



UG-98-2025-30611

**BEXAR APPRAISAL DISTRICT
MEETING OF THE BOARD OF DIRECTORS
AGENDA**

DATE OF MEETING: April 8, 2025
PLACE OF MEETING: 411 N. Frio St.; San Antonio, TX 78207
TIME OF MEETING: 2:00 pm

* PUBLIC COMMENTS MAY BE SUBMITTED BY EMAIL TO bod@bcad.org NO LATER THAN 8:00 A.M. THE MORNING OF THE MEETING, OR IN PERSON BY REGISTERING BY NAME ON THE SIGN-IN SHEET BY THE DOOR OF THE MEETING. COMMENTS RECEIVED TIMELY BY EMAIL WILL BE READ INTO THE RECORD DURING THE PUBLIC COMMENT PORTION OF THE MEETING. THE BOARD OF DIRECTORS INVITES PUBLIC COMMENT; HOWEVER, THE PUBLIC MUST BE AWARE THAT A SUBJECT RAISED BY A MEMBER OF THE PUBLIC CANNOT BE DELIBERATED OR DISCUSSED BY THE BOARD IF IT IS NOT ON THE AGENDA FOR THE MEETING AT WHICH THE SUBJECT IS RAISED. DISCUSSIONS OF SPECIFIC PROPERTIES WILL NOT BE PERMITTED.

THE PUBLIC MAY ACCESS THIS MEETING AT:

<https://zoom.us/j/99366434092?pwd=Wa6mEk4G5BpsPpH7XD4w8kByXqgLoZ.1>

Meeting ID: 993 6643 4092
Passcode: 960768

AGENDA

THE FOLLOWING ITEMS MAY BE CONSIDERED AT ANY TIME DURING THE MEETING OF THE BOARD OF DIRECTORS

PROCEDURAL

A. Meeting called to order by Dave Gannon, Chair

Recording of present directors

B. Public Comments Period (*Jimmy Saiz, Executive Assistant*)

Comments received timely by email will be read into the record at this time. Individuals wishing to address the board have three minutes to speak. The chair may grant additional time.

ACTION ITEMS

C. Minutes (*Jimmy Saiz, Executive Assistant*)

1. Approval of the minutes of the board meeting of March 18, 2025.

D. Expenditure – CAMA Enhancement (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the budgeted expenditure for CAMA program enhancements.

EXECUTIVE SESSION

E. Adjourn to Executive Session (*Rogelio Sandoval, Chief Appraiser*)

At any time during the meeting of the board of directors, the board may retire into closed Executive Session pursuant to Texas Government Code, Sections 551.071, 551.072, 551.074 & 551.076 to discuss any of the following:

1. Section 551.071 Consultation with attorney regarding pending or contemplated litigation, settlement offers, or about matters which the attorney is required to consult with the board. As authorized by this section, this meeting may be convened in closed Executive Session for the purpose of seeking confidential legal advice from the board's legal counsel on any item listed herein.
2. Section 551.072 Deliberations regarding real property.
3. Section 551.074 Personnel matters; to deliberate the appointment, employment, evaluation, reassignment duties, discipline, or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee.
4. Section 551.076 Deliberations regarding Security Devices.

Upon reconvening into open session, the board of directors may consider and/or vote upon any item discussed in closed Executive Session.

REPORTS

F. Chief Appraiser's Report

The board of directors will receive the following reports from the chief appraiser:

1. Financial Condition (*Crystal Khantharoth, Finance Director*)
 - a. Funds investment report for January and February 2025
 - b. Statement of revenues and expenses through February 28, 2025

c. Designated cash funds report through February 28, 2025

2. Appraisal Records *(Tommy Allison, Assistant Chief Appraiser)*

- a. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2025 appraisal roll.
- b. Presentation of appraisal roll correction report for the first quarter of the 2025 tax year as authorized by Section 25.25(b), Texas Tax Code.

3. District Operations *(Laura McCloud, Human Resource Director)*

- a. The chief appraiser will inform the board of the district's national recognition for the Top Workplaces USA Award for 2025.

G. Additional Reports

The board of directors will receive the following reports:

1. Community Engagement *(Jennifer Rodriguez, Communications Director)*
2. Taxpayer Liaison *(L. Christopher White, Taxpayer Liaison)*
3. Appraisal Review Board *(Daniel George, Appraisal Review Board Chair)*

H. Adjourn FILE INFORMATION

Document Number: 30611
Date/Time: 4/3/2025 3:42:50 PM
Total Pages: 3
FILED IN THE OFFICIAL PUBLIC
RECORDS OF BEXAR COUNTY
LUCY ADAME - CLARK
BEXAR COUNTY CLERK
Total Fees: \$2.00



Rogelio Sandoval
Chief Appraiser
Bexar Appraisal District

** The Board of Directors invites comments from the public about the policies and procedures of the Bexar Appraisal District, the Appraisal Review Board or other matters within the Board's jurisdiction. If you wish to address the Board but do not speak English and cannot bring your own interpreter or have limitations due to a physical disability, please notify the Taxpayer Liaison Officer in writing at the address above at or by fax at 210-242-2451 prior to the meeting in order for arrangements to be made to accommodate your needs.*

**La junta de directores invita los comentarios del público acerca de las políticas y procedimientos del distrito de evaluación de Bexar, de la junta de revisión de evaluación o de otros asuntos de jurisdicción de la junta. Si usted desea dirigir a la junta, pero no habla inglés y no puede traer su propio intérprete o tiene limitaciones debido a una discapacidad física, por favor notificar al oficial de enlace del contribuyente por escrito a la dirección anterior o por fax al 210-242-2451 antes de la reunión para que se hagan arreglos y satisfacer sus exigencias.*

BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS MEETING
APRIL 8, 2025
INDEX

<u>ISSUE</u>	<u>TAB</u>
Meeting called to order	A
Public Comments Period	B
Minutes	C
Expenditure – CAMA Enhancement	D
Adjourn to Executive Session	E
Chief Appraiser's Report	F
Additional Reports	G
Adjourn	H

STAFF SUMMARY SHEET

ISSUE: Meeting called to order by Dave Gannon, Chair

Meeting called to order and recording of present directors.

STAFF SUMMARY SHEET

ISSUE: Public Comments Period

Comments received timely by email will be read into the record at this time. Individuals wishing to address the board have three minutes to speak. The chair may grant additional time.

STAFF SUMMARY SHEET

ISSUE: Minutes

1. Approval of the minutes of the board meeting of March 18, 2025.

**MINUTES OF THE MEETING OF THE
BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS
MARCH 18, 2025**

The Board of Directors of the Bexar Appraisal District met for a meeting at 411 N. Frio in San Antonio, Texas on March 18, 2025 at 6:00 p.m. The items of business were acted upon as shown in the following minutes.

A. Call to Order

Mr. Dave Gannon, Board Chair, called the meeting to order at 6:02 pm and acknowledged the presence of the following directors:

Dr. Ralph Barksdale
Mr. Robert Bruce
Mr. Jon Fisher arrived at 6:02 pm
Councilwoman Adriana Rocha Garcia
Ms. Erika Hizel
Ms. Naomi Miller
Mr. Albert Uresti

B. Statement of Eligibility

Mr. Gannon stated the Statement of Eligibility was an annual requirement which confirmed specific qualifications for service on the board are met by each board member. He continued stating the statement of eligibility would require a signature.

C. Public Comments Period

There were no members of the public present.

D. Minutes

Mr. Gannon asked for a motion to approve the minutes of the January 14th meeting as written. Councilwoman Garcia approved the minutes. Dr. Barksdale seconded the motion which was unanimously approved.

E. Budget Ad-Hoc Committee

Mr. Rogelio Sandoval, Chief Appraiser, informed the board that the district is preparing the preliminary budget and would like the board to consider appointing a budget ad hoc committee.

Mr. Gannon asked for volunteers to serve on the budget ad-hoc committee. Dr. Barksdale and Ms. Miller volunteered to serve as committee members alongside Mr. Gannon.

Mr. Gannon asked for a motion to approve the budget ad-hoc committee. Councilwoman Garcia approved the motion. Mr. Fisher seconded the motion which was unanimously approved.

F. Adjourn to Executive Session

1. Section 551.071 Consultation with attorney regarding pending or contemplated litigation, settlement offers, or about matters which the attorney is required to consult with the board. As authorized by this section, this meeting may be convened in closed Executive Session for the purpose of seeking confidential legal advice from the board's legal counsel on any item listed herein. The Chief Appraiser will update the board on recent litigation.
2. Section 551.072 Deliberations regarding real property.
3. Section 551.074 Personnel matters; to deliberate the appointment, employment, evaluation, reassignment duties, discipline, or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee. The board of directors may discuss the Chief Appraiser 2024 performance evaluation and/or vote to amend the current contract.
4. Section 551.076 Deliberations regarding Security Devices.

Upon reconvening into open session, the board of directors may consider and/or vote upon any item discussed in closed Executive Session.

The board adjourned into executive session at 6:06 pm and reconvened at 6:42 pm.

Mr. Gannon stated the board had discussed the performance review for the Chief Appraiser and asked for a motion to approve an adjustment of compensation for the new calendar year.

Councilwoman Garcia moved to increase the Chief Appraiser's salary of 2%. Dr. Barksdale seconded the motion which was unanimously approved.

G. Discussion Item (Erika Hizek, Board Member)

The board of directors discussed the independent study on appraisal values in Bexar County.

Ms. Hizek addressed the board stating that Texas A&M had provided information regarding how major cities dealt with mass appraisal. A district provided map of the 2024 Appeals was displayed to compare parcels appealed by owner, and by agent throughout different areas within Bexar County. Statistics from Urban3's Economics of Community Development study was also discussed specifically referencing pages 22 and 24 on median sales price and zip code comparison.

Discussion continued among board members regarding home values, accessibility to appeal, and active community engagement events to make the public aware of the appeal process.

H. Discussion Item (Erika Hizek, Board Member)

Mr. Sandoval addressed the board regarding House Bill 27.86 filed by Representative Chris Turner from Tarrant County which would require an annual reappraisal by all appraisal districts.

Discussion among board members continued regarding House Bill 27.86.

I. Chief Appraiser's Report

1. Financial Condition

Ms. Crystal Khantharoth, Finance Director, presented the board with the Funds Investment Report from December 2024 financials. As of December 31, 2024, total deposits were \$11,579,075.28. Year to date interest earned \$288,308.02 and the district is over collateralized by \$6,121,484.46. Total revenues collected \$26,271,388 with a surplus of \$823,483.00. She stated that there had been several changes to the allocated funds in the reserve accounts.

Ms. Hizek asked if the surplus was in the reserve accounts. Ms. Khantharoth confirmed that part of the surplus amount did go into the reserve accounts and the remaining unaudited amount of \$823,483.00 would be returned to the taxing units in June.

Ms. Hizek asked what was in the reserve accounts. Ms. Khantharoth confirmed that the district had added \$477,000.00 to the General Restricted Fund for a balance of \$4,000,000.00, \$560,000.00 to the General Restricted Election for a balance of \$625,415.87, \$65,000.00 to Digital Orthophotography for a balance of \$165,000.00, \$175,000.00 to the Litigation Expenses for a balance of \$875,000.00, \$275,000.00 to the Retirement Fund for a total of \$387,654.16 and \$100,000.00, to the Technology Fund for a total of \$375,000.00.

2. Appraisal Records

Mr. Tommy Allison, Assistant Chief Appraiser, updated the board on: the preliminary findings of the Property Value Study, the preparation of the appraisal roll for the mailing of notices of appraised value, the conclusion of field activities, and continue to maintain a 30-day processing window of ownership records and exemption processing.

Mr. Uresti confirmed that April 11th will be the start date for the mailing of notices and asked when the mailing would be completed. Mr. Sandoval answered they would be all be mailed out in June adding the first mail-out would be Residential, then Business Personal Property, and any remaining accounts with ownership changes or other updates.

J. Additional Reports

1. Community Engagement

Ms. Jennifer Rodriguez, Communications Director, presented a new report to the board which includes Community Interaction Statistics from the Customer Information and Assistance Department, specifically outlining call volume and in person counter activity along with the 2025 Community Engagement Report for February through March.

K. Adjourn

Mr. Gannon asked for a motion to adjourn. Mr. Fisher moved to adjourn. Councilwoman Garcia seconded the motion which was unanimously approved.

There being no further business, the March 18, 2025, board of directors meeting adjourned at 7:29 pm.

Chair

Secretary

Date

STAFF SUMMARY SHEET

ISSUE: Expenditure – CAMA Enhancement

The board of directors may discuss and/or vote to authorize the budgeted expenditure for CAMA program enhancements.

STAFF SUMMARY SHEET

ISSUE: Adjourn to Executive Session

At any time during the meeting of the board of directors, the board may retire into closed Executive Session pursuant to Texas Government Code, Sections 551.071, 551.072, 551.074 & 551.076 to discuss any of the following:

1. Section 551.071 Consultation with attorney regarding pending or contemplated litigation, settlement offers, or about matters which the attorney is required to consult with the board. As authorized by this section, this meeting may be convened in closed Executive Session for the purpose of seeking confidential legal advice from the board's legal counsel on any item listed herein.
2. Section 551.072 Deliberations regarding real property.
3. Section 551.074 Personnel matters; to deliberate the appointment, employment, evaluation, reassignment duties, discipline, or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee.
4. Section 551.076 Deliberations regarding Security Devices.

Upon reconvening into open session, the board of directors may consider and/or vote upon any item discussed in closed Executive Session.

STAFF SUMMARY SHEET

ISSUE: Chief Appraiser's Report

The board of directors will receive the following reports from the chief appraiser:

1. Financial Condition

- a. Funds investment report for January and February 2025
- b. Statement of revenues and expenses through February 28, 2025
- c. Designated cash funds report through February 28, 2025

2. Appraisal Records

- a. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2025 appraisal roll.
- b. Presentation of appraisal roll correction report for the first quarter of the 2025 tax year as authorized by Section 25.25(b), Texas Tax Code.

3. District Operations

- a. The chief appraiser will inform the board of the district's national recognition for the Top Workplaces USA Award for 2025.

BEXAR APPRAISAL DISTRICT
Funds Investment Report
1/31/2025

Cash - Operating Account	\$	2,228,297.38	<u>% RATE</u>	
	\$	10,529,587.33	0%	
Total Deposits	\$	12,757,884.71	3.17%	

Other Rate Comparisons	
<u>TexPool</u>	<u>90 day T-Bill</u>
4.39%	4.26%

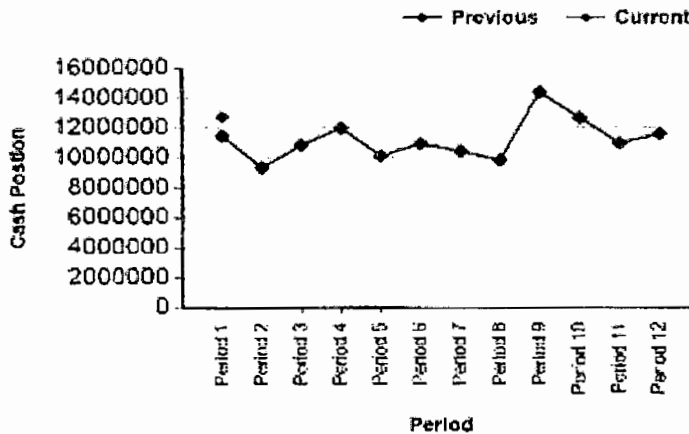
Pledged Collateral:				
FDIC	\$	250,000.00	Year-To-Date Interest Earned	\$ 25,308.24
FMV	\$	17,472,310.37		
Total Collateral	\$	17,722,310.37		

Collateral Over (Under)	\$	4,964,425.66	137% FMV Less FDIC per investment Policy
-------------------------	----	--------------	--

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 12,757,884.71	\$ 11,579,075.00	\$ 1,178,809.71	10.18%
vs. This Period Last Year	\$ 12,757,884.71	\$ 11,457,370.00	\$ 1,300,514.71	11.35%

Cash Position Detail



Signed by: *[Signature]*
Investment Officer for Bexar Appraisal District

This report and the investments represented are in compliance with the District's Investment Policy, GAAP, and the Public Funds Investment Act, Chapter 2256, Government Code.

Most recent 10 hour training course completed:

September 2024 with TAAO



Bexar Appraisal District

Balance Sheet

As of 1/31/2025

	<u>November</u>	<u>December</u>	<u>January</u>
ASSETS			
Cash and Short Term Investments	\$10,963,108.22	\$11,579,075.28	\$12,757,884.71
Accounts Receivable	(1,273.00)	4,653,677.00	737,115.00
Prepaid Expenses	68,922.40	39,134.53	39,134.53
Total Current Assets	11,030,757.62	16,271,886.81	13,534,134.24
General Fixed Assets	4,636,800.67	4,705,717.95	4,705,717.95
Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Non-Current Portion Sick & Vacation	1,333,236.29	1,370,292.72	1,370,292.72
Total Non- Current Assets	11,719,576.09	11,825,549.80	11,825,549.80
Total Assets	22,750,333.71	28,097,436.61	25,359,684.04
LIABILITIES			
Accounts Payable	239,896.18	422,674.92	363,651.73
Total Current Liabilities	239,896.18	422,674.92	363,651.73
Non-Current Sick & Vacation Accrual	1,333,236.29	1,370,292.72	1,370,292.72
Total Liabilities	1,573,132.47	1,792,967.64	1,733,944.45
Equity			
Investment in Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Investment in Fixed Assets	4,636,800.67	4,705,717.95	4,705,717.95
General Restricted Reserve Fund	3,523,000.00	4,000,000.00	4,000,000.00
Designated - Digital Orthophotography	100,000.00	165,000.00	165,000.00
Designated - Litigation Expenses	700,000.00	875,000.00	875,000.00
Designated - Retirement Funding	112,654.16	387,654.16	387,654.16
Designated - Technology Reserve	275,000.00	375,000.00	375,000.00
Designated - Homestead Audit/ Outreach	220,000.00	220,000.00	220,000.00
Designated - Building Upgrades	143,630.00	143,630.00	143,630.00
Designated - Roof Reserve	105,214.00	105,214.00	105,214.00
Designated- Election	65,415.87	625,415.87	625,415.87
Reserved for Building - Capital	1,000,000.00	1,000,000.00	1,000,000.00
Reserved for COLA Retention	96,891.28	96,891.28	96,891.28
Unreserved Funds	0.00	0.00	823,482.58
Net Profit/(Loss)	4,449,056.13	823,482.58	4,353,194.62
Total Equity	21,177,201.24	19,272,544.97	23,625,739.59
Total Liabilities and Equity	\$22,750,333.71	\$21,065,512.61	\$25,359,684.04

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the One Month Ending 1/31/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>TAXING UNITS</u>					
Alamo Community College District	\$2,080,156	\$520,039	\$520,039	(25%)	\$1,560,117
City of Alamo Heights	46,354	11,589	11,589	(25%)	34,765
Alamo Heights ISD	455,556	113,889	113,889	(25%)	341,667
City of Balcones Heights	12,292	3,073	3,073	(25%)	9,219
Bexar County	3,551,910	887,978	887,978	(25%)	2,663,932
Bexar County Emer Serv Dist#1	10,773	2,693	2,693	(25%)	8,080
Bexar County Emer Serv Dist#2	87,927	21,982	21,982	(25%)	65,945
Bexar County Emer Serv Dist#3	46,270	11,568	11,568	(25%)	34,702
Bexar County Emer Serv Dist#5	23,205	5,801	5,801	(25%)	17,404
Bexar County Emer Serv Dist#6	9,760	2,440	2,440	(25%)	7,320
Bexar County Flood	310,305	77,576	77,576	(25%)	232,729
Bexar County Emer Serv Dist#7	36,482	9,121	9,121	(25%)	27,361
Bexar County Emer Serv Dist#8	12,348	3,087	3,087	(25%)	9,261
Bexar County Emer Serv Dist#4	17,467	4,367	4,367	(25%)	13,100
Bexar County Emer Serv Dist#10	16,033	4,008	4,008	(25%)	12,025
Boerne ISD	193,744	48,436	48,436	(25%)	145,308
Bexar County Emer Serv Dist#11	12,967	3,242	3,242	(25%)	9,725
Bexar County Emer Serv Dist#12	10,407	2,602	2,602	(25%)	7,805
City of Castle Hills	27,565	6,891	6,891	(25%)	20,674
City of China Grove	2,953	738	738	(25%)	2,215
Cibolo Canyon	51,642	12,911	12,911	(25%)	38,731
Comal ISD	225,809	56,452	56,452	(25%)	169,357
City of Converse	67,732	16,933	16,933	(25%)	50,799
Crosswinds at South Lake SID	6,835	1,709	1,709	(25%)	5,126
East Central ISD	417,753	104,438	104,438	(25%)	313,315
Edgewood ISD	125,450	31,363	31,363	(25%)	94,087
City of Elmendorf	5,682	1,421	1,421	(25%)	4,261
City of Fair Oaks Ranch	27,509	6,877	6,877	(25%)	20,632
Floresville ISD	197	49	49	(25%)	148
City of Grey Forest	394	99	99	(25%)	295
Harlandale ISD	172,985	43,246	43,246	(25%)	129,739
City of Helotes	28,240	7,060	7,060	(25%)	21,180
Hill Country Village	4,050	1,013	1,013	(25%)	3,037
Town of Hollywood Park	20,646	5,162	5,162	(25%)	15,484
Judson ISD	858,879	214,720	214,720	(25%)	644,159
City of Kirby	19,549	4,887	4,887	(25%)	14,662
City of Leon Valley	36,088	9,022	9,022	(25%)	27,066
City of Live Oak	42,557	10,639	10,639	(25%)	31,918
City of Lytle	28	7	7	(25%)	21
Medina Valley ISD	196,866	49,217	49,217	(25%)	147,649
Northeast ISD	2,858,534	714,634	714,634	(25%)	2,143,900
Northside ISD	4,312,398	1,078,097	1,078,097	(25%)	3,234,301
City of Olmos Park	24,696	6,174	6,174	(25%)	18,522
City of San Antonio	4,727,591	1,181,898	1,181,898	(25%)	3,545,693
San Antonio ISD	1,773,058	443,265	443,265	(25%)	1,329,793
San Antonio MUD #1	928	232	232	(25%)	696
San Antonio River Authority	265,694	66,424	66,424	(25%)	199,270
City of Sandy Oaks	4,810	1,203	1,203	(25%)	3,607

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the One Month Ending 1/31/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
City of Schertz	19,267	4,817	4,817	(25%)	14,450
Schertz-Cibolo-Univ City ISD	85,846	21,462	21,462	(25%)	64,384
City of Selma	11,982	2,996	2,996	(25%)	8,986
City of Shavano Park	28,775	7,194	7,194	(25%)	21,581
City of Somerset	5,710	1,428	1,428	(25%)	4,282
Somerset ISD	37,944	9,486	9,486	(25%)	28,458
South San Antonio ISD	182,014	45,504	45,504	(25%)	136,510
Southside ISD	153,465	38,366	38,366	(25%)	115,099
Southwest ISD	438,061	109,515	109,515	(25%)	328,546
City of St. Hedwig	7,454	1,864	1,864	(25%)	5,590
City of Terrell Hills	41,151	10,288	10,288	(25%)	30,863
Universal City	59,631	14,908	14,908	(25%)	44,723
University Health System	3,745,316	936,329	936,329	(25%)	2,808,987
City of Von Ormy	675	169	169	(25%)	506
Westside 211 SID	11,392	2,848	2,848	(25%)	8,544
City of Windcrest	22,587	5,640	5,640	(25%)	16,947
Clear Water Creek SID	113	28	28	(25%)	85
Gates SID	197	49	49	(25%)	148
Stolte Ranch SID	1,294	324	324	(25%)	970
Tally Road SID	1,828	457	457	(25%)	1,371
Westpoint SID	18,114	4,529	4,529	(25%)	13,585
Redbird Ranch	7,313	1,828	1,828	(25%)	5,485
Bexar County Emer Serv Dist#9	2,560	640	640	(25%)	1,920
Tres Laurels SID	56	14	14	(25%)	42
Landon Ridge SID	619	155	155	(25%)	464
Lemon Creek SID	731	183	183	(25%)	548
Briggs Ranch SID	984	246	246	(25%)	738
Sapphire Grove SID	225	56	56	(25%)	169
Grace Gardens SID	84	20	20	(24%)	64
Briggs Ranch II SID	225	56	56	(25%)	169
Medina Stonehill SID	338	85	85	(25%)	253
Boerne Stage Road SID	253	63	63	(25%)	190
Stone Garden SID	225	56	56	(25%)	169
Redbird Ranch Water SID 3	197	49	49	(25%)	148
TOTAL TAX UNIT LEVY	28,127,700	7,031,924	7,031,924	25%	21,095,776
Other Revenues	20,000	44,547	44,547	(223%)	(24,547)
Other Revenues - Information Systems	8,000	219	219	(3%)	7,781
Interest Revenues	20,000	25,308	25,308	(127%)	(5,308)
TOTAL OTHER REVENUES	48,000	70,074	70,074	146%	(22,074)
TOTAL REVENUES COLLECTED	28,175,700	7,101,998	7,101,998	25%	21,073,702

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the One Month Ending 1/31/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	70,000	0	0	0	70,000
Auto Allowance	967,200	75,400	75,400	8%	891,800
Stipend	35,500	2,833	2,833	8%	32,667
Copier Costs	44,194	5,388	5,388	12%	38,806
Copier, FAX, & Printer Supplies	57,450	1,338	1,338	2%	56,112
Employee Recognition/Awards	50,000	0	0	0	50,000
Equipment Maintenance	350	131	131	38%	219
Forms Creation	225,000	0	0	0	225,000
General Insurance	45,000	50,928	50,928	113%	(5,928)
Map Production & Supplies	3,550	0	0	0	3,550
Mileage Reimbursements	4,000	0	0	0	4,000
Office Building Expense	250,000	33,446	33,446	13%	216,554
Offsite Storage	25,000	1,890	1,890	8%	23,110
Office Supplies	97,000	840	840	1%	96,160
Postage	681,157	1,008	1,008	0	680,149
Professional Dues	29,652	5,280	5,280	18%	24,372
Publications	301,819	28,252	28,252	9%	273,567
Security	300,000	13,557	13,557	5%	286,443
Telephone	93,000	5,008	5,008	5%	87,992
Training	266,812	33,919	33,919	13%	232,893
Utilities	125,000	5,524	5,524	4%	119,476
Worker's Compensation	50,000	43,907	43,907	88%	6,093
Contingency	250,000	250,000	250,000	100%	0
TOTAL OPERATING EXPENDITURES	3,971,684	558,649	558,649	14%	3,413,035
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	0	0	1,500
Information Services	500	0	0	0	500
Geographic Info. Systems	500	0	0	0	500
Customer Info & Assist	12,000	0	0	0	12,000
Residential	25,000	0	0	0	25,000
Commercial	3,500	0	0	0	3,500
Personal Property	4,500	0	0	0	4,500
Legal	2,000	0	0	0	2,000
EQUIPMENT:					
Information Services	112,000	3,002	3,002	3%	108,998
CAMA Hardware	30,000	0	0	0	30,000
TOTAL CAPITAL EXPENDITURES	191,500	3,002	3,002	2%	188,498

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the One Month Ending 1/31/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,876,837	986,566	986,566	8%	11,890,271
Salaries, Overtime	171,350	67	67	0	171,283
Retirement	2,150,130	179,783	179,783	8%	1,970,347
Payroll Taxes	32,400	12,953	12,953	40%	19,447
Group Medical Insurance	2,045,466	123,003	123,003	6%	1,922,463
Life Insurance	80,889	4,721	4,721	6%	76,168
Medicare Taxes	201,054	15,623	15,623	8%	185,431
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	16,637	16,637	33%	33,363
Departure Contingency	70,000	16,010	16,010	23%	53,990
TOTAL EMPLOYEE EXPENDITURES	17,953,126	1,355,364	1,355,364	8%	16,597,762
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	10,322	10,322	27%	27,678
Valuation Telecommunications Accounts	40,000	0	0	0	40,000
Election	1,000,000	0	0	0	1,000,000
Accounting & Auditing	50,000	989	989	2%	49,011
Legal Services	1,250,000	65,266	65,266	5%	1,184,734
Consulting Studies	40,000	304	304	1%	39,696
Taxpayer Liasion Officer	39,000	941	941	2%	38,059
Contract Services Contingency	45,800	0	0	0	45,800
Temporary Services	196,000	3,304	3,304	2%	192,696
TOTAL CONTRACT SERV. EXP	2,698,800	81,126	81,126	3%	2,617,674
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	78,600	3,172	3,172	4%	75,428
Software Maintenance	446,835	482,856	482,856	108%	(36,021)
Hardware Maintenance	43,000	3,171	3,171	7%	39,829
IS Supplies	60,000	462	462	1%	59,538
IS Services	25,000	621	621	2%	24,379
TOTAL INFO. SYSTEMS EXP.	653,435	490,282	490,282	75%	163,153
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	250,000	250,000	104%	(10,000)
Homestead Audit /Outreach	10,000	0	0	0	10,000
Field Device Maintenance	226,092	3,942	3,942	2%	222,150
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	100,000	0	0	0	100,000
CAMA Software	693,311	0	0	0	693,311
CAMA Enhancements	150,000	0	0	0	150,000
TOTAL PROJECT EXPENDITURES	1,519,403	253,942	253,942	17%	1,265,461

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the One Month Ending 1/31/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
OTHER EXPENDITURES:					
Board of Directors Expenses	4,000	475	475	12%	3,525
Chief Appraiser Expense	8,000	427	427	5%	7,573
TOTAL OTHER EXPENDITURES	12,000	902	902	8%	11,098
<u>A.R.B EXPENDITURES</u>					
Compensation	900,000	4,765	4,765	1%	895,235
Training	6,920	0	0	0	6,920
Postage	203,832	771	771	0	203,061
Legal Services	65,000	0	0	0	65,000
TOTAL A.R.B EXPENDITURES	1,175,752	5,536	5,536	0	1,170,216
TOTAL EXPENDITURES	28,175,700	2,748,803	2,748,803	10%	25,426,897
REVENUES OVER EXPENDITURES	0	(4,353,195)	(4,353,195)	0	4,353,195

BEXAR APPRAISAL DISTRICT
 STATEMENT OF EXPENDITURES FOR
 DESIGNATED CASH FUNDS (MODIFIED ACCRUAL BASIS)
 FOR THE MONTH ENDED January 31, 2025

		GENERAL RESTRICTED FUND	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 4,000,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 4,000,000.00

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 625,415.87
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 625,415.87

		DESIGNATED - DIGITAL ORTHOPHOTOGRAPHY	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 165,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 165,000.00

		DESIGNATED - LITIGATION EXPENSES	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 875,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 875,000.00

		DESIGNATED - BUILDING CAPITAL	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 1,000,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 1,000,000.00

		DESIGNATED - RETIREMENT FUNDING	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 387,654.16
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 387,654.16

		DESIGNATED - TECHNOLOGY RESERVE	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 375,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 375,000.00

		DESIGNATED - Building Upgrades	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 143,630.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 143,630.00

		DESIGNATED - Roof Reserve	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 105,214.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 105,214.00

		DESIGNATED - Homestead Exemption/Outreach	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 220,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 220,000.00

		DESIGNATED - COLLECTOR	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jan	Balance Forward		\$ 96,891.28
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 96,891.28

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the One Month Ending 1/31/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
TAXING UNITS					
Alamo Community College District	\$2,080,156	\$520,039	\$470,638	\$520,039	\$470,638
City of Alamo Heights	46,354	11,589	10,639	11,589	10,639
Alamo Heights ISD	455,556	113,889	103,161	113,889	103,161
City of Balcones Heights	12,292	3,073	2,889	3,073	2,889
Bexar County	3,551,910	887,978	804,998	887,978	804,998
Bexar County Emer Serv Dist#1	10,773	2,693	2,417	2,693	2,417
Bexar County Emer Serv Dist#2	87,927	21,982	18,847	21,982	18,847
Bexar County Emer Serv Dist#3	46,270	11,568	9,857	11,568	9,857
Bexar County Emer Serv Dist#5	23,205	5,801	4,919	5,801	4,919
Bexar County Emer Serv Dist#6	9,760	2,440	2,133	2,440	2,133
Bexar County Flood	310,305	77,576	70,295	77,576	70,295
Bexar County Emer Serv Dist#7	36,482	9,121	8,079	9,121	8,079
Bexar County Emer Serv Dist#8	12,348	3,087	2,566	3,087	2,566
Bexar County Emer Serv Dist#4	17,467	4,367	3,258	4,367	3,258
Bexar County Emer Serv Dist#10	16,033	4,008	3,374	4,008	3,374
Boerne ISD	193,744	48,436	41,611	48,436	41,611
Bexar County Emer Serv Dist#11	12,967	3,242	2,954	3,242	2,954
Bexar County Emer Serv Dist#12	10,407	2,602	2,178	2,602	2,178
City of Castle Hills	27,565	6,891	6,295	6,891	6,295
City of China Grove	2,953	738	517	738	517
Cibolo Canyon	51,642	12,911	11,628	12,911	11,628
Comal ISD	225,809	56,452	49,024	56,452	49,024
City of Converse	67,732	16,933	14,795	16,933	14,795
Crosswinds at South Lake SID	6,835	1,709	1,189	1,709	1,189
East Central ISD	417,753	104,438	86,563	104,438	86,563
Edgewood ISD	125,450	31,363	30,565	31,363	30,565
City of Elmendorf	5,682	1,421	1,248	1,421	1,248
City of Fair Oaks Ranch	27,509	6,877	6,192	6,877	6,192
Floresville ISD	197	49	39	49	39
City of Grey Forest	394	99	84	99	84
Harlandale ISD	172,985	43,246	40,913	43,246	40,913
City of Helotes	28,240	7,060	6,438	7,060	6,438
Hill Country Village	4,050	1,013	886	1,013	886
Town of Hollywood Park	20,646	5,162	4,647	5,162	4,647
Judson ISD	858,879	214,720	196,543	214,720	196,543
City of Kirby	19,549	4,887	4,363	4,887	4,363
City of Leon Valley	36,088	9,022	8,286	9,022	8,286
City of Live Oak	42,557	10,639	10,057	10,639	10,057
City of Lytle	28	7	7	7	7
Medina Valley ISD	196,866	49,217	41,372	49,217	41,372
Northeast ISD	2,858,534	714,634	657,292	714,634	657,292
Northside ISD	4,312,398	1,078,097	990,611	1,078,097	990,611
City of Olmos Park	24,696	6,174	5,294	6,174	5,294
City of San Antonio	4,727,591	1,181,898	1,079,707	1,181,898	1,079,707
San Antonio ISD	1,773,058	443,265	422,448	443,265	422,448
San Antonio MUD #1	928	232	317	232	317
San Antonio River Authority	265,694	66,424	60,109	66,424	60,109

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the One Month Ending 1/31/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
City of Sandy Oaks	4,810	1,203	756	1,203	756
City of Schertz	19,267	4,817	4,402	4,817	4,402
Schertz-Cibolo-Univ City ISD	85,846	21,462	19,041	21,462	19,041
City of Selma	11,982	2,996	2,779	2,996	2,779
City of Shavano Park	28,775	7,194	6,457	7,194	6,457
City of Somerset	5,710	1,428	1,332	1,428	1,332
Somerset ISD	37,944	9,486	8,215	9,486	8,215
South San Antonio ISD	182,014	45,504	40,131	45,504	40,131
Southside ISD	153,465	38,366	34,695	38,366	34,695
Southwest ISD	438,061	109,515	100,707	109,515	100,707
City of St. Hedwig	7,454	1,864	1,609	1,864	1,609
City of Terrell Hills	41,151	10,288	9,275	10,288	9,275
Universal City	59,631	14,908	13,909	14,908	13,909
University Health System	3,745,316	936,329	905,379	936,329	905,379
City of Von Ormy	675	169	0	169	0
Westside 211 SID	11,392	2,848	2,308	2,848	2,308
City of Windcrest	22,587	5,640	5,093	5,640	5,093
Clear Water Creek SID	113	28	7	28	7
Gates SID	197	49	0	49	0
Stolte Ranch SID	1,294	324	168	324	168
Tally Road SID	1,828	457	213	457	213
Westpoint SID	18,114	4,529	2,417	4,529	2,417
Redbird Ranch	7,313	1,828	1,312	1,828	1,312
Bexar County Emer Serv Dist#9	2,560	640	504	640	504
Tres Laurels SID	56	14	13	14	13
Landon Ridge SID	619	155	116	155	116
Lemon Creek SID	731	183	52	183	52
Briggs Ranch SID	984	246	97	246	97
Sapphire Grove SID	225	56	32	56	32
Grace Gardens SID	84	20	20	20	20
Briggs Ranch II SID	225	56	13	56	13
Medina Stonehill SID	338	85	0	85	0
Boerne Stage Road SID	253	63	0	63	0
Stone Garden SID	225	56	0	56	0
Redbird Ranch Water SID 3	197	49	0	49	0
TOTAL TAX UNIT LEVY	28,127,700	7,031,924	6,463,294	7,031,924	6,463,294
Other Revenues	20,000	44,547	51,342	44,547	51,342
Other Revenues - Information Systems	8,000	219	322	219	322
Interest Revenues	20,000	25,308	22,408	25,308	22,408
TOTAL OTHER REVENUES	48,000	70,074	74,071	70,074	74,071
TOTAL REVENUES COLLECTED	28,175,700	7,101,998	6,537,365	7,101,998	6,537,365

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the One Month Ending 1/31/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	70,000	0	0	0	0
Auto Allowance	967,200	75,400	76,317	75,400	76,317
Stipend	35,500	2,833	1,583	2,833	1,583
Copier Costs	44,194	5,388	2,977	5,388	2,977
Copier, FAX, & Printer Supplies	57,450	1,338	2,245	1,338	2,245
Employee Recognition/Awards	50,000	0	0	0	0
Equipment Maintenance	350	131	0	131	0
Forms Creation	225,000	0	0	0	0
General Insurance	45,000	50,928	42,905	50,928	42,905
Map Production & Supplies	3,550	0	0	0	0
Mileage Reimbursements	4,000	0	34	0	34
Office Building Expense	250,000	33,446	12,727	33,446	12,727
Offsite Storage	25,000	1,890	1,661	1,890	1,661
Office Supplies	97,000	840	7,877	840	7,877
Postage	681,157	1,008	(8,129)	1,008	(8,129)
Professional Dues	29,652	5,280	6,739	5,280	6,739
Publications	301,819	28,252	26,984	28,252	26,984
Security	300,000	13,557	20,912	13,557	20,912
Telephone	93,000	5,008	3,408	5,008	3,408
Training	266,812	33,919	29,653	33,919	29,653
Utilities	125,000	5,524	6,587	5,524	6,587
Worker's Compensation	50,000	43,907	39,527	43,907	39,527
Contingency	250,000	250,000	248,258	250,000	248,258
TOTAL OPERATING EXPENDITURES	3,971,684	558,649	522,264	558,649	522,264
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	0	0	0
Information Services	500	0	0	0	0
Geographic Info. Systems	500	0	0	0	0
Customer Info & Assist	12,000	0	0	0	0
Residential	25,000	0	0	0	0
Commercial	3,500	0	0	0	0
Personal Property	4,500	0	0	0	0
Legal	2,000	0	0	0	0
EQUIPMENT:					
Information Services	112,000	3,002	243	3,002	243
CAMA Hardware	30,000	0	0	0	0
TOTAL CAPITAL EXPENDITURES	191,500	3,002	243	3,002	243

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the One Month Ending 1/31/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,876,837	986,566	1,001,873	986,566	1,001,873
Salaries, Overtime	171,350	67	746	67	746
Retirement	2,150,130	179,783	186,110	179,783	186,110
Payroll Taxes	32,400	12,953	974	12,953	974
Group Medical Insurance	2,045,466	123,003	115,603	123,003	115,603
Life Insurance	80,889	4,721	4,501	4,721	4,501
Medicare Taxes	201,054	15,623	16,338	15,623	16,338
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	16,637	30,052	16,637	30,052
Departure Contingency	70,000	16,010	38,077	16,010	38,077
TOTAL EMPLOYEE EXPENDITURES	17,953,126	1,355,364	1,394,274	1,355,364	1,394,274
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	10,322	10,130	10,322	10,130
Valuation Telecommunications Accounts	40,000	0	0	0	0
Election	1,000,000	0	0	0	0
Accounting & Auditing	50,000	989	922	989	922
Legal Services	1,250,000	65,266	70,135	65,266	70,135
Consulting Studies	40,000	304	304	304	304
Taxpayer Liasion Officer	39,000	941	2,564	941	2,564
Contract Services Contingency	45,800	0	24	0	24
Temporary Services	196,000	3,304	4,296	3,304	4,296
TOTAL CONTRACT SERV. EXP	2,698,800	81,126	88,375	81,126	88,375
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	78,600	3,172	1,371	3,172	1,371
Software Maintenance	446,835	482,856	152,238	482,856	152,238
Hardware Maintenance	43,000	3,171	5,108	3,171	5,108
IS Supplies	60,000	462	1,993	462	1,993
IS Services	25,000	621	437	621	437
TOTAL INFO. SYSTEMS EXP.	653,435	490,282	161,147	490,282	161,147
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	250,000	240,000	250,000	240,000
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	226,092	3,942	171,009	3,942	171,009
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	100,000	0	2,000	0	2,000
CAMA Software	693,311	0	129,396	0	129,396
CAMA Enhancements	150,000	0	0	0	0
TOTAL PROJECT EXPENDITURES	1,519,403	253,942	542,405	253,942	542,405

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the One Month Ending 1/31/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
OTHER EXPENDITURES:					
Board of Directors Expenses	4,000	475	1,233	475	1,233
Chief Appraiser Expense	8,000	427	352	427	352
TOTAL OTHER EXPENDITURES	12,000	902	1,585	902	1,585
A.R.B EXPENDITURES					
Compensation	900,000	4,765	60,805	4,765	60,805
Training	6,920	0	0	0	0
Postage	203,832	771	9,783	771	9,783
Legal Services	65,000	0	0	0	0
TOTAL A.R.B EXPENDITURES	1,175,752	5,536	70,588	5,536	70,588
TOTAL EXPENDITURES	28,175,700	2,748,803	2,780,880	2,748,803	2,780,880
REVENUES OVER EXPENDITURES	0	(4,353,195)	(3,756,485)	(4,353,195)	(3,756,485)

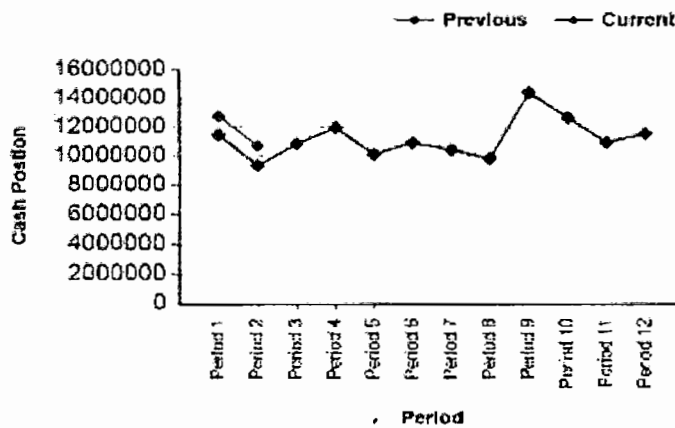
BEXAR APPRAISAL DISTRICT
Funds Investment Report
 2/28/2025

Cash - Operating Account	\$	1,140,317.11	<u>% RATE</u>	0%	Other Rate Comparisons <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">TexPool</td> <td style="text-align: center;">90 day T-Bill</td> </tr> <tr> <td style="text-align: center;">4.35%</td> <td style="text-align: center;">4.24%</td> </tr> </table>	TexPool	90 day T-Bill	4.35%	4.24%
TexPool	90 day T-Bill								
4.35%	4.24%								
	\$	9,552,012.02	2.59%						
Total Deposits	\$	10,692,329.13							
Pledged Collateral:									
FDIC	\$	250,000.00	Year-To-Date Interest Earned	\$ 47,732.93					
FMV	\$	17,538,778.45							
Total Collateral	\$	17,788,778.45							
Collateral Over (Under)	\$	7,096,449.32	164% FMV Less FDIC per investment Policy						

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 10,692,329.13	\$ 12,757,865.00	\$ 2,065,535.87	16.18%
vs. This Period Last Year	\$ 10,692,329.13	\$ 9,332,354.00	\$ 1,359,975.13	14.57%

Cash Position Detail



Signed by: *Cynthia K...*
 Investment Officer for Bexar Appraisal District

This report and the investments represented are in compliance with the District's Investment Policy, GAAP, and the Public Funds Investment Act, Chapter 2256, Government Code.

Most recent 10 hour training course completed: September 2024 with TAAO



Bexar Appraisal District

Balance Sheet

As of 2/28/2025

	<u>December</u>	<u>January</u>	<u>February</u>
ASSETS			
Cash and Short Term Investments	\$11,579,075.28	\$12,757,884.71	\$10,692,329.13
Accounts Receivable	4,653,677.00	737,115.00	737,165.00
Prepaid Expenses	39,134.53	39,134.53	39,134.53
Total Current Assets	16,271,886.81	13,534,134.24	11,468,628.66
General Fixed Assets	4,705,717.95	4,705,717.95	4,705,717.95
Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Non-Current Portion Sick & Vacation	1,370,292.72	1,370,292.72	1,370,292.72
Total Non- Current Assets	11,825,549.80	11,825,549.80	11,825,549.80
Total Assets	28,097,436.61	25,359,684.04	23,294,178.46
LIABILITIES			
Accounts Payable	422,674.92	363,651.73	253,982.67
Total Current Liabilities	422,674.92	363,651.73	253,982.67
Non-Current Sick & Vacation Accrual	1,370,292.72	1,370,292.72	1,370,292.72
Total Liabilities	1,792,967.64	1,733,944.45	1,624,275.39
Equity			
Investment in Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Investment in Fixed Assets	4,705,717.95	4,705,717.95	4,705,717.95
General Restricted Reserve Fund	4,000,000.00	4,000,000.00	4,000,000.00
Designated - Digital Orthophotography	165,000.00	165,000.00	165,000.00
Designated - Litigation Expenses	875,000.00	875,000.00	875,000.00
Designated - Retirement Funding	387,654.16	387,654.16	387,654.16
Designated - Technology Reserve	375,000.00	375,000.00	375,000.00
Designated - Homestead Audit/ Outreach	220,000.00	220,000.00	220,000.00
Designated - Building Upgrades	143,630.00	143,630.00	143,630.00
Designated - Roof Reserve	105,214.00	105,214.00	105,214.00
Designated- Election	625,415.87	625,415.87	625,415.87
Reserved for Building - Capital	1,000,000.00	1,000,000.00	1,000,000.00
Reserved for COLA Retention	96,891.28	96,891.28	96,891.28
Unreserved Funds	0.00	823,482.58	823,482.58
Net Profit/(Loss)	823,482.58	4,353,194.62	2,397,358.10
Total Equity	19,272,544.97	23,625,739.59	21,669,903.07
Total Liabilities and Equity	21,065,512.61	25,359,684.04	23,294,178.46

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Two Months Ending 2/28/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>TAXING UNITS</u>					
Alamo Community College District	\$2,080,156	\$0	\$520,039	(25%)	\$1,560,117
City of Alamo Heights	46,354	0	11,589	(25%)	34,765
Alamo Heights ISD	455,556	0	113,889	(25%)	341,667
City of Balcones Heights	12,292	0	3,073	(25%)	9,219
Bexar County	3,551,910	0	887,978	(25%)	2,663,932
Bexar County Emer Serv Dist#1	10,773	0	2,693	(25%)	8,080
Bexar County Emer Serv Dist#2	87,927	0	21,982	(25%)	65,945
Bexar County Emer Serv Dist#3	46,270	0	11,568	(25%)	34,702
Bexar County Emer Serv Dist#5	23,205	0	5,801	(25%)	17,404
Bexar County Emer Serv Dist#6	9,760	0	2,440	(25%)	7,320
Bexar County Flood	310,305	0	77,576	(25%)	232,729
Bexar County Emer Serv Dist#7	36,482	0	9,121	(25%)	27,361
Bexar County Emer Serv Dist#8	12,348	0	3,087	(25%)	9,261
Bexar County Emer Serv Dist#4	17,467	0	4,367	(25%)	13,100
Bexar County Emer Serv Dist#10	16,033	0	4,008	(25%)	12,025
Boerne ISD	193,744	0	48,436	(25%)	145,308
Bexar County Emer Serv Dist#11	12,967	0	3,242	(25%)	9,725
Bexar County Emer Serv Dist#12	10,407	0	2,602	(25%)	7,805
City of Castle Hills	27,565	0	6,891	(25%)	20,674
City of China Grove	2,953	0	738	(25%)	2,215
Cibolo Canyon	51,642	0	12,911	(25%)	38,731
Comal ISD	225,809	0	56,452	(25%)	169,357
City of Converse	67,732	0	16,933	(25%)	50,799
Crosswinds at South Lake SID	6,835	0	1,709	(25%)	5,126
East Central ISD	417,753	0	104,438	(25%)	313,315
Edgewood ISD	125,450	0	31,363	(25%)	94,087
City of Elmendorf	5,682	0	1,421	(25%)	4,261
City of Fair Oaks Ranch	27,509	0	6,877	(25%)	20,632
Floresville ISD	197	0	49	(25%)	148
City of Grey Forest	394	0	99	(25%)	295
Harlandale ISD	172,985	0	43,246	(25%)	129,739
City of Helotes	28,240	0	7,060	(25%)	21,180
Hill Country Village	4,050	0	1,013	(25%)	3,037
Town of Hollywood Park	20,646	0	5,162	(25%)	15,484
Judson ISD	858,879	0	214,720	(25%)	644,159
City of Kirby	19,549	0	4,887	(25%)	14,662
City of Leon Valley	36,088	0	9,022	(25%)	27,066
City of Live Oak	42,557	0	10,639	(25%)	31,918
City of Lytle	28	0	7	(25%)	21
Medina Valley ISD	196,866	0	49,217	(25%)	147,649
Northeast ISD	2,858,534	0	714,634	(25%)	2,143,900
Northside ISD	4,312,398	0	1,078,097	(25%)	3,234,301
City of Olmos Park	24,696	0	6,174	(25%)	18,522
City of San Antonio	4,727,591	0	1,181,898	(25%)	3,545,693
San Antonio ISD	1,773,058	0	443,265	(25%)	1,329,793
San Antonio MUD #1	928	0	232	(25%)	696
San Antonio River Authority	265,694	0	66,424	(25%)	199,270
City of Sandy Oaks	4,810	0	1,203	(25%)	3,607

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Two Months Ending 2/28/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
City of Schertz	19,267	0	4,817	(25%)	14,450
Schertz-Cibolo-Univ City ISD	85,846	0	21,462	(25%)	64,384
City of Selma	11,982	0	2,996	(25%)	8,986
City of Shavano Park	28,775	0	7,194	(25%)	21,581
City of Somerset	5,710	0	1,428	(25%)	4,282
Somerset ISD	37,944	0	9,486	(25%)	28,458
South San Antonio ISD	182,014	0	45,504	(25%)	136,510
Southside ISD	153,465	0	38,366	(25%)	115,099
Southwest ISD	438,061	0	109,515	(25%)	328,546
City of St. Hedwig	7,454	0	1,864	(25%)	5,590
City of Terrell Hills	41,151	0	10,288	(25%)	30,863
Universal City	59,631	0	14,908	(25%)	44,723
University Health System	3,745,316	0	936,329	(25%)	2,808,987
City of Von Ormy	675	0	169	(25%)	506
Westside 211 SID	11,392	0	2,848	(25%)	8,544
City of Windcrest	22,587	0	5,640	(25%)	16,947
Clear Water Creek SID	113	0	28	(25%)	85
Gates SID	197	0	49	(25%)	148
Stolte Ranch SID	1,294	0	324	(25%)	970
Tally Road SID	1,828	0	457	(25%)	1,371
Westpoint SID	18,114	0	4,529	(25%)	13,585
Redbird Ranch	7,313	0	1,828	(25%)	5,485
Bexar County Emer Serv Dist#9	2,560	0	640	(25%)	1,920
Tres Laurels SID	56	0	14	(25%)	42
Landon Ridge SID	619	0	155	(25%)	464
Lemon Creek SID	731	0	183	(25%)	548
Briggs Ranch SID	984	0	246	(25%)	738
Saphire Grove SID	225	0	56	(25%)	169
Grace Gardens SID	84	0	20	(24%)	64
Briggs Ranch II SID	225	0	56	(25%)	169
Medina Stonehill SID	338	0	85	(25%)	253
Boerne Stage Road SID	253	0	63	(25%)	190
Stone Garden SID	225	0	56	(25%)	169
Redbird Ranch Water SID 3	197	0	49	(25%)	148
TOTAL TAX UNIT LEVY	28,127,700	0	7,031,924	25%	21,095,776
Other Revenues	20,000	0	44,547	(223%)	(24,547)
Other Revenues - Information Systems	8,000	30	249	(3%)	7,751
Interest Revenues	20,000	22,425	47,733	(239%)	(27,733)
TOTAL OTHER REVENUES	48,000	22,454	92,528	193%	(44,528)
TOTAL REVENUES COLLECTED	28,175,700	22,454	7,124,452	25%	21,051,248

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Two Months Ending 2/28/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	70,000	1,359	1,359	2%	68,641
Auto Allowance	967,200	79,627	155,027	16%	812,173
Stipend	35,500	2,833	5,667	16%	29,833
Copier Costs	44,194	3,270	8,658	20%	35,536
Copier, FAX, & Printer Supplies	57,450	1,742	3,080	5%	54,370
Employee Recognition/Awards	50,000	14,190	14,190	28%	35,810
Equipment Maintenance	350	0	131	38%	219
Forms Creation	225,000	15,531	15,531	7%	209,469
General Insurance	45,000	0	50,928	113%	(5,928)
Map Production & Supplies	3,550	0	0	0	3,550
Mileage Reimbursements	4,000	70	70	2%	3,930
Office Building Expense	250,000	11,368	44,814	18%	205,186
Offsite Storage	25,000	2,009	3,899	16%	21,101
Office Supplies	97,000	3,394	4,234	4%	92,766
Postage	681,157	302,502	303,509	45%	377,648
Professional Dues	29,652	690	5,970	20%	23,682
Publications	301,819	10,974	39,226	13%	262,593
Security	300,000	16,014	29,571	10%	270,429
Telephone	93,000	4,869	9,877	11%	83,123
Training	266,812	11,943	45,862	17%	220,950
Utilities	125,000	5,875	11,399	9%	113,601
Worker's Compensation	50,000	(50)	43,857	88%	6,143
Contingency	250,000	0	250,000	100%	0
TOTAL OPERATING EXPENDITURES	3,971,684	488,209	1,046,859	26%	2,924,825
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	0	0	1,500
Information Services	500	0	0	0	500
Geographic Info. Systems	500	0	0	0	500
Customer Info & Assist	12,000	0	0	0	12,000
Residential	25,000	0	0	0	25,000
Commercial	3,500	0	0	0	3,500
Personal Property	4,500	0	0	0	4,500
Legal	2,000	0	0	0	2,000
EQUIPMENT:					
Information Services	112,000	0	3,002	3%	108,998
CAMA Hardware	30,000	0	0	0	30,000
TOTAL CAPITAL EXPENDITURES	191,500	0	3,002	2%	188,498

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Two Months Ending 2/28/2025

	<u>2025</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,876,837	1,005,034	1,991,600	15%	10,885,237
Salaries, Overtime	171,350	1,242	1,309	1%	170,041
Retirement	2,150,130	178,226	358,009	17%	1,792,121
Payroll Taxes	32,400	5,980	18,934	58%	13,466
Group Medical Insurance	2,045,466	80,192	203,195	10%	1,842,271
Life Insurance	80,889	4,896	9,618	12%	71,271
Medicare Taxes	201,054	15,708	31,332	16%	169,722
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	8,621	25,258	51%	24,742
Departure Contingency	70,000	4,164	20,174	29%	49,826
TOTAL EMPLOYEE EXPENDITURES	17,953,126	1,304,064	2,659,428	15%	15,293,698
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	0	10,322	27%	27,678
Valuation Telecommunications Accounts	40,000	0	0	0	40,000
Election	1,000,000	0	0	0	1,000,000
Accounting & Auditing	50,000	2,672	3,661	7%	46,339
Legal Services	1,250,000	57,605	122,871	10%	1,127,129
Consulting Studies	40,000	854	1,158	3%	38,842
Taxpayer Liasion Officer	39,000	0	941	2%	38,059
Contract Services Contingency	45,800	0	0	0	45,800
Temporary Services	196,000	2,452	5,756	3%	190,244
TOTAL CONTRACT SERV. EXP	2,698,800	63,584	144,710	5%	2,554,090
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	78,600	12,356	15,528	20%	63,072
Software Maintenance	446,835	95,359	578,215	129%	(131,380)
Hardware Maintenance	43,000	0	3,171	7%	39,829
IS Supplies	60,000	0	462	1%	59,538
IS Services	25,000	438	1,058	4%	23,942
TOTAL INFO. SYSTEMS EXP.	653,435	108,153	598,435	92%	55,000
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	0	250,000	104%	(10,000)
Homestead Audit /Outreach	10,000	0	0	0	10,000
Field Device Maintenance	226,092	3,946	7,888	3%	218,204
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	100,000	0	0	0	100,000
CAMA Software	693,311	0	0	0	693,311
CAMA Enhancements	150,000	0	0	0	150,000
TOTAL PROJECT EXPENDITURES	1,519,403	3,946	257,888	17%	1,261,515
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	0	475	12%	3,525
Chief Appraiser Expense	8,000	580	1,007	13%	6,993
TOTAL OTHER EXPENDITURES	12,000	580	1,482	12%	10,518

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Two Months Ending 2/28/2025

	<u>2025 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>A.R.B EXPENDITURES</u>					
Compensation	900,000	8,913	13,678	2%	886,323
Training	6,920	0	0	0	6,920
Postage	203,832	843	1,614	1%	202,218
Legal Services	65,000	0	0	0	65,000
<u>TOTAL A.R.B EXPENDITURES</u>	<u>1,175,752</u>	<u>9,756</u>	<u>15,291</u>	<u>1%</u>	<u>1,160,461</u>
<u>TOTAL EXPENDITURES</u>	<u>28,175,700</u>	<u>1,978,291</u>	<u>4,727,094</u>	<u>17%</u>	<u>23,448,606</u>
<u>REVENUES OVER EXPENDITURES</u>	<u>0</u>	<u>1,955,837</u>	<u>(2,397,358)</u>	<u>0</u>	<u>2,397,358</u>

BEXAR APPRAISAL DISTRICT
 STATEMENT OF EXPENDITURES FOR
 DESIGNATED CASH FUNDS (MODIFIED ACCRUAL BASIS)
 FOR THE MONTH ENDED February 28, 2025

		GENERAL RESTRICTED FUND	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 4,000,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 4,000,000.00

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 625,415.87
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 625,415.87

		DESIGNATED - DIGITAL ORTHOPHOTOGRAPHY	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 165,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 165,000.00

		DESIGNATED - LITIGATION EXPENSES	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 875,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 875,000.00

		DESIGNATED - BUILDING CAPITAL	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 1,000,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 1,000,000.00

		DESIGNATED - RETIREMENT FUNDING	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 387,654.16
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 387,654.16

		DESIGNATED - TECHNOLOGY RESERVE	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 375,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 375,000.00

		DESIGNATED - Building Upgrades	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 143,630.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 143,630.00

		DESIGNATED - Roof Reserve	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 105,214.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 105,214.00

		DESIGNATED - Homestead Exemption/Outreach	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 220,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 220,000.00

		DESIGNATED - COA Attention	
DATE	PAYEE	PURPOSE	AMOUNT
28-Feb	Balance Forward		\$ 96,891.28
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 96,891.28

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
 For the Two Months Ending 2/28/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>TAXING UNITS</u>					
Alamo Community College District	\$2,080,156	\$520,039	\$470,638	\$0	\$0
City of Alamo Heights	46,354	11,589	10,639	0	0
Alamo Heights ISD	455,556	113,889	103,161	0	0
City of Balcones Heights	12,292	3,073	2,889	0	0
Bexar County	3,551,910	887,978	804,998	0	0
Bexar County Emer Serv Dist#1	10,773	2,693	2,417	0	0
Bexar County Emer Serv Dist#2	87,927	21,982	18,847	0	0
Bexar County Emer Serv Dist#3	46,270	11,568	9,857	0	0
Bexar County Emer Serv Dist#5	23,205	5,801	4,919	0	0
Bexar County Emer Serv Dist#6	9,760	2,440	2,133	0	0
Bexar County Flood	310,305	77,576	70,295	0	0
Bexar County Emer Serv Dist#7	36,482	9,121	8,079	0	0
Bexar County Emer Serv Dist#8	12,348	3,087	2,566	0	0
Bexar County Emer Serv Dist#4	17,467	4,367	3,258	0	0
Bexar County Emer Serv Dist#10	16,033	4,008	3,374	0	0
Boerne ISD	193,744	48,436	41,611	0	0
Bexar County Emer Serv Dist#11	12,967	3,242	2,954	0	0
Bexar County Emer Serv Dist#12	10,407	2,602	2,178	0	0
City of Castle Hills	27,565	6,891	6,295	0	0
City of China Grove	2,953	738	517	0	0
Cibolo Canyon	51,642	12,911	11,628	0	0
Comal ISD	225,809	56,452	49,024	0	0
City of Converse	67,732	16,933	14,795	0	0
Crosswinds at South Lake SID	6,835	1,709	1,189	0	0
East Central ISD	417,753	104,438	86,563	0	0
Edgewood ISD	125,450	31,363	30,565	0	0
City of Elmendorf	5,682	1,421	1,248	0	0
City of Fair Oaks Ranch	27,509	6,877	6,192	0	0
Floresville ISD	197	49	39	0	0
City of Grey Forest	394	99	84	0	0
Harlandale ISD	172,985	43,246	40,913	0	0
City of Helotes	28,240	7,060	6,438	0	0
Hill Country Village	4,050	1,013	886	0	0
Town of Hollywood Park	20,646	5,162	4,647	0	0
Judson ISD	858,879	214,720	196,543	0	0
City of Kirby	19,549	4,887	4,363	0	0
City of Leon Valley	36,088	9,022	8,286	0	0
City of Live Oak	42,557	10,639	10,057	0	0
City of Lytle	28	7	7	0	0
Medina Valley ISD	196,866	49,217	41,372	0	0
Northeast ISD	2,858,534	714,634	657,292	0	0
Northside ISD	4,312,398	1,078,097	990,611	0	0
City of Olmos Park	24,696	6,174	5,294	0	0
City of San Antonio	4,727,591	1,181,898	1,079,707	0	0
San Antonio ISD	1,773,058	443,265	422,448	0	0
San Antonio MUD #1	928	232	317	0	0

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Two Months Ending 2/28/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
San Antonio River Authority	265,694	66,424	60,109	0	0
City of Sandy Oaks	4,810	1,203	756	0	0
City of Schertz	19,267	4,817	4,402	0	0
Schertz-Cibolo-Univ City ISD	85,846	21,462	19,041	0	0
City of Selma	11,982	2,996	2,779	0	0
City of Shavano Park	28,775	7,194	6,457	0	0
City of Somerset	5,710	1,428	1,332	0	0
Somerset ISD	37,944	9,486	8,215	0	0
South San Antonio ISD	182,014	45,504	40,131	0	0
Southside ISD	153,465	38,366	34,695	0	0
Southwest ISD	438,061	109,515	100,707	0	0
City of St. Hedwig	7,454	1,864	1,609	0	0
City of Terrell Hills	41,151	10,288	9,275	0	0
Universal City	59,631	14,908	13,909	0	0
University Health System	3,745,316	936,329	905,379	0	0
City of Von Ormy	675	169	0	0	0
Westside 211 SID	11,392	2,848	2,308	0	0
City of Windcrest	22,587	5,640	5,093	0	0
Clear Water Creek SID	113	28	7	0	0
Gates SID	197	49	0	0	0
Stolte Ranch SID	1,294	324	168	0	0
Tally Road SID	1,828	457	213	0	0
Westpoint SID	18,114	4,529	2,417	0	0
Redbird Ranch	7,313	1,828	1,312	0	0
Bexar County Emer Serv Dist#9	2,560	640	504	0	0
Tres Laurels SID	56	14	13	0	0
Landon Ridge SID	619	155	116	0	0
Lemon Creek SID	731	183	52	0	0
Briggs Ranch SID	984	246	97	0	0
Sapphire Grove SID	225	56	32	0	0
Grace Gardens SID	84	20	20	0	0
Briggs Ranch II SID	225	56	13	0	0
Medina Stonehill SID	338	85	0	0	0
Boerne Stage Road SID	253	63	0	0	0
Stone Garden SID	225	56	0	0	0
Redbird Ranch Water SID 3	197	49	0	0	0
TOTAL TAX UNIT LEVY	28,127,700	7,031,924	6,463,294	0	0
Other Revenues	20,000	44,547	51,342	0	0
Other Revenues - Information Systems	8,000	249	648	30	327
Interest Revenues	20,000	47,733	24,517	22,425	2,109
TOTAL OTHER REVENUES	48,000	92,528	76,507	22,454	2,436
TOTAL REVENUES COLLECTED	28,175,700	7,124,452	6,539,801	22,454	2,436

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Two Months Ending 2/28/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	70,000	1,359	3,084	1,359	3,084
Auto Allowance	967,200	155,027	153,838	79,627	77,521
Stipend	35,500	5,667	3,165	2,833	1,583
Copier Costs	44,194	8,658	5,972	3,270	2,996
Copier, FAX, & Printer Supplies	57,450	3,080	3,904	1,742	1,660
Employee Recognition/Awards	50,000	14,190	7,234	14,190	7,234
Equipment Maintenance	350	131	0	0	0
Forms Creation	225,000	15,531	37,184	15,531	37,184
General Insurance	45,000	50,928	42,905	0	0
Map Production & Supplies	3,550	0	118	0	118
Mileage Reimbursements	4,000	70	39	70	5
Office Building Expense	250,000	44,814	49,838	11,368	37,112
Offsite Storage	25,000	3,899	3,310	2,009	1,649
Office Supplies	97,000	4,234	15,346	3,394	7,470
Postage	681,157	303,509	360,737	302,502	368,866
Professional Dues	29,652	5,970	7,509	690	770
Publications	301,819	39,226	42,909	10,974	15,926
Security	300,000	29,571	37,606	16,014	16,694
Telephone	93,000	9,877	8,636	4,869	5,228
Training	266,812	45,862	37,662	11,943	8,009
Utilities	125,000	11,399	12,680	5,875	6,093
Worker's Compensation	50,000	43,857	39,527	(50)	0
Contingency	250,000	250,000	248,258	0	0
TOTAL OPERATING EXPENDITURES	3,971,684	1,046,859	1,121,463	488,209	599,200
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	0	0	0
Information Services	500	0	0	0	0
Geographic Info. Systems	500	0	0	0	0
Customer Info & Assist	12,000	0	0	0	0
Residential	25,000	0	0	0	0
Commercial	3,500	0	0	0	0
Personal Property	4,500	0	0	0	0
Legal	2,000	0	0	0	0
EQUIPMENT:					
Information Services	112,000	3,002	243	0	0
CAMA Hardware	30,000	0	0	0	0
TOTAL CAPITAL EXPENDITURES	191,500	3,002	243	0	0

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Two Months Ending 2/28/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,876,837	1,991,600	1,949,175	1,005,034	947,302
Salaries, Overtime	171,350	1,309	5,931	1,242	5,185
Retirement	2,150,130	358,009	357,715	178,226	171,605
Payroll Taxes	32,400	18,934	1,414	5,980	441
Group Medical Insurance	2,045,466	203,195	232,730	80,192	117,127
Life Insurance	80,889	9,618	9,141	4,896	4,640
Medicare Taxes	201,054	31,332	31,401	15,708	15,063
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	25,258	43,770	8,621	13,718
Departure Contingency	70,000	20,174	53,365	4,164	15,288
TOTAL EMPLOYEE EXPENDITURES	17,953,126	2,659,428	2,684,644	1,304,064	1,290,370
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	10,322	10,130	0	0
Valuation Telecommunications Accounts	40,000	0	0	0	0
Election	1,000,000	0	0	0	0
Accounting & Auditing	50,000	3,661	3,532	2,672	2,610
Legal Services	1,250,000	122,871	157,742	57,605	87,607
Consulting Studies	40,000	1,158	1,148	854	844
Taxpayer Liason Officer	39,000	941	3,505	0	941
Contract Services Contingency	45,800	0	48	0	24
Temporary Services	196,000	5,756	13,353	2,452	9,057
TOTAL CONTRACT SERV. EXP	2,698,800	144,710	189,459	63,584	101,084
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	78,600	15,528	16,096	12,356	14,725
Software Maintenance	446,835	578,215	257,486	95,359	105,248
Hardware Maintenance	43,000	3,171	12,015	0	6,907
IS Supplies	60,000	462	1,993	0	0
IS Services	25,000	1,058	1,852	438	1,415
TOTAL INFO. SYSTEMS EXP.	653,435	598,435	289,442	108,153	128,295
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	250,000	240,000	0	0
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	226,092	7,888	175,018	3,946	4,009
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	100,000	0	3,800	0	1,800
CAMA Software	693,311	0	131,198	0	1,802
CAMA Enhancements	150,000	0	0	0	0
TOTAL PROJECT EXPENDITURES	1,519,403	257,888	550,016	3,946	7,612
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	475	1,233	0	0
Chief Appraiser Expense	8,000	1,007	463	580	111
TOTAL OTHER EXPENDITURES	12,000	1,482	1,696	580	111

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Two Months Ending 2/28/2025

	2025 BUDGET	CURRENT YTD	2024 YTD	CURR MONTH	2024 MONTH
<u>A.R.B EXPENDITURES</u>					
Compensation	900,000	13,678	84,003	8,913	23,198
Training	6,920	0	0	0	0
Postage	203,832	1,614	18,835	843	9,052
Legal Services	65,000	0	0	0	0
TOTAL A.R.B EXPENDITURES	1,175,752	15,291	102,837	9,756	32,249
TOTAL EXPENDITURES	28,175,700	4,727,094	4,939,800	1,978,291	2,158,920
REVENUES OVER EXPENDITURES	0	(2,397,358)	(1,600,001)	1,955,837	2,156,484



2025 BOD Appraisal Records Report

As of April 4, 2025, the Bexar Appraisal District (BCAD) reports the following updates on its appraisal operations:

1. Appraisal Notices – 2025 Mailing Update

BCAD has prepared the first-round of 2025 appraisal notice mailings, sending out 393,780 notices out of the 728,138 eligible records. It's anticipated they will hit mailboxes as early as Friday, April 11th. This initial run represents approximately 93% of all 2025 appraisal records.

Context from prior years:

2024 Notices: 548,726

2023 Notices: 685,527

The continued decline in notice volume is a reflection a moderately flat market, coinciding with elevated interest rates and uncertainty in the general economy.

What's left - roughly 47,000 records remain to be processed for notice eligibility, primarily consisting of:

Business Personal Property accounts, which follow the April 15 rendition deadline.

Commercial & Agricultural properties, which are still undergoing final review.

Remaining notices will be scheduled and mailed in two additional batches—one in early May and one in early June (exact dates forthcoming).

2. Overall Appraised Values – Market Overview

For Tax Year 2025, Bexar County's total appraised value is projected to rise by approximately 3.8% year-over-year. This increase is broken down as follows:

2.0% from new construction and additions

1.8% from reappraisal adjustments

In the residential property category, the overall increase is just over 2%, with:

1.5% from new value

0.5% from reappraisal

This moderate growth suggests a stable but subdued market, with isolated areas still showing signs of appreciation.



2025 BOD Appraisal Records Report

Additional market indicators:

Average Sales Price (Real Estate Center at TAMU): Decreased from \$342,034 to \$339,972

Average Market Value of a Homestead: Slight decrease from \$339,289 to \$338,998

Sales Volume: Down 1.8% from the prior year

Months of Inventory: Increased to 4.3 months (a balanced market is considered to be 6 months)

Total Reported Sales: Relatively stable, from 23,950 to 23,672 transactions

3. Preparation for the 2025 Appeal Season

As we transition into the next phase of the appraisal calendar, our team is now shifting its focus toward appeal season preparations. These efforts are critical in supporting transparency, responsiveness, and equitable resolution for property owners.

4. Maintenance of the 30-Day Processing Window

BCAD continues to uphold its commitment to timely service, currently maintaining a 30-day processing window for:

Ownership updates, as deed filings are recorded with the County Clerk

Exemption applications, as submitted by property owners

These updates reflect BCAD's ongoing dedication to delivering fair, accurate, and efficient property valuations. We appreciate the Board's continued support and welcome any questions or discussion.

Bexar County Comparison Statistics

Category	2024 Market Value as of Certification	2025 Market Value As of 4/2/2025	Total % Change	% Change from New Construction	% Change from Reappraisal	Total % Change from 2024 to 2025
Bexar County Total Market Value	\$316,543,776,428	\$328,722,692,352	↑ 3.80%	↑ 2.00%	↑ 1.80%	↑ 3.80%
A - Bexar County Single Family Residential Market Value	\$180,751,887,361	\$184,505,064,293	↑ 2.08%	↑ 1.58%	↑ 0.50%	↑ 2.08%
B - Bexar County Multi-Family Market Value	\$26,277,461,414	\$27,409,614,780	↑ 4.31%	↑ 4.50%	↓ -0.19%	↑ 4.31%
F1 - Bexar County Commercial Market Value	\$52,341,806,036	\$56,361,966,113	↑ 7.68%	↑ 2.58%	↑ 5.10%	↑ 7.68%

County-wide Residential Sales Statistics				Appraised Values		
Bexar County Residential Sale Statistics	Calendar Year 2023 (for 2024 Reappraisal)	Calendar Year 2024 (for 2025 Reappraisal)	% Change	Bexar Co 2024 Average Homestead Value	Bexar Co 2025 Average Homestead Value	% Change
Average Sales Price for Single Family Homes Reported by TAMU	\$342,034	\$339,972	↓ -0.6%	Market Value: \$339,289	Market Value: \$338,998	↓ -0.1%
Total Dollar Volume of Sales in Bexar County Reported by TAMU	\$8,191,737,397	\$8,047,837,941	↓ -1.8%		Taxable Value: \$261,519	Taxable Value: \$271,379
Number of Single Family Home Sales Reported by TAMU	23,950	23,672	↓ -1.2%			
Months of Inventory (6 Months Considered Stable)	3.6	4.3				

Key Takeaways:

Average Sales Price in Bexar County reported by the Real Estate Center at Texas A&M changed from \$342,034 to \$339,972.

The total number of reported sales in Bexar County was nearly static going from 23,950 to 23,672 while the average sales price fell just under 1%.

Sales Total Dollar Volume reported by the Real Estate Center at TAMU was down from the year prior by 1.8%.

Inventory has increased to 4.3 months but 6 months is considered a stable, balanced market.

Average Market Value of a Homestead in Bexar County went from \$339,289 to \$338,998.

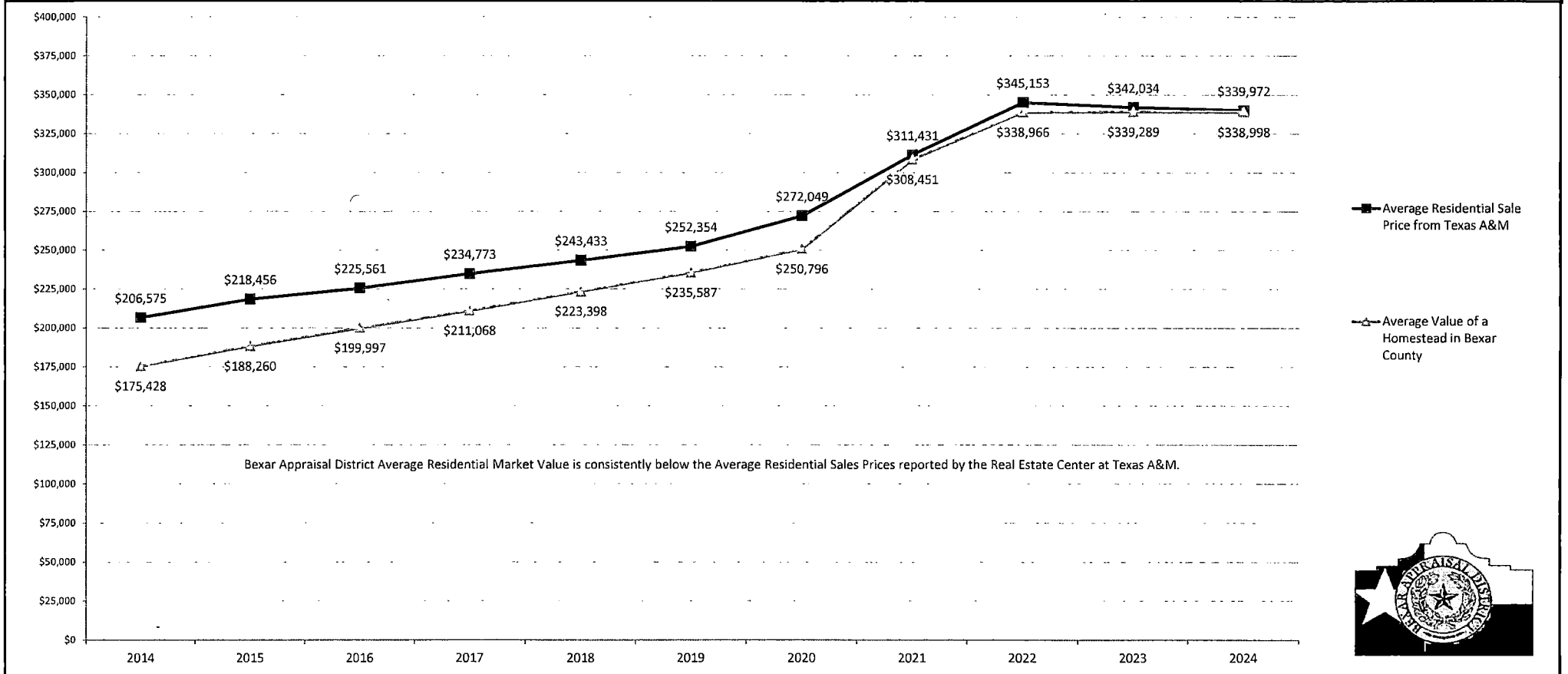
Deadline to Protest is May 15, 2024 OR 30 Days AFTER the Notice is MAILED (Whichever is Later)

Parties may file protests online on the agency's website in the Online Services Portal tab or mail their notice of protest to the district.

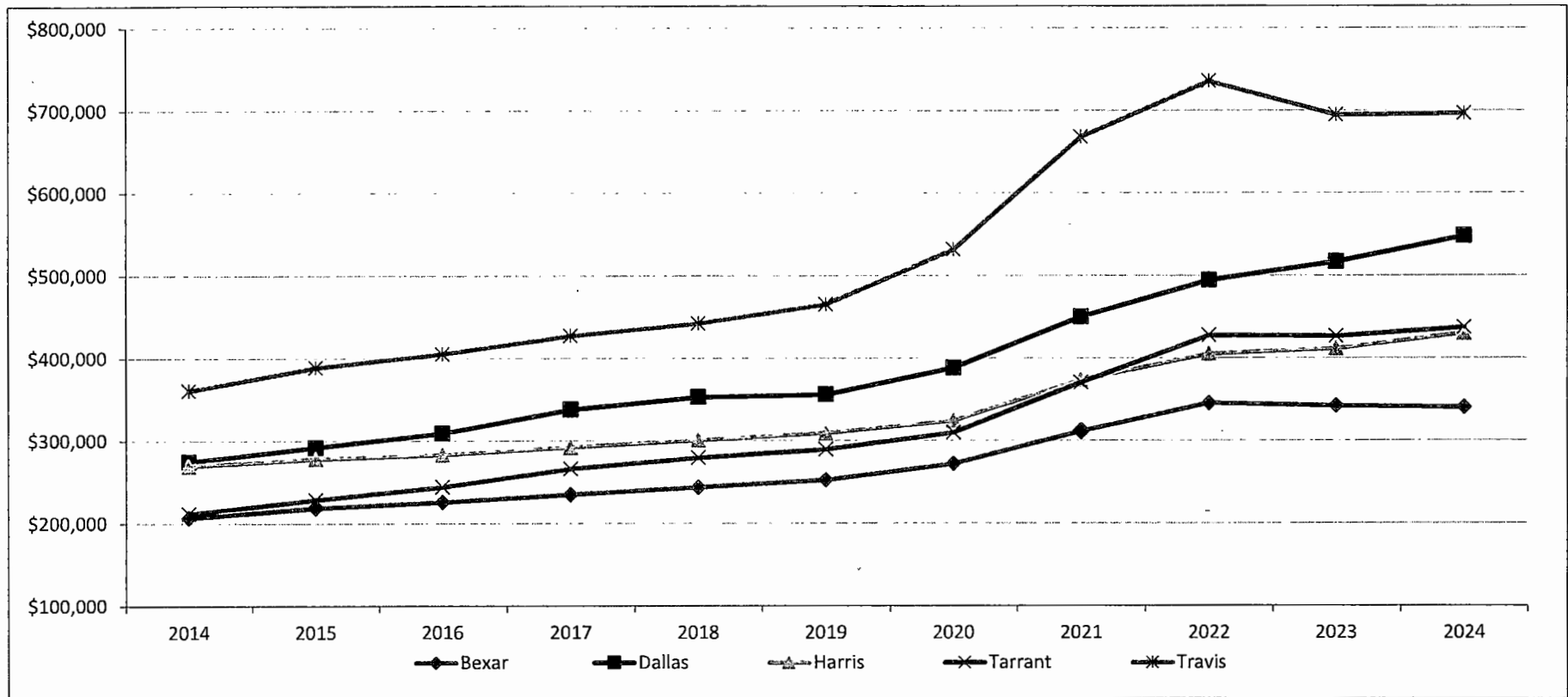


Comparison of the Average Market Value of a Homestead vs. Average Sale Price of a Home in Bexar County

2014 Sale Year for 2015 Appraisal Year		2015 Sale Year for 2016 Appraisal Year		2016 Sale Year for 2017 Appraisal Year		2017 Sale Year for 2018 Appraisal Year		2018 Sale Year for 2019 Appraisal Year		2019 Sale Year for 2020 Appraisal Year		2020 Sale Year for 2021 Appraisal Year		2021 Sale Year for 2022 Appraisal Year		2022 Sale Year for 2023 Appraisal Year		2023 Sale Year for 2024 Appraisal Year		2024 Sale Year for 2025 Appraisal Year	
Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Certified	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead	Average Sale \$ from RE Center at TAMU	Bexar AD Average Market Value of Homestead - Prelim	Average Sale \$ from RE Center at TAMU
\$175,428	\$206,575	\$188,260	\$218,456	\$199,997	\$225,561	\$211,068	\$234,773	\$223,398	\$243,433	\$235,587	\$252,354	\$250,796	\$272,049	\$308,451	\$311,431	\$338,966	\$345,153	\$339,289	\$342,034	\$338,998	\$339,972

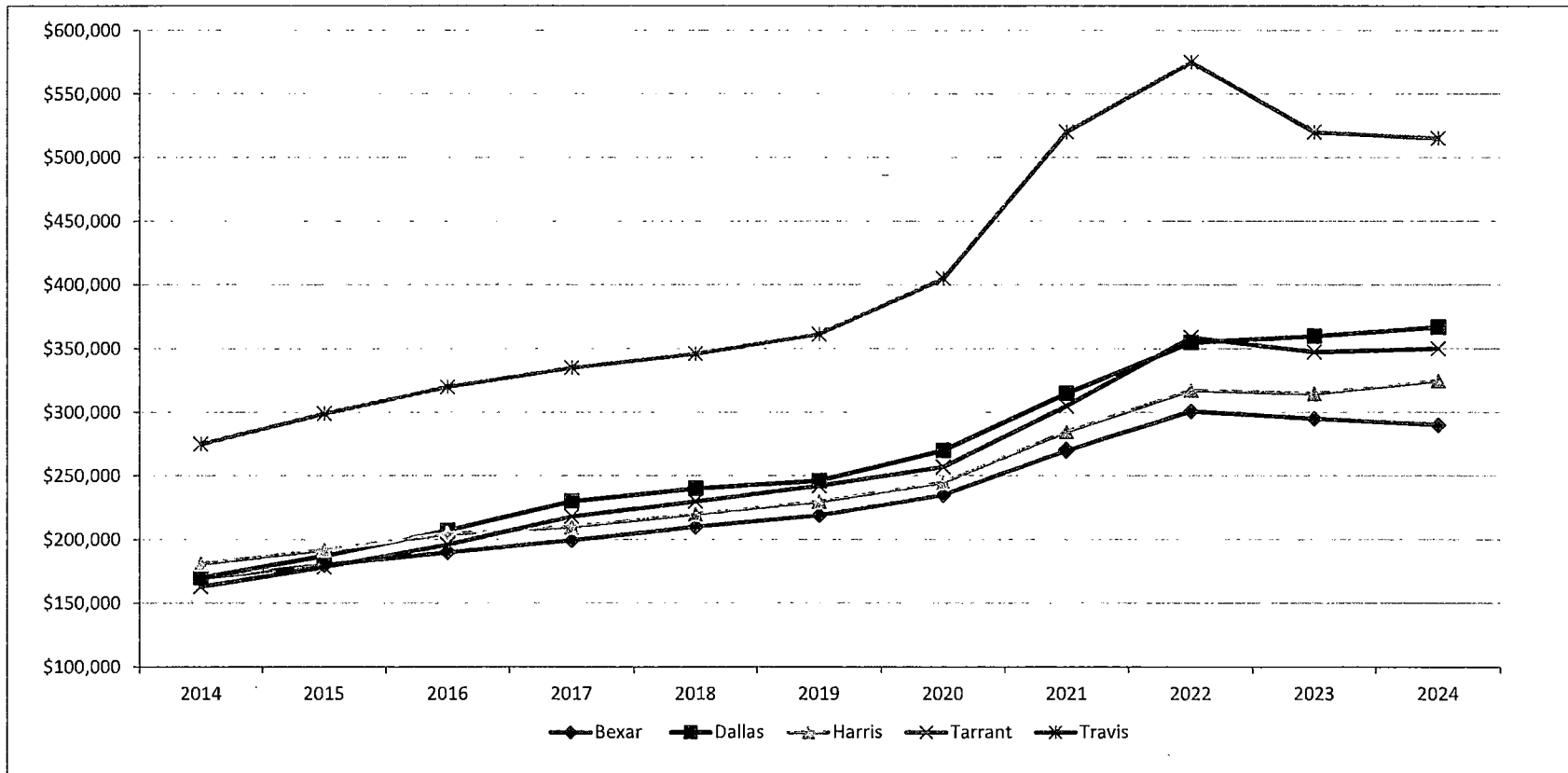


Average Residential Sales Prices by Calendar Year by County



Year	Bexar	Dallas	Harris	Tarrant	Travis
2014	\$206,575	\$274,505	\$269,380	\$211,560	\$360,907
2015	\$218,456	\$291,827	\$278,263	\$228,432	\$389,048
2016	\$225,561	\$308,872	\$283,098	\$244,076	\$405,462
2017	\$234,773	\$337,740	\$292,150	\$265,985	\$427,412
2018	\$243,433	\$352,720	\$300,732	\$279,200	\$442,308
2019	\$252,354	\$355,588	\$309,115	\$289,261	\$465,338
2020	\$272,049	\$388,121	\$324,364	\$309,596	\$531,636
2021	\$311,431	\$450,172	\$373,753	\$370,438	\$667,919
2022	\$345,153	\$494,268	\$405,214	\$427,765	\$735,515
2023	\$342,034	\$516,575	\$411,570	\$426,511	\$694,494
2024	\$339,972	\$547,563	\$430,010	\$436,977	\$696,317

Median Residential Sales Prices by Calendar Year by County

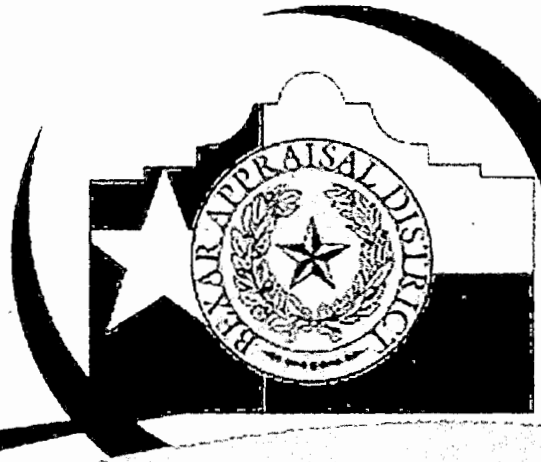


Year	Bexar	Dallas	Harris	Tarrant	Travis
2014	\$170,000	\$170,000	\$181,000	\$163,000	\$275,000
2015	\$180,000	\$187,000	\$192,000	\$178,500	\$299,000
2016	\$190,000	\$207,000	\$204,488	\$196,000	\$320,000
2017	\$199,400	\$230,000	\$210,000	\$218,000	\$335,000
2018	\$210,000	\$240,000	\$220,000	\$230,000	\$346,000
2019	\$219,000	\$246,000	\$229,900	\$242,000	\$361,414
2020	\$235,000	\$270,000	\$245,000	\$257,000	\$405,000
2021	\$270,000	\$315,000	\$285,000	\$305,000	\$520,000
2022	\$300,900	\$355,000	\$317,500	\$359,000	\$575,000
2023	\$295,000	\$359,900	\$315,000	\$347,500	\$520,000
2024	\$290,000	\$367,000	\$325,000	\$350,000	\$515,000

2025 APPEAL DEADLINE AD

THE 2025 PROPERTY VALUE APPEAL DEADLINE IS May 15th

Scan the QR code to submit your appeal online. For more information, visit bcad.org.



Will be featured in:

- SA REPORT
- SAN ANTONIO CURRENT
- SAN ANTONIO OBSERVER
- LA PRENSA
- HEARST MEDIA- EXPRESS-NEWS, MYSA.COM, SOUTHSIDE REPORTER & CONNEXION

Will run in print & digital formats from

**April 6 -
May 11**

Appraisal Records Report

Subject: Quarterly Update on Appraisal Roll Corrections

Under Section 25.25(b) of the Tax Code, the chief appraiser has the authority to make corrections to the appraisal roll to address errors such as incorrect names or addresses, ownership details, property descriptions, multiple appraisals, exemptions, or clerical inaccuracies, provided these changes do not increase tax liability.

By the 10th day after the end of each calendar quarter, the chief appraiser is required to report to the appraisal review board and this board of directors any changes made during that period that resulted in a decrease in a property owner's tax liability.

This ensures transparency and accuracy in the management of the appraisal roll.

**Bexar Appraisal District
25.25B Report**

Prop ID	Geo ID	Legal Description	Owner Name	Year	Sup Num	Sup Date	Code	Supp Action	Supp Description	Beginning Market	Beginning Appraised	Beginning Assessed	Corrected Market	Corrected Appraised	Corrected Assessed	Delete Date

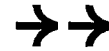
STAFF SUMMARY SHEET

ISSUE: Additional Reports

The board of directors will receive the following reports:

1. Community Engagement
2. Taxpayer Liaison
3. Appraisal Review Board

March 2025 Community Interaction Statistics



- 8,660 - Total Answered Calls
- 79.3% - % Answered
- 12.9% - % Abandoned
- 0:02:30 - Average Speed of Answer
- 0:07:33 - Average Call Duration
- 0:51:10 - Max Longest Wait

Inbound Calls

10,921

Total Presented Calls

Counter Activity

4,079

Total Visitors

- 195 Daily Average
- 0:07:29 - Average Wait Time
- 0:10:24 - Average Service Time

- 868 Total Residents Engaged
- 98.7% Via Web Chat
- 680 Questions Asked
- 306 Messages Submitted

AskECAD Chatbot

1,285

Total Communications

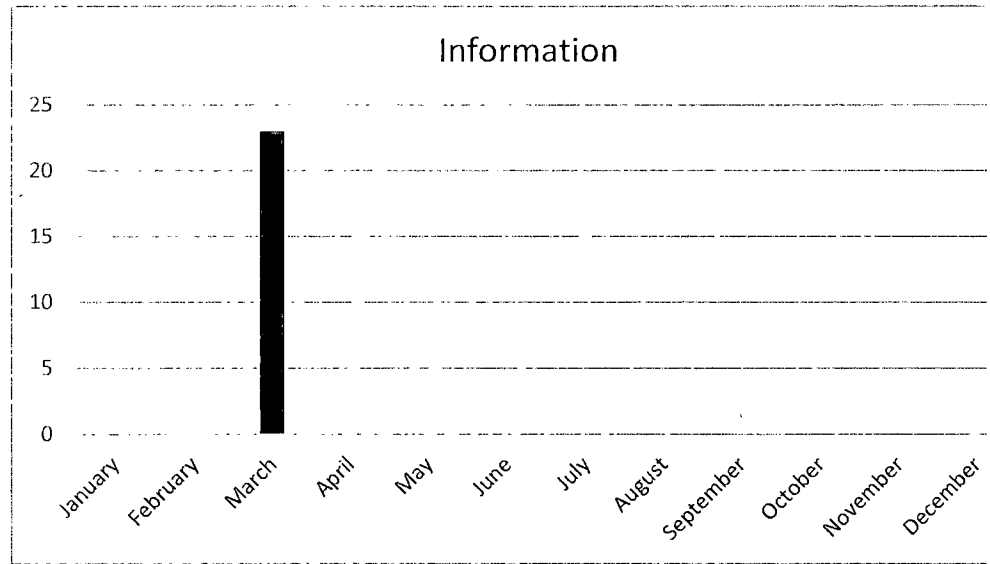
Community Engagement Events

6

Total Events

- Estimated 86 Total Residents Engaged

Month	Information
January	
February	
March	23
April	
May	
June	
July	
August	
September	
October	
November	
December	



Jimmy L. Saiz

From: Tax Payer. Liaison
Sent: Monday, March 31, 2025 12:10 PM
To: Jimmy L. Saiz
Subject: TPL Reports Calendar
Attachments: TPL Reports Calendar.ics; 2025 March Report.xlsx

Good afternoon, Jimmy,

Here is my March report.

Sincerely,

TPL Reports Calendar

Monday, March 3, 2025 – Monday, March 31, 2025

Time zone: (UTC-06:00) Central Time (US & Canada)

(Adjusted for Daylight Saving Time)

March 2025

Su Mo Tu We Th Fr Sa

						1
2	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>
<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	13	14	15
16	17	18	19	20	<u>21</u>	<u>22</u>
<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	29
30	31					

▲ <u>Shaunna Hanover PID: 134797</u>	Mon, Mar 3 to	Wed, Mar 5	8:00 AM – 8:30 AM
<u>Joe Caruso PID: 700743</u>			10:00 AM – 10:30 AM
<u>SGJ Holdings LLC PID: 142156</u>			11:00 AM – 12:30 PM
<hr/>			
▲ <u>Carla martinez PID: 1086341</u>	Tue, Mar 4 to	Tue, Mar 11	8:00 AM – 7:30 AM
<u>Dosheia Carter PID: 1161387</u>			10:00 AM – 10:30 AM
<hr/>			
▲ <u>Alan Taylor (Daurius Cayan) PID: 986140</u>	Thu, Mar 6		9:00 AM – 9:30 AM
<hr/>			
▲ <u>James Wells PID: 1128540</u>	Fri, Mar 7 to	Mon, Mar 10	8:00 AM – 7:30 AM
<u>John Wilson PID: 1037564</u>			9:00 AM – 9:30 AM
<u>Can Alemdar PID: 511360</u>			10:00 AM – 10:30 AM
<u>Joel Juarez PID: 726097</u>	Fri, Mar 7 to	Tue, Mar 11	10:00 AM – 3:30 PM

▲ <u>Sylvia Molina: PID: 1353869</u>	Mon, Mar 10 to Tue, Mar 11	8:00 AM – 2:00 PM
<u>John Mason PID: 346618</u>	Mon, Mar 10 to Tue, Mar 11	9:00 AM – 10:00 AM
<u>Jessica An Tran PID: 1060345</u>		3:30 PM – 4:00 PM
▲ <u>Prose Westover Owner LP (Ryan LLC) PID: 1353751</u>	Tue, Mar 11 to Wed, Mar 12	8:00 AM – 2:30 PM
<u>Velma Goodwater PID: 1139690</u>	Tue, Mar 11 to Wed, Mar 12	4:30 PM – 11:30 AM
<u>Sue Kritzler PID: 750286</u>	Tue, Mar 11 to Wed, Mar 12	5:00 PM – 3:30 PM
▲ <u>Ryan Shimek PID: 1321945</u>	Wed, Mar 12	12:30 PM – 1:00 PM
▲ <u>Chris Dias PID: 988383</u>	Fri, Mar 21 to Fri, Mar 28	8:00 AM – 9:00 AM
▲ <u>Matthew Nielsen PID: 1044727</u>	Mon, Mar 24	8:00 AM – 8:30 AM
<u>O'Connor & Associates</u>		11:00 AM – 11:30 AM
▲ <u>Richard Rodriguez PID: 1435915</u>	Tue, Mar 25 to Thu, Mar 27	10:30 AM – 2:00 PM
▲ <u>Sumo Group LLC PID: 1105097</u>	Thu, Mar 27	8:00 AM – 8:30 AM
<u>Mason Brand PID: 652437</u>		11:00 AM – 11:30 AM
<u>Kevin Conrad PID: 1353751</u>	Thu, Mar 27 to Fri, Mar 28	4:30 PM – 10:30 PM

Details

Monday, March 3, 2025

▲ **Time** 3/3/2025 8:00 AM – 3/5/2025 8:30 AM
Subject Shaunna Hanover PID: 134797
REQUEST TYPE: HOMESTEAD EXEMPTION

I am sending the homestead exemption forms to be processed.

ACTION TAKEN:

I received to paper work . I printed it out the packet and gave it to customer service to be processed.

▲ **Time** 10:00 AM – 10:30 AM
Subject Joe Caruso PID: 700743
REQUEST TYPE: INFORMATION

Panel A heard 25.25© for year 2020-2024. The taxes were paid for 2023, but not paid for 2024. Because taxes were not paid, they denied the hearing.

△ **Time** 11:00 AM – 12:30 PM
Subject SGJ Holdings LLC PID: 142156
REQUEST TYPE: COMPLAINT

Mr. Garcia walked out of the panel room after the second hearing. He had 2 more hearings left. He was upset, he stated that he felt the total value should be less. The panel granted the breakdown of the property. This is what Mr. Garcia wanted. The area was shown to him and he still was not satisfied. He got upset and started to leave. He was informed by the Panel Chair that if he walked out of the room before the hearing is complete, that he will close the entire hearing and his land data would remain the same. Mr. Garcia decided to walk out.

ACTION TAKEN:

I read the complaint, I listened to the audio. There was no contact information for the customer.

Tuesday, March 4, 2025

△ **Time** 3/4/2025 8:00 AM – 3/11/2025 7:30 AM
Subject Carla martinez PID: 1086341
REQUEST TYPE: EXEMPTION CANCELLATION

I request that the exemption for PID: 1086341 be cancelled according to section 11.43(j) of the Texas Property Tax Code. The Bexar County Tax Office may collect the estimated taxes based of the correction of prior year appraisal rolls.

ACTION TAKEN:

I received the correct paperwork and I made a copy and sent it to customer service for processing. I emailed the customer and informed her that her cancellation of exemption is being processed.

△ **Time** 10:00 AM – 10:30 AM
Subject Dosheia Carter PID: 1161387
REQUEST TYPE: HOMESTEAD EXEMPTION

I received an email with the correct forms for a Homestead Exemption

ACTION TAKEN:

I downloaded the forms, but the packet together and gave it to customer service to be processed.

Thursday, March 6, 2025

△ **Time** 9:00 AM – 9:30 AM
Subject Alan Taylor (Daurius Cayan) PID: 986140
REQUEST TYPE: LATE HEARING

I am requesting a late hearing (2022) of PID: 98140 at 15976 Gillette Rd. This is pertaining to a 25.25D correction hearing scheduled for the account for tax year 2022

ACTION TAKEN:

I received the email, I put the ARB Chair's Review packet together and submitted it to the ARB Chair for further process.

Friday, March 7, 2025

▲ **Time** 3/7/2025 8:00 AM – 3/10/2025 7:30 AM

Subject James Wells PID: 1128540

REQUEST TYPE: HOMESTEAD EXEMPTION

I would like to apply for homestead exemption. To complete my packet, I am sending a copy of my driver's license.

ACTION TAKEN:

I received a copy of his driver's license and sent the completed packet to Customer Service to be processed.

▲ **Time** 9:00 AM – 9:30 AM

Subject John Wilson PID: 1037564

REQUEST TYPE: INFORMATION

Since my divorce, I have paid off my home. My escrow account is dissolved, How do I take over payments?

ACTION TAKEN:

I called and spoke with the taxpayer. I explained to him that the Mortgage Company has a code attached to the account. Call them and have them to remove that code. The request to protest paperwork will be sent to your mailing address. Call the Tax Assessors office inform them of your process and they will document it in your files.

OUTCOME:

Taxpayer was satisfied. The issue was resolved

▲ **Time** 10:00 AM – 10:30 AM

Subject Can Alemdar PID: 511360

REQUEST TYPE: REMOVING AND TRANSFERRING HOMESTEAD

I would like to transfer the HS Exemption to the property I purchased in Austin on 12/12/2024. The address is: 516 E. Slaughter Ln #2404 Austin, TX.

ACTION TAKEN:

I received the correct paperwork from the taxpayer and put the packet together and forwarded that to Customer Service to be processed.

OUTCOME:

Taxpayer was satisfied

▲ **Time** 3/7/2025 10:00 AM – 3/11/2025 3:30 PM

Subject Joel Juarez PID: 726097

REQUEST TYPE: Homestead Exemption

How can I verify that I have the homestead exemption? It's shown up on my previous year of 2023 but not on my 2024 appraisal report. Please advise.

ACTION TAKEN:

I checked PACS and it showed that the exemption is in place. I emailed the customer and assured him that the 2024 exemption is in place.

Monday, March 10, 2025

△ **Time** 3/10/2025 8:00 AM – 3/11/2025 2:00 PM

Subject Sylvia Molina: PID: 1353869
REQUEST TYPE: INFORMATION

I am researching a property for Opportunity Home San Antonio. The property address is 522 Everest St. San Antonio TX. 78209, it is Vista At Everest Apartments. I am searching to see if any taxes are owed at 522 Everest St. San Antonio, TX. 78209. See Attached.

ACTION TAKEN:

I called the director of the Commercial Department. The account has been Killed and it was PID: 493706 and the owner was Horton Stephen P. As far as if they owe any taxes, they may be able to get that information from the tax office.

△ **Time** 3/10/2025 9:00 AM – 3/11/2025 10:00 AM

Subject John Mason PID: 346618
REQUEST TYPE: INFORMATION

My name is Cindy Mason, daughter of John T. Mason III. We were at the office 2 weeks ago, they told me I could email you to get my dad the exemption from 203 broadbent to 23490 Thornwood Dr where he now lives. We couldn't file because we didn't have the recorded deed which I'm attaching now with the application.

ACTION TAKEN:

I received the information. I put the packet together and gave it to Customer Service to be processed. I emailed the taxpayer to inform them the matter was taken care of.

OUTCOME:

The taxpayer was satisfied.

△ **Time** 3:30 PM – 4:00 PM

Subject Jessica An Tran PID: 1060345
REQUEST TYPE: EXEMPTION REMOVAL

The property at 7118 Calypso Dawn. This property has an over 65 exemption, but the owner has passed away (please see the attached death certificate). Could you please assist us in removing the exemption and updating the property tax accordingly?

ACTION TAKEN:

I printed the forms and put the packet together and gave it to customer services to be processed.

Tuesday, March 11, 2025

△ **Time** 3/11/2025 8:00 AM – 3/12/2025 2:30 PM
Subject Prose Westover Owner LP (Ryan LLC) PID: 1353751
REQUEST TYPE: INFORMATION

The determination letter was sent to the wrong address. The Appointment of Agent was signed and sent on 6/3/2024 with the correct address. On 5/9/2024, I sent the Notice of Protest form to BCAD with the correct address. Since we didn't receive the Determination Letter, we are asking for the determination letter be sent to the correct address with the current date stamped.

ACTION TAKEN:

I listened to the customer, I printed the information he emailed. Since he stated that it was the part of the ARB who sent it to the incorrect address, I filled out an ARB Chair's Review and put it on the ARB Chair's desk.

△ **Time** 3/11/2025 4:30 PM – 3/12/2025 11:30 AM
Subject Velma Goodwater PID: 1139690
REQUEST TYPE: INFORMATION

Hello Mr. White-
I was pointed your direction for some guidance on how to hopefully reach a settlement agreement on a 2023 appeal that is currently in the 45 day settlement period to arbitration. Any help is greatly appreciated! This error by the BCAD has been truly a nightmare to try and resolve.

ACTION TAKEN:

I responded to her email: I am sorry that your experience with the Appraisal Review board as well as the BCAD was not a positive one. I have listened to the audio of your 25.25 (c) hearing regarding the square footage issue. The ARB listened to the evidence and weighed the difference between you and BCAD. This was approved by the ARB. Ms. Goodwater, this hearing was not a value hearing, but rather a determination of what the value would have been with the corrected home size. The square foot was changed from 5487 square foot to 3966 square foot. If I had known before you had your late hearing, I may have been able to try and connect you to an appraiser to assist you with incorrect square footage. Once you submit your paperwork for arbitration, I would no longer be involved in the outcome of the case. I did reach out to arbitration and was informed that they are waiting on an arbitrator.

△ **Time** 3/11/2025 5:00 PM – 3/12/2025 3:30 PM
Subject Sue Kritzler PID: 750286
REQUEST TYPE: HOMESTEAD EXEMPTION

I am writing on behalf of my mother, Sue E. Kritzler (in cc), who would

like to file a Homestead Exemption for her house at 5 Champion Ln,
San Antonio, 78257.

ACTION TAKEN:

I printed out the form, put the packet together and gave it to
customer service to be processed

Wednesday, March 12, 2025

△ **Time** 12:30 PM – 1:00 PM
Subject Ryan Shimek PID: 1321945
REQUEST TYPE: HOMESTEAD EXEMPTION

I am wanting to apply for my homestead tax exemption (military) and
hoping I have the right email address. I've attached the required form
and copies of my drivers license, but please let me know if you need
anything else.

ACTION TAKEN:

I printed the forms, put the packet together and gave it to customer
service to be processed.

Friday, March 21, 2025

△ **Time** 3/21/2025 8:00 AM – 3/28/2025 9:00 AM
Subject Chris Dias PID: 988383
REQUEST TYPE: EXEMPTION FORM 50-123

I am sending an Exemption Application for Solar or Wind-Powered
Energy Devises to be processed for year 2025

ACTION TAKEN:

I received the application, I printed it and took it to Customer Service
to be processed.

Monday, March 24, 2025

△ **Time** 8:00 AM – 8:30 AM
Subject Matthew Nielsen PID: 1044727
REQUEST TYPE: EXEMPTION

I am submitting the request For Cancellation of Exemptions

ACTION TAKEN:

I received the email with the request. I printed it out and gave it to
Customer Service to be processed

△ **Time** 11:00 AM – 11:30 AM
Subject O'Connor & Associates
REQUEST TYPE: SET UP AN APPOINTMENT

Our office would like to set-up an appointment, in the next 24 to 48
hours, between you and the head of our office, Olivia Boddy. This
meeting would address some on-going issues that we hope can be
resolved by start of the 2025 season.

ACTION TAKEN:

I called the number on the email several times and the mailbox was not set up.. I also emailed O'Connor and I didn't get a response.

Tuesday, March 25, 2025

▲ **Time** 3/25/2025 10:30 AM – 3/27/2025 2:00 PM

Subject Richard Rodriguez PID: 1435915
REQUEST TYPE: OWNERSHIP CHANGE

I am hoping to resolve an issue here concerning Business Personal Property tax.

ACTION TAKEN:

I received the email with the request and I forwarded it to Business Personal Property

Thursday, March 27, 2025

▲ **Time** 8:00 AM – 8:30 AM

Subject Sumo Group LLC PID: 1105097
REQUEST TYPE: CHANGE OF ADDRESS

I am requesting a change of address.

ACTION TAKEN:

I received an email with the correct form. I printed it and put it in the incoming Change of address box at the Customer Service Box.

▲ **Time** 11:00 AM – 11:30 AM

Subject Mason Brand PID: 652437
REQUEST TYPE: MAP OVERLAY

I am requesting a map overlay for Medina Valley ISD, Boerne ISD, and Comal ISD .

ACTION TAKEN :

I received his request, I sent him an address for him to put in his search engine (Opendata-Cosagis) which may be of some help, I then sent him the online request for open records .

▲ **Time** 3/27/2025 4:30 PM – 3/28/2025 10:30 PM

Subject Kevin Conrad PID: 1353751
REQUEST TYPE: RESCHEDULE

I wanted to follow up to see if there's any update from the ARB Chairman on reissuing the notice of determination for this PID: 1353751.

ACTION TAKEN:

I forwarded his email to the ARB Chair.

STAFF SUMMARY SHEET

ISSUE: Adjourn