



**TRAVIS CENTRAL APPRAISAL DISTRICT  
2024-04: REQUEST FOR PROPOSAL  
PROFESSIONAL PRINTING SERVICES**

**PROPOSAL DUE DATE: Tuesday, December 3, 2024, at 2:00 p.m. (CST)**

ISSUED BY: TRAVIS CENTRAL APPRAISAL DISTRICT- FINANCE DEPARTMENT

# Travis Central Appraisal District is accepting qualification statements for the following project:

The Travis Central Appraisal District is accepting sealed proposals for professional printing services until 2:00 p.m., December 3, 2024.

A copy of the RFP package in its entirety is available on the Travis Central Appraisal District website at <https://traviscad.org/publicinformation>

Responses shall be mailed or hand delivered in a sealed envelope marked on the outside "2024-04: RFP for Printing Services- DO NOT OPEN" prior to 2:00 p.m. on Tuesday, December 3, 2024.

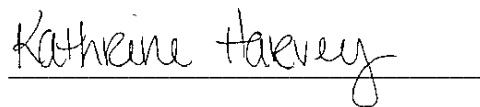
Responses can be mailed to:

Travis Central Appraisal District  
ATTN: Finance Department  
P.O. Box 149012  
Austin, Texas 78714-9012

Responses can be hand delivered to:

Travis Central Appraisal District  
ATTN: Finance Department  
850 E. Anderson Lane  
Austin, TX 78752

TCAD reserves the right to reject any or all qualification statements and to waive technicalities or formalities, and to accept the response which the District determines to be most qualified. The District may determine no action and reserves the right to do so. Qualification statements submitted after the deadline date will not be considered.



Kat Harvey, SHRM-CP  
Director of HR & Finance  
Travis Central Appraisal District

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## Section 1: General Information & Requirements

### 1.1 General Information

Pursuant to the provisions of Chapter 252, Texas Local Government Code, the Travis Central Appraisal District is seeking qualified companies to submit proposal responses for professional printing and mailing services ("Consultant"). The Travis Central Appraisal District ("TCAD") is seeking a qualified consultant to perform printing services for notices of appraised value (NOAV) and other notices as required by the Texas Property Tax Code and the associated mailing services for these print jobs.

This Request for Proposal (RFP) contains information and instructions to enable interested proposers to prepare and submit a proposal and describes the terms and conditions that the successful Consultant will be expected to accept as part of the performance of the Contract.

### 1.2 Public Information

All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (*Texas Government Code*, Chapter 552.001, *et. Seq.*) after the solicitation is completed. The District strictly complies with all statutes, court decisions, and opinions of the Texas Attorney General with respect to disclosure of RFP information.

### 1.3 Clarifications and Interpretations

Any clarifications or interpretations of this RFP that materially affect or change its requirements will be posted on the District's website at <https://traviscad.org/publicinformation>. It is the responsibility of the respondents to obtain this information. All addenda issued by the District prior to the proposal due date are considered to be incorporated herein by reference. The deadline for the District to issue addenda statements is Wednesday, November 20, 2024. Interpretations or clarifications in any other form, including oral statements, will not be binding on the District and should not be relied on in preparing proposals. Award information will be issued by the Travis Central Appraisal District via e-mail directly to the qualified respondent. A courtesy e-mail will be sent to all other respondents who are not selected.

#### 1.4 Proposal Submission

All proposals must be received **at the address specified prior to the deadline**. The District will not consider any response to this solicitation that is not received at the address specified by the deadline.

**DEADLINE AND LOCATION:** The District will receive proposals up to the time and date at the location described below:

**Tuesday, December 3, 2024, at 2:00 p.m.**

Mail to:

Travis Central Appraisal District  
ATTN: Finance Department  
P.O. Box 149012  
Austin, TX 78714-9012

Hand Deliver to:

Travis Central Appraisal District  
ATTN: Finance Department  
850 E. Anderson Lane  
Austin, Texas 78752

Responses shall be mailed or hand delivered in a sealed envelope marked on the outside **"2024-04: RFP for Professional Printing Services- DO NOT OPEN"**. A contact name, return address and e-mail address for the respondents contact person must be included. Respondents should submit three (3) identical copies of the qualifications.

#### 1.5 Point of Contact

The District designates the following person as its representative and point of contact for this RFP. Respondents shall restrict all contact with the District and direct all questions regarding this RFP, including questions regarding terms and conditions and technical specifications to the point-of-contact person:

Kat Harvey, Director of HR & Finance  
PO Box 149012  
Austin, TX 78714-9012  
(512) 834-9317 Ext. 405  
[Kharvey@tcadcentral.org](mailto:Kharvey@tcadcentral.org)

***All questions and requests for clarifications must be received by 2:00 p.m., Friday, November 15, 2024.***

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## 1.6 General Terms, Conditions & Requirements for Solicitations

This Request for Proposal shall be governed by the following documents unless an exception is otherwise taken within this Solicitation.

- Section 252 of the Texas Local Government Code (reference only)
- Travis Central Appraisal District Finance Policy (reference only)
- General Terms and Conditions (reference only)

The term of the initial contract will be for one (1) year, with the option to renew for two additional twelve (12) month periods.

## 1.7 District's Reservation of Rights

The District reserves the right to divide the project into multiple parts, to reject any and all qualifications and re-solicit for new qualifications or reject any and all submissions and temporarily or permanently abandon the Project. The District makes no representations, written or oral, that it will enter into any form of agreement with any respondent to this RFP for any project and no such representation is intended or should be construed by the issuance of this RFP.

## 1.8 Reimbursement of Cost

Respondents acknowledge and accept that any costs incurred from the respondent's participation in this RFP shall be at the sole risk and responsibility of the respondent.

## 1.9 Eligible Respondents

Only individuals, companies, or lawfully formed business organizations may apply. This does not preclude a respondent from using consultants. The District will contact only the individual firm or formal organization that submits a proposal.

## 1.10 Disclosure of Interested Parties

Respondent represents and warrants that if selected for award of a contract as a result of the Solicitation, Respondent will submit to Agency a Certificate of Interested Parties prior to contract execution in accordance with Section 2252.908 of the Texas Government Code.

## 1.11 Prohibition on Contracts with Companies Boycotting Israel

Respondents are advised that Texas Government Code, Section 2270.002 prohibits a governmental entity from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

### 1.12 Lobbying Prohibition

Respondent represents and warrants that Agency's payments to Respondent and Respondent's receipt of appropriated or other funds under the contract are not prohibited by Sections 556.005 or 556.0055 of the Texas Government Code.



## Section 2: Summary Information

### 2.1 Historical Background

The Travis Central Appraisal District was created under the 66th Texas State Legislature in 1979 under the provisions of Senate Bill 621, known as the Property Tax Code. The District is responsible for the appraisal of property subject to ad valorem taxation in Travis County, Texas. The District is currently governed by a board of thirteen directors. Travis County appoints two board members, Austin ISD appoints two board members, City of Austin appoints two board members, and Austin ISD and City of Austin appoint one board member together. Two board members are appointed by a vote of the eastern and western taxing entities within Travis County. The County Tax Assessor-Collector serves as a board member as part of his/her statutory duties. The remaining three board members are elected by the voters of Travis County.

The District was formed in 1981 and formally began operations in 1982, pursuing its mission to provide accurate appraisal of all property in Travis County at one hundred percent of market value, equally and uniformly, in a professional, ethical, economical and courteous manner, working to ensure that each taxpayer pays only their fair share of the property tax burden. As stipulated under the Texas Property Tax Code, the District serves the citizens and taxpayers of Travis County and the taxing entities which lie within Travis County.

### 2.2 Project Description and Scope

The District is seeking a qualified consultant to provide professional printing and mailing services. The vendor selected must show workers compensation insurance per statutory requirements (Exhibit E). Respondents must provide a price for the initial contract year, and a price for each year under the optional renewal. Specifications regarding the current printing and mailing services for the District are provided in Section 3 of this document.

The Texas State Legislature has enacted into law in previous years substantial and significant changes concerning requirements for various notifications to taxpayers. These changes for Appraisal Districts can be a significant change to notice form design which might require additional programming. As part of the proposal, the District requests that all proposers state a summary of previous Appraisal District experience and their ability to timely perform concerning the changes needed to comply with legislative mandates, quality printing, and the subsequent mailing of the appraisal notices. Proposer's stated history of prior successful experience with notice printing, sorting and mailing, and all other aspects of this quote, will be an important factor in the District's recommendation to the Board of Directors for awarding a contract to the proposer who provides the "best value" to the District.

**Changes are pursuant to the Texas State Legislature and are REQUIRED. Failure to implement Legislatively mandated changes are grounds for immediate termination of the contract as well as the ability for TCAD to recover any cost associated with finding a new vendor.**

### 2.3 Project Schedule

Event	Date
RFP Released	11/07/2024
RFP Clarification Request Deadline	11/15/2024
RFP Addenda Deadline	11/20/2024
RFP Submittal Deadline	12/03/2024
RFP Data File: Sent to Submittal Vendors for Preliminary Processing	12/10/2024
RFP Data File: Final Vendor Submission	01/17/2025
Responses submitted to the Board of Directors	January 2025
Agreement Execution (no later than)	January 2025
Contract begins	January 2025

Other project deadlines and schedule details will be discussed and outlined in the contract agreement.

### 2.4 General Conditions

All respondents shall agree to the following conditions:

- A. The original proposal and three (3) copies shall be delivered in a sealed envelope marked **“2024-04: RFP for Printing Services- DO NOT OPEN”** on or before 2:00 p.m., Tuesday, December 3, 2024, to Travis Central Appraisal District, ATTN: Finance Department. Requests for extension of the closing date or time will not be granted. Only proposals with the required documentation will be considered. Proposals arriving late will not be considered. Proposers should allow sufficient mailing or transportation time to insure the timely receipt of the proposal.
- B. All proposals, attachments to, and/or documents submitted with a proposal must be signed by an individual who is authorized to act on behalf of the proposer.
- C. Any company or corporation conducting business with TCAD shall be on file with the Secretary of State of Texas and certified to do business in this state.
- D. Respondents agree by submissions of their proposal that they have reviewed the RFP documents and instructions and accept the requirements.
- E. Each proposal shall be prepared in a simple manner and provide straightforward, concise delineation of the responder’s ability to satisfy the requirements of the RFP.
- F. Respondents desiring to submit proposals in response to this request must comply with all mandatory submission requirements set out in this document. Failure to comply with any part of the request may subject the response to immediate rejection.
- G. Any inquiries from parties concerning this RFP and its requirements shall be submitted in writing (e-mail is acceptable) to: Kat Harvey, Travis Central Appraisal District, P.O. Box 149012, Austin, Texas 78714-9012 or at [kharvey@tcadcentral.org](mailto:kharvey@tcadcentral.org).

- H. No negotiations, decisions or actions shall be initiated or executed by the proposer as a result of any decision with a TCAD employee. Only those communications that are in writing from TCAD shall be considered as a duly authorized expression of TCAD.
- I. Following the submission deadline, a data file containing relevant forms will be provided to the vendors who provided an RFP on **December 10, 2024** for preliminary processing. Vendors are required to process and return this data file by **January 17, 2025** to confirm their ability to meet the RFP requirements. Failure to submit the processed file by the deadline may result in disqualification from further consideration.

### 2.5 Pre-Proposal Conference

No pre-proposal conference will be held.

### 2.6 Competitive Selection

The method to be used to select the consultant is detailed in Texas Local Government Code, Section 252.

- This is a negotiated procurement.
- In making the determination, the District shall consider the Proposer’s technical expertise and experience, the proposed fees/costs, the proposer’s references and record of responsibility, and any other relevant factor that the District deems necessary.
- The District reserves the right to retain all Proposal responses for a period of forty-five (45) days after the opening date for examination and comparison.

### 2.7 Criteria Used for Selection

Proposals will be evaluated based on the following criteria:

Criteria	Weighted Value
Experience and References	15
Prior experience with Appraisal District’s in Texas for printing of Notices of Appraised Value	25
Price	20
Compatibility with the District’s software	20
Prior relationship with the District (if any)	20

### 2.8 Availability of Funds

In the event that sufficient funds are not available for the project, the District reserves the right to negotiate the scope of this contract, delay implementation, reject all proposals, or award another type of contract other than that required by the RFP.

## 2.9 Award of Contract

Upon successful negotiations between the District and the selected proposer, the parties will be required to enter into a written Agreement with the Travis Central Appraisal District. All scopes of work related to the project shall be governed by the executed agreement.

## 2.10 HB 1295 Requirements

This procurement falls under the requirements of HB1295 (Government Code Section 2252.908). The awarded Contractor will be required to complete and submit form 1295. The form along with instructions are available on the Texas Ethics Commission website at <https://www.ethics.state.tx.us/filinginfo/1295/>.

## 2.11 Notice of Appraised Value

- Data will be provided as input stream to be merged with the form. The preferred method of data exchange is FTP server. The vendor would be responsible for the FTP server. Data input stream is a txt file that must be merged correctly for each form. A sample data file is included as an addendum to this RFP and should be used to generate the sample notices required in the response.
- Form length varies from 6 to 10 pages and the vendor must be able to handle both form lengths within a single data stream.
- Pages 1-6 includes standard and variable data that is specific to each property. All variable data must be aligned to fit within the boundaries of the appropriate square. Page 7-8 includes a color insert that is required to be printed in color. Page 9-10 includes standard documents provided by the Comptroller's office.
- **Position of 3 of 9 barcode is essential to future forms processing and must be placed exactly in the same position as the sample.**
- The vendor must provide samples of the printed forms for forms processing testing of the barcode. The sample must pass forms processing testing.
- A two-page insert "Taxpayers Rights and Remedies" is to be included in **ALL** Notice of Appraised Value envelopes. This document is printed in black and white ink, duplex, legal size paper. It is the vendor's responsibility to provide this form with the Notices of Appraised Value mailing. The current version of Taxpayers Rights and Remedies is included as page 9-10 of the sample notice of appraised value.
- Vendor shall coordinate data specifications, format, and laser system programming requirements with the District's IT department. Vendor is to provide proofs of all documents to the District's IT department for approval prior to printing. Proofs may be provided via email and/or FTP. The vendor shall correct any errors or omissions noted and return to the District for final approval.
- Generate up to 10 different types of notices in a single run.
  - a. 25.19A-Regular notice (send to Agent and if property does not have an agent, send to owner)
  - b. 25.19EN1-Regular notice (Has a certain agent, agent wants notices sent to owner only)
  - c. 25.19EN2- Regular notice (Agent properties, these do not get mailed, PDF only to publish to portal. Includes rights and remedies and PIN must be redacted)
  - d. 25.19A2-Corrected Notice (send to Agent and if property does not have an agent, send to owner)
  - e. 25.19EN1C-Corrected notice (Has a certain agent, agent wants notices sent to owner only)

- f. 25.19EN2C-Corrected notice (Agent properties, these do not get mailed, PDF only to publish to portal Includes rights and remedies and PIN must be redacted)
  - g. 25.19CA1 Long Penalty Letter Notice (send to Agent and if property does not have an agent, send to owner)
  - h. 25.19CA3\_MH Long Penalty Letter Notice (Has a certain agent, agent wants notices sent to owner only)
  - i. 25.19CA4\_AGNT Long Penalty Letter Notice (Agent properties, these do not get mailed, PDF only to publish to portal Includes rights and remedies and PIN must be redacted)
- Send Omitted notices throughout the year: 25.19OP-YR
  - Send individual PDFs back, for every property in each run, for the website (PIN must be redacted). Each PDF file needs to be named with the PID\_Mail to Type (O/A)\_Owner/Agent ID\_year\_Run ID. Example: 299063\_O\_1502954\_2024\_153
  - **Standard notices** should be grouped based on the owner ID in the data stream, and all notices for a given owner should be put in a single envelope. Standard notices are ten pages.
  - **Colored Insert.** A full color insert is included with the notice as pages 7-8.
  - TCAD may make changes to the wording in the sample form provided.
  - Vendor must print Notice of Appraised Value 25.19's with a 3 of 9 barcode with selected data. The bar code will be tested for validity and it must pass for the proposal to be accepted. Positioning of the bar code is **very important**. You must print the complete form. Offset printing will not allow this positioning to work.
  - **The District reserves the right to change the Notices of Appraised Value from year to year. If changes are made, the District will negotiate the contract changes with the selected vendor for each required change.**
  - All envelopes are ordered by the vendor and invoiced to the District.
  - All quantities and materials are estimates based upon previous year processing records and future projections. Actual quantities to be processed may be more or less than those indicated in these specifications.
  - All materials must be processed and metered at the first class postal rate. However, all USPS postage discounts available (i.e., presort) must be taken and that savings passed on to the District.
  - All processing charges (i.e., printing, folding, inserting, metering, sorting, handling, etc.) are to be included in each quote.
  - All materials processed must be expeditiously delivered to an appropriate USPS acceptance point on the same day as that of the postmark and at no additional expense to the District.
  - In the event that any of the materials are damaged or destroyed during processing, they must be replaced.
  - The proposed postal rate is requested on the response sheets so that the District staff may use this information for postage cost projections.
  - The District reserves the right to negotiate with the successful vendor(s): the costs associated with the processing of miscellaneous mailing jobs that may not be included in these specifications should the need arise. A separate purchase order will be issued for these items as they occur.
  - All mailing should be merged into one envelope when same name/same address are present. You can use the Owner ID number to identify multiples.
  - Travis Central Appraisal District will produce Notice of Appraised Value data and send this file to the vendor in compliance with section 25.19 of the Texas Property Tax Code. This will be around April 1, 2025. The specific date that the data will be transmitted will be communicated at least 30 days before the data transfer.

- Each prospective vendor must provide three or more references providing successful Appraisal District Printing and Mailing services within the last five-year period.
- The awarded vendor will generate samples from final data provided by the District prior to this production requirement. These samples must be presented for review and verification by the District's Chief Appraiser. Changes to the form and/or data stream are possible up to the initial printing date. The vendor must have programming capability to handle the data stream and merge to the form. Vendor will have to create the form from the samples provided.

## Section 3: Content of Submittal

Each response shall be submitted as outlined in this section. Please include an outside cover and /or first page, containing the section name. A table of contents should be shown first, followed by dividers separating each of the following sections.

### 3.1 CRITERIA ONE: Company Information

- Provide a statement of interest for the Project, including a narrative describing the company and project team's unique qualifications as they pertain to this project.
- Provide the following information for the firm:
  - Legal name of the company as registered with the Secretary State of Texas
  - Address of principal office
  - Address of local office
  - Year Founded
  - Type of Organization (individual, partnership, corporation, joint venture, etc.)
  - Year opened- local office
  - Primary contact name
  - Primary contact title
  - Primary contact e-mail address
  - Primary contact phone number
  - Any former names that the organization operated under
- If your organization is a corporation, answer the following:
  - Date of incorporation
  - State of incorporation
  - President's name
  - Vice President's name
  - Secretary's name
  - Treasurer's name
- If your organization is a partnership, answer the following:
  - Date of organization
  - Type of partnership (if applicable)
  - Name(s) of general partner(s)
- If your organization is individually owned, answer the following:
  - Date of organization
  - Name of owner
- If your organization is another form other than those listed above, describe it and name the principals.

**3.2 CRITERION TWO: General Company History and Qualification**

- Provide a brief history of the firm and each proposed consultant including a list of services routinely provided
- An organizational chart that explains the team members and their responsibilities related to this project.
- Provide a list that outlines each person and contact information for the following positions:
  - Project Manager
  - Other Personnel which will be actively involved in the project
  - Number of non-clerical personnel employed
  - Number of clerical personnel employed
- Provide a resume and references for each individual proposed team member. The minimum information must be provided for each individual:
  - Job title and description of responsibilities
  - Number of years in current job title
  - Number of years with company
  - Other titles/roles with the proposing company prior to the current role
  - Formal education
  - Number of years of related experience
  - Projects the individual has been involved with in the current job title
  - Other experience you deem applicable

**3.3 CRITERION THREE: Experience and References**

- Discussion of firm's experience in working with municipalities or special districts
- List of municipal projects within Texas from the past three years, whether complete or ongoing, including references. For each project or contract, provide the following:
  - Company name and location
  - Year contract began
  - Year contract ended (if applicable)
  - Short description of project
  - Name, address, telephone number, and e-mail for contact person tasked with the daily responsibility and management of the project
  - Total cost
- Describe the firm's process in working with consultants and integrating them into the consulting process.
- Describe how the firm will report the status of the Project to District management.

References shall be considered relevant based on specific project participation and experience with the respondent. The District may contact references during any part of this process. The District reserves the right to contact any other reference at any time during the RFP process.



**3.4 CRITERION FOUR: Sample Data- Notices of Appraised Value**

- As part of the initial submission, please include a signed acknowledgment that you understand a sample data file will be provided on **December 10, 2024**, after the RFP submission deadline. Using this data, you will be required to submit a sample Notice of Appraised Value for a 25.19A notice type, as described below, by **January 17, 2025**.
  - a. Please provide a sample Notice of Appraised Value for a 25.19A notice type using the sample data file. This should be submitted as if the notice is being mailed. Include a stock envelope (does not have to include TCAD's return address information) and stuff the envelope using the sorting/stuffing machine you would use in production. Provide 3 complete copies of the notice in 3 separate envelopes.

**3.5 CRITERION FIVE: Sample Data- SB2 Postcard**

- Please provide a sample SB2 postcard using the generic address information provided in the sample document. This should be submitted as if the postcard is being mailed. Provide 3 complete copies of the postcard.

**3.6 CRITERION SIX: Signed Transmittal and Acknowledgement Letter**

The Transmittal and Acknowledgement Letter (Exhibit A) must be signed by a principal in the firm and submitted as part of the response packet.

**3.7 CRITERION SEVEN: Estimated Cost**

Price Proposal Form (Exhibit B) must be signed and returned as part of the proposal package.

**3.8 CRITERION EIGHT: Signed Ethics Statement**

The Ethics Statement (Exhibit C) must be signed by a principal in the firm and submitted as part of the response packet.

**3.9 CRITERION NINE: Signed Certification Regarding Debarment, Suspension & Other Responsibility Matters Form**

The Certification Regarding Debarment, Suspension, and Other Responsibility Matters Form (Exhibit D) must be signed by a principal in the firm and submitted as part of the response packet.

## Section 4: Format for Statement of Qualifications

### 4.1 General Instructions

- Proposals shall be prepared in order of stated criterion, providing a concise, straightforward description of the respondent's ability to meet the requirements of this RFP.
- Respondents shall carefully read the information contained in this RFP and submit a complete response to all requirements and questions as directed. Incomplete proposals will be considered non-responsive and may be subject to rejection.
- Proposals and any other information submitted by respondents in response to this RFP shall become the property of the District and are subject to the Public Information Act.
- The District will not compensate respondents for any expenses incurred in Proposal preparation or for any presentations that may be made. Respondents submit proposals at their own risk and expense.
- The District makes no representations of any kind that an award will be made as a result of this RFP. The District reserves the right to accept or reject any or all proposals, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFP when deemed to be in the District's best interest.
- Qualifications shall consist of answers to criteria provided in Section 3. It is not necessary to repeat the questions in the proposal; however, it is essential to reference the question number with the corresponding answer.
- Failure to comply with all requirements contained in this RFP may result in the rejection of the proposal.

### 4.2 Page Size, Binding, Dividers and Tabs

- Responses shall be printed on letter size (8 ½" x 11") paper and collated.
- Additional attachments shall NOT be included with the proposal. Only the responses provided by the respondent to the questions identified in Section 3 of this RFP will be used by the District for evaluation.
- Separate and identify the response to each criterion in Section 3 of this RFP by use of a divider sheet.

### 4.3 Table of Contents

Submittals shall include a Table of Contents and page numbers for each part of the proposal.

## Transmittal and Acknowledgment Letter

Travis Central Appraisal District  
Request for Proposal- Printing Services

\_\_\_\_\_  
Date

In response to the above referenced request for proposal from Travis Central Appraisal District, the attached qualifications, forms, exhibits, and statements are submitted in response. I have read all attachments including the specifications and fully understand what is required.

In submitting this qualifications statement, I agree to the following conditions:

1. Proposals submitted and opened on Tuesday, December 3, 2024, may not be withdrawn for forty-five (45) days following the statements opening.
2. To enter into negotiation and subsequently execute a Contract with the District, if selected on the basis of the Proposal.
3. To acknowledge that a data file for preliminary processing will be provided on December 10, 2024, and to submit the required processed sample data (Criterion Four) by January 17, 2025, as specified in the RFP.
4. To accomplish the work in accordance with the Contract documents.

\_\_\_\_\_  
(Name of Institution)

Authorized Representative:

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Date)

## Pricing Proposal Form

The proposal shall complete the following pricing. The proposer shall contain a straightforward, concise delineation of the proposer’s fees to satisfy the requirements of this RFP.

NOTE: The costs and percentage provided on this form below are to be used only to establish the cost estimates.

Proposer Company Name: \_\_\_\_\_

### YEAR 1- 2025

Proposed per piece cost to print 450,000 notices of appraised value	\$ _____
Proposed per piece cost to print 350,000 notices of appraised value	\$ _____
Proposed per piece cost to print 250,000 notices of appraised value	\$ _____
Proposed per piece cost to print 300,000 SB2 postcards	\$ _____

### OPTIONAL YEAR 2- 2026

Proposed per piece cost to print 450,000 notices of appraised value	\$ _____
Proposed per piece cost to print 350,000 notices of appraised value	\$ _____
Proposed per piece cost to print 250,000 notices of appraised value	\$ _____
Proposed per piece cost to print 300,000 SB2 postcards	\$ _____

### OPTIONAL YEAR 3- 2027

Proposed per piece cost to print 450,000 notices of appraised value	\$ _____
Proposed per piece cost to print 350,000 notices of appraised value	\$ _____
Proposed per piece cost to print 250,000 notices of appraised value	\$ _____
Proposed per piece cost to print 300,000 SB2 postcards	\$ _____
Current postage rate for standard letter	\$ _____

## ETHICS STATEMENT

(Complete and Return this Form with Response)

The undersigned firm, by signing and executing this RFP or RFQ, certifies and represents to the Travis Central Appraisal District that the firm has not offered, conferred or agreed to confer any pecuniary benefit, as defined by 1.07 (a) (6) of the Texas Penal Code, or any other thing of value as consideration for the receipt of information or any special treatment of advantage relating to this RFP or RFQ; the firm also certifies and represents that the firm has not offered, conferred or agreed to confer any pecuniary benefit or other thing of value as consideration for the recipient's decision, opinion, recommendation, vote or other exercise of discretion concerning this RFP or RFQ, the firm certifies and represents that firm has neither coerced nor attempted to influence the exercise of discretion by any officer, trustee, agent or employee of the Travis Central Appraisal District concerning this RFP or RFQ on the basis of any consideration not authorized by law; the firm also certifies and represents that firm has not received any information not available to other firms so as to give the undersigned a preferential advantage with respect to this RFP or RFQ; the firm further certifies and represents that firm has not violated any state, federal, or local law, regulation or ordinance relating to bribery, improper influence, collusion or the like and that firm will not in the future offer, confer, or agree to confer any pecuniary benefit or other thing of value of any officer, trustee, agent or employee of the Travis Central Appraisal District in return for the person having exercised their person's official discretion, power or duty with respect to this RFP or RFQ; the firm certifies and represents that it has not now and will not in the future offer, confer, or agree to confer a pecuniary benefit or other thing of value to any officer, trustee, agent, or employee of the Travis Central Appraisal District in connection with information regarding this RFP or RFQ, the submission of this RFP or RFQ, the award of this RFP or RFQ or the performance, delivery or sale pursuant to this RFP or RFQ.

**THE FIRM SHALL DEFEND, INDEMNIFY, AND HOLD HARMLESS THE TRAVIS CENTRAL APPRAISAL DISTRICT, ALL OF ITS OFFICERS, AGENTS AND EMPLOYEES FROM AND AGAINST ALL CLAIMS, ACTIONS, SUITS, DEMANDS, PROCEEDING, COSTS, DAMAGES AND LIABILITIES ARISING OUT OF, CONNECTED WITH, OR RESULTING FROM ANY ACTS OR OMISSIONS OF FIRM OR ANY AGENT OR EMPLOYEE OF FIRM IN THE EXECUTION OR PERFORMANCE OF THIS RFP or RFQ.**

I have read all of the specifications and general RFP or RFQ requirements and do hereby certify that all items submitted meet specifications.

FIRM: \_\_\_\_\_

OFFICER NAME: \_\_\_\_\_

OFFICER SIGNATURE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE: \_\_\_\_\_

ZIP CODE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

TELEFAX: \_\_\_\_\_

DEVIATIONS FROM SPECIFICATIONS IF ANY:

\_\_\_\_\_  
\_\_\_\_\_

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER  
RESPONSIBILITY MATTERS**  
(Complete and Return this Form with Response)

Name of Entity: \_\_\_\_\_

The prospective participant certifies to the best of their knowledge and belief that they, the principals in the firm, and the firm:

1. Are not presently debarred, suspended, proposed for debarment, and or declared ineligible from providing bank depository services, financial management, financial records management, financial advisory services, any associated management services, and or voluntarily surrendered their license to provide such related services in the State of Texas and or the United States of America.
2. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from conducting any business and or financial transactions by any department or agency of Federal, State, and or local government.
3. Have not been convicted of, had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
4. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, Local) with commission of any of the offenses enumerated in item 3 above of the certification; and
5. Have not within a ten (10) year period preceding this RFP or RFQ had one or more public transactions (Federal, State, Local) terminated for cause or default.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award. In addition, under 18 USC Section 1001, a false statement may result in a fine up to a \$10,000.00 or imprisonment for up to five (5) years, or both.

\_\_\_\_\_  
Name and Title of Authorized Representative (Typed)

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

# Sample 25.19A Notice of Appraised Value





# 2024 NOTICE OF APPRAISED VALUE

This is NOT a Tax Statement. Do Not Pay From This Notice

TRAVIS CENTRAL APPRAISAL DISTRICT  
850 E ANDERSON LANE  
P.O. Box 149012  
Austin, Texas 78714-9012  
Phone: (512) 834-9138

Date of Notice: April 12, 2024

Property ID: [REDACTED]  
Ownership %: 100.00  
Ref ID2: [REDACTED]  
[REDACTED]  
Legal Acres: 0.1891  
Situs: [REDACTED]  
Owner ID: [REDACTED]

#BWNRFRT  
#11900001288600 [REDACTED] #



**E-File PIN: xxxxxxxxxx**  
To File a Protest on this Property go to  
<https://www.traviscad.org/protests>

Dear Property Owner:  
We have appraised the property listed above for the tax year 2024. As of January 1, our appraisal is outlined below.

Market Value	Net Appraised Value (Includes Homestead Limitation if Applicable)
901,157	901,157

Taxing Unit	2023 Exemption	2023 Exemption Amount	2024 Exemption	2024 Exemption Amount	Exemption Amount Change	2023 Taxable	2024 Taxable	Freeze Year and Ceiling
HURST CREEK MUD		0		0	0	881,375	901,157	
LAKE TRAVIS ISD		0		0	0	881,375	901,157	
TRAVIS CO ESD NO 6		0		0	0	881,375	901,157	
TRAVIS COUNTY		0		0	0	881,375	901,157	
TRAVIS COUNTY HEALTHCARE DISTRICT		0		0	0	881,375	901,157	
VILLAGE OF THE HILLS		0		0	0	881,375	901,157	

**On May 4, 2024, Travis County voters will have the opportunity to vote for three elected members to our Board of Directors. The last day to register to vote is Thursday, April 4, 2024. Early voting is from April 22 to April 30. To check your voter registration status and find your local polling place, visit [votetravis.com](http://votetravis.com).**

If you are claiming an over 65 or disabled person exemption on your school district taxes, the taxes on your property cannot increase during the time you own and live in that home. Your school district taxes will not go above your tax ceiling unless you improve the home (other than normal repairs and maintenance). If you improve your property (by adding rooms or buildings) or are transferring a freeze percentage from another property, your ceiling amount may increase from prior years.

Enclosed are copies of the following documents published by the Texas Comptroller of Public Accounts: (1) Property Tax Remedies and (2) Notice of Protest.

# A Breakdown of Your Property's Values

Appraisal Information	Last Year's - 2023	Proposed - 2024
Market Value of Building & Other Structures	815,471	835,253
Market Value of Non Ag/Timber Land	65,904	65,904
Market Value of Ag/Timber Land	0	0
Market Value of Personal Property/Minerals	0	0
Total Market Value	881,375	901,157
Productivity Value of Ag/Timber Land	0	0
Appraised Value	881,375	901,157
Homestead Value Limitation	0	0
Circuit Breaker Value Limitation	0	0
<b>Net Appraised Value (Possible Homestead or Circuit Breaker Limitations)*</b>	881,375	901,157
Exemptions (DV - Disabled Vet; DP - Disabled Person; HS - Homestead; OV65 - Over 65)		

*\*The Net Appraised Value of properties with a homestead exemption is limited to the lower of last year's net appraised value plus 10% or the current market value. (Texas Property Tax Code, Section 23.23). The Net Appraised Value of real properties without a homestead exemption and whose value is less than \$5 million is limited to the lower of last year's net appraised value plus 20% or the current market value. (Texas Property Tax Code, Section 23.231)*

Under Section 23.231, Tax Code, for the 2024, 2025, and 2026 tax years, the appraised value of real property other than a residence homestead for ad valorem tax purposes may not be increased by more than 20 percent each year, with certain exceptions. The circuit breaker limitation provided under Section 23.231, Tax Code, expires December 31, 2026. Unless this expiration date is extended by the Texas Legislature, beginning in the 2027 tax year, the circuit breaker limitation provided under Section 23.231, Tax Code, will no longer be in effect and may result in an increase in ad valorem taxes imposed on real property previously subject to the limitation.

**The Texas Legislature does not set the tax amount of your local taxes. Your property tax burden is decided by your locally elected officials and all inquiries concerning your taxes should be directed to those officials.**

The appraisal district only determines the value of the property. Budgets and tax rates are set by the governing body of each taxing unit. Taxpayers have a voice in the decisions that affect those rates. In early August, taxing units take the first step toward adopting a tax rate by calculating No New Revenue and Voter Approval tax rates. If a taxing unit increases their budget, they will need to increase your property taxes and adopt a tax rate higher than the No New Revenue rate. Visit [TravisTaxes.com](http://TravisTaxes.com) in early August to review how these proposals will impact your property tax bill and learn about opportunities to voice your opinion on these decisions.

The difference between the 2019 appraised value and the 2024 appraised value is 73%. This percentage information is required by Tax Code Section 25.19(b-1).

**If you believe your property's market value is incorrect, you have the right to file a protest.**

To file a protest, complete the notice of protest form included in this mailing and submit it to the Appraisal Review Board no later than **May 15, 2024**. Forms can be submitted online, at the mailing address below, or dropped off in person.

**Submit Your Protest No Later Than **May 15, 2024****

**Mailing Address:** Travis Appraisal Review Board, PO Box 149012, Austin, TX 78714-9012

**Drop off in person:** 850 E Anderson Lane, Austin, TX 78752

**Online:** [www.traviscad.org/protests](http://www.traviscad.org/protests)

**Informal meeting will be offered by phone or online starting April 22, 2024.**

**Formal hearings will begin June 3, 2024 and will be held via remote telephonic hearings with Video component or at 850 E Anderson Lane, Austin, TX 78752**

Please visit [www.traviscad.org/protests](http://www.traviscad.org/protests) for more information on filing a protest, informal meetings, and formal hearings.

If your property is valued over \$50 million and is commercial real and personal property, industrial and manufacturing real and personal property, real and personal property of utilities, or multifamily residential real property, you have the right to have a protest related to this property heard by a special panel of the Appraisal Review Board. If you have any questions or need more information, contact the Appraisal District at (512) 834-9138.

# Description of Exemptions

Please see a brief explanation of these total or partial exemption of property from taxation required or authorized by the Property Tax Code.

## **General Residence Homestead Exemption (HS) - (Tax Code Section 11.13(a) and (b))**

A property owner who acquires property after Jan. 1 may receive the residence homestead exemption for the applicable portion of that tax year immediately on qualification of the exemption, if the previous owner did not receive the same exemption for the tax year. The property owner must occupy the property as the owner's primary residence and the residence homestead exemption cannot be claimed by the property owner on any other property.

## **Disabled Person Exemption (DP) - (Tax Code Section 11.13(c) and (d))**

Persons under a disability for purposes of payment of disability insurance benefits under Federal Old-Age, Survivors, and Disability Insurance. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit or other compelling evidence establishing the applicant's ownership interest in the homestead. (See Form 50-114-A) An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

## **Age 65 or Older Exemption (OV65) - (Tax Code Section 11.13(c) and (d))**

This exemption is effective Jan. 1 of the tax year in which the property owner becomes age 65. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit or other compelling evidence establishing the applicant's ownership interest in the homestead. (See Form 50-114-A) An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

## **Surviving Spouse of an Individual Who Qualified for Age 65 or Older Exemption (OV65s) - (Tax Code Section 11.13(q))**

Surviving spouse of person who qualified for the age 65 or older exemption may receive this exemption if the surviving spouse was 55 years of age or older when the qualifying spouse died. The property must have been the surviving spouse's residence homestead at the time of death and remain the surviving spouse's residence homestead. This exemption cannot be combined with an exemption under 11.13(d).

## **100 Percent Disabled Veterans Exemption (DVHS) - (Tax Code Section 11.131(b))**

Property owner who has been awarded a 100 percent disability compensation due to a service-connected disability and a rating of 100 percent disabled or individual unemployability from the U.S. Department of Veterans Affairs or its successor. Documentation must be provided to support this exemption request.

**Surviving Spouse of a Disabled Veteran Who Qualified or Would Have Qualified for the 100 Percent Disabled Veteran's Exemption (DVHSS) - (Tax Code Section 11.131(c) and (d))** Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.131(b) at the time of his or her death or would have qualified for the exemption if the exemption had been in effect on the date the disabled veteran died) who has not remarried since the death of the veteran. The property must have been the surviving spouse's residence homestead at the time of the veteran's death and remain the surviving spouse's residence homestead.

## **Donated Residence Homestead of Partially Disabled Veteran (DVCH) - Tax Code Section 11.132(b))**

A disabled veteran with a disability rating of less than 100 percent with a residence homestead donated by a charitable organization at no cost or at some cost that is not more than 50 percent of the good faith estimate of the market value of the residence homestead as of the date the donation is made. Documentation must be provided to support this exemption request.

**Surviving Spouse of a Disabled Veteran Who Qualified for the Donated Residence Homestead Exemption (DVCHS) - (Tax Code Section 11.132(c) and (d))** Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.132(b) at the time of his or her death) who has not remarried since the death of the disabled veteran and maintains the property as his or her residence homestead.

## **Surviving Spouse of an Armed Services Member Killed in the Line of Duty (MASSS) - (Tax Code Section 11.133(b) and (c))**

Surviving spouse of a U.S. armed services member who is killed or fatally injured in the line of duty who has not remarried since the death of the service member. Documentation must be provided to support this exemption request.

## **Surviving Spouse of a First Responder Killed in the Line of Duty (FRSS) - (Tax Code Section 11.134)**

Surviving spouse of a first responder who is killed or fatally injured in the line of duty who has not remarried since the death of the first responder. Documentation must be provided to support this exemption request.

# Property Owner's Notice of Protest



PID: [REDACTED]

Protest Deadline: May 15, 2024

## Travis Central Appraisal District

Submit **By Mail** PO Box 149012 Austin, TX 78714

Submit **In Person** 850 E Anderson Lane Austin, TX 78752

Submit **Online** www.traviscad.org/protests

2024

Tax Year

Appraisal District Account Number (if known)

**GENERAL INFORMATION:** A property owner or an owner's designated agent can use this form to file a protest with the appraisal review board (ARB) pursuant to Tax Code Section 41.41. Lessees contractually obligated to reimburse a property owner for property taxes may be entitled to protest as a lessee if all Tax Code requirements are met, including those in Tax Code Section 41.413.

**FILING INSTRUCTIONS:** File this document and all supporting documentation with the appraisal district office in the county in which the property is taxable. **Do not file this document with the Texas Comptroller of Public Accounts.**

### SECTION 1: Property Owner or Lessee

- Person Age 65 or Older    Disabled Person    Military Service Member    Military Veteran
- Spouse of a Military Service Member or Veteran

Name of Property Owner or Lessee

Mailing Address, City, State, ZIP Code

Phone Number (area code and number)

### SECTION 2: Property Description

Physical Address, City, State, Zip Code (if different than above)

If no street address, provide legal description:

Mobile Home Make, Model and Identification (if applicable):

### SECTION 3: Reasons for Protest

To preserve your right to present each reason for your ARB protest according to law, be sure to select all boxes that apply. Failure to select the box that corresponds to each reason for your protest may result in your inability to protest an issue that you want to pursue.

- |                                                                                                                                                     |                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Incorrect appraised (market) value and/or value is unequal compared with other properties.                                 | <input type="checkbox"/> Incorrect appraised or market value of land under special appraisal for ag-use, open-space or other special appraisal. |
| <input type="checkbox"/> Property should not be taxed in _____ (taxing unit).                                                                       | <input type="checkbox"/> Owner's name is incorrect.                                                                                             |
| <input type="checkbox"/> Property is not located in this appraisal district or otherwise should not be included on the appraisal district's record. | <input type="checkbox"/> Property description is incorrect.                                                                                     |
| <input type="checkbox"/> Failure to send required notice. _____ (type)                                                                              | <input type="checkbox"/> Incorrect damage assessment rating for a property qualified for a temporary disaster exemption.                        |
| <input type="checkbox"/> Exemption was denied, modified or cancelled.                                                                               | <input type="checkbox"/> Circuit breaker limitation on appraised value for all other real property was denied, modified or canceled.            |
| <input type="checkbox"/> Temporary disaster damage exemption was denied or modified.                                                                | <input type="checkbox"/> Other: _____                                                                                                           |
| <input type="checkbox"/> Ag-use, open-space or other special appraisal was denied, modified or cancelled.                                           |                                                                                                                                                 |
| <input type="checkbox"/> Change in use of land appraised as ag-use, open-space or timberland.                                                       |                                                                                                                                                 |

### SECTION 4: Additional Facts

What is your opinion of your property's value? (optional) \$ \_\_\_\_\_

Provide facts that may help resolve this protest:

**SECTION 5: Hearing Type**

Do you request an informal conference with the appraisal office before the protest hearing?  Yes  No

Do you request a single-member ARB panel or a regular panel of at least three members?  Single-member panel  Regular panel

A property owner does not waive the right to appear in person at a protest hearing by submitting an affidavit to the ARB or by electing to appear by telephone conference call.

I intend to appear in the ARB hearing scheduled for my protest in the following manner (check only one box):

- In person
- By telephone conference call and will submit evidence with a written affidavit delivered to the ARB before the hearing begins.\*\* (may use Comptroller Form 50-283, Property Owner Affidavit of Evidence)
- By videoconference and will submit evidence with a written affidavit delivered to the ARB before the hearing begins.\*\* (may use Comptroller Form 50-283, Property Owner Affidavit of Evidence)
- On written affidavit submitted with evidence and delivered to the ARB before the hearing begins

**SECTION 6: ARB Hearing Notice and Procedures**

I request my notice of hearing to be delivered by (check one box only):

- Regular first-class mail
- Certified mail and agree to pay the cost (if applicable)

\*Per Sec. 41.46(d) of the Texas Property Tax Code, if you choose to receive your hearing notice by Certified Mail, you must include payment of \$5.75 in the form of cashier's check or money order with your Notice of Protest form. If payment is not received, the ARB will send your notice by USPS First Class Mail.

If a protest goes to a hearing, the ARB automatically sends each party a copy of the ARB's hearing procedures.

I want the ARB to send me a copy of its hearing procedures  Yes  No

Do you request an electronic reminder by text or email of the date, time and place of your ARB protest hearing? (check one box only):

- Yes, by text to \_\_\_\_\_ Mobile Phone Number (area code and number)
- Yes, by email to \_\_\_\_\_ Email Address\*
- No

\* An email address of a member of the public could be confidential under Government Code Section 552.137; however, by including the email address on this form, you are affirmatively consenting to its release under the Public Information Act.

**SECTION 7: Special Panel Request for Property Value of \$57 Million or More**

I request a special panel to hear my protest:  Yes  No

My property is appraised at \$57 million or greater:  Yes  No

Appraisal district's value assigned to your property \$ \_\_\_\_\_

Property Classification:

- Commercial real and personal property
- Industrial and manufacturing real and personal property
- Real and personal property of utilities
- Multifamily residential real property

**SECTION 8: Certification and Signature**

- Property Owner
- Property Owner's Agent
- Other: \_\_\_\_\_

print here

\_\_\_\_\_  
Print Name of Property Owner or Authorized Representative

sign here

\_\_\_\_\_  
Signature of Property Owner or Authorized Representative

\_\_\_\_\_  
Date

\*\* If you decide later to appear by telephone conference call or videoconference, you must provide written notice to the ARB at least 10 days before the hearing date. You are responsible for providing access to the call to any person(s) you wish to invite to participate in the hearing. Review the ARB's hearing procedures for county-specific conference call or videoconference procedures.

**Important Information**

**GENERAL INFORMATION**  
This form is for use by a property owner or an owner's designated agent to file a protest with the ARB pursuant to Tax Code Section 41.41. Lessees contractually obligated to reimburse a property owner for property taxes may be entitled to protest as a lessee if all Tax Code requirements are met, including those in Tax Code Section 41.413.

**FILING INSTRUCTIONS**  
This form and all supporting documentation must be filed with the appraisal district office in each county in which the property is located. Do not file this document with the Texas Comptroller of Public Accounts. Contact information for appraisal district offices may be found on the Comptroller's website.

**SINGLE-MEMBER PANELS**  
An ARB must provide the option of a single-member panel hearing if requested in the notice of protest or submitted in writing to the ARB not later than the 10th day before the date of the hearing. (Tax Code Section 41.45(b-4))

**SPECIAL PANELS**  
Special panels are available in counties with a population of 1.2 million or more. To qualify for a special panel to hear your protest, a property must have an appraised value determined by the appraisal district of equal to or greater than the minimum eligibility amount determined by Tax Code Section 6.425(g) and be classified as one of the following:  
• commercial real and personal property;  
• real and personal property of utilities;  
• industrial and manufacturing real and personal property; or  
• multifamily residential real property.

**ELECTRONIC REMINDER**  
Electronic reminders are available in counties with a population of 120,000 or more. You must request the reminder on your notice of protest or in writing and provide a valid email address or telephone number. (Tax Code Section 41.46(f))

**ELECTRONIC DELIVERY OF COMMUNICATION**  
A property owner or their authorized representative may request electronic

communications from a tax official under Tax Code Section 1.085(a-1) by using Form 50-843, Request for Electronic Delivery of Communication with a Tax Official. The form must be filed with the applicable tax official in the county where the property is located.

**FINAL ORDER OF DETERMINATION**  
Email delivery of the Order of Determination is available in counties with a population of 120,000 or more.

**DEADLINES**  
With exceptions, the typical deadline for filing a notice of protest is midnight, May 15. (Tax Code Section 41.44) Contact the ARB for the county in which the property is located for the specific protest filing deadline.

**NOTICE**  
The Comptroller's office may not advise a property owner, a property owner's agent, the chief appraiser or any appraisal district employee on a matter that the Comptroller's office knows is the subject of a ARB protest. Consult Tax Code Chapter 41 or the ARB hearing procedures for more information.



# THE PROTEST PROCESS

If you disagree with your property's market value, you may file a protest. **The deadline to file a protest is May 15 or 30 days after your Notice of Appraised Value is mailed.** Your deadline will be printed on your notice.

## SAVE TIME & DO IT ALL ONLINE

You can file your protest, attend an informal meeting, and attend your ARB hearing all from the comfort of your own home. Avoid wait times in our office. Just sign in at your scheduled time for an informal meeting or ARB hearing and you'll receive a text message and/or email letting you know when we're ready for you. Instructions are available at [traviscad.org/protests](https://traviscad.org/protests).



1

## FILE YOUR PROTEST

Protests may be filed online, by mail, or in person. **Filing online is the easiest and fastest way to resolve your protest.** You will need an online account and efile pin number (found on your Notice of Appraised Value) to file online. Visit [traviscad.org/protests](https://traviscad.org/protests) to file your protest.

2

## HAVE AN INFORMAL MEETING

An informal meeting gives you a chance to meet with a TCAD appraiser to get feedback and possibly resolve your protest. Informal meetings are optional and will be available starting April 16. **Property owners interested in an informal meeting should schedule themselves at [traviscad.org/getinlineonline](https://traviscad.org/getinlineonline).**

3

## ATTEND YOUR ARB HEARING

The Travis Appraisal Review Board is an independent entity that will hear and make a decision on your protest. Hearings will be scheduled for you and information will be sent to you 14 days before your hearing date. You will have access to TCAD's evidence prior to the hearing using the TCAD online portal. More information on ARB hearings is available at [traviscad.org/arbhearings](https://traviscad.org/arbhearings).

For more information on the protest process, visit [traviscad.org/protests](https://traviscad.org/protests).





# Taxpayer Assistance Pamphlet

January 1, 2024

You are entitled to an explanation of the remedies available to you when you are not satisfied with your property's appraised value. The Texas Comptroller of Public Accounts is required to publish a pamphlet that explains the remedies available to taxpayers and procedures to be followed in seeking remedial action. The Comptroller's office must provide information related to the functions of the taxpayer liaison officer (TLO) appointed in appraisal districts with a population of more than 120,000 and include advice on preparing and presenting a protest.

The Tax Code further directs that copies of the pamphlet be made readily available to taxpayers at no cost. The chief appraiser of an appraisal district may include it with the notice of appraised value mailed to property owners to explain the deadlines and procedures used in protesting their property's value. The chief appraiser must provide another copy to property owners initiating a protest.

The first step in exercising your rights under the Tax Code is to protest your property's appraised value. The following remedies only address appraised values and related matters. Government spending and taxation are not the subjects of this publication and must be addressed by local taxing units.

## How to Protest Property Value

Appraisal districts must send required notices by May 1, or by April 1 if your property is a residence homestead, or as soon as practical thereafter. The notice must separate the appraised value of real and personal property.

The notice will also include the date and place the appraisal review board (ARB) will begin hearing protests and an explanation of the availability and purpose of an informal conference with the appraisal district to resolve your concerns before your ARB hearing. If you are dissatisfied with your appraised value or if errors exist in the appraisal records of your property, you should file a notice of protest with the ARB.

If an appraisal district has an internet website, it must permit electronic filing of a protest for incorrect appraised value and/or unequal appraisal of property for which a residence homestead exemption has been granted, with certain exceptions. Counties with populations of 500,000 or more are required to have a website. Contact your local appraisal district for more details on filing a protest electronically.

## What Can be Protested

The notice of protest may be filed using the model form on the Comptroller's website: [comptroller.texas.gov/forms/50-132.pdf](http://comptroller.texas.gov/forms/50-132.pdf). The notice need not be on this form. Your notice of protest is sufficient if it identifies (1) the

protesting person claiming an ownership interest in the property, (2) the property that is the subject of the protest and (3) dissatisfaction with an appraisal district determination.

You may request the ARB schedule hearings on protests to be held consecutively concerning up to 20 designated properties on the same day. You may use a special notice on the Comptroller's website: [comptroller.texas.gov/forms/50-131.pdf](http://comptroller.texas.gov/forms/50-131.pdf).

You may protest your property's value in the following situations:

- the value the appraisal district placed on your property is too high and/or your property is unequally appraised;
- the appraisal district denied a special appraisal, such as open-space land, or incorrectly denied or modified your exemption application;
- the appraisal district failed to provide you with required notices;
- the appraisal district denied the circuit breaker limitation on appraised value for non-homestead real property; or
- other matters prescribed by Tax Code Section 41.41(a).

## How to Complete the Protest Form

If using the protest form, these tips will help ensure that you can present your evidence and preserve your appeal rights.

- You should pay particular attention to the reason for protest section of the form.
- What you check as the reason for the protest influences the type of evidence you may present at your hearing.
- Your appeal options after the hearing are influenced by what you protest.

In the case of a typical residential property, checking incorrect appraised value and/or unequal appraisal will allow you to present the widest types of evidence and preserve your full appeal rights.

## How to Resolve Concerns Informally

Appraisal districts will informally meet with you and try to resolve your objections prior to your ARB hearing. You must request the informal conference with the appraisal district on either your notice of protest form or in writing before your scheduled hearing date. It is very important, however, that you preserve your right to a hearing with the ARB by filing your notice of protest before the deadline, even if you expect to resolve your concerns at the informal meeting with the appraisal district.

Ask one of the appraisal district's appraisers to explain how the district arrived at your property's value. Be sure the property description is correct and that the measurements for your home or business and lot are accurate. Many appraisal districts have this information online.

## What is an ARB?

The ARB is an independent, impartial group of citizens authorized to resolve disputes between taxpayers and the appraisal district. The local administrative district judge or the judge's designee appoints ARB members in all counties. Beginning on July 1, 2024 in counties with a population of less than 75,000, the local administrative district judge, or the judge's designee will continue to appoint ARB members. In counties with a population of 75,000 or more, the board of directors of the appraisal district will appoint the ARB members, including special panel ARB members to hear complex property cases where available.

The ARB must adopt and follow certain hearing procedures that may be unfamiliar to you. It must base its decisions on facts it hears from you and the appraisal district to decide whether the appraisal district has acted properly in determining your property's value.

ARB members cannot discuss your case with anyone outside of the hearing. Protest hearings, however, are open to the public and anyone can sit in and listen to the case. A closed hearing is allowed on the joint motion of the property owner and chief appraiser if either intends to disclose proprietary or confidential information at the hearing.

## When are Protests Filed?

You must file your notice of protest with the ARB no later than May 15 or 30 days after the appraisal district mailed the notice of appraised value, whichever is later. You may request an evening or Saturday hearing. The ARB will notify you at least 15 days in advance of the date, time and place of your hearing. Under certain circumstances, you may be entitled to a postponement of the hearing to a later date. The ARB begins hearings around May 15 and generally completes them by July 20. Start and end dates can vary by appraisal district.

At least 14 days before your protest hearing, the appraisal district will mail a copy of this pamphlet; a copy of the adopted ARB hearing procedures; and a statement that you may request a copy of the data, schedules, formulas and any other information the chief appraiser will introduce at your hearing.

You or your authorized representative may appear at the ARB hearing in person, by telephone conference call, videoconference or by filing a written affidavit. To appear by telephone conference call or videoconference, you must provide written notice at least 10 days before the hearing, and any evidence must be submitted by written affidavit delivered to the ARB before the hearing begins. ARBs in counties with populations less than 100,000 that

also lack the technological capabilities for video-conferences are not required to provide them.

If you fail to appear, you may lose the right to be heard by the ARB on the protest and the right to appeal. If you or your authorized representative fails to appear at a hearing, you are entitled to a new hearing if you file with the ARB, not later than four days after your hearing date, a written statement showing good cause for failing to appear and request a new hearing. Good cause is defined as a reason that includes an error or mistake that was not intentional or was not the result of conscious indifference and will not cause undue delay or injury to the person authorized to extend the deadline or grant a rescheduling.

### What Steps to Take to Prepare for a Protest Hearing

You should consult with the appraisal district staff about your property's value. Ask questions about items you do not understand. The appraisal district is required to provide copies of documents that you request, at no charge via first class mail or electronically by filing a written request to exchange electronic communications on a form prescribed by the Comptroller for that purpose. Many appraisal districts provide a great deal of information on their websites at no charge.

If you are protesting the appraisal of your home or small business, you can view videos on the topic on the Comptroller's website at [comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/).

Observing the following tips can also help in achieving a successful appeal:

- *Be on time and prepared for your hearing.* The ARB may place time limits on hearings.
- *Stick to the facts and avoid emotional pleas.* The ARB has no control over the appraisal district's operations or budget, tax rates for local taxing units, inflation or local politics; addressing these topics in your presentation wastes time and will not help your case.
- *Review the ARB hearing procedures.* After you receive the ARB hearing procedures, take time to become thoroughly familiar with them and be prepared to follow them.
- *Present your information in a simple and well-organized manner.* You and the appraisal district staff are required to exchange evidence at or before the hearing. Photographs and other documents are useful. You should take an appropriate number of copies so that each ARB member and the appraisal district representative receives one.

The date of your appraisal is Jan. 1, so you should make sure that changes made before that date are included in the appraisal. Improvements or damage to your property after Jan. 1 should not be part of the appraisal or the protest.

If you are protesting business property value or other appraisal matters, you should have evidence to support your opinion of value. Sales data may not be available or relevant, but income and expense information may be useful.

Generally, the appraisal district has the burden of proof in value and unequal appraisal disputes. An appraiser's job is to appraise property at its market value, equitably and uniformly.

### Limited Binding Arbitration

After you have filed a notice of protest and if you believe your ARB or chief appraiser failed to comply with a procedural requirement relating to your protest, you may file a request for limited binding arbitration (LBA) to compel the ARB or chief appraiser to comply with certain procedural requirements.

To request LBA, you must file a Request for Limited Binding Arbitration. Additional information about filing an LBA request, including filing deadlines and fees, can be found on the Comptroller's website at [comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/).

### What if you are Dissatisfied with the ARB's Decision

After the ARB rules on your protest, it will send a written order by certified mail. If you are dissatisfied with the order of determination, there are three options to appeal. Any ARB decision can be appealed to the state district court in the county in which the property is located. Depending on the facts and property type, you may be able to appeal to the State Office of Administrative Hearings (SOAH) or to regular binding arbitration.

Additional information about appealing an ARB decision, including filing deadlines and fees, can be found on the Comptroller's website at [comptroller.texas.gov/taxes/property-tax/protests/index.php](http://comptroller.texas.gov/taxes/property-tax/protests/index.php).

In all types of appeals you are required to pay a specified portion of your taxes before the delinquency date.

### TLOs

Appraisal district boards of directors in counties with populations of more than 120,000 must appoint a TLO whose primary responsibility is assisting taxpayers, property owners and members of the public with understanding the appraisal process, the protest process, the procedures for filing complaints, comments, and suggestions with the appraisal district, and filing an LBA request.

A property owner may file a written complaint with the TLO to request resolution of a dispute on a matter that does not relate to property appraisal. The TLO may resolve a complaint by directing the property owner to the appropriate resources or referring the issue to the appropriate employee or officer of the appraisal district or ARB. Additionally, the TLO may facilitate an informal meeting with the parties of the dispute to resolve the issue and notify a property owner of the resolution of a complaint not later than the 90th day after the date the complaint is filed. The resolution of a complaint filed is not an action that a property owner is entitled to protest, request LBA or appeal under Tax Code Chapter 42.

TLOs also assist property owners, agents, and members of the public with understanding the Comptroller's ARB Survey process for submitting comments, complaints and suggestions related to the fairness and efficiency of the ARB.

### What is the Comptroller's role in the protest process?

The Comptroller's office provides a survey for property owners to offer feedback on the ARB experience that may be submitted by mail or electronically. The online survey is available in English at [surveymonkey.com/r/surveyarb](http://surveymonkey.com/r/surveyarb) and in Spanish at [surveymonkey.com/r/Spanishsurveyarb](http://surveymonkey.com/r/Spanishsurveyarb). Survey results are published in an annual report. The Comptroller's office does not, however, have oversight responsibility over the ARB and has no authority to investigate complaints about the ARB. Any complaints about the ARB or its members should be directed to the ARB itself, the TLO or the applicable appointing authority. The Comptroller's office has no direct involvement in the protest process.

Further, this pamphlet is intended to provide customer assistance to taxpayers. It does not address all aspects of property tax law or the appraisal process. The Comptroller's office is not offering legal advice, and this information neither constitutes nor serves as a substitute for legal advice. Questions regarding the meaning or interpretation of statutes, notice requirements and other matters should be directed to an attorney or other appropriate counsel.

### Where can you get more information?

This publication does not cover all aspects of the ARB protest process or property taxes. For more information, please see the following web resources:

- *Appraisal Protests and Appeals;*
- *Appraisal Review Board Manual;*
- *Paying Your Taxes;*
- *Property Tax System Basics;*
- *Taxpayer Bill of Rights;*
- *Texas Property Tax Code;* and
- *Valuing Property.*

This information is found on the Comptroller's Property Tax Assistance website. It provides property owners a wealth of information on the appraisal and protest process at [comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/). For specific inquiries, you must contact the appraisal district in which your property is located.

**Property Tax Assistance Division  
Texas Comptroller of Public Accounts  
Publication #96-295. Revised January 2024.**

For additional copies visit our website:

[comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/)

 Sign up to receive email updates on the Comptroller topics of your choice at [comptroller.texas.gov/subscribe/](http://comptroller.texas.gov/subscribe/).

In compliance with the Americans with Disabilities Act, this document may be requested in alternative formats by calling:

**800-252-5555.**

# Sample SB2 Postcard



# 2024 PROPOSED PROPERTY TAX BILL INFORMATION

[TravisTaxes.com](https://TravisTaxes.com)



# YOUR 2024 PROPOSED PROPERTY TAX BILL IS NOW AVAILABLE

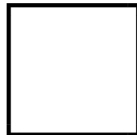
Your taxing entities and elected officials are in the process of determining their new budgets and tax rates. These decisions will directly impact your property tax bill.

Visit **TravisTaxes.com** to learn more about how these decisions will affect you and identify upcoming opportunities to participate in the process.

Information on your property will be updated as local elected officials finalize their budgets and tax rates. Check the website regularly for the latest information.



Travis Central Appraisal District  
P.O. Box 149012  
Austin, TX 78714-9012



**John Doe**  
**1234 Anywhere St.**  
**City, State Zip**

Visit **TravisTaxes.com** to view an estimate of your 2024 property tax bill.