

# Travis Central Appraisal District



Board of Director's Meeting  
January 13, 2020  
11: 30 a.m.

# AGENDA ITEM

**#5A**

# TRAVIS CENTRAL APPRAISAL DISTRICT

## BOARD OFFICERS

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



MARYA CRIGLER  
CHIEF APPRAISER

## BOARD MEMBERS

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

## TCAD - BOARD OF DIRECTORS MINUTES OF THE DECEMBER 18, 2019 WORK SESSION

### Call to order

Meeting called to order by Tom Buckle at 10:31 a.m. on December 18, 2019 at 8314 Cross Park Drive, Austin, Texas 78754.

### Establishment of Quorum

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

Also present were Marya Crigler, Chief Appraiser, Leana Mann, Director of Operations, Karen Evertson of Evertson & Sanchez, and Trish Carls, Board of Director's General Counsel.

### Citizens Communication

Members of the Board heard from:

- Bill Aleshire, Attorney for Texas ProTax

### Work Session Items

1. Receive presentation on results of 2020 protest process survey

### Adjourn

**Respectfully submitted,**

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James Valadez, Secretary

**Approved:**

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Tom Buckle, Chair

DRAFT

# TRAVIS CENTRAL APPRAISAL DISTRICT

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JAMES VALADEZ  
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MARYA CRIGLER  
CHIEF APPRAISER

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ANTHONY NGUYEN  
ELEANOR POWELL  
RYAN STEGLICH  
FELIPE ULLOA

## TCAD - BOARD OF DIRECTORS MINUTES OF THE DECEMBER 18, 2019 MEETING

### 1. Call to order

Meeting called to order by Tom Buckle at 11:15 a.m. on December 18, 2019 at 8314 Cross Park Drive, Austin, Texas 78754.

### 2. Establishment of Quorum

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

Also present were Marya Crigler, Chief Appraiser, Leana Mann, Director of Operations, Karen Evertson of Evertson & Sanchez, and Trish Carls, Board of Director's General Counsel.

### 3. Citizens Communication

Members of the Board heard from:

- Ken Martin, The Austin Bulldog
- Lorri Michel, Attorney
- Bill Aleshire, Attorney for Texas ProTax

### 4. Consent Items

- a. Approval of the minutes of the November 13, 2019 meeting
- b. Taxpayer liaison report **[PULLED FROM CONSENT]**
- c. Section 25.25B Report **[PULLED FROM CONSENT]**
- d. Accounting statements
- e. Line Item Transfers **[PULLED FROM CONSENT]**
- f. Personnel report **[PULLED FROM CONSENT]**

**MOTION:** Approve consent item 4A and 4D  
**RESULT:** **ADOPTED [UNANIMOUS]**

**MOVER:** Bruce Grube

**SECONDER:** James Valadez

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

**4B. Taxpayer liaison report**

Members of the Board heard from:

- David Bawcom, Texas Protax
- Debra Bawcom, Texas Protax

**RESULT: DISCUSSED**

**4C. Section 25.25B Report**

Members of the Board heard from:

- David Bawcom, Texas Protax
- Debra Bawcom, Texas Protax

**RESULT: DISCUSSED**

*Note: Board Member Anthony Nguyen requested that more information be provided on the 25.25B report to include what correction was made, beginning market value, and ending market value.*

**4E. Line Item Transfers**

**MOTION:** Approve budget line item transfers as presented

**RESULT: ADOPTED [UNANIMOUS]**

**MOVER:** Anthony Nguyen

**SECONDER:** Theresa Bastian

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

*Note: Board Member Anthony Nguyen requested a detailed general ledger report for the postage and freight line item.*

**4F. Personnel Report**

**RESULT: DISCUSSED**

*Note: Board Member Theresa Bastian requested that open positions be presented on future personnel reports.*

**5A. Discussion and action on board operating policies revisions.**

Members of the Board heard from Trish Carls, Board of Director's General Counsel.

**MOTION:** Approve the operating policies with the correction of WCAD website address to TCAD website address in Section IV and the addition of a recording policy.

**RESULT:** **ADOPTED [UNANIMOUS]**

**MOVER:** Theresa Bastian

**SECONDER:** Eleanor Powell

**AYES:** Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

**ABSENT:** Blanca Zamora-Garcia, Ryan Steglich

**5B. Discussion and action on 2020 protest season process.**

Members of the Board heard from:

- Steve Neal, Attorney
- Terry Hood, Yucon Square HOA
- Brian Tear, Travis County resident
- Debra Bawcom, Texas Protax
- David Bawcom, Texas Protax
- Bill Aleshire, Attorney for Texas Protax
- JP Krueger, Five Stone Property Tax Advisors

At 12:28 PM the Board recessed.

At 12:36 PM, the Board resumed the open session and continued with Item 5B.

**RESULT: DISCUSSED**

*Note: Board Members requested the following data be provided at the next meeting:*

- *Chief Appraisers proposal for informal hearings*
- *Proposed timeline and any scheduling complications*
- *Average informal settlement amount in previous years*
- *Chief Appraiser's proposal for what percentage might require management approval*
- *Amount of workload for staff under proposed informal solutions- number of hears per day, number of days*
- *Proposal to be published publicly prior to next meeting and allow citizen comment on specific proposal.*

**5C. Discussion and action on budget amendments.**

**MOTION:** Approve budget amendments as presented.

**RESULT:** **ADOPTED [UNANIMOUS]**

**MOVER:** Theresa Bastian

**SECONDER:** Bruce Grube

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

*Note: Board Member Anthony Nguyen recommended that all notifications to taxing entities be e-mailed as well as mailed.*

**5D. Discussion and possible action on 2020-2022 appraisal services contract- Capitol Appraisal Group**

**MOTION:** Approve contract with Capitol Appraisal Group

**RESULT:** **ADOPTED [UNANIMOUS]**

**MOVER:** James Valadez

**SECONDER:** Eleanor Powell

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

**5E. Chief Appraiser Report to include: 2020 field work, 850 EAL renovation status**

Members of the Board heard from Marya Crigler, Chief Appraiser.

**RESULT: NO ACTION NECESSARY**

At 1:10 PM the Board moved to executive session; TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 et sec [THE TEXAS OPEN MEETING ACT] INCLUDING:

SEC. 551.071; Consultation with attorney regarding pending or contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas *(Item 5G)*

SEC. 551.074; Personnel matters; to deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of the Chief Appraiser or other public officer or employee; or to hear a complaint or charge. *(Item 5F)*

SEC. 551.076; Deliberations regarding security devices

At 2:29 PM, the Board resumed the public session and returned to Item 5F.



**5F. Discussion and Action on Chief Appraiser's annual performance review and employment contract.**

**MOTION:** Adopt the eight amendment to the Chief Appraisers employment contract with \$220,000 in compensation and a lump sum payment of \$11,000, and December noted as the review period.

**RESULT: ADOPTED**

**MOVER:** James Valadez

**SECONDER:** Bruce Grube

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian

NAYS: Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

**5G. Discussion on appeals report and litigation update**

**RESULT: DISCUSSED IN EXECUTIVE SESSION**

**5H. Discussion and possible action to add items to future agendas.**

Members of the Board heard from Betty Thompson, Appraisal Review Board Chairperson

**RESULT: DISCUSSED**

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

- *Revision of 25.25B notification process*
- *Next meeting: Monday, January 13, 2020 at 11:30 a.m.*

**5I. Adjournment**

**MOTION:** Adjourn meeting at 2:43 PM

**RESULT: APPROVED [UNANIMOUS]**

**MOVER:** Theresa Bastian

**SECONDER:** Eleanor Powell

AYES: Tom Buckle, Bruce Grube, James Valadez, Felipe Ulloa, Eleanor Powell, Theresa Bastian, Anthony Nguyen

ABSENT: Blanca Zamora-Garcia, Ryan Steglich

**Respectfully submitted,**

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James Valadez, Secretary

**Approved:**

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Tom Buckle, Chair

DRAFT

# **AGENDA ITEM**

**#5B**

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# Taxpayer Liaison Report

01/13/2020

Martin Wilbanks

# Travis Taxpayer Liaison Activity Report

Activity Tracking	Complaint	Protest	eFile	Residential Inquiry	Commercial Inquiry	BPP Inquiry	Exemptions	Address Change	Agrent Appt / Rev	Open Records	Property Tax Issues	Total
2016 Total	19	109	19	92	3	16	90	12	29	6	35	430
(Apr-Dec)	4%	25%	4%	21%	1%	4%	21%	3%	7%	1%	8%	100%
2017 Total	26	229	4	65	16	31	162	16	37	6	61	653
	4%	35%	1%	10%	2%	5%	25%	2%	6%	1%	9%	100%
2018 Total	21	299	10	38	5	32	172	15	21	7	54	674
	15%	39%	1%	5%	1%	4%	23%	2%	3%	1%	7%	100%
2019												
January	1	27	0	23	0	1	37	1	0	1	10	101
February	2	15	0	2	0	1	28	1	2	2	4	57
March	1	9	0	2	0	5	28	1	0	0	1	47
April	2	30	0	6	0	7	35	0	7	2	1	90
May	3	79	46	6	0	1	21	4	53	1	1	215
June	1	60	0	1	3	2	10	0	183	0	0	260
July	1	83	0	9	0	7	9	1	4	0	0	114
August	6	154	0	10	0	3	10	2	1	3	4	193
September	2	140	0	19	0	0	16	1	0	1	0	179
October	9	149	0	2	0	3	14	0	0	3	6	186
November	2	43	0	5	2	4	9	1	2	0	11	79
December	0	19	0	6	0	2	10	4	0	2	12	55
2019 Total	30	808	46	91	5	36	227	16	252	15	50	1576
	2%	51%	3%	6%	0%	2%	14%	1%	16%	1%	3%	100%

# 2019 Issues by Property Owners about ARB Protest Hearings

*Objective:*

*minimize complaints by working with Property Owners  
to understand and resolve their issues*

- No informal hearings
- Not understanding the process
- Not enough time
- Evidence presented not considered
- Treated disrespectfully
- Result unfair - Wanting another hearing
- Environment noisy

# 2019 Complaint Log

January 18, 2019 PID 358051 James Nawrocki  
Challenge method for determining lake front properties in error

February 20, 2019 PID 349635 Margaret Hill  
Solar panel on property in error.

February 25, 2019 PID 545156 Synthia Henry  
Homestead exemption dropped due to error in ownership transfer.

March 04, 2019 PID 198137 Paulino Flores  
Property owner wanted homestead exemption and over 65 exemption be granted although property owner lacked valid documentation.

April 11, 2019 PID 550865 Jerrilyn Hayashi  
Challenge of square footage for current and prior five years

April 17, 2019 PID 759582 Jan Hill  
Challenge over 65 exemption calculation

May 14, 2019 PID 157187 / 157188 / 157189 John King  
Inappropriate actions by ARB during hearing

May 16, 2019 PID 466030 Mary Finley  
Problems with eFiling

May 28, 2019 PID 821052 Justin Ramsey  
eFile and ARB protest filing process confusing.

June 10, 2019 Agent: Five Stone John Krueger  
Inappropriate actions by ARB member during hearings.

July 18, 2019 PID 317921 / 852081 / 561911 / 317803 / 532027 Donovan DePrist  
Appraiser in ARB hearing was unprofessional, condescending

July 26, 2019 PD 576891 Mike Thering  
Did not receive notice of hearing. Notice sent to Agent of record, Five Stone

August 7, 2019 PID 235552 Agent: Five Stone John Krueger  
Inappropriate actions by ARB member during hearing

August 12, 2019 PID 322370 Oscar Manzano  
Object to termination of Informal hearing.

August 12, 2019 PID 236222 Jamie Poltonieri / Bill Kleinsorge  
No informal. Time for ARB hearing too short for presenting evidence

August 14, 2019 PID 555675 Lieng Chin  
Evidence presented not fairly considered by ARB panel. ARB unprofessional, rude.

August 22, 2019 PID 485325 Jila Nelson

At ARB hearing, evidence presented was not fairly considered. Limited time to present.

August 30, 2019 PID 273866 Benjamin Jones

efile process not fair offer

September 04, 2018 PID 545068 / 328588 / 211966 / 294656 / 326513 / 500354 / 343667 / 545188 / 211966 / 294656 / 326513 / 500354 / 343667 / 298230 / 335356 / 341356 / 511414 / 224079 / 500128 / 485780 / 297771 / 511430 / 341665 / 511802 / 485729 / 292942 Searle, Equity Trust Company

No informal.

September 13, 2019 PID 304167 Glen Chappell

No informal

October 08, 2019 PID 173773 Barbara Mangrum

No Informal. ARB process stressful. Treated like an adversary by ARB.

October 15, 2019 PID 187627 / 207334 / 207333 Michael Kleinman

Object to termination of Informal hearing. Poor physical condition of new facility.

October 15, 2019 PID 355886 / 382651 Mac Spellmann

Evidence used by district not provided 14 days before ARB hearing.

October 16, 2019 PID 315817 Elizabeth Best

ARB Hearing did not properly consider physical issues with the property.

October 17, 2019 PID 877615 Logan Coker

ARB process stressful. ARB did not consider evidence presented. ARB disrespectful.

October 18, 2019 PID 758273 Jim Back

No one called to confirm if rescheduled hearing date/time was convenient

October 23, 2019 PID 554756 Belinda Rosa

Challenging exemption denial. Supporting documentation not on file.

October 30, 2019 PID 274476 Matt Wanat

During the ARB hearing, the appraiser was disrespectful, dismissive.

October 30, 2019 PID 783479 Mike Collins

Evidence presented not considered by ARB. Process confusing.



# AGENDA ITEM

#6A

Attn: TCAD Board, Marya Crigler  
12/14/2019

**Informal Review Recommendation**

My recommendation is for TCAD to create an opportunity for face to face meetings to review information only if appraisers are not able to change appraised values during these face to face meetings.

Moving this ability to change appraised value to a uniform process with multiple layers of oversight outside of a face to face meeting makes for a fairer and more transparent process for all property owners.

In the process I'm recommending:

- Appraisers can assist property owners or their representatives with the protest during these meetings, answering questions and helping to interpret information. This should especially help property owners who are new or unfamiliar with the appraisal process.
- Appraisers should also be able to input notes from the meeting that attach to the online protest with information for reviewers to be considered. Face to face meetings are a valuable part of communication and information sharing and provide a way to make sure and get the right information to a case reviewer.
- Any adjustments of appraised value would be made similar to the current online process, taking place after all information has been reviewed via an offer through the TCAD portal. If that is not satisfactory, the property owner then can request an ARB hearing where they can present their case to an ARB panel that is appointed by a district judge.

Forcing an appraiser to make unilateral valuation changes while in a potentially adversarial face to face meeting creates a system ripe for abuses. Let's have a system that is consistent, transparent and fair to all taxpayers.

Sincerely,

Ryan Steglich  
TCAD Board Member  
AISD Appointee

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BLANCA ZAMORA-GARCIA

## 2020 Informal Meeting Recommendation

- **Timeline**

- Generally, the appraisal district is required to send notices of appraised value by April 1 or as soon thereafter as practicable (25.19(a)) and submit the completed appraisal records to the appraisal review board for review and determination by May 15<sup>th</sup> or as soon thereafter as practicable (25.22(a)).
- Opportunity for informal meetings with staff should occur within the general timeframe from when notices are mailed and the records are submitted to the appraisal review board and formal hearings begin.
- After the records are submitted to the appraisal review board, protests are scheduled and require 15 days advance notice; therefore, the first practical day for formal hearings is 15 days after the May 15<sup>th</sup> appraisal roll submission date.
- For 2020 the estimated available timeline for informal meetings would be between **April 1, 2020 through May 29, 2020**.
- This provides approximately **8 weeks** for informal meetings and approximately **8 weeks** for formal appraisal review board hearings.

- **Historic Informal Meetings**

Year	# Informal	Avg Chg
2005	12,912	-17%
2006	18,311	-16%
2007	20,763	-13%
2008	32,534	-13%
2009	49,006	-13%
2010	45,566	-12%
2011	50,597	-10%
2012	50,509	-11%
2013	53,157	-10%
2014	61,393	-11%
2015	66,270	-10%
2016	69,600	-10%
2017	75,460	-9%
2018	87,236	-9%

- **2020 Informal Meeting Capacity**

	<b>Owners</b>	<b>Agents</b>	
<b>Meetings per hour</b>	5	10	
<b>Number of Appraisers</b>	31	31	
<b>Hours per day</b>	8	8	
<b>Number of days</b>	12	30	
	14,880	74,400	<b>89,280</b>

- **Complications**

- Outside agencies, such as Austin Board of Realtors, train and advise the public to delay filing their protests until the very last day before the protest deadline and attempt to postpone or delay their hearings until the very end of the season. This strategy cannot be accommodated by the appraisal district -- everyone cannot be last.
- Because not all protest will have been filed, advanced scheduling of informal meetings will be impracticable. CAD will need to develop an online reservation system similar to DMV. Wait times may be long depending on the demand for services each day.
- Intensive public outreach will be required to ensure that persons wanting informals come starting April 1 so that days and capacity are not wasted.
- Do not have capacity to have multiple informal meetings on the same property.

- **Potential percentage for management approval**

- No settlement offers can be made without documented supporting evidence.
- Once CAD's supporting evidence packet is created the appraiser may make a settlement offer up to the evidence suggested amount with no management approval.
- Chief Appraiser, Deputy Chiefs, Division Directors, Managers and Team Leads will determine additional circumstances and percentages for management approval on a case by case basis.
  - Implement procedures for review and oversight to ensure fair and consistent settlements to all property owners
  - Dependent upon staff knowledge and experience
  - Conflict of interest concerns

Marya Crigler, RPA  
Chief Appraiser

## TCAD 2020 AG ADVISORY BOARD MEMBERS SUMMARY

Pending Reappointment	Existing Members
<b>January 1, 2020 – December 31, 2021</b>	<b>January 1, 2019 – December 31, 2020</b>
Mauri Pottuu	Dan Dierschke
Larry Mellenbruch	Cliff Kessler
	Linda Hall
	Tommy Miertschin

**Mr. Mauri Pottuu** lives in western Travis County and has been in the farming and ranching business since 1984. He is retired from the industrial management business and is a member of the American Angus Association and the Travis County Farm Bureau. He is an annual host of the Range Field Day that is conducted by the Travis County Extension Service. He is familiar with farming and ranching on the western side of Travis County and particularly interested in range management and registered Angus Cattle.

**Mr. Larry Mellenbruch** lives in eastern Travis County and is a farmer and rancher. He has been in the farming and ranching business for the last 60 years. He is a retired electrical engineer and is a member of the Texas Farm Bureau and the Texas Southwestern Cattle Raisers Association. He is familiar with farming and ranching practices, economics of agricultural and environmental issues related to land in the area.

**Mr. Dan Dierschke** is a fifth generation Texas agricultural producer. He and his wife, Marilyn, have produced beef and hay near Austin, Texas for the last 45 years. He has been involved in many organizations such as Cattlemen’s Beef Board, Texas Beef Council, Texas Farm Bureau, U.S. Meat Export Federation, Technical Subcommittee on Farm and Land Preservation for USDA’s National Resources and Conservation Service, just to name a few. Mr. Dierschke has also served two terms appointed by the governor on the Texas Farm and Ranch Land Preservation Council and as an advisor on the U.S. Trade for animals and animal products. He has been on the TCAD Agricultural Advisory Board since 2000.

**Ms. Linda Hall**, born and raised in Travis County, has been a ranching in Travis County for 45 years. She is also involved in the Texas Farm Bureau and many community activities. She is familiar with farming and ranching practices, economics of agriculture and environmental issues related to land in the area. She has been on the TCAD Agricultural Advisory Board since 2017.

**Mr. Cliff Kessler** farms in eastern Travis County. He is retired from the Travis Central Appraisal District after 25 years of service. He is also involved in the Texas Farm Bureau, Aqua Water Supply Corporation, Emergency Services District 13 and Blackland Prairie Concerned Citizens Association. Before retiring, he had farmed in Travis County for 35 years. He has been on the TCAD Agricultural Advisory Board since 2010.

## TCAD 2020 AG ADVISORY BOARD MEMBERS SUMMARY

**Mr. Tommy Miertschin** is the Travis County Executive Director for the Farm Service Agency. He has been farming and ranching for the past 20 years and is in day to day contact with many of the Travis County farmers and ranchers. He is involved with many programs offered by the county and brings invaluable information to the Agricultural Advisory Board meetings. He has been on the TCAD Agricultural Advisory Board since 2000.

DRAFT