



**Notice is hereby given that on Friday, November 8, 2024, the Board of Directors of Tarrant Appraisal District will meet in open session beginning at 8:00 a.m. at the Tarrant Appraisal District boardroom, 2500 Handley Ederville Rd, Fort Worth, TX**

This meeting and supporting material will be available at [www.tad.org](http://www.tad.org) and TAD's YouTube and Facebook channels.

## **AGENDA**

- 1. Call to Order**
- 2. Verify Presence of Quorum and Posting of Meeting Notice**
- 3. Pledges of Allegiance**
- 4. Invocation**
- 5. Recognize Visitors; Hear Public Comments**
- 6. Information Items**
  - a) Report by Taxpayer Liaison Officer
  - b) Report by TAD Board of Directors ARB Committee
  - c) Report by Chief Appraiser
    - i. Public Speaking Engagements
    - ii. Donations
    - iii. CAMA Conversion
    - iv. IT Security Progress
    - v. 2023 Final Arbitration Results
    - vi. 2024 Current Arbitration Status
    - vii. Property Value Study (PVS) Background & Initial Ratios
- 7. Action Items**
  - a) Consent Agenda Items:
    - (1) Action regarding approval of Board of Directors meeting minutes from September 9, 2024
    - (2) Action regarding renewal of the annual "CoStar Suite" subscription for 2025
    - (3) Action regarding approval of amendment to previously approved Interlocal Agreement with Tarrant County for Sheriff's Department Security Services
  - b) Action regarding payment of the balance due to Tarrant County for the May 2024 TAD Board of Directors election conducted by the Tarrant County Elections Administration office and consider action moving committed funds to the general fund for payment of the election cost

- c) Action regarding payment of Annual Maintenance and Support services provided by Manatron, Inc. and Payment of Annual Escrow Fee
- d) Action regarding approval of purchase for additional IT contracting service
- e) Action regarding award of contract for homestead exemption audit services
- f) Action regarding award of contract for mineral & utility appraisal services
- g) Action regarding award of contract for bank depository services
- h) Actions regarding purchase of TreppCRE subscription services
- i) Consider and possible action on penalty & interest waiver requests for late allocation payments from taxing entities for good cause
  - (1) City of Grand Prairie
  - (2) HEB ISD
  - (3) Keller ISD
  - (4) City of Burleson
  - (5) Tarrant County

**8. Recess to Executive/Closed Session Pursuant to the Following Part(s) of the Texas Open Meetings Act Government Code Ch. 551, for the Following Purposes:**

Section 551.076 – Deliberation regarding the deployment, or specific occasions for implementation, of security personnel or devices related to Board of Directors meetings

Section 551.074 – Deliberation regarding the upcoming annual job performance evaluation of the Chief Appraiser

**9. Return to Open Session for Possible Action on Items Deliberated on in Executive/Closed Session**

Reconvene in open session for possible further discussion and possible action on items deliberated in executive session related to the deployment, or specific occasions for implementation, of security personnel or devices related to Board of Directors meetings

**10. Propose Future Agenda Items; Set Next Meeting Date; Adjourn**

Next meeting date: 8:00 AM Friday, December 13, 2024, at Tarrant Appraisal District, 2500 Handley Ederville Rd, Fort Worth, Texas

Joe Don Bobbitt  
Executive Director/Chief Appraiser

The public is invited to address the Board during the Public Comments period under Agenda Item 5 regarding any item on the Agenda and other issues under the Board’s jurisdiction. During the Public Comments period, the Chairman will allow each speaker five minutes but may expand the time as needed if doing so will not interfere with the Board’s completing its business and adjourning its meeting at a reasonable time. The Board may refuse to hear comments on subjects not reasonably related to items on the Agenda, to policies and procedures of Tarrant Appraisal District or Tarrant Appraisal Review Board, or to other issues under the Board’s jurisdiction. The Board may not respond to comments regarding items not on the Agenda.

**Information Item 6(a): Report by Taxpayer Liaison Officer**

**Information Item 6(b): Report by TAD Board of Directors ARB Committee**

# **GUIDELINES FOR SELECTION OF Tarrant Appraisal Review Board Members**

- Taxpayer Liaison Officer (TLO) is appointed each year by TAD Board of Directors (BOD)
- TLO will be responsible for publicizing the availability of member positions on the ARB.
- TLO will establish a separate P.O. Box just for ARB application.
- TLO to check P.O. Box at least 3 times weekly.
- Referrals for applicants can be provided to the TLO directly.
- TLO will maintain a log of all applicants and screen according to Property Tax Code Guidelines.
- After initial screening, TLO will notify only those applicants who do not meet minimal guidelines within 2 weeks.
- TLO will forward to TAD H.R. Department those applicants who have met minimum property tax code requirements. Criminal background checks will be the responsibility of the H.R. Departments.
- TLO will establish a drop box at the front desk for walk-in applications.
- TLO will have dedicated email address for ARB member applications.
- TLO will maintain a record of all applicants and submit to the TAD BOD the total number of applicants and number rejected (without naming individuals) at each TAD BOD meeting when posted on Agenda under TLO Report.
- TLO will submit qualified applicants to the chair of the TAD BOD ARB for scheduling of interviews.
- The Chair of the TAD BOD ARB Committee will then submit final applicants to the TAD BOD for approval.

# **GUIDELINES FOR SELECTION OF Tarrant Appraisal Review Board Members**

- Once applicants are approved by the TAD BOD TLO will draft Letters of Approval for signature of TAD BOD Chair or Designee.
- The Chair of the ARB will notify the TLO as to the number of ARB members at least every 2 months. The TLO after notification by the ARB Chair will inform the Chair of the TAD BOD Committee as to how many members are needed and then proceed to schedule interviews with the subcommittee regarding those applicants that have been screened and eligible for consideration.
- Ideally six applicants might be scheduled each day as needed. Interviews will be scheduled back-to-back for individual applicants to meet with available committee members in 15-minute intervals which could mean a total of approximately one and one half hours of interview time.
- After the last interview, the committee will determine which applicants to recommend to the TAD BOD.
- Questions of applicants should be uniform in nature as outlined prior to interviews.

**Information Item 6(c): Report by Chief Appraiser**

**Action Item 7(a)(1): Action regarding approval of Board of Directors meeting minutes from September 9, 2024**

**Staff Recommendation:**

**Approve Board of Directors meeting minutes from September 9, 2024, as presented**



**Tarrant Appraisal District**  
**Board of Directors Meeting Minutes**  
**Friday, September 9, 2024**

This meeting was conducted in compliance with the Open Meetings Act as written in the statute. A quorum of the members of the Board attended in person at the Tarrant Appraisal District boardroom, 2500 Handley Ederville Rd, Fort Worth, Texas.

These minutes are a summary of the only subjects the Board addressed and the actions it took. For details, see the agenda, supporting documents and video posted on TAD's website at this URL: <https://www.tad.org/board-of-directors> and TAD's YouTube and Facebook channels.

**Members Present:**

Mr. Alan Blaylock	Mr. Rich DeOtte
Mr. Matt Bryant	Mr. Vince Puente, Chair
Mr. Gary Losada	Ms. Callie Rigney
Ms. Gloria Peña, Secretary	

**Also Participating:**

Mr. Joe Don Bobbitt, Chief Appraiser  
Mr. Brad Patrick, Director of Administration  
Ms. Sharon Baxter, TAD Attorney

**Not Present:**

Ms. Wendy Burgess, Tax Assessor Collector  
Mr. Eric Morris

Chair Puente called the meeting to order at 8:01am, verified a quorum was present and the notice was posted timely. After pledges and invocation, the board took up the following agenda items:

**5. Public Comments- Ms. Collins, Mr. Botts, Mr. Campos, Mr. Dodson, Mr. Hantz, Mr. Bennett, Ms. Lunski, Mr. Crouch, Ms. Seri, Ms. Nikander, & Ms. Mang spoke.**

Mr. DeOtte moved to move the Discussion Item 7. To the next item of business and Ms. Rigney seconded. The vote was unanimous, 7-0.

**7. Discussion Item**

**Discussion regarding entity feedback, and resolutions disapproving budget and/or reappraisal plan**

The board received resolutions opposing the adopted 2025 TAD budget and the adopted 2025-2026 reappraisal plan. These resolutions were received from the following ISDs: Arlington, Azle, Crowley, Everman, Fort Worth, Kennedale, Lake Worth, Northwest, HEB and Eagle Mountain Saginaw and White Settlement opposed only the reappraisal plan.

**6. Action Item**

**a. Action regarding approval of Board of Directors meeting minutes – August 9, 2024**

Mr. Blaylock moved to approve the meeting minutes as presented and Ms. Peña seconded. The motion passed 7-0.

**b. Action regarding award of contracts for medical, dental, vision, life, disability, and related insurance for TAD employees for 2025**

Mr. Losada moved to authorize the Chief Appraiser to enter into a contract with Texas Association of Counties to provide group medical Insurance through Blue Cross Blue Shield for 2025 using the Health Reimbursement Account option for the base plan, buy up plan and health savings account as presented in the proposal. Mr. DeOtte seconded; the motion failed, 2-5 with Mr. DeOtte and Mr. Puente voting for and Mr. Blaylock, Mr. Bryant, Mr. Losada, Ms. Pena and Ms. Rigney against.

Mr. Blaylock moved to authorize the Chief Appraiser to enter into a contract with Texas Association of Counties to provide group medical Insurance through Blue Cross Blue Shield for 2025 by renewing the existing plan options from Blue Cross Blue Shield without the Health Reimbursement Account option as presented in the proposal. Mr. Losada seconded. The motion passed, 5-1, with Mr. DeOtte abstaining and Mr. Puente voting against.

Ms. Pena moved to authorize the Chief Appraiser to enter into a contract with Mutual of Omaha to provide Dental, Voluntary Vision, Group, and Voluntary Life, Accidental Death & Dismemberment, Long Term Disability, and Voluntary Short-Term Disability for 2025 as presented in the proposal. Mr. Losada seconded; the motion passed unanimously, 7-0.

No action was taken regarding HSA plan premium contribution changes.

**c. Action regarding contract for Computer Assisted Mass Appraisal (CAMA) software**

Mr. DeOtte moved to authorize the Chief Appraiser to enter into a contract with True Prodigy not to exceed \$10,000,000 over 5 years pending review by the board's attorney; Ms. Rigney seconded. The motion passed, unanimously, 7-0.

Mr. DeOtte moved to authorize the Chief Appraiser to transfer \$838,414 from CAMA reserve funds in FY 2024 for the acquisition of a CAMA system. Mr. Blaylock seconded and the motion passed, 7-0.

**d. Action regarding a resolution to create policy concerning entity allocation payment penalty and interest waiver authority to Chief Appraiser**

No action was taken on this item.

**8. Propose Future Agenda Items; Set Next Meeting Date; Adjourn**

- a. Next Published Meeting date is November 8<sup>th</sup>, 2024 at Tarrant Appraisal District, 2500 Handley Ederville Rd, Fort Worth, Texas.
- b. The board was asked to submit requested future agenda items to the Chairman & Chief Appraiser by email no later than 8-days prior to next scheduled meeting (to allow time for draft process and posting).
- c. The meeting adjourned at 11:20am.

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Gloria Peña, Board Secretary

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Vince Puente, Board Chair

**Action Item 7(a)(2): Action regarding renewal of the annual “CoStar Suite” subscription for 2025**

Since 2003, TAD has subscribed to CoStar Realty Information Inc. for information on comparable local, area and national sales data on commercial properties. The data is critical to the accurate valuation of commercial property. “CoStar Suite” is considered to be a premier source of valuation data in the marketplace.

**Vendor’s Description of the Services provided by the “CoStar Suite” Subscription:**

CoStar Property Professional – Includes full market inventory of properties and spaces, searchable by market and submarket, with details on each one. Also includes access to photos, aerials, maps, floor plans, stacking plans and more.

CoStar Comps – Includes commercial real estate comparables, across all property types. Also includes detailed sales transactions, including price, cap rates, names of buyers and sellers.

CoStar GO – Includes detailed information on properties, sales comps, tenant information and more. CoStar Go is fully integrated into a mobile platform optimizing exclusively for the iPad.

The subscription renewal provides 16 licenses that are shared among TAD’s commercial appraisal staff members. The data package subscription is priced on a monthly basis at \$6,812. On an annual basis, the total subscription cost is \$81,744 for 2025. Renewal notice is needed by November 30, 2024.

**Staff Recommendation:**

**Authorize renewal of the annual subscription with CoStar Realty Information, Inc. for the “CoStar Suite” of services at a total cost not to exceed \$81,744 for 2025**

**Funds are included in the approved FY 2025 Budget**

**Action Item 7(a)(3): Action regarding approval of amendment to previously approved Interlocal Agreement with Tarrant County for Sheriff's Department Security Services**

Per Board action at the August 9<sup>th</sup> meeting, the Chief Appraiser entered into an Interlocal Agreement with Tarrant County for Tarrant County Sheriff Department Security Services. At the time of approval, the total dollar amount proposed by the County was \$192,895.66 for October 1, 2024 – September 30, 2025 (the County's fiscal year). Recently, the County notified TAD that recent recalculation of the cost resulted in a lower total amount required by TAD. Due to this change, they have asked that the Chief Appraiser sign an amendment to the Interlocal Agreement. A copy of the amendment is attached. The new total amount for October 2024 – September 2025 will be \$182,438.31.

**Staff Recommendation:**

**Authorize execution of proposed amendment to the Interlocal Agreement with Tarrant County for Sheriff's Department Security Services for October 1, 2024, through September 30, 2025, for a total cost of \$182,438.31.**

**Funds are included in the approved FY 2024 and FY 2025 Budgets**



THE STATE OF TEXAS

AMENDMENT NO. ONE - INTERLOCAL AGREEMENT  
BETWEEN TARRANT COUNTY AND TARRANT  
APPRAISAL DISTRICT

COUNTY OF TARRANT

AMENDMENT NO. ONE

WHEREAS, on October 1, 2024, through Court Order No. 143963, Tarrant County, Texas ("COUNTY") and Tarrant Appraisal District ("TAD"), entered into an Interlocal Agreement ("AGREEMENT") where TAD is requesting the COUNTY's assistance with Security Services ("PROJECT"); and

NOW, THEREFORE, the COUNTY and TAD hereby agree to the following Amendment No. One to the said AGREEMENT:

1. The language on page 1 concerning payment and term of the AGREEMENT is stricken and replaced with the following: DISTRICT agrees to pay the sum of \$182,438.31 to the COUNTY for the Security Services for the period beginning October 1, 2024 and ending September 30, 2025. Payments to the COUNTY will be paid in monthly installments of \$15,203.19 beginning with the date of execution of this Agreement by both parties.
2. All other conditions and requirements of said AGREEMENT remain the same, unless amended in writing and agreed upon by both parties.

SIGNED AND EXECUTED this \_\_\_\_\_ day of \_\_\_\_\_, 2024.

TARRANT COUNTY, TEXAS

Tarrant Appraisal District

\_\_\_\_\_  
Tim O'Hare  
County Judge

\_\_\_\_\_  
Joe Don Bobbitt  
Chief Appraiser

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

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

\_\_\_\_\_  
APPROVED AS TO FORM\*

\_\_\_\_\_  
APPROVED AS TO FORM

\_\_\_\_\_  
Criminal District Attorney's Office\*

\_\_\_\_\_  
TAD Attorney

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

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

\*By law, the District Attorney's Office may only advise or approve contracts or legal documents on behalf of its clients. It may not advise or approve a contract or legal document on behalf of other parties. Our review of this document was conducted solely from the legal perspective of our client. Our approval of this document was offered solely for the benefit of our client. Other parties should not rely on this approval and should seek review and approval by their own respective attorney(s).



**COST ANALYSIS FOR CONTRACT BUILDING SECURITY SERVICES -  
TARRANT APPRAISAL DISTRICT (TAD) FY2025**

**BASE SALARY**

Patrol Deputy	Salary for Grade 53-II-K \$41.22	\$85,737.60
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**FRINGE BENEFITS**

Structure	Estimated at 7%	6,001.63
Lump	3.00%	2,752.18
Longevity	Maximum \$5/month for 25 years	1,500.00
Holiday Pay	13 days x 8 hours x \$45.43	4,724.57
Retirement	11.88%	11,965.06
FICA	7.65%	7,704.77
Worker's Comp	\$1.27 per \$100 worth of payroll	1,200.04
Group Medical	Per employee rate (\$917/mo)	11,004.00
Certification Pay	\$50/per month	600.00
Clothing	\$700/year	<u>700.00</u>
		<b>\$133,889.85</b>

Hourly Rate (includes projected step & structure increase)	\$45.43
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Combined Hourly Rate: \$133,889.85 / 2080 hours	\$64.37
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(Combined Hourly rate is calculated using actual salary as of July 2024 and all associated costs )

Basic Services	1 position x \$133,889.85	\$133,889.85
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Indirect Cost Rate	Basic Services x 36.26%	\$48,548.46
**(Based on 36.26% ICR)		

<b>TOTAL ANNUAL COST:</b>	<b><u>\$182,438.31</u></b>
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**Action Item 7(b): Action regarding payment of the balance due to Tarrant County for the May 2024 TAD Board of Directors election conducted by the Tarrant County Elections Administration office and consider action moving committed funds to the general fund for payment of the election cost**

At the April 22<sup>nd</sup> meeting, the Board approved a contract with the Tarrant County Elections Administrator to conduct TAD's Board of Directors election on May 4, 2024. At that time, TAD was presented with an estimate of the total cost for the election along with a required deposit amount. The estimated cost was \$645,470.34 and the required deposit was \$484,110. The action taken by the Board was to approve the contract, direct staff to pay the deposit and that after the 2023 audit was completed a recommendation for recommitment of funds would be made to the Board to cover the costs.

Since that time, fund balances have been updated by Board action with both the committing of excess funds, the purchase of IS equipment & CAMA contract and the creation of a new fund. The current available fund balances are as follows:

- CAMA Committed Fund - \$16,625
- Building Maintenance Fund - \$1,101,034
- Technology Committed Fund - \$395,961
- Litigation Fund - \$300,000
- Contingency Fund per BOD Policy - \$7,866,375

On October 3<sup>rd</sup>, TAD received an invoice from Tarrant County with the final calculation of the election cost and the amount due at this time. The final cost of the 2024 BOD election was \$696,702. Per the attached invoice and documentation, the TAD BOD election cost was broken down as follows:

- Early In-person Voting - \$235,511.16
- Early Mail-in Voting - \$24,050.24
- Election Day Expenses - \$304,623.80
- General Expenses - \$69,180.25
- Contract Administration Fee - \$63,336.55

The remaining due at this time is \$212,592.

**Staff Recommendations:**

**Authorize the transfer of \$696,702 from the \_\_\_\_\_ Fund(s) to the general fund to account for the previously paid deposit of \$484,110 and for payment of the balance due for the May 2024 TAD Board of Directors election. Further, authorize the Chief Appraiser to pay the remaining balance of \$212,592 to Tarrant County for the May 2024 TAD Board of Directors election**



CONTRACT FOR ELECTION SERVICES

ELECTION DATE: May 4, 2024  
 POLITICAL SUBDIVISION: All Entities

TAB # 33  
 MULTIPLIER: 0.4036

Category	Units or Description	Election Actual	TARRANT APPRAISAL
<b>EARLY VOTING BY PERSONAL APPEARANCE (EVPA) EXPENSES:</b>			
EVPA polling place personnel		\$ 448,598.10	\$ 181,671.71
EVPA temporary support staff		\$ 37,416.59	\$ 15,084.32
EVPA supply kits		\$ 12,190.00	\$ 4,914.33
EVPA Verity Duos		\$ 49,305.00	\$ 20,174.83
EVPA Verity Scans		\$ 8,215.00	\$ 3,311.83
EVPA Verity Controllers		\$ 5,565.00	\$ 2,243.50
EVPA polling place rentals/custodial		\$ 2,176.46	\$ 848.31
EVPA polling place telephone lines		\$ 2,013.47	\$ 811.72
EVPA furniture rentals		\$ 12,435.00	\$ 5,004.75
EVPA correspondence & postage		\$ 178.32	\$ 71.91
EVPA parking meter expenses		\$ 2,450.00	\$ 1,225.00
EVPA training materials		\$ 369.44	\$ 148.94
OTHER:		\$ -	\$ -
OTHER:		\$ -	\$ -
OTHER:		\$ -	\$ -
<b>Category Subtotal</b>		<b>\$ 580,912.38</b>	<b>\$ 235,511.16</b>
<b>EARLY VOTING BY MAIL (EVM) EXPENSES:</b>			
EVM ballots		\$ 9,088.31	\$ 3,891.22
EVM envelopes & supplies		\$ 20,056.96	\$ 8,587.52
EVM ballot postage		\$ 15,888.87	\$ 6,802.93
EVM correspondence & postage		\$ 347.88	\$ 148.95
Ballot Printing Setup Fee		\$ 1,500.00	\$ 605.35
Early Voting Ballot Board personnel & SVC		\$ 9,947.06	\$ 4,014.28
OTHER:		\$ -	\$ -
OTHER:		\$ -	\$ -
<b>Category Subtotal</b>		<b>\$ 56,829.08</b>	<b>\$ 24,050.24</b>
<b>ELECTION DAY (ED) EXPENSES:</b>			
ED polling place personnel		\$ 236,215.22	\$ 95,411.31
ED temporary support staff		\$ 239,118.83	\$ 96,499.97
ED supply kits		\$ 41,400.00	\$ 16,707.59
ED Verity Scan		\$ 27,900.00	\$ 11,289.17
ED Verity Controller		\$ 18,900.00	\$ 7,647.50
ED Verity DUOs		\$ 122,170.00	\$ 49,349.33
ED polling place rentals/custodial		\$ 43,456.95	\$ 19,247.85
ED Furniture rentals		\$ 9,427.00	\$ 3,804.41
Emergency Teams		\$ 3,020.95	\$ 79.50
Wireless Data		\$ 6,838.20	\$ 2,766.94
Rally Station facility rental		\$ 338.66	\$ 136.67
Rally Station personnel		\$ 3,491.91	\$ 1,409.21
Rally Station phone lines		\$ 389.85	\$ 157.33
Rally Station equipment		\$ -	\$ -
OTHER: parking meter expenses		\$ 290.00	\$ 117.03
OTHER:		\$ -	\$ -
OTHER:		\$ -	\$ -
<b>Category Subtotal</b>		<b>\$ 752,957.57</b>	<b>\$ 304,623.80</b>

<b>GENERAL EXPENSES OF ELECTION</b>		
Rental Vehicles	\$ 67,423.66	\$ 27,209.82
Fuel expenses	\$ 4,734.39	\$ 1,910.63
Mileage expense	\$ -	\$ -
Chair rental for Training Center	\$ -	\$ -
Publication of Legal Notices	\$ 16.50	\$ 6.66
Postage/Shipping	\$ 1,277.01	\$ 515.36
Audio recordings	\$ -	\$ -
Language translations	\$ -	\$ -
Communication equipment rental	\$ -	\$ -
Elections Department staff overtime	\$ 53,838.61	\$ 21,727.37
Voting system vendor site support	\$ -	\$ -
Training materials	\$ 449.05	\$ 181.22
DUO Ballots	\$ 22,247.06	\$ 8,978.13
OTHER: Election Security	\$ 21,436.58	\$ 8,651.05
OTHER:	\$ -	\$ -
OTHER:	\$ -	\$ -
<b>Category Subtotal</b>	<b>\$ 171,422.86</b>	<b>\$ 69,180.25</b>

<b>TOTAL ELECTION EXPENSES</b>		
<b>ELECTION SUBTOTAL:</b>	<b>\$1,562,121.89</b>	<b>\$633,365.46</b>
<b>Election Services Contract Administration Fee (10%)</b>	<b>\$156,212.19</b>	<b>\$63,336.55</b>
<b>TOTAL COST OF ELECTION:</b>	<b>\$1,718,334.08</b>	<b>\$696,702.00</b>
<b>LESS DEPOSIT</b>		<b>\$484,110.00</b>
<b>BALANCE DUE</b>		<b>\$212,592.00</b>

**Action Item 7(c): Action regarding payment of Annual Maintenance and Support services provided by Manatron, Inc. and Payment of Annual Escrow Fee**

The initial ten-year period for the Manatron/Aumentum contract ends at the end of 2024. While TAD has engaged with True Prodigy for their Computer Assisted Mass Appraisal (CAMA) software for future years, there is the need to maintain the current CAMA system (Aumentum Technologies) for tax year 2025. Aumentum will provide TAD with CAMA software for the upcoming tax year and also be used to migrate and test data for the software conversion to True Prodigy. The maintenance and support cost for Aumentum for 2025 is \$319,904. In addition, an annual escrow fee for 2025 paid through Manatron to a third party, NGC Group, to maintain a current version of the Aumentum software source code is also included at an amount of \$2,843.

**Staff Recommendation:**

**Authorize payment of the 2025 software maintenance and support fee in the amount of \$319,904 and the annual escrow fee in the amount of \$2,843, for a total payment to Manatron, Inc. of \$322,747**

**Funds are included in the approved FY 2025 Budget**

**Invoice No.** MANMN0005195  
**Date** 10/30/2024  
**Due Date** 1/1/2025  
**Customer No.** 4322101  
**Page** 1 of 1



**Bill To**

TARRANT COUNTY APPRAISAL DISTRICT  
 BRADPATRICK/ DIR ADM/TERRISA STEWART/ FIN  
 OFFICER  
 2500 HANDLEY-EDERVILLE RD  
 FORT WORTH, TX 76118-6909  
 United States

**Ship To**

TARRANT COUNTY APPRAISAL DISTRICT  
 2500 HANDLEY-EDERVILLE RD  
 FORT WORTH, TX 76118-6909  
 United States

Contract/Project Number	Purchase Order	Payment Terms	Currency	
	JAN-DEC25	Start of Maint Period	HARRIS-US\$	

  

Item No	Description	Quantity	Unit Price	Amount
AUMAA-S	Aumentum Assmt Admin Spt: January 2025 to December 2025	1.00	95,623.00	95,623.00
AUMCM-S	Aumentum Case Mgmt Support: January 2025 to December 2025	1.00	47,812.00	47,812.00
AUMPP-S	Aumentum Personal Prop Admin Sys Spt: January 2025 to December 2025	1.00	9,131.00	9,131.00
AUMRECEE-S	Aumentum Records Admin Enterprise Spt: January 2025 to December 2025	1.00	47,812.00	47,812.00
AUMVAL-S	Aumentum Valuation System Spt: January 2025 to December 2025	1.00	119,526.00	119,526.00
ESCROW-S	Annual Escrow Fee: January 2025 to December 2025	1.00	2,843.00	2,843.00
AUMLEVY-S	Aumentum Levy Mgmt Support *Included*: January 2025 to December 2025	1.00	0.00	0.00
AUMMOBILE-S	Aumentum Mobile System Spt *Included*: January 2025 to December 2025	1.00	0.00	0.00

**Remit To:**  
 Manatron, Inc.  
 ("Aumentum Technologies")  
 PO Box 74008484  
 Chicago, IL 60674-8484

Subtotal	322,747.00
Misc	0.00
Taxes	0.00
Freight	0.00
<b>Total</b>	<b>322,747.00</b>



Invoice Questions? Please call or email Renee Fuller at 866-471-2900 ext.277737 or  
[renee.fuller@augmentumtech.com](mailto:renee.fuller@augmentumtech.com).

***Thank you for your business!***

**Action Item 7(d): Action regarding approval of purchase for additional IT contracting service**

At the January 12<sup>th</sup> meeting, the Board authorized staff to engage with Improving Enterprises, a contracting service provider, for two temporary IT staff members in lieu of filling open positions at that time. Hiring temp-to-perm allowed senior Information Services staff to vet the candidates at an overall cost savings to the district. Both temporary employees performed well, though additional time was required to finalize several projects, onboard and align with TAD pay periods. This exceeded the Board approved \$115,000 per employee. A total of \$21,070.80 of additional expense occurred before the two temporary workers were made permanent TAD employees. Approval is sought for the expense beyond the approved dollar amount.

TAD has also engaged with Improving Enterprises for various IT-related tasks throughout the year such as ransomware recovery activities, TxDIR and Azure engagements. Up to this point, the total internally approved expenses totaled \$47,000. However, it is projected that while this particular task is winding down for 2024, additional work is still needed. For this reason and to adhere to purchasing policy since the total spend will be in excess of \$50,000, a request has been made for authorization for additional contract work from Improving Enterprises for the remainder of calendar year 2024 for \$36,000. This would put the total not to exceed amount for this project at \$83,000 overall.

**Staff Recommendation:**

**Authorize the Chief Appraiser to engage with Improving Enterprises for the additional expense of \$21,070.80 for temporary IT staff. Also authorize the Chief Appraiser to engage in contracting work with Improving Dallas beyond the previously authorized amount for an additional amount not to exceed \$36,000 and capping the total project spend at \$83,000 for the remainder of calendar year 2024**

**Funds are included in the approved FY 2024 Budget**



## **Action Item 7(e): Action regarding award of contract for homestead exemption audit services**

### **Background:**

In compliance with SB 1801 passed in 2023, TAD developed an internal review plan to audit homestead properties in Tarrant County. In June 2024, TAD posted a request for proposals (RFP) for an outside vendor to identify erroneously granted homestead exemptions to further assist with this process. The 2025 TAD budget includes \$470,000 specifically for this project. Examples of erroneously granted exemptions may include people who are either renting their homes but were granted a homestead exemption, people receiving exemptions on multiple homes (both in Tarrant County and any other county in-state or out of state), people not residing in the home while receiving homestead exemption or otherwise may not qualify for the exemption being claimed. There are approximately 400,000 various homestead exemptions on parcels owned by Tarrant County residents. TAD sought a homestead research solution that uniquely identifies any homestead account, and systematically identifies homestead exemptions with a high risk of having been erroneously granted. In turn, to assist property owners, the solution should also denote properties that may qualify for the exemption that do not currently have one on record. This research solution should utilize sources including, but not limited to, nationwide information on deceased individuals, out-of-country residents, multiple homes, and multiple homestead exemption forms.

We received responses from four vendors: CoreLogic, Lexis Nexis, Linebarger & True Roll.

### **Vendor Summary:**

- CoreLogic is known for nationwide real estate data and cost estimators. Homestead Audit service is a new product line currently used in Colorado, but would require some development
- Lexis Nexis is one of the largest personal data aggregators and is routinely used by government agencies. TAD currently has licenses for the search tools
- Linebarger is a tax collection firm that specializes in the full-service model including legal advice regarding applicants' qualifications and the collection of P&I on erroneous exemptions
- True Roll specializes in homestead audits and utilizes advanced technology to provide a better user experience to districts and taxpayers integrating application process, validation, annual review, and removal of exemptions. Configurable business rules allow for automated approval or denial of exemptions based on confidence level

RFP Responses were graded by four staff members with CoreLogic having the highest score on the base level, True Roll having the highest score on the mid-level, and no vendors offer a full-service model within our 2025 budget. Staff attempted to quantify hidden or associated costs for the district and taxpayers based on effort required for the mid-level offering for each vendor plus CoreLogic's base level offering. This was compared to TAD's current in-house homestead audit process, 2025 planned in-house process, and a full countywide audit for apples-to-apples comparison to the vendor offerings.

<u>Document compliance</u>		True Roll	Core Logic	Lexis Nexis	Linebarger
2.2 A	In specified Format	TRUE	TRUE	TRUE	TRUE
2.2 B	Straight Forward	TRUE	TRUE	TRUE	TRUE
2.2 C	Question reprinted	TRUE	TRUE	TRUE	TRUE
2.2 D	Initiated corrections	N/A	N/A	N/A	N/A
2.2 E	Page, font, & page numbers	TRUE	TRUE	TRUE	TRUE
2.2 F	No additional terms	TRUE	TRUE	TRUE	TRUE (FALSE option 3)
2.2 G	Single proposal per item	TRUE	TRUE	TRUE	TRUE
2.2 H	Inclusive costs	TRUE	TRUE	TRUE	TRUE
2.2 I	Clear corrections	N/A	N/A	N/A	N/A
2.2 J	Signed proposals	TRUE	TRUE	TRUE	TRUE
2.3 B	Original, copy, & electronic copies	TRUE	TRUE	TRUE	TRUE

<u>Scoring from attachment B for Basic Level Service</u>						
Basic	5 points	Letter of Introduction and Executive Summary	5	4.5	5	5
Basic	15 points	Project Approach and Work Plan	15	10.5	12.5	10.75
Basic	15 points	Project Team Qualifications & Relevant Experience	14.25	7	13.75	13.75
Basic	5 points	Conformance of RFP	5	5	5	5
Basic	15 points	Audit	14	11.75	11.25	11.25
Basic	10 points	Ability to identify non-HS properties which qualify	2.5	9.5	0	0
Basic	10 points	Ability to verify validity of new applications	2.5	0	1.25	0
Basic	25 points	Proposed Cost of Service	9.15	20	14.55	1.25
		Actual Cost	\$424,000	\$67,000	\$240,000	\$800,000
		Three year contract Annual Cost	Same	Same	\$200,000	Same
		<b>Total Score</b>	<b>67.4</b>	<b>68.3</b>	<b>63.3</b>	<b>47.0</b>

<u>Scoring from attachment B for Mid Level Service</u>						
Mid	5 points	Letter of Introduction and Executive Summary	5	4.5	5	5
Mid	15 points	Project Approach and Work Plan	15	10.5	12.25	10.75
Mid	15 points	Project Team Qualifications & Relevant Experience	14.25	7	14	14
Mid	5 points	Conformance of RFP	5	5	5	5
Mid	15 points	Audit	14	10.5	10.75	10
Mid	10 points	Ability to identify non-HS properties which qualify	9.75	9.5	9.25	0
Mid	10 points	Ability to verify validity of new applications	9.75	7.5	2.5	0
Mid	25 points	Proposed Cost of Service	18.3	20	10.4	1.25
		Actual Cost	\$424,000	\$290,000	\$492,000	\$1,000,000
		Three year contract Annual Cost	Same	Same	\$402,000	Same
		<b>Total Score</b>	<b>91.1</b>	<b>74.5</b>	<b>69.2</b>	<b>46.0</b>

Scoring from attachment B for Highest Level Service		True Roll	Core Logic	Lexis Nexis	Linebarger
Full	5 points	5	4.5	5	5
Full	15 points	15	10.5	12.25	11.5
Full	15 points	14	7	13.25	13.25
Full	5 points	5	5	5	5
Full	15 points	15	10.5	13.75	11
Full	10 points	9.75	9.5	9.75	4.25
Full	10 points	9.75	7.5	2.5	4.25
Full	25 points	10.4	20	13.3	5
Actual Cost		\$1,866,000	\$475,000	\$1,600,000	\$1,160,000
Three year contract Annual Cost		Same	Same	Same	Year three is @ 52%
Total Score		83.9	74.5	74.8	59.3

Other Factors		True Roll	Core Logic	Lexis Nexis	Linebarger
Available API integration		TRUE	BETA	TRUE	FALSE
Online taxpayer direct application tools		TRUE	BETA	FALSE	FALSE
Built in workflow tools to improve efficiency and productivity		TRUE	BETA	PARTIAL	FALSE
Best UI- designed for self serve		Best UI- designed for self serve	No experience in Texas	Full Svc. Cost is not capped but \$4 per entry	May take two years for first run
AI based analytic tools and text conversion		AI based analytic tools and text conversion	Mid level does not have a reasonable added value	largest data repository	Requires live CAMA access in full service
Most Comprehensive Mid-level offering		Most Comprehensive Mid-level offering	Maybe Ideal with Basic if DPS is added and Letters was removed	No HS application vetting process	No indication that mid includes missing homestead or new apps

**Distinct Processes:**

Audit Existing HS (required by law)  
 Find Missing HS (service for Taxpayers)  
 Vet applications for qualifications (eliminate new errors)

**Board Decisions:**

Pursue back taxes on erroneous exemptions (deceased, non primary)  
 Pursue back taxes on fraudulent exemptions (multiple homesteads)  
 Vendor Selection

**Background Data**

Population	2,155,000	# of Applications per Year	48,000
Total Homesteads	403,481	# Situs Match per Year	22,000
Non-Homesteaded Residential	183,519	Avg Minutes to P/Process	15
TAD Expected Initial Flag Rate	2-4%	Days of Backlog (90 day deadline)	35
TAD Estimated Final Erroneous Rate	0.5 -1.0%	Vendor Amount budgeted for 2025	\$ 470,000
Average Income based on Census	\$ 39,915	TAD Staff AVG Hourly Salary & Benefits	\$ 28
Est Minutes to Apply (incl. phone & travel)	60		

	Cost	Assumptions
		Minutes per
<b>Vendor Cost</b>		
Accounts Audited	RFP cost from vendor	
Estimated Flagged for review	Number of Accounts with Homestead to be audited	
<b>Additional Costs:</b>	Number of Accounts flagged for reapplication	
Mailing Applications	Estimate of paper, envelope and postage costs for applications	\$ 1.32
Training Costs (Hours)	Department training from outside counsel	\$ 200
Legal Costs (Hours)	Average cost of a lawsuit times two anticipated lawsuits	\$ 900
<b>Additional Cost Sub Total</b>		
<b>Total Not including labor</b>	Vendor cost plus estimated materials w/o labor	
<b>Staff Costs:</b>		
TAD staff implementation cost estimate	Estimate of cost of staff to implement vendors solution	
Phone Calls (25% of flagged acct @15 min/call)	Estimate of number of phone calls generated and staff cost	\$ 0.25
Estimated Avg Time to Review Application	Estimate of time to review all applications received, (internal has higher amounts of normal applications with lower average time, vendor flagged will contain higher ratio of problem applications leading to higher average time)	
Cost of Staff Review	Staff cost based on number of applications and expected error rate	\$ 28.27
Cost of Management Time	Management cost for supervising project and escalation of complaints	\$ 387,859
Est Vetting Time Reduction by vendor process	Reduction in processing time for new application vetting	
Vetting New Applications	Estimated staff cost to process 48,000 new owner applications	\$ 28.27
Support Service Staff labor commitment	Estimate of customer service staff committed to project	3,221,223
<b>Staff Costs SubCost:</b>		
<b>Total Cost to TAD</b>	Cost of vendor solution plus estimated staff cost and material	
<b>EST Taxpayer Time Cost</b>	Estimated cost to taxpayers based on their average salary and estimated time to complete application	19.19
<b>Total Estimated Project Costs</b>	Total estimated costs borne by taxpayers	48,000.00

	2024 TAD Audit	2025 TAD Planned Zone Audit	2025 TAD Full Audit	CoreLogic Basic	CoreLogic Mid	Linebarger Mid	LexisNexis Mid	TrueRoll Mid
<b>Vendor Cost</b>				\$ 67,000	\$ 290,000	\$ 1,160,000	\$ 492,000	\$ 424,000
Accounts Audited	22,000	90,000	403,481	403,481	403,481	403,481	403,481	403,481
Estimated Flagged for review	14,000	57,272.73	256,760.64	12,104	12,104	12,104	12,104	12,104
<b>Additional Costs:</b>								
Mailing Applications	\$ 18,480	\$ 75,600	\$ 338,924	\$ 15,978	\$ 15,978	\$ 15,978	\$ 15,978	\$ 15,978
Training Costs (Hours)	\$ 400	\$ 400	\$ 400	\$ 400	\$ 400	\$ 400	\$ 400	\$ 400
Legal Costs (Hours)	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800
<b>Additional Cost SubTotal</b>	<b>\$ 20,680</b>	<b>\$ 77,800</b>	<b>\$ 341,124</b>	<b>\$ 18,178</b>	<b>\$ 18,178</b>	<b>\$ 18,178</b>	<b>\$ 18,178</b>	<b>\$ 18,178</b>
<b>Total Not including labor</b>	<b>\$ 20,680</b>	<b>\$ 77,800</b>	<b>\$ 341,124</b>	<b>\$ 85,178</b>	<b>\$ 308,178</b>	<b>\$ 1,178,178</b>	<b>\$ 510,178</b>	<b>\$ 442,178</b>
<b>Staff Costs:</b>								
TAD staff implementation cost estimate				\$ 5,145	\$ 5,145	\$ 594	\$ 594	\$ 594
Phone Calls (25% of flagged acct @15 min/call)	\$ 6,596	\$ 26,984	\$ 120,974	\$ 5,703	\$ 5,703	\$ 5,703	\$ 5,703	\$ 5,703
Estimated Avg Time to Review Application	\$ 10	\$ 10	\$ 10	\$ 15	\$ 15	\$ 15	\$ 15	\$ 15
Cost of Staff Review	\$ 65,962	\$ 269,843	\$ 1,209,738	\$ 85,546	\$ 85,546	\$ 85,546	\$ 85,546	\$ 28,515
Cost of Management Time	\$ 19,393	\$ 19,393	\$ 19,393	\$ 19,393	\$ 19,393	\$ 19,393	\$ 19,393	\$ 19,393
Est Vetting Time Reduction by vendor process	100%	100%	100%	95%	95%	50%	75%	20%
Vetting New Applications	\$ 339,231	\$ 339,231	\$ 339,231	\$ 339,231	\$ 339,231	\$ 169,615	\$ 339,231	\$ 67,846
Support Service Staff labor commitment	\$ 431,181	\$ 655,451	\$ 1,689,335	\$ 455,017	\$ 455,017	\$ 280,851	\$ 450,466	\$ 122,051
<b>Staff Costs SubCost:</b>	<b>\$ 451,861</b>	<b>\$ 733,251</b>	<b>\$ 2,030,459</b>	<b>\$ 540,195</b>	<b>\$ 763,195</b>	<b>\$ 1,459,029</b>	<b>\$ 960,644</b>	<b>\$ 564,229</b>
<b>Total Cost to TAD</b>	<b>\$ 1,189,774</b>	<b>\$ 2,020,174</b>	<b>\$ 5,848,327</b>	<b>\$ 1,153,398</b>	<b>\$ 1,153,398</b>	<b>\$ 1,153,398</b>	<b>\$ 1,153,398</b>	<b>\$ 1,153,398</b>
<b>EST Taxpayer Time Cost new application</b>								
<b>Total Estimated Project Costs</b>	<b>1,641,635</b>	<b>2,753,424</b>	<b>7,878,786</b>	<b>1,693,594</b>	<b>1,916,594</b>	<b>2,612,427</b>	<b>2,114,042</b>	<b>1,717,627</b>

**Staff Conclusion:**

Staff recommends the highest scored response being True Roll’s mid-level offering as the most complete package offering time-saving benefits to the taxpayers and staff. The vendor cost is within the 2025 budget, it saves the district staff time that can be refocused to improve customer response time, and the total estimated project cost is only slightly higher than the base level offering from CoreLogic.

As an alternative staff would recommend the base offering from CoreLogic due to the smallest vendor cost.

**Staff Recommendation:**

**Authorize the Chief Appraiser to negotiate a contract with True Roll to provide homestead exemption audit services at the “intermediate” level in an amount not to exceed \$424,000.**

**Funds are included in the approved FY 2025 Budget**

**Action Item 7(f): Action regarding award of contract for mineral & utility appraisal services**

TAD’s existing mineral, electric and gas utility appraisal services contract with Pritchard & Abbott expires on December 31, 2024. Under this contract, Pritchard & Abbott established market values for all the oil, gas, and other mineral interests and related tangible personal property (encompassing drilling rigs, compressors, storage tanks, gathering pipelines, etc.) and for all the electric and gas utilities (including power plants, transmission lines, distribution systems, etc.) and other multi-locational personal property assets located in Tarrant County. The contract provides for electronically transmitting to TAD mineral values and required account data in TAD-prescribed electronic formats, handling both property owner and leaseholder inquiries and protests before the Appraisal Review Board. For this, in 2024, Pritchard & Abbott’s contracted price was \$285,600.

A request for qualifications (RFQ) was prepared, advertised per policy and documents were distributed to five different appraisal firms. As was requested in 2020, respondents had the option to propose bids to only handle the mineral appraisals, only the utility appraisals or to bid on a combined contract. Bids were requested for a three-year period, with two additional optional years available. Two responses were timely received from **Pritchard & Abbott** and **Capital Appraisal Group**. Wardlaw Appraisal Group, Hugh Landrum and Associates and Thomas Y. Pickett chose not to bid. Both bidders are considered to be well qualified in the area of mineral appraisal and electric and gas utility appraisal and would be good partners. TAD’s staff has examined the two bids and weighed the qualifications, experience, capacity to perform the required tasks, work product to be delivered, among other factors. The most effective comparison was between both firms’ combination bids for mineral and utility services. As for cost, those calculations are as follows:

Over a Five-Year Period:	Pritchard and Abbott:	<b>\$2,066,850</b>
	Capitol Appraisal Group:	<b>\$1,516,000</b>

While both appraisal firms are qualified for the tasks sought and consideration must be given to continuity of service, the overall cost difference holds weight as TAD looks to operate within its budget. The amount denoted in the 2025 budget for these services is \$300,000.

**Staff Recommendation:**

**Authorize the Chief Appraiser to negotiate with Capitol Appraisal Group for the three-year (2025 – 2027) mineral, electric and gas utility appraisal services contract with the option of two additional years (2028 – 2029) per the unit cost rates and not-to-exceed dollar amounts listed here:**

<b>2025: \$297,000</b>	<b>2028: \$306,000</b> (TAD option)
<b>2026: \$300,000</b>	<b>2029: \$310,000</b> (TAD option)
<b>2027: \$303,000</b>	

**Funds are included in the approved FY 2025 Budget**

### **Action Item 7(g): Action regarding award of contract for bank depository services**

Bids were recently sought from financial institutions for designation as the district's depository per 6.09 of the Texas Property Tax Code.

For the past eight years, First Financial Bank has provided TAD's banking depository services. Those services have included, among others, monthly bank statements for TAD's operating account, full collateralization of all TAD deposits, direct deposits of TAD employee paychecks, positive pay fraud protection services, investment opportunities, and other ACH and wire services. Under its agreement with First Financial Bank, TAD maintained a minimum balance to offset all bank fees.

With the expiration of TAD's depository agreement with First Financial Bank, a request for proposals (RFP) was prepared. It was publicly advertised on two separate occasions and on TAD's website. Origin Bank, Inwood National Bank, Frost Bank, JP Morgan Chase Bank and First Financial Bank submitted proposals.

The primary components of the TAD RFP embraced:

- Required banking services, including basic banking services (deposits, withdrawals, monthly statements, etc.), positive pay services (to verify checks before payment to avoid check fraud), ACH capabilities for direct deposits and payments, and ample collateral capabilities to secure TAD's operating and money market accounts;
- Fees and charges for contemplated banking services (including those for both an initial two-year period plus an additional two years, as authorized by the Property Tax Code) plus prospective interest earnings rates; requested were the methods by which TAD could avoid fees altogether either by minimum balances or earned interest credits.
- The bank's financial condition as reflected in both its most recent annual independent audit other independent sources; and
- References from other public sector bank customers.

Following are the conclusions arrived at after reviewing and analyzing each of the five proposals in light of the RFP requirements:

- All five banks can provide the required services, extending to the provision of online banking services;
- All five banks are financially solid and capable of satisfying TAD collateral requirements;
- All five banks have experience with public sector customers;
- All five banks provided no cost proposals when comparing either a Minimum Compensating Balance or Estimated Fees vs Earnings Credit Rates. A number of other areas such as convenience, customer service, options for temporary excess funds, and additional services offered to employees were also considered

Based on the aforementioned analysis, at the end of the process, estimated benefits received do not outweigh the efforts to transition to another institution.



**Staff Recommendation:**

**Staff recommends the Board designate First Financial Bank as the district depository for a two-year term beginning in 2025 and running through 2026 or until its successor is designated and has qualified.**

## **Action Item 7(h): Actions regarding purchase of TreppCRE subscription services**

TreppCRE is a subscription service that provides data, analytics and software technology to the commercial real estate industry for multiple uses. With Trepp, TAD commercial appraisers will have access to both loan information that includes independent property appraisals, history of actual income and expenses, tenant information and current lease terms, lender-indicated cap rate calculations and property-specific performance information for all types of commercial properties in the Texas market. Trepp's data comes from actual income and expense information submitted annually to loan servicers by the owner, as well as the underwriter information and third-party appraisals used internally by the servicer to validate the financials that are being provided and to measure financial stability and loan risk. Trepp also provides market analytical tools and economic reports for measuring and benchmarking metro area real estate performance and trends. TAD will have a powerful data source for income approach modeling, income approach valuation and for support of valuations in the appeals process. This tool will greatly complement and enhance our overall valuation data resource toolset, that already includes CoStar and MLS for the sales approach and Marshall & Swift MVP for the cost approach to value. Additional salient points:

- Trepp is currently partnering with 45 CADs in Texas (from midsize to large CADs)
- The Texas Comptroller has been utilizing Trepp data as a main source when conducting ratio studies. Having this data will assist TAD with the property value study
- Trepp's data is SEC regulated, making their financials 100% accurate outside of fraud. This will give TAD staff more confidence in setting values and when discussing with property owners and agents during the appeals process
- Trepp employs two former assessors with appraisal backgrounds that help with training and advisory engagements
- Trepp's portfolio analytics tool has been utilized by many jurisdictions as a commercial data repository to store all historical financial data the CAD has on commercial properties. This tool also allows for the CAD to run comp grids and analytics on top of that data including building models within the tool.
- Trepp allows you to access statewide Texas data. The greatly assists in valuing complex properties when comparables within the county might be hard to come by

Trepp has offered two payment options, both of which are extreme discounts from their normal fee:

Option 1: One year of service from January 1, 2025 – December 31, 2025, for \$95,000

Option 2: Five years of service from January 1, 2025 – December 31, 2029, plus a free trial period included from the commencement of the contract through December 31, 2024.

Stub Period: November 8 - December 31, 2024 – FREE

Year 1: January 1 – December 31, 2025 - \$80,000

Year 2: January 1 – December 31, 2026 - \$85,000

Year 3: January 1 – December 31, 2027 - \$95,000

Year 4: January 1 – December 31, 2028 - \$100,000

Year 5: January 1 – December 31, 2029 - \$105,000

Option 2 also includes access for the commercial staff to the Saas product and includes additional model and evidence packet building features.

**Staff Recommendation:**

**Authorize the Chief Appraiser to enter into a contract with Trepp for the TreppCRE subscription service for a 62-month total term (November 2024 – December 2029) at a total cost of \$465,000 and authorize payment for the initial year of TreppCRE service to commence in January 2025 at a cost of \$80,000.**

**Funds are included in the approved FY 2025 Budget**

**Action Item 7(i): Consider and possible action on penalty & interest waiver requests for late allocation payments from taxing entities for good cause**

Per Section 6.06(e), a taxing entity's allocation payment is late if not paid on the date it is due. The Code calls for penalty and interest to apply if not paid in a timely manner. Section 6.06(k) states that for good cause shown, the board of directors may waive the penalty and interest on a delinquent payment. The following entities listed below have asked for consideration from the Board to have their penalty and interest waived. Attached are the requests of the entities. We asked that their requests be made in writing so that we could present them to the Board. Pertinent information regarding the payments is listed below.

City of Grand Prairie – 4<sup>th</sup> quarter allocation was due 10/1/24 and was paid on 10/25/24; penalty & interest notice/invoice was sent 10/10/24 and has not been paid as they are awaiting TAD BOD decision. Total P&I due based on 24 days is \$4,827.46.

HEB ISD – 4<sup>th</sup> quarter allocation was due 10/1/24 and was paid on 10/18/24; penalty & interest notice/invoice was sent 10/10/24 and has not been paid as of 11/1/24. Total P&I based on 17 days is \$12,404.39.

Keller ISD – September allocation was due 9/1/24 and was paid on 9/13/24; penalty & interest notice/invoice was sent 9/13/24 and has not been paid as of 11/1/24. Total P&I based on 12 days is \$5,963.71.

City of Burleson – 4<sup>th</sup> quarter allocation was due on 10/1/24 and was paid on 10/18/24; penalty & interest notice/invoice was sent 10/10/24 and was paid on 10/18/24. Total P&I paid was \$418.02.

Tarrant County – October allocation was due 10/1/24 and was paid on 10/15/24; penalty & interest notice/invoice was sent on 10/10/24 and has not been paid as of 11/1/24. Total P&I based on 14 days \$11,906.95.

**From:** Latifia Coleman <[lcoleman@GPTX.org](mailto:lcoleman@GPTX.org)>

**Sent:** Thursday, October 17, 2024 9:02 AM

**To:** Terrisa Stewart <[TStewart@TAD.org](mailto:TStewart@TAD.org)>

**Cc:** Thao Vo <[tvo@GPTX.org](mailto:tvo@GPTX.org)>

**Subject:** RE: City of Grand Prairie [Penalty & Interest] and [New Contact Information]

Hi Terrisa,

Yes, please request a waiver for the 4<sup>th</sup> quarter penalties. What would you need to begin that process? I've submitted the invoice request for the 4<sup>th</sup> quarter and it is scheduled to be paid by next Friday. Unfortunately, we missed the cut-off for this week. We did not receive the invoice in August as the invoice was dated. I understand that this doesn't absolve us of fault for not paying on time. However, we are asking for some leniency as we have historically had a good payment history. We have the invoice on the radar of the right staff members now and will be more efficient with paying on time.

Thank you,

Latifia M. Coleman, MBA, CPP, CGFO

**Assistant Director**



Management Services Department

300 W. Main St.

Grand Prairie, TX 75050

[lcoleman@gptx.org](mailto:lcoleman@gptx.org)

Office: 972-237-2006

**BOARD OF TRUSTEES**

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**L.O. "Dobie" Williams**  
Deputy Superintendent of Business Operations

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BECKY EWART

DAWN JORDAN-WELLS

October 31, 2024

Tarrant Appraisal District  
Board of Directors  
2500 Handley-Ederville Road  
Fort Worth, TX 76118-6909

To the TAD Board of Directors,

Hurst-Eules-Bedford ISD recently received an invoice for 2024 penalty and interest charges against the 4<sup>th</sup> quarter allocation payment that was due on October 1, 2024. Normally the emailed invoice comes to me, Dobie Williams at [dobiewilliams@hebisd.edu](mailto:dobiewilliams@hebisd.edu). In this instance, I went back and looked through my emails and I had no email from Terrisa Stewart dated August 15, 2024, with the 4<sup>th</sup> quarter allocation invoice attached. What I did find was a reminder email from Terrisa Stewart, dated September 16, 2024, in my SPAM folder. From here, I requested that the our Technology Department search to see if they could locate the August 15, 2024, email and why the September 16, 2024, email reminder went to my SPAM folder. Below is the response I received from our IT Department:

From: **Helpdesk PMC** <[helpdesk@hebisd.edu](mailto:helpdesk@hebisd.edu)>  
Date: Tue, Oct 15, 2024 at 3:43 PM  
Subject: Re: Email from TAD not received on 8/15  
To: Dobie Williams <[DobieWilliams@hebisd.edu](mailto:DobieWilliams@hebisd.edu)>

Hi Mr. Dobie,

As we talked about earlier, you did not receive an email from them on 8/15/2024 (At least no way to be found in your gmail). However, we did find the reminder email from Terrisa Stewart on 9/16/2024. We also checked your SPAM and Filter and there is no setting to send the email to SPAM.

Please let me know if there is anything else I can assist you.

As such, we are requesting that the penalties and interest be waived with good caused based on our previous track record of on-time payments since we did not receive the email on August 15, 2024 with the invoice attached and the September 16, 2024 reminder went to my SPAM folder. Also, for future invoices can you please send them to [accountspayable@hebisd.edu](mailto:accountspayable@hebisd.edu) In addition to my email address [dobiewilliams@hebisd.edu](mailto:dobiewilliams@hebisd.edu) as well as my Administrative Assistant's email [robynwhitney@hebisd.edu](mailto:robynwhitney@hebisd.edu).

Thank you for your consideration of this matter.

A handwritten signature in blue ink that reads "L.O. Williams" with a stylized flourish at the end.

L.O. "Dobie" Williams, RTSBA  
Deputy Superintendent, Business Operations

1849 A Central Drive, Bedford, Texas 76022-6096 817.283.4461 FAX 817.354.3311

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Keller, Texas 76248  
Phone: 817-744-1000  
www.KellerISD.net

October 17, 2024

Tarrant Appraisal District  
Board of Directors

2500 Handley Ederville Rd  
Fort Worth, TX 76118

Re: Request for Waiver of Penalty/Interest Amount

Dear Board of Directors,

I would like to officially request a waiver of penalty and interest in the amount of \$6,515.62 assessed for the September 2024 allocation payment. Our payment was issued on September 13, 2024, nine working days after the due date. All payments for the quarter were received by the quarter end date of September 30.

In light of this, and of the fact that entities were unaware that penalties and interest were beginning to be assessed, I respectfully request that Keller ISD be granted a waiver of the P&I for this month only. Now that we are aware of the new requirements, we will ensure that all payments are received by TAD prior to the due date.

Sincerely,

Kristin Williams, CPA, CGFO  
Keller ISD  
Director of Finance



Vicki Cummings  
Accounting Coordinator

City of Burleson  
141 W Renfro St.  
Burleson, TX, 76028  
[vcummings@burlesontx.com](mailto:vcummings@burlesontx.com)  
817-426-9658

November 1, 2024

Dear Tarrant Appraisal District Board,

We hope this message finds you well. We are writing to request to waive the Penalty & Interest. Please consider our request at your next board meeting.

Previous supervisors who oversaw the accounts payable process, including the former Director of Finance, Assistant Finance Director, Controller, and Chief Accountant, are no longer with the department. During this period of unordinary transition that impacted prior review processes, the invoice was unintentionally overlooked.

We would like the opportunity to waive the P&I and to continue our long-standing good-faith relationship between Burleson and the Tarrant Appraisal District. We are committed to ensuring that our payments meet the required standards. Thank you for your consideration.

Sincerely,

Vicki Cummings



**Item 8: Recess to Executive/Closed Session Pursuant to the Following Part(s) of the Texas Open Meetings Act Government Code Ch. 551, for the Following Purposes:**

Section 551.076 – Deliberation regarding the deployment, or specific occasions for implementation, of security personnel or devices related to Board of Directors meetings

Section 551.074 – Deliberation on the upcoming annual job performance evaluation of the chief appraiser

**Item 9: Return to Open Session for Possible Action on Items Deliberated on in Executive/Closed Session:**

Reconvene in open session for possible further discussion and possible action on items deliberated in executive session related to the deployment, or specific occasions for implementation, of security personnel or devices related to Board of Directors meetings