

# Travis Central Appraisal District



Board of Director's Meeting  
October 23, 2020  
11:30 a.m.

# TRAVIS CENTRAL APPRAISAL DISTRICT

## BOARD OFFICERS

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



MARY A CRIGLER  
CHIEF APPRAISER

## BOARD MEMBERS

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

**VIA VIDEOCONFERENCE** - The public may hear and view this meeting while in progress online at  
<https://us02web.zoom.us/j/362812703>

## AGENDA

**REGULAR MEETING - FRIDAY, OCTOBER 23, 2020 – 11 30AM**



2 pgs 202081393

- 1 CALL TO ORDER
- 2 ESTABLISHMENT OF QUORUM
- 3 CITIZENS COMMUNICATION - Public comment will be allowed via teleconference, no in-person input will be allowed. All public comment will occur at the beginning of the meeting starting at 11 30 AM. To speak remotely at this meeting persons must register online at [https://www.traviscad.org/speaker registration](https://www.traviscad.org/speaker-registration) no later than 1 5 hours prior to the meeting start time. Approximately one hour prior to the meeting start time, speakers will receive email instructions on how to login to participate in the meeting. Emails will come from outreach@tcadcentral.org
- 4 CONSENT AGENDA - These items may be acted upon by one motion. No separate discussion or vote on any of the items will be had unless requested by a Board member.
  - a APPROVAL OF THE MINUTES OF THE SEPTEMBER 3, 2020 MEETING
- 5 REGULAR AGENDA
  - a DISCUSSION AND ACTION ON PURCHASE FROM STATE OF TEXAS DIR CONTRACT # DIR-TSO 4288 OF CARAHSOFT TECHNOLOGY CORPORATION TRANSUNION-ENHANCED REAL ESTATE REPORT
  - b DISCUSSION AND POSSIBLE ACTION ON ADMINISTRATIVE JUDGE'S APPOINTMENT, REAPPOINTMENT OR REPLACEMENT OF APPRAISAL REVIEW BOARD MEMBERS
  - c DISCUSSION AND POSSIBLE ACTION ON LITIGATION AND APPEALS RELATED TO PENDING LAWSUITS AND ANTICIPATED LAWSUITS
  - d DISCUSSION AND POSSIBLE ACTION TO ADD ITEMS TO FUTURE AGENDAS
  - e ADJOURNMENT

**THE BOARD MAY MEET IN EXECUTIVE SESSION TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC 551 001 et seq [THE TEXAS OPEN MEETING ACT] INCLUDING**

- SEC 551 071, Consultation with attorney regarding pending or contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas
- SEC 551 072, Deliberations regarding real property
- SEC 551 074, Personnel matters, to deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of the Chief Appraiser or other public officer or employee, or to hear a complaint or charge
- SEC 551 076, Deliberations regarding security devices

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

# CERTIFICATE OF POSTING

I, Leana Mann, Director of Operations of the Travis Central Appraisal District, do hereby certify that on the 14th day of October 2020, by 5 o'clock pm this Notice of Meeting was posted at the District's Offices, located at 8314 Cross Park Drive, Austin, Texas 78754 This Notice of Meeting was posted in a place readily accessible to the general public at all times for 72 continuous hours prior to the meeting, filed with the Travis County Clerk for posting by the Clerk at the Travis County Courthouse, and posted on the District's website

*Leana Mann*

By

Printed Name Leana Mann

Title Director of Operations

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

October 20 20

Dana DeBeauvoir

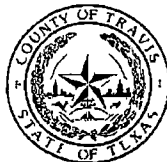
County Clerk, Travis County, Texas

By

*E. Medina*

Deputy

**E. MEDINA**



**202081393**

**FILED AND RECORDED  
OFFICIAL PUBLIC RECORDS**

*Dana DeBeauvoir*

Dana DeBeauvoir, County Clerk  
Travis County, Texas

Oct 14, 2020 04 06 PM

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MEDINAE

# AGENDA ITEM

**#4A**

# TRAVIS CENTRAL APPRAISAL DISTRICT

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BLANCA ZAMORA-GARCIA

## **TCAD - BOARD OF DIRECTORS** **MINUTES OF THE SEPTEMBER 3, 2020 PUBLIC HEARING HELD VIA TELECONFERENCE**

### **1. Call to order**

Meeting called to order by James Valadez at 11:32 a.m. on September 3, 2020.

Due to COVID-19, in accordance with Texas Government Code 418.016, Governor Abbott announced the suspension of various provisions of the Open Meetings Act that require government officials and members of the public to be physically present at a specified meeting location. Pursuant to that suspension, this meeting was held utilizing the Zoom meeting service. Members of the public were not allowed to attend this meeting in person. The public was able hear, view and participate in this meeting while in progress online.

### **2. Establishment of Quorum**

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

Also present were Marya Crigler, Chief Appraiser, Leana Mann, Director of Operations, and Dustin Banks, Litigation Attorney.

### **3. Citizens Communication**

None

### **4. Public hearing on proposed 2021 Travis Central Appraisal District budget**

- a. OPEN PUBLIC HEARING
- b. RECEIVE PUBLIC COMMENT ON PROPOSED BUDGET  
None
- c. CLOSE PUBLIC HEARING

**5. Public hearing on proposed 2021-2022 Travis Central Appraisal District reappraisal plan**

- a. OPEN PUBLIC HEARING
- b. RECEIVE PUBLIC COMMENT ON PROPOSED BUDGET  
None
- c. CLOSE PUBLIC HEARING

**6. Adjournment**

**MOTION:** Adjourn meeting at 11:34 a.m.

**RESULT:** **APPROVED [UNANIMOUS]**

**MOVER:** Bruce Grube

**SECONDER:** Blanca Zamora Garcia

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

ABSENT: Eleanor Powell, Theresa Bastian

Respectfully submitted,

\_\_\_\_\_  
Theresa Bastian, Secretary

Approved:

\_\_\_\_\_  
James Valadez, Chairperson

# TRAVIS CENTRAL APPRAISAL DISTRICT

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ANTHONY NGUYEN  
ELEANOR POWELL  
RYAN STEGLICH  
FELIPE ULLOA  
BLANCA ZAMORA-GARCIA

## **TCAD - BOARD OF DIRECTORS** **MINUTES OF THE SEPTEMBER 3, 2020 TELECONFERENCE MEETING**

### **1. Call to order**

Meeting called to order by James Valadez at 11:46 a.m. on September 3, 2020.

Due to COVID-19, in accordance with Texas Government Code 418.016, Governor Abbott announced the suspension of various provisions of the Open Meetings Act that require government officials and members of the public to be physically present at a specified meeting location. Pursuant to that suspension, this meeting was held utilizing the Zoom meeting service. Members of the public were not allowed to attend this meeting in person. The public was able hear, view and participate in this meeting while in progress online.

### **2. Establishment of Quorum**

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

Also present were Marya Crigler, Chief Appraiser, Leana Mann, Director of Operations, and Dustin Banks, Litigation Attorney.

### **3. Citizens Communication**

None

### **4. Consent Items**

- Approval of the minutes of the June 8, 2020 meeting
- Taxpayer liaison report
- Section 25.25b report
- Accounting statements
- Line item transfers
- Personnel report

**MOTION:** Approve consent agenda  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Bruce Grube **SECONDER:** Blanca Zamora-Garcia

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

ABSENT: Eleanor Powell, Theresa Bastian

**5A. Discussion and possible action on adoption of the 2021 appraisal district budget.**

Members of the board heard from:  
Marya Crigler, Chief Appraiser  
Leana Mann, Director of Operations

**MOTION:** Adopt the fiscal year 2021 budget as proposed  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Bruce Grube **SECONDER:** Tom Buckle

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

ABSENT: Eleanor Powell, Theresa Bastian

**5B. Discussion and possible action on adoption of the District's 2021 & 2022 Reappraisal Plan**

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

**MOTION:** Adopt the 2021 & 2022 reappraisal plan  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Blanca Zamora-Garcia **SECONDER:** Ryan Steglich

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

ABSENT: Eleanor Powell, Theresa Bastian

**5C. Discussion and possible action on Chief Appraiser and ARB Chair join report on status of protest status and hearings**

Members of the board heard from:  
Marya Crigler, Chief Appraiser  
Storey Cordelle, Travis ARB Chairman

**MOTION:** Request Travis County Administrative Judge appoint new ARB members to fill vacancies  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Tom Buckle **SECONDER:** Blanca Zamora-Garcia



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

ABSENT: Eleanor Powell, Theresa Bastian

**5D. Discussion and possible action on number of appraisal review board members for 2021**

**MOTION:** Request Travis County Administrative Judge appoint a total of 200 ARB members for 2021

**RESULT:** **APPROVED [UNANIMOUS]**

**MOVER:** Anthony Nguyen

**SECONDER:** Blanca Zamora-Garcia

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

ABSENT: Eleanor Powell, Theresa Bastian

**5E. Discussion and possible action on Chief Appraiser report to include: COVID-19 appraisal district operations update and 850 EAL renovations update.**

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

**RESULT:** **DISCUSSED**

**5F. Discussion and possible action on adoption of qualified replacement benefit arrangement through Texas County and District Retirement System (TCDRS) under IRS section 415.**

Members of the board heard from:  
Leana Mann, Director of Operations

**MOTION:** Approve qualified replacement benefit arrangement

**RESULT:** **APPROVED [UNANIMOUS]**

**MOVER:** Bruce Grube

**SECONDER:** Felipe Ulloa

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

ABSENT: Eleanor Powell, Theresa Bastian

**5G. Discussion and possible action on expense reimbursement for Appraisal Review Board member William Fields.**

Members of the board heard from:  
Storey Cordelle, Travis ARB Chairman

**MOTION:** Approve expense reimbursement for William Fields  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Tom Buckle **SECONDER:** Blanca Zamora-Garcia

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

ABSENT: Eleanor Powell, Theresa Bastian

**5H. Discussion and possible action on waiver of penalty and interest for Lago Vista ISD.**

**MOTION:** Waive penalties and interest for Lago Vista ISD  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Tom Buckle **SECONDER:** Ryan Steglich

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

ABSENT: Eleanor Powell, Theresa Bastian

**5I. Discussion and possible action on litigation and appeals related to pending lawsuits and anticipated lawsuits**

**RESULT:** **NO DISCUSSION; MOVED TO NEXT AGENDA ITEM**

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

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

- *COVID 19 Update*
- *Next Meeting tentatively scheduled for December 1, 2020 at 11:30 a.m.*

**5G. Adjournment**

**MOTION:** Adjourn meeting at 12:37 PM  
**RESULT:** **APPROVED [UNANIMOUS]**  
**MOVER:** Blanca Zamora-Garcia **SECONDER:** Bruce Grube

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

ABSENT: Eleanor Powell, Theresa Bastian

Respectfully submitted,

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Theresa Bastian, Secretary

Approved:

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James Valadez, Chairperson

DRAFT

# AGENDA ITEM

**#5A**

# TRAVIS CENTRAL APPRAISAL DISTRICT

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BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District  
Board of Directors

FROM: Leana H. Mann  
Director of Operations

DATE: October 14, 2020

RE: Item No. 5A- Data Purchase Request

The District requests the Board of Directors approve a not to exceed purchase amount of \$250,000 to purchase proprietary data from Carahsoft Technology Corp. The District will purchase the data off of the Department of Information Resources (DIR) state purchasing contract DIR-TSO-4288.

Description	Amount
Enhanced Real Estate Report	\$ 250,000
<b><i>TOTAL COST</i></b>	<b><i><u>\$ 250,000</u></i></b>

Respectfully submitted,

Leana H. Mann, CGFO  
Director of Operations

# 2021 VALUATIONS

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**NEW SOLUTIONS FOR MARKET DATA ACQUISITION**



**TRAVIS CENTRAL**  
APPRAISAL DISTRICT

# ACCESS TO SALES DATA IN TEXAS

- Texas is a nondisclosure state; however, Texas does not prevent appraisal districts from acquiring sales data.
- State law requires and anticipates that appraisal districts use sales data.
- Access to sales data is a challenge for appraisal districts across the state.
- Appraisal districts use a variety of sources to compile data including sales questionnaires, protests, deeds, and third party vendors.



# HOW WE GOT HERE

**February 2018**

Travis CAD signs an agreement with CoreLogic

**May 2019**

Austin Board of Realtors sends Travis CAD a cease and desist letter

**December 2019**

ABoR announces a settlement with CoreLogic

**February 2020**

Travis CAD informs taxing entities we are unable to recalibrate our models





# HOW WE GOT HERE

ABoR's actions had an impact on Travis CAD's ability to acquire data from other sources, including sources used by other appraisal districts:

- Multiple Listing Services
- Sales Questionnaires
- Title Companies
- Financial Institutions
- Leasing Agencies
- Property Managers
- Real Estate Brokers and Agencies



# 2020 MARKET DATA DEFICIENCY

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



# AGGREGATE DATA

ABoR offered Travis CAD aggregate data by zip code.

It is **illegal** for Travis CAD to change market values without having the data to support those changes.

Using aggregate data to do across-the-board increases would violate:

- Texas Property Tax Code
- International Association of Assessing Officers Mass Appraisal Standards
- Uniform Standards of Professional Appraisal Practices



# 2020 APPRAISALS

Travis CAD analyzed the available data and concluded that it was insufficient to recalibrate existing residential appraisal models for tax year 2020.

- New construction, changes to commercial, and changes to other non-residential properties were added to the appraisal roll.
- Some properties below the homestead limitation saw an increase in assessed value as values continue to catch up to their cap.
- Property owners and tax agents were able to protest property value regardless of whether or not the parcel was reappraised.



# MARKET DATA SOURCES

Travis CAD is required to follow International Association of Assessing Officers (IAAO) Standard on Sales Verification.

## Market Data Sources:

- Real Estate Transfer Documents
- Sales Verification Questionnaires
- Buyers and Sellers
- Third Party Sources



# THIRD PARTY SOURCES

- Multiple Listing Services
- Title Companies
- Financial Institutions
- Leasing Agencies/Property Managers
- Real Estate Brokers and Agencies
- Government and Private Fee Appraisers
- Attorneys
- Appraisal Organizations
- **\*Data Vendors\***



# THIRD PARTY SOURCES

Since May 2019, Travis CAD has inquired of appraisal districts and assessing offices on resources they use to acquire market data.

- United States
- Canada
- European Union
- Asia



# THIRD PARTY SOURCES

In 2020, Travis CAD received a lead about the assessor's office in Cook County, Illinois on a potential new product offering from Carahsoft Technology Corporation.

*Carahsoft Technology Corp specializes in technology and data solutions for federal, state and local government agencies and is an aggregator of big data from multiple proprietary sources.*





# THIRD PARTY SOURCES

## Carahsoft's TransUnion Enhanced Real Estate Report

“Providing property appraisers with instant access to current data so they can properly report changes that impact property values and owner's tax obligations”.

- Features up-to-date reports on property characteristics, including square footage, structural changes, number of bedrooms and bathrooms, sales price, historical sales price and sale date.



# THIRD PARTY SOURCES

## Carahsoft's TransUnion Enhanced Real Estate Report

- New product added to State of Texas Department of Information Resources contract DIR-TSO-4288 in summer of 2020.
- Pilot test of sample data verified the accuracy of market data information included in report.



# THIRD PARTY SOURCES

This contract does NOT violate the ABoR cease and desist letter.

- Carahsoft's TransUnion Enhanced Real Estate Report is a proprietary product **owned** and offered by Carahsoft/ TransUnion.
- TransUnion is a company with 90,000 data sources, including financial institutions, private databases and public records repositories, and aggregated by 200+ data scientists, 25 data centers distributed globally.



# RECOMMENDATION

Travis CAD should use State of Texas DIR contract DIRTSO-4288 to purchase Carahsoft's TransUnion Enhanced Real Estate Report for all parcels in Travis County and purchase periodic (quarterly) update reports.

- Initial Enhanced Real Estate Report cost \$201,788
- Estimated cost per periodic quarterly report \$25,000



# 2021 APPRAISALS

**We are very optimistic that the Enhanced Real Estate Report data will enable Travis CAD to calibrate 2021 appraisal models.**

Travis CAD will continue to seek additional market data from alternative sources, including deeds, land contracts, and sales questionnaires.

