2023

## Homestead Exemption Audit and Production Solution

For years we have been seeking a solution to our increasing homestead processing loads. With the recent legislation requirement for mandatory 5-year audits on every existing application, we were pleasantly surprised when we went back into the market earlier this year to find a solution that fully covers our need for not only auditing, but can also help alleviate the aggressive grind of our homestead application workflow. Below I will try to compress our process, TrueRoll's services and contract details into this executive summary for Board consideration; I have also included their proposal in this summary.

TrueRoll is currently serving twenty-one other Texas appraisal districts. We have seen recommendations from other CADs come across email distribution groups as well as examined an exhaustive Tarrant CAD vendor comparison of the top three application-auditing solutions showing TrueRoll as the clear functional and cost winner. The core annual audit processing of existing homestead exemptions runs through a much more exhaustive AI process than we currently have access to including personal finance, other government agencies, online advertising, real estate listings, online rentals, and even social media. The comprehensive list of data sources TrueRoll uses to audit yields proper exemption removal from invalid applications which benefits our entities and makes for a fair application standard. This process also yields a clean list of homeowners that are not currently receiving benefit, but do in fact qualify for homestead exemption, so we can add them to our Taxpayer notification campaigns and get them set up.

We are also looking to work with TrueRoll in leveraging a new process they are calling AppVet. This process allows us to continuously add new applications throughout the year to offset internal research and qualification of each new homestead exemption request as they arrive. This functionality targets a portion of the customer service department's daily workflow while also adding currently un-accessible research data sources which should give a highly confident qualification. Initially IST staff will be coding and exporting data to/from PACS and TrueRoll until API integration is finalized with BIS who will be taking over our online application portals starting Q1 next year.

We are seeking approval to move forward with a three-year contract with TrueRoll to include annual audits, AppVet production data processing up to 55k per year, OCR processing of scanned paper applications up to 40k per year, and special investigation reports for high profile applications. Contract cost details are as follows: **year one - \$127,125, years two and three - \$169,500 each** with a non-appropriation of funds clause included to not bind the Board of Directors. This purchase would **fund from line item 5770 Computer Software Licensing & Subscriptions**.

Please let me know if you have any questions or concerns with our TrueRoll recommendation for both annual audit and daily production processing of homestead applications.

**Ryan Matthews**

Deputy Chief Appraiser - Technology



# Proactive Homestead Monitoring™

An end-to-end solution for managing exemption roll accuracy and new application verification. TrueRoll will empower the Collin Central Appraisal District to correct & **monitor its exemption roll in real-time.**

Prepared For:

Shane Cheek, RPA, RTA  
Dir of Information Services  
Collin Central Appraisal District  
250 Eldorado Pkwy  
McKinney, TX 75069

REVISED On: September 29, 2023

Prepared By

Mike Sarver  
VP of Homestead at TrueRoll  
mike@trueroll.io  
985.966.4663



# About TrueRoll

TrueRoll empowers over 80 local governments across the country to maintain accurate property tax rolls by identifying unqualified and unclaimed homestead exemptions using data science and automation.

For over a decade, cofounders Tyler Masterson and Joseph Walsh, Ph.D., have built government data solutions. It came to their attention that there was a need to modernize and automate the homestead exemption lifecycle. Utilizing data and industry-focused business logic, they created TrueRoll, which allows offices to **automatically vet new exemption applications and proactively identify unclaimed and unqualified homestead exemptions, in real-time.**

## Challenge

The process for identifying unqualified exemptions typically relies on a single-point-in-time batch audit or time-consuming investigative tasks like reviewing returned mail, investigating every new exemption application, or researching properties that send their mail to a non-situs address.



## Solution

TrueRoll Proactive Homestead Monitoring™: Thousands of federal, state, local, and proprietary databases enable TrueRoll to discover and contextualize data on individual owners and parcels in ways not currently possible for government agencies. Our award-winning<sup>1</sup> online platform gives your staff the power to identify errors, manage, and update your tax roll proactively.

Our **80+** customers, located in **11** different states (IA, SC, TX, FL, LA, IL, IN, WA, GA, UT, HI), use TrueRoll to **free up time, create taxation fairness, identify new revenue, and generate trust.**

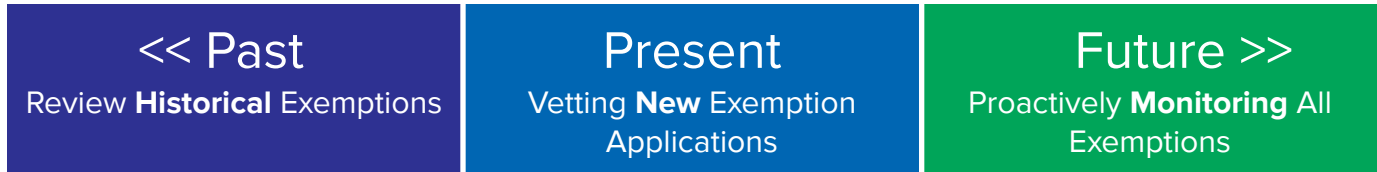
<sup>1</sup> <https://www.govtech.com/100/2022> - Government Technology Magazine names TrueRoll to the top 100 government technology companies “focused on, making a difference in state and local government agencies across the United States.” - TrueRoll made the list 2 years in a row!





# The Promise of TrueRoll's Approach

TrueRoll's unique approach focuses on the **Past, Present & Future**, and is the only full-lifecycle exemption administration solution on the market.



TrueRoll performs an AI-powered historical review of your exemption roll dating back up to 10 years to make sure your tax roll is current and monies owed are paid.

New exemption applications come in every day, often 1000s per year that take multiple employees months to review. New applications can now be automatically vetted, approved/denied with TrueRoll using a fraction of the resources.

Tax rolls are dynamic. The only way to keep them accurate is to monitor the qualification status of each exemption enrollee in real-time and notify the citizens proactively when their qualification status changes. **No more audits and no more multi-year back-tax processes.**

The benefits to our customers of this full lifecycle approach are the following:

- 1. Increased tax revenues** by removing unqualified exemptions and identifying unqualified auto-renewals **before** they renew.
- 2. Increased social equity** by identifying **unclaimed** exemptions -- owners eligible for homesteads but are not currently enrolled.
- 3. Reduced citizen disruption** by eliminating the problematic collection of back-taxes by proactively identifying disqualified exemptions before fines are necessary.
- 4. Time savings for Collin Central Appraisal District staff** by automating the identification of unqualified exemptions across 1,000s of data sources, removing the need to monitor rental sites manually, check returned mail, and read endless obituaries.
- 5. Improved relationship between the taxpayers** and your office through positive press associated with removing unqualified exemptions and enrolling qualified homeowners.<sup>2</sup>

<sup>2</sup> All deployments come with an optional PR module to easily create positive coverage around your exemption equality initiative.



# TrueRoll's Core Capabilities

The TrueRoll service scours 1,000+ data sources and produces a prioritized list of potentially unqualified exemptions for review by your staff.

At the highest level, our customers provide their tax roll and new exemption applications to our team via a CAMA-connected interface. We then provide you with potentially unqualified exemptions and accompanying contextualized evidence of compliance or non-compliance in an easy-to-use web interface.

TrueRoll Proactive Homestead Monitoring has three main components:



## Discovery

Our platform scours many national and local data sources - from the tax rolls of over 3,000 county offices to DMV databases to rental listings to social media profiles - to uncover potentially unqualified homestead exemptions.

Our business rules are configurable so you see only the "flags" your office cares about.

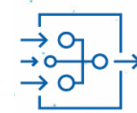


## Decision

With our Assisted or Full-Service Audit option, TrueRoll's trained investigators will review some or all of your potentially unqualified exemptions (we call them Candidates), perform additional research, and provide your team a recommendation on each exemption's qualification status and recommended next steps (denial, back taxes, etc.).

Once we discover the potentially unqualified exemptions, the next step is to use our detailed owner and property history information to decide on the qualification status of each.

TrueRoll prioritizes the Candidates based on artificial intelligence so your office can spend its time where it will have the biggest impact.



## Action

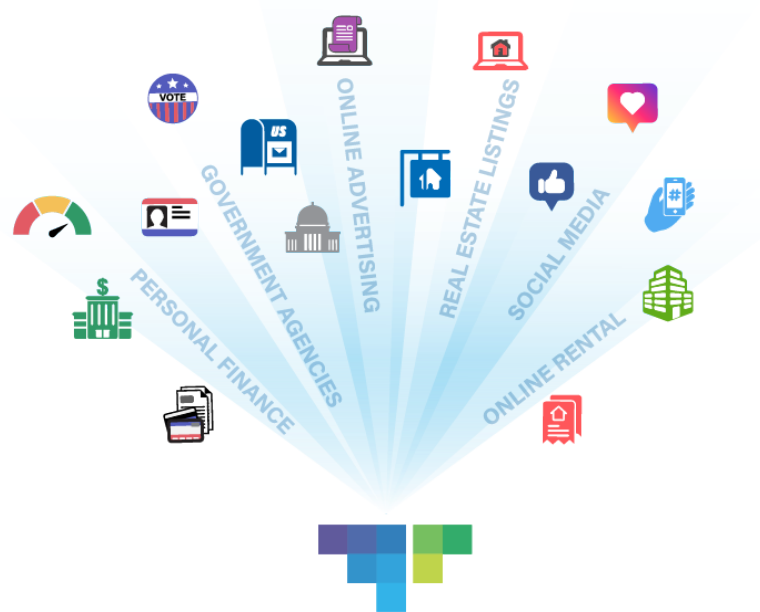
Once you've decided on what action to take, TrueRoll will help you take the next step by providing features to help you contact the citizen, send out a denial letter, and capture the audit history of every action taken against that parcel.

Our configurable workflow maps to your end-to-end exemptions administration process.



# Our Comprehensive Data Sources

TrueRoll data was designed **specifically for determining the qualification of homestead exemptions and applications.**



*The TrueRoll platform includes proprietary data and business rules specifically configured for your office.*

## Core Exemption Datasets

- National Tax Parcel Databases
- State Driver's License Databases
- USPS Change of Address Database
- Federal Master Death File
- State and Local Vital Statistics Data
- National & Local Obituary Listings
- Voter Records
- Owner Credit / Address Histories
- Vehicle Registrations
- Utility History
- Court Filings
- Eviction cases (often signifies rentals)
- Liens / Judgments / Bankruptcies

## TrueRoll Proprietary Data Sources

- Veterans/Active Duty Dataset
- Local MLS Rental/Lease Listings
- Historical Address Vacancies
- Undiscovered Duplexes
- Juror Excusal Reasons
- Direct Integration with your CAMA
- TrueRoll National Rental Database
- Custom Data for Your Jurisdiction such as:
  - Returned Mail to your Office
  - Rental Registrations
  - Your Active Investigations
  - Open Data or 311 Data
  - Fraud Hotline
  - Public Utilities



# ■ The TrueRoll Data Science Process

Our proprietary data science process solves the complex challenge of person-and-parcel entity matching across disparate data sources and presents actionable insights.



*“With this project, were not only going to identify unqualified exemptions, it gives us perspective on how to **organize our entire exemption workflow.**”*  
- Rob Ross, Chief Data Officer, Cook County IL

## Step 1: Cleansing & Preparation

After requesting your tax roll data, we cleanse and process it against our thousands of data sources (public, private, purchased, scraped, etc.). We use 100’s of exemption eligibility criteria modeled off your state’s legislative code to find exemptions that may be unqualified.

## Step 2: Researching & Prioritization

TrueRoll then prioritizes the potentially unqualified exemption (we call them “Candidates”) to your [www.trueroll.app](http://www.trueroll.app) web application INBOX based on confidence levels. If you are a TrueRoll Assisted or Full-Service Audit customer, trained TrueRoll investigators will perform the investigation work for you.

## Step 3: Decision & Action

Based on the flags that TrueRoll presents and any investigation our team has performed on the Candidate parcels, your team can take the necessary action: remove the exemption, deny it for future years, lien, back assess, or other.

## Step 4: Proactively Monitor Exemption Enrollees & New Applicants

Lastly, TrueRoll will proactively monitor existing enrollees and new exemption applicants. This proactive monitoring process identifies a parcel as potentially unqualified due to a move, rental listing, or other flags.

**Implementation typically takes six weeks to complete after your data is received.**



# Going Beyond Point-in-Time List Audits

TrueRoll.app provides **real-time discovery** of disqualifying events in your tax roll and provides workflow capabilities that keep data fresh, capture parcel history, and makes investigation work simple.

TrueRoll.app’s web-based application displays a list of potentially unqualified exemptions (Candidates). A Candidate is an owner/parcel flagged based on the rules that match your state’s eligibility requirements and your local knowledge. Over time, TrueRoll learns from your work via AI-powered feedback. It continues to provide the results that matter to your office, allowing you to focus your investigations on the Candidates that matter most.

## Candidates List Screen

The screenshot shows the TrueRoll web application interface. At the top, there's a navigation bar with 'Candidates', 'Tax Roll', 'Admin', and 'Logout'. Below that is a 'Candidates List' header. A search bar is prominently displayed with a red '1' next to it. Below the search bar are various filters and a 'SEARCH' button with a red '2' next to it. The main content area is a table with columns for 'Parcel Number', 'Details', 'Flags', 'Status', and 'Priority'. Two rows are visible, each with a red '3' next to the parcel number and a red '4' next to the priority indicator. A red '5' is next to an in-app chat icon in the bottom right of the table.

1. Work Queues that map to your exemption administration business process
2. Robust search capabilities
3. Summary level review of parcel and flag information
4. Priority sorted list via artificial intelligence
5. In-app chat and email support



# Candidates Details Screen

**SITUS INFO**

Address: 501 N Clinton St, 806, Chicago, IL 60654  
Parcel Num: 17-09-112-107-1031  
Owner(s): buyer: mitchell sean, mail: jism llc  
Class Desc: residential condominium  
Exemption(s): homestead  
Market \$: \$474,230.00  
Assessed \$: \$138,285.00  
Deed Date: 12/13/2019  
County URL: [Link](#)

**MAILING INFO**

Address: 236 Coe Rd, Clarendon Hl, IL 60514  
County: Dupage

**CANDIDATE STATUS**

Queue: Inbox

**FLAG DETAILS**

FLAG	DETAILS	DATE
Multiple HSE out of Jurisdiction	236 Coe Rd, Clarendon Hills IL 60514-1002 county: DuPage County, IL parcel: 0902307012 LBSC function: Private household owner name: Sean Mitchell mailing address: 236 Coe Rd, Clarendon Hills IL 60514-1002 exemption info: Dual Homestead value: \$297,800 match type: owner, address source: national parcel database date label: last refresh	10/28/20
Situs Mail Differ	mail address: 236 coe rd, clarendon hills, il 60514 mail county: dupage match type(s): house nbr, full address source: tax roll date label: tax roll, as of	8/12/20
Out of County Mail	mail address: 236 coe rd, clarendon hills, il 60514 mail county: DuPage County, IL match type: geocode, city name source: tax roll date label: tax roll, as of	8/12/20

**Update** Add Flag Labels Attach Doc

By Updating a Candidate, you can change a Candidate's existing details and Queue.

Queue:

Reason:

Unqualified Start Yr:

Lien:

Add Note

**UPDATE**

**Documents**

None

**Update Type** Details

User	Date
Stephen G	2/22/21
85user	2/12/21

Records 1-2 of 2

© 2021 TrueRoll

The Candidate Details Screen brings information from your CAMA, TrueRoll's data sources, and your analysts' notes into one screen

## Candidate Details Screen Features

- Displays data from your CAMA about the situs property and exemption recipients.
- “Flags,” tell the context of what’s happening at a property to help you determine if the exemption is valid
- All actions taken against a Candidate are tracked in the Candidate History panel to provide a dedicated audit trail
- Assign a Candidate a custom “Label” to manage your workflow (field visits and managerial reviews)
- Add custom flags on the fly (a piece returned mail, neighbor calls to report fraud)
- Upload files, photos, and anything you need to help you support your decisions
- Assign the investigation to someone else in your office



# Configuration Screens to Meet Your Specific Needs

TrueRoll projects leverage our Customer Success Delivery Methodology<sup>3</sup> to ensure our algorithms are tailored to your specific needs

**Admin**

**Configuration**

- Report: Candidate Status
- Report: Candidate Docket
- Search: Label
- Update: Archive Candidates
- Update: Quest. Responses
- Train: Video Modules

**Admin**

- Report: Mail Merge
- Config: Labels
- Config: Quest. Templates
- Config: New User
- Search: Unclaimed Exemptions

Label Name ▾

- Office Hours Investigations
- No File - 2020
- Interesting Cases
- Gold Book - 2020
- EEU Initial Training Set
- Citizen Complaint

Records 1-7 of 7

**Candidate Docket Report**

Right click and select print to generate a printed or pdf version of this docket using your browser's print function

**Candidate Details**

**SITUS INFO**

Address 3520 [redacted] Tx 78801  
 Parcel Num 17997  
 Owner(s) EVERETT R  
 Class UNK  
 Exemption(s) Over 65 Surviving Spouse I Homestead  
 Market \$ \$278,688.00  
 Assessed \$ \$257,852.00  
 Qualification Date 1/1/2002  
 County URL [Link](#)

**MAILING INFO**

Address 2648 [redacted] Field Rd, [redacted], Tx 78801  
 County Uvalde

**CANDIDATE STATUS**

Queue Inbox  
 Printer-friendly screen

**Candidate Flags**

FLAG	DETAILS	DATE ▾
Deceased	<b>EVERETT RAY</b> last residence: 2648 [redacted] FIELD RD, [redacted], TX source: pcoa match type: name, address date label: pcoa source date mail address: 2648 [redacted] FIELD RD, [redacted], TX	5/31/22
Situs Mail Differ	mail county: TX source: tax roll match type: house nbr, full address date label: tax roll, as of	5/11/22
Multi Properties	<b>309 AILEEN ST, PLAINVIEW, TX 79072</b> county: HALE COUNTY, TX parcel: 11758 property classification: single family residence owner name: mailing address: 2648 [redacted] FIELD RD, [redacted], TX assessed value: \$41,533.00 market value: \$41,533.00 source: national parcel database match type: address, last name, first initial	12/2/21

Configuration occurs in the Admin Interface  
-Reports, Batch Questionnaire printing,  
and User Management

Features like the Candidate Docket Report  
(printer friendly version of TrueRoll evidence)  
were requested and implemented based on  
requirements requested by Fulton County, GA

"When you adopt a new product, you are always worried it might be too complicated to be worth it, **but TrueRoll couldn't be easier to use, we love it so far!**"  
- Mark Miller, Supervisor of Assessments, IPAI Exemptions Course Instructor  
-Marion County, IL



<sup>3</sup> <https://www.trueroll.io/blog-customer-success> describes why our approach to “Customer Success” is so key to the outcomes of our customers.



# Proprietary Features for Your Analysts

Proprietary Direct-2-Parcel™ and TrueMail Merge™ features exemplify how TrueRoll allows your office to quickly identify, research, and communicate with a taxpayer about an unqualified exemption.

## Direct-2-Parcel™

The screenshot shows the TrueRoll interface with a 'Candidate Details' page. A green arrow points from the 'Details' tab to a 'Direct-2-Parcel' link. Another green arrow points from this link to a 'TPAS' website showing 'Account #: 00276359' and 'Property: 7825 DANIEL DR'. A third green arrow points from the 'TPAS' website to a map showing the property location.

TrueRoll may discover a duplicate exemption in another jurisdiction. To verify the current status of that additional exemption, you can simply click on the link within TrueRoll. It will take you directly to the parcel details screen on the other jurisdiction's website.

## Mail Tracking

The screenshot shows the 'Report: Mail Merge' interface. A green arrow points from the 'Download Data' button to a table of mail merge data. The table has columns for Template, Parcel Number, Situs Address, Owner Name(s), Mail Address, Exempt Description(s), Situs Address Line 1, and Situs Address Line 2.

Template	Parcel Number	Situs Address	Owner Name(s)	Mail Address	Exempt Description(s)	Situs Address Line 1	Situs Address Line 2
NCOA	0001320230	1179 nature's hammock rd s saint johns, fl 32259	ROCHING DUNELEY ADONNA L	1179 nature's hammock rd s, Jacksonville, fl 32259	Homestead   Homestead Band	1179 Nature's Hammock Rd S	Saint Johns, FL 32259
NCOA	000120070	1064 holly oaks ct saint johns, fl 32259	VAGHEFI MOHAMMAD REZA REV LIVING TRUST D 3-17-2014 ETAL	1064 holly oaks ct saint johns, fl 32259	Homestead Band   Homestead	1064 Holly Oaks Ct	Saint Johns, FL 32259

The screenshot shows a 'PROPERTY APPRAISER' form titled 'Affidavit Confirming Continued Eligibility of Homestead Exemption'. A green arrow points from the 'Download Data' button in the previous screenshot to this form.

Data from TrueRoll can batch export data to mail merge with your office's communication templates. Our customers use this for questionnaires, denial letters, and other citizen contact forms.





# Unclaimed Exemption Identification

Optional, no additional fee.

**The goal of most of our clients is to optimize taxation-equity and fairness** across their tax base by ensuring that all qualified homeowners are aware of and receiving the benefits afforded to them by state and local exemption laws.

To accomplish these goals, TrueRoll applies the same data science principles described in sections above to identify homeowners that possess qualifying criteria but are not receiving an exemption. The primary objectives of this capability are to:

- 1. IDENTIFY:** Use multiple data sources and advanced data science techniques to identify as many homeowners with unclaimed exemptions as possible.<sup>4</sup>
- 2. PRIORITIZE:** Prioritize the results based on level-of-confidence to optimize awareness campaigns.
- 3. COMMUNICATE:** Maximize the public exposure of this data-driven effort to enroll homeowners to progress our client’s mission of taxation equality.



*"We chose TrueRoll because **you're flexible in your approach, more cost effective,** and allow us to identify unclaimed exemptions as well as unqualified exemptions"*  
*- Eddie Creamer, Property Appraiser, St John's County FL*

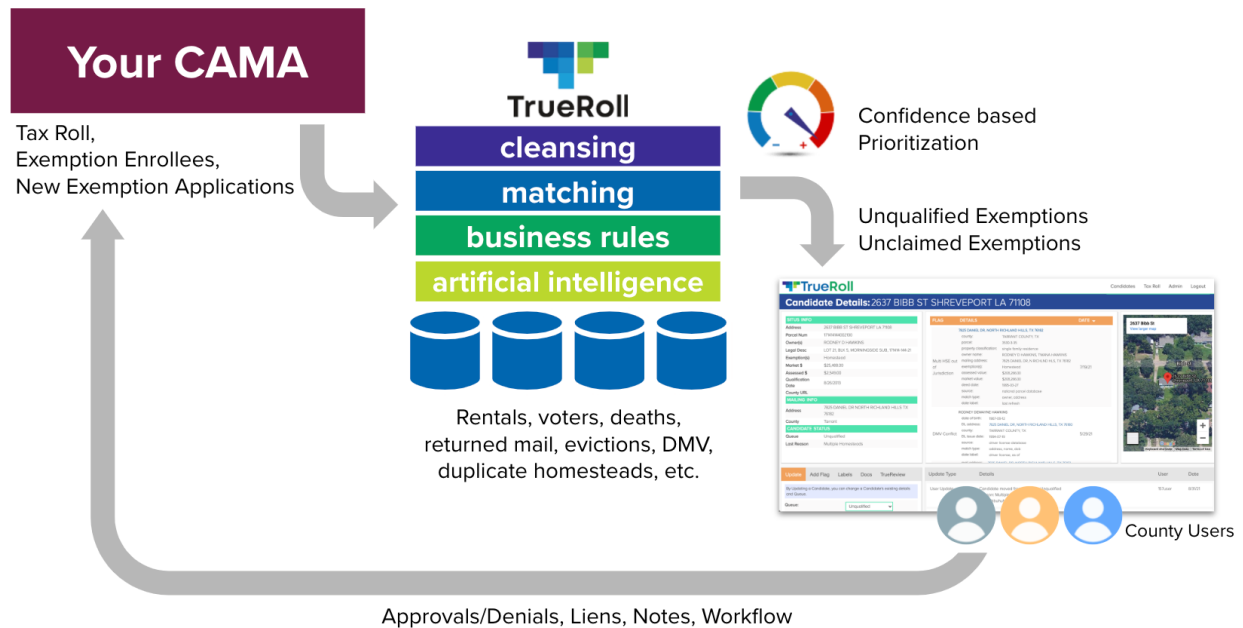


<sup>4</sup> TrueRoll's unqualified exemption campaigns have helped enroll hundreds of new & qualified exemptions in jurisdictions just like yours (Cook County, IL, St Johns County, FL, etc).



# TrueRoll Integrates to your CAMA

Your CAMA system and TrueRoll stay in sync. Your tax roll **and new exemption applications** get sent to TrueRoll for analysis. Workflows initiated in TrueRoll get sent back to your CAMA for action.



*TrueRoll receives data from your CAMA, processes and monitors new applications and existing enrollees. That data is then made available to our internal investigators (in a Full-Service audit) and your office users for review and decision making. Approvals, back assessments, notes, and workflow triggers get sent back to your CAMA in a format your IT staff can work with.*

## TrueRoll CAMA integration partners include but are not limited to

- ★ Tyler Technologies: IAS World, Orion, Assessment Connect
- ★ Vision CAMA
- ★ I3 Software & Services
- ★ GSA (Government Software Assurance)
- ★ Custom CAMA
- ★ Patriot Properties CAMA
- ★ Harris Govern, PACS
- ★ Devnet
- ★ MARS CAMA
- ★ SmartCAMA™ by PRAESES
- ★ Home-grown CAMA systems in Lee FL, Cook IL, King WA, etc.



# TrueRoll Differentiators

Every homestead solution must have reliable data, intelligent person-parcel matching, and a straightforward way to deliver the information to your office. However, not all homestead solutions are created equal.

	Differentiator	Why it Matters	Example
<b>Our Singular Focus on Homesteads</b>	Typically, big data providers sell to public safety, courts, investigators, banks, and libraries. TrueRoll's sole focus is homestead exemption accuracy, which gives us unique expertise on the subject.	We've assembled data from sources relevant to exemption qualifications that our competitors don't have, like online rental histories, MLS data, military data, and address vacancies.	We allow customers to submit custom data sets like returned mail, rental registries from their taxing districts, and citizen complaint data. Each dataset enhances the dataset with local intelligence.
<b>Proactive Monitoring</b>	TrueRoll monitors 1000s of datasets in real-time and provides those updates seamlessly to the user so that the data is relevant at the time of review.	Real-world data is dynamic. There will be gaps in homestead compliance and lost revenue without proactive monitoring. Proactive monitoring is also an opportunity to communicate with your citizens about their changing exemption status.	A homeowner had a qualified exemption on Jan 1, 2021. They move and rent out their home in mid-2021. Now they are ineligible. TrueRoll would identify that in real-time.
<b>Web-based</b>	Unlike our competitor's list-based service, we deliver unqualified exemptions through an easy-to-use web-based workflow system. We also integrate with your CAMA.	A web-based application (vs a list service) provides up-to-date data, there is no way to successfully manage a dynamic tax roll without it.	When a citizen calls in to ask why their exemption was removed, customer service staff in your office can review the case history in TrueRoll and better handle the citizen information request.
<b>Artificial Intelligence Improves Over Time</b>	TrueRoll uses AI in the form of <i>machine learning</i> to improve its results as you use it.	TrueRoll is a time-saving tool that surfaces the parcels most likely to be unqualified to the top of your inbox, so you use your resources only on the parcels most likely to be unqualified.	In some jurisdictions, vacancy flags are more prevalent and better predictors of an unqualified exemption. In others, it's rental flags. TrueRoll learns this over time and either promotes or demotes these flags based on your jurisdiction's results.



# Pricing

TrueRoll guarantees over 100% ROI each year. TrueRoll can often pay for itself in collected back taxes alone, but to understand the full ROI consider all of the benefits

- Collections** Back taxes collected from historically unqualified exemptions
- New Assessed Value** The annual value of future tax revenue that is added to the tax roll by removing unqualified exemptions that would otherwise have been renewed.
- Efficiency Savings** Value of staff time saved identifying and investigating properties using manual processes versus automated identification

Year 1: Application Backlog & Homestead Vetting & TaxRoll Monitoring	Year 2: Online Homestead Vetting & TaxRoll Monitoring	Year 3: Online Homestead Vetting & TaxRoll Monitoring
<p><b>AppVet™:</b> Exemption Application backlog analysis deployed within TrueRoll (~6k pending applications as of 9/18/23), plus remainder of new applications received thru end of 2023 (up to 8,000) Includes digitization of hand written pdf applications. Up to 55k apps processed per year (of which a max of 40k can be OCR'd) See Pricing Notes for details</p>	<p><b>AppVet™:</b> Ongoing Homestead Exemption Application vetting deployed with TrueRoll or via 3rd party online homestead forms integration (BIS, Just Appraised, or PACS) Integration support included, no additional service charge Up to 55k apps processed per year (of which a max of 40k can be OCR'd) See Pricing Notes for details</p>	<p><b>AppVet™:</b> Ongoing Homestead Exemption Application vetting deployed with TrueRoll or via 3rd party online homestead forms integration (BIS, Just Appraised, or PACS) Integration support included, no additional service charge Up to 55k apps processed per year (of which a max of 40k can be OCR'd) See Pricing Notes for details</p>
CAMA Data Import	CAMA Data Import	CAMA Data Import
Collin Central Appraisal District-specific configurations	Collin Central Appraisal District-specific configurations	Collin Central Appraisal District-specific configurations
TrueRoll Customer Success Delivery Methodology™: Training, bi-weekly project meetings & quarterly updates	TrueRoll Customer Success Delivery Methodology™: Training, bi-weekly project meetings & quarterly updates	TrueRoll Customer Success Delivery Methodology™: Training, bi-weekly project meetings & quarterly updates
<b>TrueRoll Proactive Monitoring™</b> of all ~230k homestead exemptions, unlimited users	<b>TrueRoll Proactive Monitoring™</b> of all ~230k homestead exemptions, unlimited users	<b>TrueRoll Proactive Monitoring™</b> of all ~230k homestead exemptions, unlimited users
Annual <b>Unclaimed Exemption</b> Identification	Annual <b>Unclaimed Exemption</b> Identification	Annual <b>Unclaimed Exemption</b> Identification
<b>50**</b> Exemption Investigation Reports by TrueRoll Certified Exemption Investigators	<b>100**</b> Exemption Investigation Reports by TrueRoll Certified Exemption Investigators	<b>Optional: 400**</b> Exemption Investigation Reports (IRs) per year by TrueRoll Certified Exemption Investigators for an additional fee of \$64,500 (or \$234,000 total)

**Year 1: (Discounted 25%)  
\$127,125  
(billed quarterly)**

**Year 2: \$169,500  
(billed quarterly)**

**Year 3: \$169,500 or  
\$234,000 with 400 IR's  
(billed quarterly)**



See pricing Notes on the following page

# Pricing & Collin CAD Solution Notes:

- ★ **Training & Support** via chat, email, phone, & zoom included. Pricing expires 30 days from Proposal date
- ★ **Flexible billing:** quarterly, semi-annual, or annual invoices.
- ★ \*\* Number of Investigation Reports for Assisted Service is based on your preference - changes may update price
- ★ **3 year agreement details:**

**Year 1: Application Backlog Vetting, Homestead Vetting and Proactive Homestead Monitoring:** Application Backlog (~6k pending apps) vetting to begin Q4 2023 within the TrueRoll system. Includes the digitization of ~6k pending handwritten apps received from Collin CAD in PDF file format, and vetting the remainder of new applications received through the end of 2023 (up to 8k). Some applications may be unreadable and/or incomplete, these will be flagged for Collin CAD staff manually review. TrueRoll will digitize all PDF applications in a timely manner using an AI-powered OCR handwriting identification process we've developed with other Texas jurisdictions. TrueRoll expects OCR failure rate to be 25% or lower. New Exemption Application Vetting continues throughout year 1 of the service under the same terms as year 2 and 3 of agreement. Proactive Homestead Monitoring of the entire exemption tax roll to begin in Year 1. New Application processing and vetting is expected to occur in monthly batches transmitted from Collin CAD to TrueRoll and vice versa.

OCR Annual limits: All new applications requiring OCR above 40k annual limit will be charged at \$1.50 per application via annual true-up invoice.

**Year 2 and 3** includes continued TrueRoll Proactive Exemption Monitoring of the entire exemption Tax roll with ongoing AppVet™ for up to 55,000 new apps per year, of which TrueRoll will OCR and vet up to 40k handwritten/pdf applications. All new handwritten/pdf applications requiring OCR above the 40k annual limit will be charged at \$1.50 per application via an annual true-up invoice. TrueRoll expects OCR failure rate to be 25% or lower.

- ★ **Harris Govern/PACS integration and Tax Roll refreshes**

PACs integration consists of our "PACS Query" which exports PACS data in a specified format to TrueRoll directly. In either Assisted Service level scope, Collin CAD can schedule monthly export queries for increased tax roll accuracy throughout the year via PACS or BIS or Just Appraised. TrueRoll's endpoint is also consumable by PACS and BIS; this enables TrueRoll results to be visible inside CAMA.

Monthly Tax roll refreshes, for use in Proactive Homestead Monitoring and ongoing New Application Vetting to begin on or about Q1 2024 once Harris Govern/PACs export is synced for automated exports to TrueRoll containing minimum required data elements.



# Collin Central Appraisal District

October 16, 2023

List of Texas appraisal districts currently in contract with TrueRoll for homestead exemption auditing services:

1. Austin CAD
2. Bastrop CAD
3. Bosque CAD
4. Comanche CAD
5. Dallas CAD
6. Denton CAD
7. Dimmit CAD
8. Ector CAD
9. El Paso CAD
10. Fannin CAD
11. Gregg CAD
12. Grimes CAD
13. Hansford CAD
14. McLennan CAD
15. Real CAD
16. Rusk CAD
17. Uvalde CAD
18. Walker CAD
19. Williamson CAD
20. Yoakum CAD
21. Zavala CAD

**M.**

**Appoint 2024 TLO**



# Collin Central Appraisal District

October 16, 2023

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright", is positioned to the right of the "FROM:" line.

RE: Appoint 2024 Taxpayer Liaison Officer (TLO)

Mr. Chris Nickell has expressed his desire to continue to serve the Board of Directors in the capacity of TLO.

It is my recommendation that you should appoint Mr. Nickell as your TLO for calendar year 2024.

Additionally, it is my recommendation that the appointment be considered temporary, requiring action in the fourth quarter of 2024, regarding the 2024 appointment.



# REPORTS

REPORTS

REPORTS



# Collin Central Appraisal District Taxpayer Liaison Officer

Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly Status Report

DATE: October 26, 2023

1. On 10.9.2023 I met with a taxpayer who had their ARB hearing 9.27.2023. His concern is that his value has gone to \$567,187 from an arbitration value last year of \$315,776. He feels that the CAD is not allowed to raise its value for 2 years.
2. Reviewed 49 CSS cards received for September with only one marked Needs Improvement / Satisfactory. *Came in 3 times to get homestead Exemption filed. They were professional, however.*
3. Received a letter from Mr. Tom Pickens thanking Wendy Gilliland, Director of Customer Service, for her phone help in explaining how to move his homestead exemption to his new home.

Regards,

Chris Nickell  
Taxpayer Liaison Officer



# Collin Central Appraisal District Taxpayer Liaison Officer

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Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly TDLR Status Report

DATE: October 26, 2023

The TDLR complaint #PTP20230007199, Mr. Binit, that was reported to the board at the June 22<sup>nd</sup> BOD Meeting is still open waiting for a reply from the comptroller's office.

Regards,

Chris Nickell  
Taxpayer Liaison Officer



# COLLIN APPRAISAL REVIEW BOARD

250 Eldorado Pkwy, McKinney, TX 75069

Phone: 469.742.9288 • Web: [www.collinarb.org](http://www.collinarb.org)

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October 17, 2023

Collin Central Appraisal District Board of Directors  
The Honorable Chairman Rodenbaugh  
250 Eldorado Parkway  
McKinney, Texas 75069

Re: Appraisal Review Board 2023 end of year summation

Board of Directors of the Collin Central Appraisal District:

Thank you for this opportunity to speak before you. I have been honored to serve as Chairman of the Appraisal Review Board in 2023. I could not do this effectively without the support of my fellow officers, the Vice Chair, George Chollar and our Secretary, Dianne Faltys. I am also blessed by having a group of members that help make the ARB operate so successfully.

- 2023 was a record year for protests in Collin County, resulting in a total of 114,785 protests, which was up 16% from last year.
- From May to July, the ARB was successful in having less than 5% remaining of the taxable base, thus allowing certification of the appraisal roll. Much time was saved by combining evidence into one conversation for market and equity
- Diversity exists within the ARB
  - 52 Members at end of 2023
  - 20 women on the ARB
  - 43 of the members have at least a bachelor's degree
  - 15 members have Masters degrees
  - 1 member with a PHD
  - 2 members have Juris Doctorates
  - 3 members have CPA's
- Workshops and training of the ARB members were held at Collin College, which is an excellent site for training. Mandatory State Comptroller training was done in March. Residential, BPP, Land and Commercial training was conducted by experienced members of the ARB in May. We also had two legal workshops done by the ARB attorney, an Active Shooter and CPR course. Training is paramount to the success of the ARB.

There were many dedicated individuals who worked tirelessly to ensure the smooth functioning of the ARB. These individuals were passionate about their work and strived to provide the best possible service to the community. Two such people were Stephanie Cave and Tina Castillo, they led an excellent staff of customer service professionals who played a vital role in ensuring all inquiries were handled promptly and efficiently. Both are highly regarded for their attention to detail and their ability to handle complex tasks with ease. They were able to create an environment where different backgrounds came together, forming a cohesive team that supported one another.

Another remarkable individual is Ryan Matthews, every idea solicited to Mr. Matthews resulted in a YES answer. The timers for panel members to keep track of the time spent in each case, the process for new applicants which has now become an online process, and his tireless staff who support the ARB in many ways, is much appreciated.

Robert Wood is another great person working in the Appraisal District. Robert was always willing to go the extra mile to assist the ARB and provided exceptional service to both the public and the ARB.

I also want to thank several other individuals who have supported the ARB with enthusiasm and vigor. Thank you, Toni Bryan, for all you do to help us with the budget. Rusty Craig, thank you for preparing the checks to ARB members quicker than ever!

Overall, the District is fortunate to have such great people working together. Their dedication, expertise, and commitment to excellence made a significant impact on the ARB's success in 2023.

I also want to thank the Board for their support of the ARB.

Looking ahead to 2024:

The ARB has requested fifteen new members.

Training will again be a top priority for 2024.

We will continue to look at ways to improve the efficiency of the ARB.

I will not run for Chairman in 2024. Due to next year being my last with the ARB, I have decided to become a panel member and to be there for the new Chairman-elect.

Thank you for all your support!

Regards,

*Dean Soderstrom*

Dean Soderstrom, ARB Chairman  
Collin Appraisal Review Board



CC:

Marty Wright, Chief Appraiser

Stephanie Cave-Bernal, Deputy Chief Appraiser

Tina Castillo, Director of ARB and Agent Services



# Collin Central Appraisal District

October 12, 2023

## Approaching Phone System Migration

The purpose of this executive summary is an informational update to the Board of Directors regarding our current ShoreTel/Mitel phone system end of life and status update on our multi-year research for valid alternatives.

In 2014, we partnered with Affiliated located in Plano to convert our then Avaya/Nortel PBX system to a ShoreTel onsite appliance solution maintaining our existing copper T1 connections. It was a major win in functionality that allowed us to grow in device counts and administration. In 2017, ShoreTel was acquired by Mitel but no additional functionality was added to the system, just a simple rebranding and license model cost adjustment. In 2020 during the pandemic, we added additional SIP trunks (phone calls over our internet connection) due to all the additional phone usage and ARB hearings being requested as phone hearings. In 2021, we added a session boarder controller virtual appliance and utilized our Microsoft Office 365 licenses to infuse specific staff with Microsoft Teams soft phone access to better leverage cost options and system resources while not expanding our phone system backend past needed virtual machine servers.

Today in 2023, we are still running the same physical T1 connections and physical ShoreTel appliances (covered with maintenance) from 2014. We have extended this system as far as we could to save the cost of ripping and replacing; unfortunately, that time is approaching. We have been looking at solutions starting last year due to performance and call quality issues with Teams routed calls. We were just recently notified that our legacy environment now has published end-of-life dates from the manufacturer which begin in 2024 and 2025 with certain license depreciations and then full system depreciation by 2029. Affiliated has stated they will continue to support our system at their local level until parts and core system licenses are not able to be sourced; so, we are not hard pressed by the declared depreciation dates.

We are looking at a large departure from our existing copper/SIP hybrid onsite appliance/virtualized machine PBX. We are targeting fully cloud hosted solutions that do not require the classic capital hardware purchases, are easier to port to different cloud suppliers, give us missing omnichannel options for Taxpayer communication (phone, email, AI web bot, web chat, SMS and other potential API connectivity all integrated), and allow faster deployment to remote/home based staff as we continue to expand staff levels or are required to work from home due to another pandemic scenario. All for roughly what we pay today monthly counting all our different expansions on our 2014 system.

Thank you in advance for allowing me to notify you of our approaching phone system migration, I would be grateful to receive any feedback you may have in this effort.

**Ryan Matthews**

Deputy Chief Appraiser - Technology



# QUARTERLY INVESTMENT REPORT

For the Quarter Ended

September 30, 2023

Prepared by

Valley View Consulting, L.L.C.

The investment portfolio of the Collin Central Appraisal District is in compliance with the Public Funds Investment Act and the District's Investment Policy and Strategies. We certify that we 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 our knowledge and belief, in all material respects the Investment Report was prepared in accordance with the guidelines presented in the 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.

A blue ink signature of Brian Swanson.

Brian Swanson, Deputy Chief Appraiser - Business Operations and Compliance

10-19-23

Date

A blue ink signature of Toni Bryan.

Toni Bryan - Director of Operations and Finance

10/19/23

Date

**Disclaimer:** These reports were compiled using information provided by the District. No procedures were performed to test the accuracy or completeness of this information. The market values included in these reports were obtained by Valley View Consulting, L.L.C. from sources believed to be accurate and represent proprietary valuation. Due to market fluctuations these levels are not necessarily reflective of current liquidation values. Yield calculations are not determined using standard performance formulas, are not representative of total return yields, and do not account for investment advisor fees.



**Summary**

**Quarter End Results by Investment Category:**

Asset Type	June 30, 2023			September 30, 2023		
	Ave. Yield	Book Value	Market Value	Ave. Yield	Book Value	Market Value
DDA/MMA/Pool	1.50%	\$ 5,003,839	\$ 5,003,839	4.91%	\$ 14,528,265	\$ 14,528,265
Securities/CDs	2.57%	23,278,974	23,278,974	4.17%	15,224,898	15,224,898
<b>Totals</b>	<b>2.38%</b>	<b>\$ 28,282,813</b>	<b>\$ 28,282,813</b>	<b>4.53%</b>	<b>\$ 29,753,162</b>	<b>\$ 29,753,162</b>

**Current Quarter Average Yield (1)**

Total Portfolio	4.53%
Rolling Three Month Treasury	5.53%
Rolling Six Month Treasury	5.38%
TexPool	5.32%

**Fiscal Year-to-Date Average Yield (2)**

Total Portfolio	N/A
Rolling Three Month Treasury	5.20%
Rolling Six Month Treasury	5.07%
TexPool	5.00%

**Interest Earnings (Approximate)**

This Quarter	\$ 183,427
Fiscal Year-to-Date	\$ 448,434

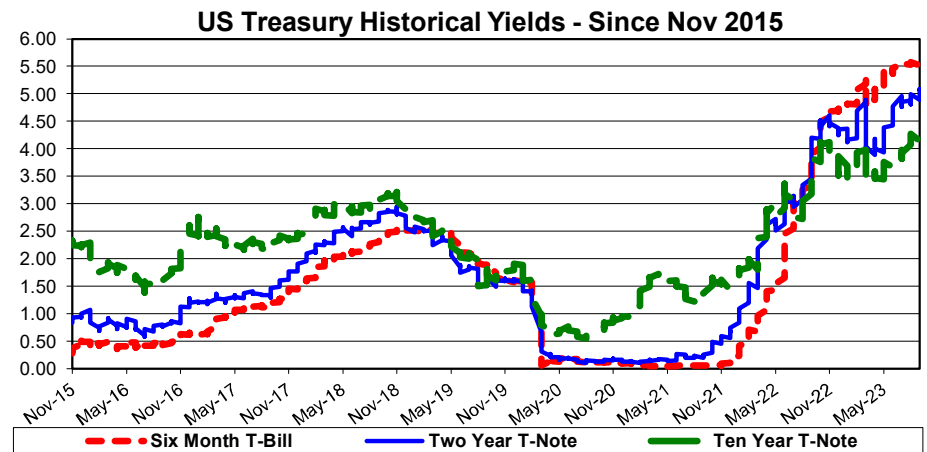
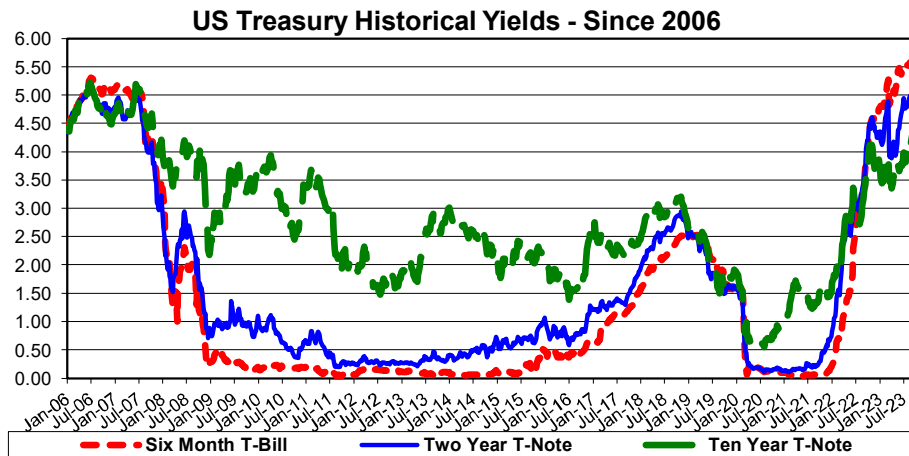
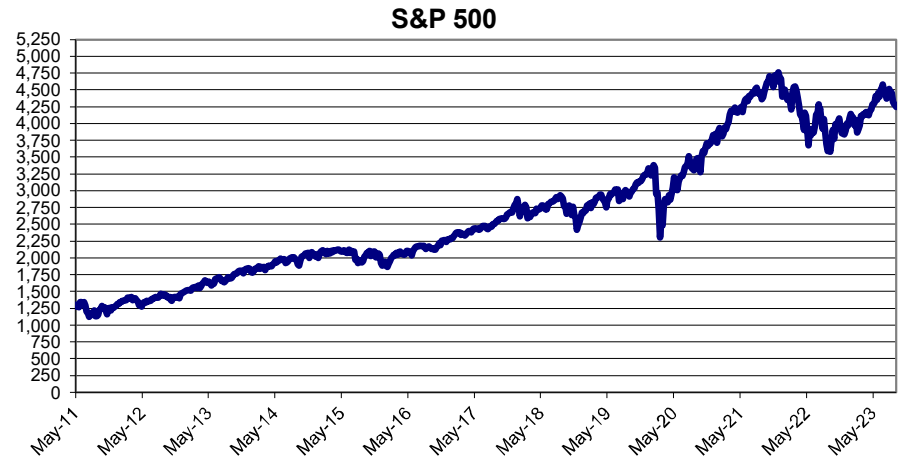
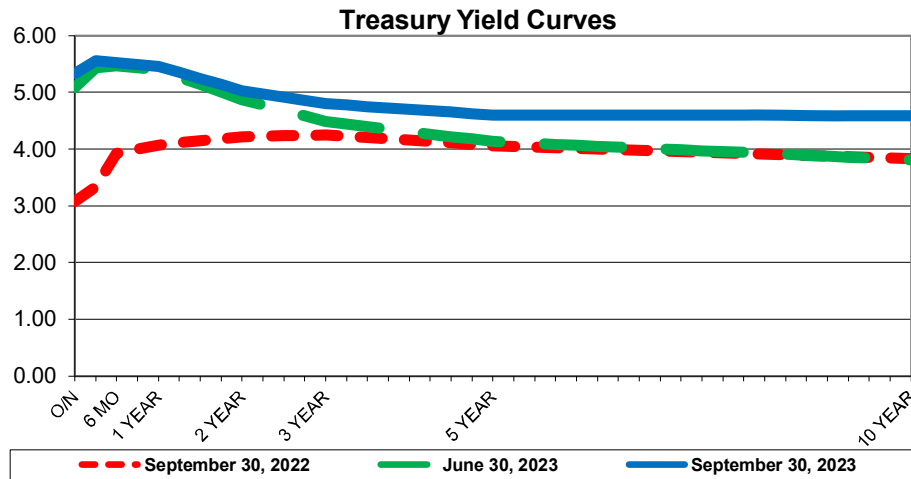
(1) **Current Quarter Average Yield** - based on adjusted book value, realized and unrealized gains/losses and investment advisory fees are not considered. The yield for the reporting month is used for bank, pool, and money market balances.

(2) **Fiscal Year-to-Date Average Yields** - calculated using quarter end report yields and adjusted book values and does not reflect a total return analysis or account for advisory fees..

## Economic Overview

9/30/2023

The Federal Open Market Committee (FOMC) maintained the Fed Funds target range 0.25% to 5.25% - 5.50% (Effective Fed Funds are trading +/-5.33%). A pause is projected at least until the September 19-20 meeting, with any future actions data-dependent. Second Quarter 2023 GDP posted 2.1%. September Non-Farm Payroll surged up 336k new jobs, above the 170k projection. The S&P Stock Index continued to slide below 4,300. The yield curve drifted higher on the long end. Crude Oil traded +/--\$85 per barrel. Inflation drifted lower but still over the FOMC 2% target (Core PCE +/-3.9% and CPI +/-3.7%). The slowing China and German economies, Ukrainian/Russian and Israeli/Hamas conflicts continue to weight on future outlooks.



**Holdings Report  
September 30, 2023**

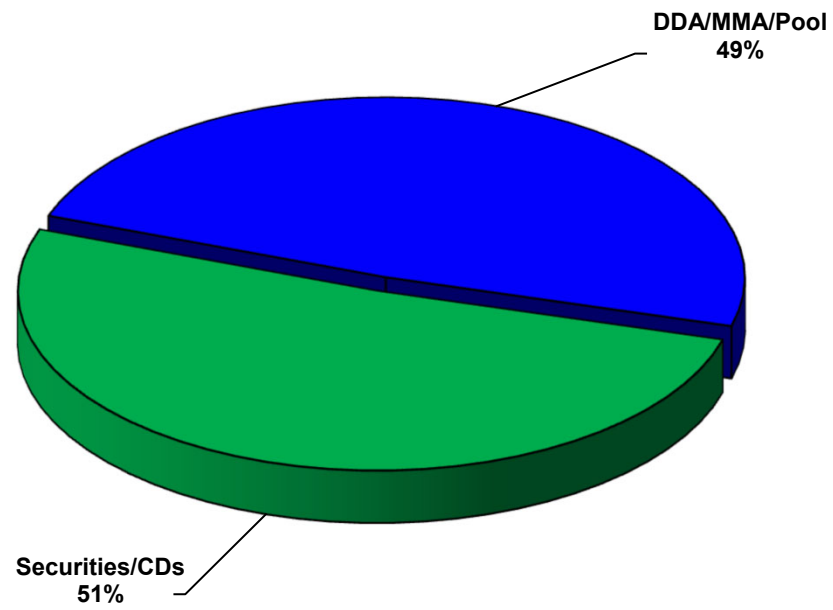
Issuer	Coupon	Credit Rating	Settlement Date	Maturity Date	Face Value	Book Value	Market Price	Market Value	YTM @ Cost	Days To Maturity
American National Bank Operating	1.51		09/30/23	10/01/23	\$ 1,000,874	\$ 1,000,874	1.00	\$ 1,000,874	1.51	1
American National Bank ARB acc't	1.51		09/30/23	10/01/23	9,205	9,205	1.00	9,205	1.51	1
Independent Financial Operating	0.00		09/30/23	10/01/23	1,000,000	1,000,000	1.00	1,000,000	0.00	1
Independent Financial MMA	5.64		09/30/23	10/01/23	10,515,570	10,515,570	1.00	10,515,570	5.64	1
Texas Capital Bank MMA	5.23		09/30/23	10/01/23	2,002,616	2,002,616	1.00	2,002,616	5.23	1
American National Bank CD	2.98		11/07/23	11/07/23	1,022,227	1,022,227	100.00	1,022,227	2.98	38
American National Bank CD	2.98		11/07/22	11/07/23	1,022,227	1,022,227	100.00	1,022,227	2.98	38
American National Bank CD	2.98		11/07/23	11/07/23	1,022,227	1,022,227	100.00	1,022,227	2.98	38
Prosperity Bank CD	2.78		11/16/22	11/16/23	1,023,142	1,023,142	100.00	1,023,142	2.78	47
Prosperity Bank CD	2.78		11/16/22	11/16/23	1,023,142	1,023,142	100.00	1,023,142	2.78	47
Prosperity Bank CD	2.78		11/16/22	11/16/23	1,023,142	1,023,142	100.00	1,023,142	2.78	47
American National Bank CD	3.55		12/29/22	12/29/23	1,026,505	1,026,505	100.00	1,026,505	3.55	90
American National Bank CD	3.55		12/29/22	12/29/23	1,026,505	1,026,505	100.00	1,026,505	3.55	90
American National Bank CD	3.55		12/29/22	12/29/23	1,026,505	1,026,505	100.00	1,026,505	3.55	90
East West Bank CD	5.71		09/21/23	03/21/24	2,003,131	2,003,131	100.00	2,003,131	5.88	173
East West Bank CD	5.64		09/21/23	06/21/24	2,003,093	2,003,093	100.00	2,003,093	5.80	265
East West Bank CD	5.57		09/21/23	09/23/24	2,003,054	2,003,054	100.00	2,003,054	5.73	359
					<b>\$29,753,162</b>	<b>\$29,753,162</b>		<b>\$29,753,162</b>	<b>4.53</b>	<b>72</b>

(1) (2)

**(1) Weighted average yield to maturity** - The weighted average yield to maturity is based on adjusted book value, realized and unrealized gains/losses and investment advisory fees are not considered.

**(2) Weighted average life** - For purposes of calculating weighted average life, pool investments are assumed to have a one day maturity.

### Portfolio Composition



**Book & Market Value Comparison**  
**September 30, 2023**

Issuer	Yield	Maturity Date	Book Value 06/30/23	Increases	Decreases	Book Value 09/30/23	Market Value 06/30/23	Change in Market Value	Market Value 09/30/23
American National Bank Operating	1.510	10/01/23	\$ 4,962,578	\$ -	\$ (3,961,705)	\$ 1,000,874	\$ 4,962,578	\$ (3,961,705)	\$ 1,000,874
American National Bank ARB acc't	1.510	10/01/23	-	9,205	-	9,205	-	9,205	9,205
Independent Financial Operating	0.000	10/01/23	-	1,000,000	-	1,000,000	-	1,000,000	1,000,000
Independent Financial MMA	5.640	10/01/23	-	10,515,570	-	10,515,570	-	10,515,570	10,515,570
Prosperity Bank Operating	0.000	10/01/23	41,261	-	(41,261)	-	41,261	(41,261)	-
Texas Capital Bank MMA	5.230	10/01/23	-	2,002,616	-	2,002,616	-	2,002,616	2,002,616
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	1.710	08/25/23	507,125	-	(507,125)	-	507,125	(507,125)	-
Prosperity Bank CD	2.780	09/14/23	1,000,000	-	(1,000,000)	-	1,000,000	(1,000,000)	-
Prosperity Bank CD	2.780	09/14/23	1,000,000	-	(1,000,000)	-	1,000,000	(1,000,000)	-
Prosperity Bank CD	2.780	09/14/23	1,000,000	-	(1,000,000)	-	1,000,000	(1,000,000)	-
Prosperity Bank CD	2.780	09/14/23	1,000,000	-	(1,000,000)	-	1,000,000	(1,000,000)	-
Prosperity Bank CD	2.780	09/14/23	1,000,000	-	(1,000,000)	-	1,000,000	(1,000,000)	-
Prosperity Bank CD	1.710	09/22/23	1,012,769	-	(1,012,769)	-	1,012,769	(1,012,769)	-
Prosperity Bank CD	1.710	09/22/23	1,012,769	-	(1,012,769)	-	1,012,769	(1,012,769)	-
Prosperity Bank CD	1.710	09/22/23	1,012,769	-	(1,012,769)	-	1,012,769	(1,012,769)	-
American National Bank CD	2.370	09/29/23	1,017,680	-	(1,017,680)	-	1,017,680	(1,017,680)	-
American National Bank CD	2.370	09/29/23	1,017,680	-	(1,017,680)	-	1,017,680	(1,017,680)	-
American National Bank CD	2.370	09/29/23	1,017,680	-	(1,017,680)	-	1,017,680	(1,017,680)	-
American National Bank CD	2.980	11/07/23	1,014,682	7,545	-	1,022,227	1,014,682	7,545	1,022,227
American National Bank CD	2.980	11/07/23	1,014,682	7,545	-	1,022,227	1,014,682	7,545	1,022,227
American National Bank CD	2.980	11/07/23	1,014,682	7,545	-	1,022,227	1,014,682	7,545	1,022,227
Prosperity Bank CD	2.780	11/16/23	1,016,082	7,059	-	1,023,142	1,016,082	7,059	1,023,142
Prosperity Bank CD	2.780	11/16/23	1,016,082	7,059	-	1,023,142	1,016,082	7,059	1,023,142
Prosperity Bank CD	2.780	11/16/23	1,016,082	7,059	-	1,023,142	1,016,082	7,059	1,023,142
American National Bank CD	3.550	12/29/23	1,017,528	8,977	-	1,026,505	1,017,528	8,977	1,026,505
American National Bank CD	3.550	12/29/23	1,017,528	8,977	-	1,026,505	1,017,528	8,977	1,026,505
American National Bank CD	3.550	12/29/23	1,017,528	8,977	-	1,026,505	1,017,528	8,977	1,026,505
East West Bank CD	5.875	03/21/24	-	2,003,131	-	2,003,131	-	2,003,131	2,003,131
East West Bank CD	5.800	06/21/24	-	2,003,093	-	2,003,093	-	2,003,093	2,003,093
East West Bank CD	5.727	09/23/24	-	2,003,054	-	2,003,054	-	2,003,054	2,003,054
<b>Total / Average</b>	<b>4.530</b>		<b>\$ 28,282,813</b>	<b>\$ 19,607,411</b>	<b>\$(18,137,061)</b>	<b>\$ 29,753,162</b>	<b>\$ 28,282,813</b>	<b>\$ 1,470,349</b>	<b>\$ 29,753,162</b>

**Collateral Position  
September 30, 2023**

	<b>Independent Financial</b>	<b>Texas Capital Bank</b>	<b>American National Bank</b>	<b>Prosperity Bank</b>	<b>East West Bank</b>
Collateral Value	\$ 27,482,859	\$ 2,000,000	\$ 12,464,176	\$ 14,556,774	\$ 6,196,000
+ FDIC Insurance	250,000	250,000	250,000	250,000	250,000
<b>Total Enhancement</b>	<b>\$ 27,732,859</b>	<b>\$ 2,250,000</b>	<b>\$ 12,714,176</b>	<b>\$ 14,806,774</b>	<b>\$ 6,446,000</b>
Total Deposits	\$ 11,515,570	\$ 2,002,616	\$ 7,156,274	\$ 3,069,425	\$ 6,009,278
Collateral Required	\$ 11,265,570	\$ 1,752,616	\$ 7,113,462	\$ 2,904,008	\$ 5,759,278
<b>Excess Coverage</b>	<b>\$ 16,217,289</b>	<b>\$ 247,384</b>	<b>\$ 5,557,902</b>	<b>\$ 11,737,349</b>	<b>\$ 436,722</b>
Percentage Coverage	241%	112%	178%	482%	107%
Collateral Type:					
Agency Bullets				\$ 14,556,774	
Agency Letter of Credit (LOC expiration date)	\$ 15,000,000 04/12/24	\$ 2,000,000 04/30/24			\$ 6,196,000 09/27/24
Municipal Bonds			\$ 12,464,176		
Mortgage Backed Securities	\$ 9,197,982				
Real Estate Mortgage Investment Conduits/ Collateralized Mortgage Obligations (1)	\$ 3,284,877				

(1) The Public Funds Collateral act requires all REMIC/CMOs to have an expected weighted average life of 10 years or less and not constitute a high-risk security as determined by a 300 basis point market movement high risk test.

COLLIN CENTRAL APPRAISAL DISTRICT  
ACTIVE VENDOR LIST  
FOR 3RD QUARTER 2023

Vendor	Vendor
1 ACTIVE SHOOTER PREVENTION PROJECT, LLC	51 DALLAS BUSINESS JOURNAL
2 ADP INC	52 DALLAS MORNING NEWS
3 ADVANCED STANCHIONS, INC	53 DEARBORN NATIONAL LIFE INSURANCE COMPANY
4 AFFILIATED COMMUNITONS, INC.	54 DELL MARKETING
5 AFFILIATED COM-NET, INC.	55 DEX IMAGING
6 AFLAC	56 DISCOVERY BENEFITS
7 AIRCRAFT BLUE BOOK	57 DLT SOLUTIONS LLC
8 AIRPAC, INC	58 DMNMEDIA
9 ALFORD INSURANCE AGENCY	59 DSS
10 AMERICAN LANGUAGE TECHNOLOGIES	60 DSS FIRE INC
11 AMERICAN SERVICES	61 DSS FIREGUARD, INC.
12 APPLIED LITHO RESOURCE INC	62 <b>ELLERBEE-WALCZAK, INC (NEW)</b>
13 APPRAISAL INSTITUTE	63 ELLIOTT ELECTRIC SUPPLY
14 ARMSTRONG & ARMSTRONG, P.C.	64 EQUIP SOURCE CAPITAL
15 ASSN TECHNOLOGY SERVICES, INC	65 ESRI INC
16 AT&T (CLOUD MICROSOFT)	66 EXPERIAN MARKETING SOLUTIONS
17 AT&T (FIBER)	67 FASTVUE, INC.
18 AT&T (MAIN LOCAL)	68 FEDEX OFFICE
19 AT&T (U-VERSE)	69 FERRELLGAS
20 AT&T MOBILITY	70 FIRST STOP HEALTH
21 BATTERIES PLUS	71 FISH WINDOW CLEANING
22 BCC SOFTWARE	72 FLOWERS, JEFFREY L
23 BEE LINE SERVICES	73 GARCIA, ROBERT
24 BELO + COMPANY	74 GREAT AMERICA FINANCIAL SERVICES
25 <b>BETSY ROSS FLAG GIRLS INC (from inactive)</b>	75 GREEN MOUNTAIN ENERGY
26 BIS CONSULTING	76 GSO ARCHITECTS
27 BLUECROSS BLUESHIELD (LIFE&STLT)	77 HARRIS GOVERN
28 BLUECROSS BLUESHIELD OF TEXAS	78 HAVEN TECHNOLOGY CORP
29 BUSINESS & LEGAL RESOURCES	79 HAYNES LANDSCAPE & MAINTENANCE, INC
30 CAPITOL APPRAISAL GROUP, LLC	80 HERITAGE BROKERAGE SERVICES
31 CAPITOL BLIND AND DRAPERY CO.	81 HEXAGON GEOSPATIAL
32 CARD SERVICE CENTER	82 HOLT CAT
33 CARENOW	83 HOME DEPOT
34 CCIM INSTITUTE	84 HUMETRICS HOLDING INC
35 CDW-G	85 HUTCHINS BBQ
36 CINTAS CORPORATION #0487	86 IAAO
37 CINTAS FIRST AID	87 IDERA
38 CINTAS MAT SERVICE	88 IGNITE HR, LLC
39 CINTAS SANI CLEAN	89 IN BLOOM
40 CITY OF MCKINNEY	90 INDECO SALES, INC.
41 CITY OF MCKINNEY POLICE DEPARTMENT	91 INSIGHTS
42 <b>CIVIC PLUS (NEW)</b>	92 INSURICA EXPRESS
43 COLLIN COUNTY CHAPTER TAAO	93 INTEX ELECTRICAL CONTRACTORS, INC
44 COLLIN COUNTY COMMUNITY COLLEGE DISTRICT	94 IREM
45 COLORIT GRAPHICS SERVICES	95 J.D. POWER VALUATION SERVICES
46 COMPUNETIX, INC.	96 JALAPENO'S MEXICAN GRILL
47 CONATSER, DAN E	97 JONES, MICHAEL R
48 COPYNET	98 JOPLIN'S
49 COSTAR REALTY INFORMATION INC	99 JUST APPRAISED INC
50 CUSHMAN & WAKEFIELD	100 JUST TEXAS

COLLIN CENTRAL APPRAISAL DISTRICT  
ACTIVE VENDOR LIST  
FOR 3RD QUARTER 2023

Vendor	Vendor
101 K. EVANS & ASSOCIATES, PLLC	151 SHRED-IT USA LLC
102 KERBY & KERBY PLLC	152 SOCIETY FOR HUMAN RESOURCE MGT
103 KT CONTRACTING - CONCRETE SERIES, LLC	153 SOUND PRODUCTIONS LLC
104 LAYER 2 GmbH	154 SOURCE STRATEGIES INC
105 LEGAL SHIELD / ID SHIELD	155 SPECTRUM ENTERPRISE
106 LOOPNET	156 SPRADLIN, TERRY
107 M&M FENCING AND WELDING, INC.	157 SPRUCED INTERIORS
108 MALIN GROUP, THE	158 STAPLES BUSINESS CREDIT
109 MARSHALL & SWIFT	159 STAR LOCAL MEDIA
110 MB&B TROPHIES AND AWARDS	160 STRATEGIC EQUIPMENT LLC
111 MC PURE CLEANING, LLC	161 SUPERIOR VISION OF TEXAS
112 MCROBERTS & COMPANY	162 SWINGLE COLLINS & ASSOCIATES
113 MEDIUM GIANT COMPANY, INC	163 TAAD
114 METRO COUNCIL OF APPRAISAL DISTRICTS	164 TAAD-IAAO CHAPTER
115 MICHAEL'S KEYS, INC.	165 TAAO
116 MICROSOFT CORPORATION	166 TASB, INC.
117 MIDDLE, LLC	167 TCDRS
118 MONA LISA MOVING CO	168 TDLR
119 MURLEY PLUMBING	169 TEXAS ARCHIVES
120 MYPRINTCHOICE	170 TEXAS COMPTROLLER OF PUBLIC ACCOUNTS
121 NATIONAL PROPERTY VALUATION ADVISORS, INC	171 TEXAS DEPARTMENT OF PUBLIC SAFETY
122 NATIONWIDE RETIREMENT SOLUTIONS	172 TEXAS SDU CHILDSUPP
123 NORTH CENTRAL TX COG	173 TEXAS SECRETARY OF STATE
124 NORTH TEXAS SIGN SHOP	174 THE CAMBRIAN GROUP
125 ONE SOURCE COMMERCIAL FLOORING, INC	175 THOMAS GALLAWAY CORP dba TECHNOLOGENT
126 PAPERTONE ENTERPRISES LLC	176 TIME WARNER CABLE
127 PARAGON ROOFING INC	177 TML-IRP
128 PERDUE, BRANDON, FIELDER, COLLINS & MOTT	178 TOTAL BEVERAGE SYSTEMS
129 PICTOMETRY	179 TRABOLD COMPANY
130 PITNEY BOWES RESERVE ACCOUNT	180 TRANE US INC
131 PITNEY LEASE	181 TREPP, LLC
132 PITNEY SUPPLIES	182 TRUE PRODIGY TECH SOLUTIONS LLC
133 PLANO OFFICE SUPPLY	183 TX OFFICE INSTALLATION SERVICES INC.
134 PLANO PEST CONTROL	184 U.S. POSTAL SERVICE
135 PODS	185 UBISTOR, INC.
136 PRICE, FRANK	186 UNUM LIFE INSURANCE CO OF AMERICA
137 PRICEWATERHOUSECOOPERS	187 USER SCAPE
138 PROPERTY TAX EDUCATION COALITION, INC	188 VAIL & PARK, P.C.
139 PROSTAR SERVICES, INC	189 VALBRIDGE PROPERTY ADVISORS
140 QUALITY PERSONNEL SERVICE	190 VALLEY VIEW CONSULTING, LLC
141 RESCUE STAT (formerly STAT PADS)	191 VANGUARD CLEANING SERVICES
142 ROBERT HALF INTERNATIONAL INC.	192 VARIVERGE LLC
143 ROCKIN G DRYWALL & CONSTRUCTION	193 WAITWHILE, INC.
144 SAM'S CLUB	194 WASTE CONNECTIONS OF TEXAS
145 SAN MIGUEL GRILL	195 WAYPOINT BUSINESS SOLUTIONS, LLC
146 SAUNDERS & WALSH, PLLC	196 WEX HEALTH INC
147 SERVICE FIRST	197 YOURMEMBERSHIP.COM, INC.
148 <b>SHAREGATE (NEW)</b>	198 ZOHO CORP
149 SHELL ENERGY SOLUTIONS	
150 SHI GOVERNMENT SOLUTIONS	

**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 peach color.**

**This list EXCLUDES employees, deputy sheriffs, arbitrators, ARB members, and other non-vendor names.**





# Collin Central Appraisal District

October 17, 2023

TO: Board of Directors

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

RE: 2023 Protest Report

- There have been 114,785 protests and motions filed as of October 17, 2023, which is up 16% from 2022. This is a record number of protests filed for Collin County.
- For 2023, the Appraisal Review Board issued approximately 48,000 Orders of Determination, which opens up the possibility of appeals through Binding Arbitration, SOAH, and District Court.
- The Appraisal Review Board will continue hearing protest cases with 12 panels running concurrently the week of November 6<sup>th</sup>.
- The remaining assessed value of the nearly 3,900 properties under appeal is approximately \$2.2 billion and consists mostly of agent represented residential properties.

# COLLIN CENTRAL APPRAISAL DISTRICT

## 2023 INQUIRY / PROTEST / HEARING STATS

October 17, 2023	2018	2019	2020	2021	2022	<b>2023</b>	<b>2023 MORE INFO</b>
<b><u>INQUIRY STATS</u></b>							<b>Per Day</b>
PHONE	2,142	2,519	1,014	498	389	1,993	66
CHANGE FROM PRIOR YR	4.95%	17.60%	-59.75%	-50.89%	-21.89%	412.34%	
COUNTER (INCLUDES KIOSK)	11,791	13,198	332	205	643	6,944	231
<b>TOTAL INQUIRIES</b>	<b>13,933</b>	<b>15,717</b>	<b>1,346</b>	<b>703</b>	<b>1,032</b>	<b>8,937</b>	<b>7905</b>
CHANGE FROM PRIOR YR	14.48%	12.80%	-91.44%	<b>-47.77%</b>	<b>46.80%</b>	<b>765.99%</b>	<i>more inquiries</i>
<b><u>EFILE PROTEST STATS</u></b>							
ELIGIBLE PROPERTIES	252,678	259,816	315,655	324,032	335,938	347,533	
EFILE PROTESTS	17,561	20,592	21,953	20,896	24,430	21,023	
CHANGE FROM PRIOR YR	3.43%	17.26%	6.61%	-4.81%	16.91%	-13.95%	
% OF EFILE TO ELIGIBLE	6.95%	7.93%	6.95%	6.45%	7.27%	6.05%	
<b><u>PROTEST STATS</u></b>							
TAXPAYER PROTESTS	27,263	30,024	29,896	26,721	32,990	30,481	
AGENT PROTESTS	44,930	48,908	51,832	52,712	65,987	84,304	<b>Yr-over-Yr</b>
<b>TOTAL PROTESTS</b>	<b>72,193</b>	<b>78,932</b>	<b>81,728</b>	<b>79,433</b>	<b>98,977</b>	<b>114,785</b>	<b>15,808</b>
CHANGE FROM PRIOR YR	8.78%	9.33%	3.54%	<b>-2.81%</b>	<b>24.60%</b>	<b>15.97%</b>	<i>more protest</i>
<b><u>ARB HEARING STATS</u></b>							
TAXPAYER HEARINGS	4,924	6,482	4,426	4,055	8,057	7,293	
WITHDRAWALS-PFWD	760	1,136	579	1,521	3,312	2,466	
S&W's	17,697	12,717	17,222	14,818	10,475	11,179	
NO-SHOWS	7,350	7,913	5,548	5,520	10,500	8,594	
PHONE HEARINGS (TP and AGT)	9	8	6,406	7,259	6,703	8,362	
<b>AGENT HEARINGS</b>	<b>11,197</b>	<b>13,653</b>	<b>18,898</b>	<b>23,176</b>	<b>36,632</b>	<b>40,745</b>	
WITHDRAWALS-PFWD	9,108	12,501	10,366	8,884	7,661	10,538	
S&W's	16,946	18,912	19,271	16,678	16,756	23,927	<b>ARB Hearings</b>
NO-SHOWS	5,284	1,908	1,384	1,436	2,149	1,387	
TOPLINES	-	-	14,331	15,663	25,335	26,038	
<b>TOTAL HEARINGS</b>	<b>16,121</b>	<b>20,135</b>	<b>23,324</b>	<b>27,231</b>	<b>44,689</b>	<b>48,038</b>	<i>of protest</i>
CHANGE FROM PRIOR YR	25.64%	24.90%	15.84%	<b>16.75%</b>	<b>64.11%</b>	<b>7.49%</b>	<i>had a hearing</i>
<b>TOTAL NO-SHOW RATE</b>	<b>43.94%</b>	<b>32.78%</b>	<b>22.91%</b>	<b>20.35%</b>	<b>22.06%</b>	<b>17.20%</b>	



# Collin Central Appraisal District

October 17, 2023

TO: Board of Directors

FROM: Tina Castillo, Director of ARB & Agents Services

RE: 3rd Quarter 2023- 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 319 Requests for Binding Arbitration filed for 2023.

The total certified market value of the properties under appeal is \$298,743,074. The difference between the certified value of the properties and the requestor opinion of value is \$65,439,341.

- Below is a representation of the current 2023 arbitration case load, along with the 2022 statistics, as reference.

<b>ARBITRATION STATUS</b>	<b>2023</b>	<b>ARBITRATION STATUS</b>	<b>2022</b>
Active	228	Active	4
Rejected	0	Rejected	1
Withdrawn	4	Withdrawn	27
Dismissed	0	Dismissed	1
Settled	87	Settled	174
District	0	District	50
Taxpayer/Agent	0	Taxpayer/Agent	62
<b>TOTAL</b>	<b>319</b>	<b>TOTAL</b>	<b>319</b>

<b>ARBITRATED BY</b>	<b>2023</b>	<b>ARBITRATED BY</b>	<b>2022</b>
Agent	237	Agent	227
Taxpayer	82	Taxpayer	92
<b>TOTAL</b>	<b>319</b>	<b>TOTAL</b>	<b>319</b>


<b>PROPERTY TYPE</b>	<b>2023</b>	<b>PROPERTY TYPE</b>	<b>2022</b>
Residential	206	Residential	237
Land	13	Land	6
Commercial	86	Commercial	66
BPP	14	BPP	10
<b>TOTAL</b>	<b>319</b>	<b>TOTAL</b>	<b>319</b>



# Collin Central Appraisal District

October 18, 2023

TO: Board of Directors

FROM: Brian Swanson, Deputy Chief of Business Operations and Compliance 

RE: 2023 3Q Litigation Report Update

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

- There have been 777 lawsuits filed at this point for the 2023 tax year. The total certified value of lawsuits received is \$28,369,242,096. This should be the majority of the lawsuits we can expect for 2023. There will still be some filed during the supplemental hearings in the fall and winter months, but they will be nominal.
- The increase in lawsuits filed from 2022 to 2023 was a staggering 43.6%. You will also note from the table below that we had a 60% increase in the number of individual accounts filed. This is due to the filing of numerous leased residential properties.
- We currently have over 75% of the 2022 lawsuits settled and more than 98% of the remaining years settled going back to 2019.
- The chart below illustrates the year, current status, citations, total PID's, and certified values over the last five years which were updated as of the October 3, 2023 supplement:

**COLLIN CENTRAL APPRAISAL DISTRICT  
LITIGATION SUMMARY  
October 18, 2023**

YEAR	STATUS	CITATIONS	PID'S UNDER SUIT	PID'S ON CERTIFIED ROLL	PERCENTAGE OF PID'S UNDER SUIT	CERTIFIED VALUE	CERTIFIED MARKET VALUE FOR THE COUNTY	PERCENTAGE OF CERTIFIED MARKET VALUE
2019	IN PROGRESS	2	3			\$ 35,933,449		
	LITIGATION FINALIZED	293	741			\$ 8,991,017,761		
		295	744	382,520	0.19%	\$ 9,026,951,210	\$ 180,236,281,441	5.01%
2020	IN PROGRESS	2	2			\$ 2,447,653		
	LITIGATION FINALIZED	426	755			\$12,734,199,723		
		428	757	392,138	0.19%	\$12,736,647,376	\$ 188,328,482,364	6.76%
2021	IN PROGRESS	6	6			\$ 45,526,386		
	LITIGATION FINALIZED	360	706			\$11,196,609,079		
		366	712	403,221	0.18%	\$11,242,135,465	\$ 200,590,594,152	5.60%
2022	IN PROGRESS	130	279			\$ 5,669,522,334		
	LITIGATION FINALIZED	411	664			\$12,493,867,359		
		541	943	416,155	0.23%	\$18,163,389,693	\$ 250,290,704,368	7.26%
2023	IN PROGRESS	767	1490			\$28,296,503,578		
	LITIGATION FINALIZED	10	13			\$ 72,738,518		
		777	1503	431,964	0.35%	\$28,369,242,096	\$ 295,289,128,246	9.61%
2019-2023	IN PROGRESS	907	1780			\$34,049,933,400		
	LITIGATION FINALIZED	1500	2879			\$45,488,432,440		
	<b>GRAND TOTALS&gt;&gt;&gt;&gt;</b>	<b>2407</b>	<b>4659</b>	<b>2,025,998</b>	<b>0.23%</b>	<b>\$79,538,365,840</b>	<b>\$1,114,735,190,571</b>	<b>6.85%</b>

**Legal Expense Summary (by expense code and vendor)**  
**YTD Totals as of (10/17/2023)**

**LEGAL EXPENSE BY EXPENSE CODE**

Name	2023 YTD Total	2023 Budget	2022 Total	2021 Total	2020 Total	2019 Total
LITIGATION	1,300,545		\$1,265,087	\$1,282,281	\$1,105,332	\$1,053,772
EXPERT/APPRaisal	342,992		\$278,266	\$266,111	\$355,794	\$322,846
GENERAL	43,544		\$47,361	\$45,539	\$62,511	\$50,107
PERSONNEL	2,884		\$49,063	\$23,216	\$12,750	\$647
ARBITRATION	27,900		\$17,100	\$15,050	\$18,500	\$7,300
SUBTOTAL	\$1,717,866	\$2,070,000	\$1,656,876	\$1,632,197	\$1,554,886	\$1,434,671
ARB RELATED	1,200	30,000	\$16,031	\$15,015	\$7,574	\$8,311
<b>TOTAL</b>	<b>\$1,719,066</b>	<b>\$2,100,000</b>	<b>\$1,672,908</b>	<b>\$1,647,212</b>	<b>\$1,562,460</b>	<b>\$1,442,981</b>
	\$0					

**LEGAL EXPENSE BY VENDOR**

Name	2023 YTD Total	2022 Total	2021 Total	2020 Total	2019 Total
1 ARBITRATION&SUBPOENA RELATED	27,900	\$17,100	\$15,050	\$18,500	\$7,300
2 ARMSTRONG & ARMSTRONG	1,200	\$16,031	\$15,015	\$7,574	\$8,311
3 CUSHMAN & WAKEFIELD	0	\$0	\$37,600	\$56,500	\$97,900
4 FISHER & PHILLIPS LLC	0	\$0	\$209	\$203	\$197
5 FRANK PRICE	0	\$4,000	\$10,000		
6 HBS REAL ESTATE	157,250	\$85,000	\$104,050	\$4,700	\$20,450
7 INTEGRA REALTY RESOURCES	0	\$0	\$0	\$0	\$14,146
8 MALIN GROUP, THE	0	\$31,916	\$38,461	\$99,919	\$71,494
9 MCROBERTS AND COMPANY	80,800	\$72,850	\$74,500	\$151,175	\$88,856
10 NPV ADVISORS	17,500	\$19,500	\$0	\$0	\$0
11 PERDUE, BRANDON, FIELDER	2,029	\$2,500	\$3,036	\$2,814	\$3,930
12 PHILLIPS MURRAH PC	0	\$0	\$384	\$540	\$450
13 SAUNDERS & WALSH, PLLC	1,344,945	\$1,355,010	\$1,337,407	\$1,177,036	\$1,099,948
14 VALBRIDGE PROPERTY ADVISORS	87,442	\$69,000	\$11,500	\$43,500	\$30,000
<b>TOTAL</b>	<b>\$1,719,066</b>	<b>\$1,672,908</b>	<b>\$1,647,212</b>	<b>\$1,562,460</b>	<b>\$1,442,981</b>



# Collin Central Appraisal District

October 19, 2023

TO: Board of Directors

FROM: Brad Richards, Director of Business Personal Property

RE: 2023 Utility Properties Appraisal Report

Beginning with the 2022 tax year, the Collin Central Appraisal District entered into an agreement with Capitol Appraisal Group to appraise our Comptroller category J properties. These include our cable television systems, gas & electric utility systems, pipeline systems, railroad companies and telecommunication companies. Capitol is responsible for rendition processing and the mailing of appraisal notices. The Company agrees to represent its evaluations for the District in any appeals of its appraisals, including hearings before the Appraisal Review Board, any arbitration proceedings, and any proceedings before the Comptroller of Public Accounts, (i.e.) the Texas Comptroller's Property Value Study. The latter could be very beneficial if the district were to fail a ratio study in a particular school district.

I have included the results of the 2022 & 2023 Tax Years.

<u>Tax Year</u>	<u>Properties</u>	<u>Market Value</u>
2022	1,152	\$4,823,193,963
2023	1,162	\$5,220,675,065