



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

DATE OF MEETING: October 22, 2024
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.**

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.

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

1. Approval of the minutes of the public hearing of September 10, 2024

2. Approval of the minutes of the meeting of September 10, 2024

3. Approval of the minutes of the meeting of September 16, 2024

ACTION ITEMS

D. Contract – Group Insurance (*Bill Rusteberg, Risk Managers*)

The board of directors may discuss and/or vote to authorize the chief appraiser to select the service providers and to enter into a contract with said providers for group insurance programs.

E. Contract – Audit Services (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for audit services.

F. Contract – Security Services (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for security services.

G. Contract – Temporary Services (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for temporary services.

H. Contract – Janitorial Services (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for janitorial services.

I. Contract – Aerial Orthophotography (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for aerial orthophotography.

INFORMATION ONLY

J. Board of Directors Manual (*Rogelio Sandoval, Chief Appraiser*)

The board of directors may discuss and update meeting dates and communication methods among all board members and the district.

K. Intent to Encumber Funds (*Rogelio Sandoval, Chief Appraiser*)

The chief appraiser will inform the board of directors of the district's intent to amend the 2024 operating budget and encumber funds.

L. Clarification of the reappraisal plan regarding properties protested in 2026.
(*Mr. Robert Bruce*)

EXECUTIVE SESSION

M. 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.

The board of directors may consider and act upon any item discussed in closed Executive Session.

REPORTS

N. 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 July, August, and September 2024
 - b. Statement of revenues and expenses through September 30, 2024
 - c. Designated cash funds report through September 30, 2024
2. Appraisal Records (*Tommy Allison, Assistant Chief Appraiser*)
 - a. Presentation of appraisal roll report for the third quarter of the 2024 tax years as authorized by Section 25.25(b), Texas Property Tax Code.
 - b. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2024/2025 appraisal roll.

3. Recognition

- a. The chief appraiser will inform the board of directors of the district's recognition as one of San Antonio Express News' Top Workplaces for 2024.

O. Additional Reports

The board of directors will receive the following reports:

1. Community Outreach (*Jennifer Rodriguez, Communications Director*)
2. Taxpayer Liaison Reports (*L. Christopher White, Taxpayer Liaison*)

P. Adjourn



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.*

FILE INFORMATION

Document Number: 30266
Date/Time: 10/15/2024 4:11:18 PM
Total Pages: 4
FILED IN THE OFFICIAL PUBLIC
RECORDS OF BEXAR COUNTY
LUCY ADAME - CLARK
BEXAR COUNTY CLERK
Total Fees: \$2.00

BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS MEETING
OCTOBER 22, 2024
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STAFF SUMMARY SHEET

ISSUE: Meeting called to order

Meeting called to order by Dave Gannon, Chair, and recording of present directors.

STAFF SUMMARY SHEET

ISSUE: Public comment period

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. Regarding such a subject, discussion, if any, by the Board shall be limited to a proposal to place said subject on the agenda for a subsequent meeting.

Anyone who wishes to address a particular agenda item may submit an email to bod@bcad.org no later than 8:00 am the morning of the meeting or may register by name on the sign-in sheet by the door to do so in person. Comments received timely by email will be read into the record during the public comment portion of the meeting. Discussion of value of specific properties will not be permitted.

STAFF SUMMARY SHEET

ISSUE: Minutes

1. Approval of the minutes of the meeting of the public hearing of September 10, 2024
2. Approval of the minutes of the meeting of September 10, 2024
3. Approval of the minutes of the meeting of September 16, 2024

**MINUTES OF THE PUBLIC HEARING OF THE
BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS
SEPTEMBER 10, 2024**

The Board of Directors of the Bexar Appraisal District met for a public hearing at 411 N. Frio in San Antonio, Texas on September 10, 2024 at 2:00 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 2:00 p.m. and acknowledged the presence of the following directors:

Dr. Ralph Barksdale
Mr. Robert Bruce
Mr. Jon Fisher
Councilwoman Adriana Rocha Garcia
Ms. Erika Hizel
Ms. Naomi Miller
Ms. Rebecca Ruiz
Mr. Albert Uresti

Mr. Gannon mentioned that representatives of the district were in Denver a few weeks ago at a meeting of the International Association of Assessing Officers and that the district received a Certificate of Excellence and Assessment Administration, along with two of the district's staff receiving their individual IAAO designations.

B. Public Comment Period

Mr. Gannon commented that 12 emailed comments had been received word for word and for the sake of time the first comment would be read along with the names of the citizens that submitted.

The list included:

Gary and Christina Ladyko
William and Elizabeth Fecci
May K. Douglas, Fair Oaks Ranch
Hugh Arendall
Douglas Family Revocable Living Trust
Joanie Alexander
Frank Acosta Jr.
Brian Pierce
Susan Masters
Louis Sanchez
Cheryl Aycock

Their memos reflected support for the motion before the board suggesting the board should consider future appraisals to reflect the cost of living plus three percent.

Daniel Villareal (emailed statement) suggested appraising every other year would cause the appraisal district to become misaligned with the state and for the school district to lose \$16 million or more.

Dr. Jaime Aquino (emailed statement) stated the district's recommended plan would pose a significant negative impact to the school district's ability to manage its budget and tax rate.

Tricia Cruz (emailed statement) stated the appeal process is time consuming and that any residential property that is increased by 5% must be justified by the appraisal board.

Rolando Ramirez (emailed statement) stated moving appraisals to every other year would create disparities among properties and that the appraisal district may face a higher debt service tax which would prevent the school district from benefitting from tax rate compression.

Joseph Saporito (emailed statement) stated he was in favor of the appraisal district reappraising residential properties every two years and that if the reappraisal increased more than five percent, the district must provide clear and convincing evidence of that increase.

G.L. Lamborn (emailed statement) stated the San Antonio Board of Realtors had provided data showing property values for 2022 had declined and the appeal process is flawed.

David Clark (emailed statement) stated that if annual appraisals ended, school districts would lose \$25 million to \$75 million in funding with additional state losses.

Patricia D. Keene and Lynn D. Keene (emailed statement) stated annual reappraisals could lead to unpredictable and steep increases and that if properties increased more than five percent the district needed to provide clear and convincing evidence.

Wesley Scott (emailed statement) stated non-appraised properties that experience market increases are subject to review by the Property Value Tax Study and failing the PVS would affect state funding.

Tom Cummins (emailed statement) stated opposing the proposal would damage public school districts financially and would cost the North East ISD \$16 million dollars each year.

Brian Hovey (emailed statement) stated Bexar County residents did not protest their home values due to not understanding the process, the time needed and resources to determine a value.

Grant Moody (emailed statement) stated granting a successful protestor, a one-year rollover without requiring them to go through the appeal process again promoted efficiency, fairness, and understanding of the challenges faced by our residents.

Melinda Cox (emailed statement) stated the district should not sacrifice the importance of much needed dollars to our students, staff and parents as funding had not increased since 2019.

Melinda Espiritu-Azocar (emailed statement) stated delaying appraisals by a year would force schools to operate with outdated financial data, delaying increases for teacher salaries, classroom resources, and student programs.

Julia Grizzard (emailed statement) stated she believed the plan would result in consequences that would worsen by moving to two-year appraisals and highly recommended the board not support the proposed reappraisal plan.

Mark Dorazio (emailed statement) stated ceasing to reappraise residential property in the immediate year after a successful appeal would assist residents who are in tight financial condition.

Suzie Bayné, in attendance, stated the reappraisal plan being discussed should take into consideration the homeowners that have successfully appealed their appraisals. Homeowners that have had a decrease in value would not be affected and they would be benefitting.

Gim Chin, emailed to speak but not in attendance.

Ruth Forehand, in attendance, stated she hoped these highlights brought to the board's attention to some of the frustration from the public and she would support an every other year appraisal process.

Velma Pena, in attendance, stated the reappraisal plan is welcomed but the main concern is having the two-year reappraisal plan not working in the public's favor.

Brady Alexander, in attendance, stated the appraisal process in older neighborhoods needed to be fixed that the school district's budget should not be a homeowner's responsibility, and that the City of San Antonio gives plenty of tax-exempt projects through the San Antonio Housing Trust.

Claudia Sanchez, in attendance, stated working-class communities are not able to attend board meetings during the day due to the time, lack of transportation and it would be more accessible to the community to have meetings in Spanish.

John Craft, in attendance, stated placing a five percent threshold where the appraisal district would have to provide clear and convincing evidence would be outside of what the school district had proposed for its budget.

Mitch Meyer, in attendance, stated the appeal process is time consuming and takes resources, and that the administration of the appraisal process is broken and needs to change.

Johnny Rodriguez, in attendance, asked if the appraisal district is considering a two-year reappraisal plan with the possibility of one year in that cycle, how would the appraisal district address it for the following year?

C. Public hearing as required by Section 6.06 of the Texas Property Tax Code, regarding:

Presentation by the chief appraiser and district staff member(s) summarizing the proposed 2025 operating budget.

Mr. Rogelio Sandoval, Chief Appraiser, thanked the Budget Ad Hoc Committee members, Ms. Ruiz and Mr. Gannon, for meeting to discuss the preliminary 2025 budget, adding the district needed to send the preliminary budget to all taxing units for approval before September 15th. He continued stating that the district was requesting a 2025 budget of \$28,175,700 which is an 8.7% increase from the 2024 budget of \$2,274,500. He added that the highlights of the increases were the unfunded mandate for the election for the board members with the district reserving \$1,000,000 and an additional 60 positions within the Customer Service and Residential Departments to include three clerks, one supervisor, and two appraiser positions.

Mr. Gannon asked for clarification on the election costs. Ms. Crystal Khantharoth, Finance Director, confirmed that the first election was \$805,667.58 and the district had paid \$402,833.79 to date. She added the initial cost for the runoff was \$584,108.45 and currently the total cost of the runoff was \$1,389,786.03. She stated the district still had an estimated balance of \$552,368.11 as the elections department has yet to provide a final audit for the remaining balance due.

Mr. Gannon confirmed that once the Public Hearing Meeting was adjourned the board will then proceed to the regular board meeting that will include Executive Session.

D. Public hearing as required by Section 6.05(i) and 25.18 of the Texas Property Tax Code, regarding:

Presentation by the chief appraiser and district staff member(s) summarizing the proposed 2025 and 2026 biennial reappraisal plan.

Mr. Sandoval addressed the board to provide specifics within the 2025-2026 Reappraisal Plan referring to Page 18 of the reappraisal plan which specifies that in accordance with Tax Code Section 23.01 under Subtitle F, the reduced value will stand in the next year unless the change is supported by "clear and convincing evidence". He stated this standard requires a higher level of evidence than a preponderance of evidence and when reviewing individual property appraisals in the year after a resolution, the appraisal district staff relied on market evidence to determine if the market value should be adjusted based upon clear and convincing evidence. He continued stating that if the value is determined as a result of protest under Section 41.41(a) or an appeal under Section 42.26 concerning unequal appraisal, the district could justify an increase by correction of any inequalities in the property's appraisal in relation to like kind and character. Mr. Scott Griscom, Assistant Chief Appraiser, passed out data and statistics for discussion relating to information that was discussed during the previous board meeting regarding homestead caps and market values.

Councilwoman Adriana Rocha Garcia added that she submitted a memo to the City of San Antonio's Intergovernmental Relations Committee to ask for help at the next legislative session relating to MLS Data being used as evidence during appeals, increasing legal resources to CADS, looking into an increase in exemption amounts, how we could provide relief to legacy homeowners and how gentrification affects our cities.

Mr. Gannon confirmed that aside from the language that was highlighted earlier, the recommendation to the board for the annual reappraisal without thresholds would be the same as presented.

No further discussion or action was taken.

E. Adjourn the hearing

There being no further business, the September 10, 2024 Public Hearing adjourned at 3:41 pm

Chair

Secretary

Date

**MINUTES OF THE MEETING OF THE
BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS
SEPTEMBER 10, 2024**

The Board of Directors of the Bexar Appraisal District met for a meeting at 411 N. Frio in San Antonio, Texas on September 10, 2024 at 3:59 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 3:59 p.m. and acknowledged the presence of the following directors:

Dr. Ralph Barksdale
Mr. Robert Bruce
Mr. Jon Fisher
Councilwoman Adriana Rocha Garcia
Ms. Erika Hizel
Ms. Naomi Miller
Ms. Rebecca Ruiz
Mr. Albert Uresti

B. Public Comment Period

All members of the public that were signed up to speak addressed the board during the Public Hearing.

C. Minutes

Ms. Ruiz made a motion to approve the minutes from the August 20, 2024 board meeting as written and Ms. Miller seconded the motion which was unanimously approved.

D. Adjourn to Executive Session

Board members adjourned to closed session at 4:04pm.

All board members reconvened at 4:23pm. No action was taken upon reconvening in open session.

E. Discussion Item (*Erika Hizel, Board Member*)

Discuss due diligence on constituencies impact to include schools and follow up from last meeting.

Ms. Erika Hizel presented the *Housing Report for San Antonio – New Braunfels, Spotlight on January 2024* from The Texas Real Estate Research Center at Texas A&M University focusing on economic news and housing updates. She stated the data presented was 2020-2021 and 2022-2023 financial data from Northside ISD and showed there was significant revenue being received from tax payers in the amount of \$879,000,000.

F. Discussion Item (Erika Hizel, Board Member)

Discuss what constitutes “clear and convincing evidence” that results in a tax value notice.

Mr. Tommy Allison, Assistant Chief Appraiser, confirmed that the district included the “clear and convincing evidence” question on, page 18 of the 2025-2026 reappraisal plan. Mr. Scott Griscom, Assistant Chief Appraiser, stated that the data on page four is the same data that the district uses to determine trends when determining value. Mr. Allison added that page 31 of the reappraisal plan includes the general algorithm that is used to appraise residential properties.

G. Reappraisal Plan Motion (Robert Bruce, Board Member)

Motion would not require reappraisal in the year following settlement of a contested value agreed to by the parties, excepting only new construction or new improvements or evidence of a reduction in value.

Mr. Gannon confirmed with Mr. Bruce that the recommendation to the reappraisal plan presented by the staff would stand as is with the two modifications reflected in the mentioned motions. Mr. Rogelio Sandoval, Chief Appraiser, asked for clarification that if a property owner had their value lowered through an appeal but the district’s analysis showed the value went down even further, it would not require reappraisal in the year following the supplement. Mr. Gannon confirmed that the annual reappraisal presented by the district staff would be passed in its entirety with these two modifications.

Mr. Bruce moved to approve the motion to not require reappraisal in the year following settlement of a contested value agreed to by the parties, excepting only new construction or new improvements or evidence of a reduction in value which was seconded by Councilwoman Garcia. Mr. Gannon asked all members of the board of directors who supported Motion G, to raise their right hand. The following members voted in agreeance and the motion passed unanimously:

Dr. Barksdale
Ms. Ruiz
Mr. Uresti
Councilwoman Garcia
Mr. Gannon
Mr. Fisher
Mr. Bruce
Ms. Hizel
Ms. Miller

H. Reappraisal Plan Motion (Robert Bruce, Board Member)

Motion per the State Property Tax Code regulations on or before March 15th prior to rendering the year’s values on April 15th, any mass appraisal resulting in increases greater than 5% will be presented to the Board of Directors of review, with particular emphasis on clear and convincing evidence supporting the increases.

Mr. Uresti stated he was against the motion. Mr. Bruce stated he would like to find an alternative as the district needed to be proactive. Councilwoman Garcia recommended the board to form a sub-committee to revisit this topic. Mr. Gannon reiterated to the board that the reappraisal plan needs to be passed by September 15th and asked if the reappraisal plan could be amended if needed. Mr. Griscom confirmed that Page 18 of the reappraisal plan stated it could be amended if there was a disaster declaration by the Governor.

Mr. Uresti made a motion to table agenda item H for a later time which Dr. Barksdale seconded. The following members voted in agreeance and the motion passed unanimously:

Dr. Barksdale
Ms. Ruiz
Mr. Uresti
Councilwoman Garcia
Mr. Gannon
Mr. Fisher
Mr. Bruce
Ms. Hizel
Ms. Miller

I. 2025 - 2026 Reappraisal Plan

Mr. Gannon asked to confirm one last motion to approve the appraisal plan as submitted with the modification approved in item G. Ms. Miller moved to confirm the appraisal plan as submitted with the modification adding item G which Councilwoman Garcia seconded. The motion was unanimously approved.

J. 2025 Operating Budget

Mr. Sandoval presented the board with the 2025 budget information and highlights and restated the amount was \$28,175,700 an increase of \$2,274,500 or 8.78% from 2024, adding the bulk of that was due to the unfunded election mandate and additional staff.

Ms. Miller made a motion to adopt by resolution to the 2025 operating budget for the Bexar Appraisal District. Mr. Fisher seconded the motion which was unanimously approved.

K. Contract – Exchange Online Subscription Microsoft

Ms. Crystal Khantharoth, Finance Director, asked for board approval for the district to enter into a contract for the Exchange Online for Microsoft 365 ES subscription in the annual amount of \$77,213 for a three-year agreement for a total of \$231,638.

Ms. Hizel made a motion to approve the district entering into a contract for the Exchange Online for Microsoft 365 ES subscription. Dr. Barksdale seconded the motion which was unanimously approved.

L. Contract – Telecommunications and Mineral Services

Ms. Khantharoth, Finance Director, asked for board approval for the district to enter into a contract with Capital Appraisal Group for Telecommunication and Mineral Services. The contract amount is \$78,190 for January 1, 2025 to December 31, 2025.

Ms. Miller made a motion to approve the district entering into a contract with Capital Appraisal Group for Telecommunications and Mineral Services. Dr. Barksdale seconded the motion which was unanimously approved.

M. Contract – Laser Printing/Mailing Services

Ms. Khantharoth asked for board approval for the district to enter into contract with VariVerge for Laser Printing and Mailing Services in the amount of \$354,451 which will start December 1, 2024 through November 30, 2025.

Mr. Fisher made a motion to approve entering into a contract with VariVerge for Laser Printing and Mailing Services. Mr. Gannon seconded the motion which was unanimously approved.

N. Selection of the Appraisal Review Board Ad Hoc Committee

Mr. L. Christopher White, Tax Payer Liaison, addressed the board of directors regarding the Appraisal Review Board Ad Hoc Committee which would review applications, interview applicants, and make appointment recommendations. He stated the board of directors may want to consider appointing two elected officials, adding and two appointed officials, adding the board would also be selecting the ARB Chair and ARB Vice Chair. Mr. Gannon asked for a timeframe and how much time the board has to allocate. Mr. White provided key dates and mentioned that this information will also be emailed to the Ad Hoc Committee Members.

Dr. Barksdale moved to appoint Ms. Miller, Ms. Hizel, Mr. Bruce, and himself to the ARB Ad Hoc Committee and Mr. Gannon as backup when needed. Mr. Fisher seconded the motion which was unanimously approved.

O. Increase Appraisal Review Board members

Mr. White addressed the board asking them to increase the number of Bexar Appraisal Review Board members from 50 to 65.

Ms. Miller made a motion to approve by resolution increasing the members of the Appraisal Review Board. Mr. Fisher seconded the motion which was unanimously approved.

P. Chief Appraiser Reports

The following reports were moved to October's agenda for further discussion.

1. Financial Condition

2. Appraisal Records

3. District Operations

Q. Adjourn

Mr. Gannon asked for a motion to adjourn. Ms. Ruiz approved the motion and Dr. Barksdale seconded the motion which was unanimously approved.

There being no further business, the September 20, 2024 board of directors meeting adjourned at 6:01 p.m.

Chair

Secretary

Date

**MINUTES OF THE MEETING OF THE
BEXAR APPRAISAL DISTRICT
BOARD OF DIRECTORS
SEPTEMBER 16, 2024**

The Board of Directors of the Bexar Appraisal District met for a meeting at 411 N. Frio in San Antonio, Texas on September 16, 2024 at 3:00 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 3:02 p.m. and acknowledged the presence of the following directors:

Dr. Ralph Barksdale
Mr. Robert Bruce, via Zoom
Mr. Jon Fisher
Mr. Dave Gannon
Councilwoman Adriana Rocha Garcia
Ms. Erika Hizek
Ms. Rebecca Ruiz
Mr. Albert Uresti

B. Public Comment Period

Zach Rathbun, (emailed statement) stated he was in favor of reappraisals every two years, and limit appraisal increases.

Brady Alexander, present, stated that the comps used in aging neighborhoods vary drastically and the appraisal process needs to improve.

C. Clarification of details regarding the previously approved 2025-2026 Reappraisal Plan

Mr. Rogelio Sandoval, Chief Appraiser, addressed the board to ask for clarification of the 2025-2026 reappraisal plan and confirmed that nothing was changing. He asked for clarification that any property that was appealed and lowered for 2024 would roll into 2025, and if appealed and lowered for 2025 would rollover to 2026.

Councilwoman Garcia mentioned that the City of San Antonio plans on a two-year projection when budgeting. Troy Elliott, Deputy Chief Financial Officer with the City of San Antonio, was in attendance and explained how the city projects their forecast and stated that freezing protests would cause increased exemptions or trends to flatten which would cause lost revenue.

Conversation continued between board members to clarify statistics on value.

Prior to the board voting on the clarification of details regarding the 2025-2026 Reappraisal Plan previously approved on September 10th, Mr. Bruce asked for clarification of the motion. Mr. Gannon confirmed that the motion would be to reappraise in 2025 and 2025 protests

would roll to 2026 and the district would carry that plan until it changes into a subsequent reappraisal plan.

The following members voted in agreeance and the motion passed unanimously:

Dr. Barksdale
Ms. Ruiz
Mr. Uresti
Councilwoman Garcia
Mr. Gannon
Mr. Fisher
Mr. Bruce

D. Adjourn to Executive Session

The board did not adjourn into Executive Session.

E. Executive Session

As the board did not adjourn into Executive Session, there was no action to be taken.

F. Adjourn

Mr. Gannon asked for a motion to adjourn. Ms. Ruiz moved to approve to adjourn the meeting. Dr. Barksdale seconded the motion which was unanimously approved.

There being no further business, the September 16, 2024 board of directors meeting adjourned at 3:55 p.m.

Chair

Secretary

Date

STAFF SUMMARY SHEET

ISSUE: Contract – Group Insurance

The board of directors may discuss and/or vote to authorize the chief appraiser to select the service providers and to enter into a contract with said providers for group insurance programs.



3003 Matthew & Adams
Yoakum, Texas 77995
Email: RiskManager@RiskManagers.us

1 October 2024

Ms. Laura McCloud
Bexar Appraisal District
411 N. Frio
San Antonio, Texas 78283

Re: Request for Proposals: Group Medical and Dental Insurance

Dear Ms. McCloud,

The Bexar Appraisal District issued a Request for Proposal (RFP) for fully insured Group Medical and Dental Insurance for district employees and their families to be effective January 1, 2025, through December 31, 2025.

Medical Insurance

We have reviewed the medical insurance proposals received during the Request for Proposal (RFP) process from the following companies:

1. Blue Cross & Blue Shield of Texas (Incumbent)
2. Curative Insurance Company

The following insurance companies provided written confirmation declining to submit offers citing they would be uncompetitive:

1. Aetna
2. United Health Care

Discussion

The fully insured medical insurance market is limited and varies geographically. In San Antonio there are four major carriers active in the market including Aetna, Blue Cross, Cigna, and United HealthCare. Nationally the market in general is not limited to these four carriers as there are others active in geographic pockets across the country. Such is the case in San Antonio. Curative Insurance Company, a relatively new Austin, Texas based company submitted a proposal in response to the RFP.

Comparing fully insured proposals is not a perfect science as carriers are required to submit benefit filings with the Texas Department of Insurance for approval and not all benefit filings are the same. However, benefit comparisons between insurers can be simplified within certain parameters such as

deductibles, co-insurance features and copays and other standard provisions common to most group health insurance policies. An RFP process must necessarily take these factors into account. Vendors were instructed to provide proposals with benefits as close as possible to those requested by the benefit specifications.

"It is the intention of Bexar Appraisal District to maintain, as much as possible, the current benefit levels. However, it is understood that proposers may not be able to match current benefits in total. Bexar Appraisal District will consider and evaluate alternative proposals. Please base your proposal on the current level of benefits as closely as possible. Clearly indicate any deviations in benefits in your proposal. Carriers are encouraged to be creative and to present their most competitive coverage and pricing proposal utilizing the current benefit structure as a basis." - Bexar Appraisal District RFP Specifications

Evaluation Process

In consideration of recommendations to be made to the Bexar Appraisal District Board of Directors the Bexar Appraisal District's insurance committee evaluation process considered the relative importance of price, quality, service, and other factors set forth in the Request for Proposal specifications.

"The Bexar Appraisal District will evaluate proposals received on the proposal deadline. The evaluation criteria will include, but will not be limited to price, service, reporting capabilities, network, and responsiveness." - Bexar Appraisal District RFP Specifications

The evaluation process included a four-stage process.

Stage 1 - Outreach to vendors for information/confirmation in areas of each proposal for clarification, such as provider access through PPO networks, availability of client services representative/s, COBRA support services, information on wellness programs, Employee Assistance Program/s and other areas of interest to the overall program offering that are important considerations in addition to financial considerations. *This stage did not include any negotiations with any vendor and was limited for clarification purposes only.*

State 2 - Report of findings to the Bexar Appraisal District's insurance committee.

Stage 3 - Negotiations with all vendors towards a best and final offer. Competitive information was not shared with any vendor.

Stage 4 – The committee's final evaluation process, based on the results of Stage 3, was not an easy one as both finalists offer attractive proposals within budgetary constraints and benefits equal to or better than current benefits.

Stage 4 encompassed a data-based scoring process based on numerical values assigned to key metrics forming a base line to grade each of the vendors to support fair and unbiased vendor selection. Below are the results:

	Weighting	BCBS	Pts	Curative	Pts2
Total Cost Compared to Current	5	+4.5%	8	-8.3%	10
Renewal Rate Cap	3	No	8	10%	10
Network Adequacy	5	100%	10	96%	8
Transition Credit	3	\$40,000	10	\$15,000	8
Benefits	5	Match	9	+/-	10
Claim Reporting	2	1.0	10	1.0	10
Disruption	4	None	10	Yes	8
Total Points			65		64
Total Potential Points			70		70
%			92.8%		91.14%
Weighted Average			9.22		9.11
Total Weighted Average Pts			64.65		63.77
Weighted Average			92.4%		91.10%
Note:					
Points Scale: 1-10					
Weight Scale: 1-5					

Health Insurance Recommendation

The Bexar Appraisal District insurance committee recommends award to Blue Cross & Blue Shield. Important considerations include:

- No change in benefits
- No disruption due to change in provider network and Rx formulary
- Justifiable Renewal = -55% below renewal rate cap
- Cost within budgetary constraints
- High employee satisfaction

This recommendation was not made without a strong look at the Curative proposal which is attractive in many areas including cost savings and better benefits for members who follow certain guidelines. The recommendation to remain with Blue Cross for one more plan year also considered Curative's recent entry into the fully insured group medical business and the lack of a long-term history with documented member experience. The committee is strongly interested in revisiting Curative's model during the next renewal cycle which begins August 2025.

Dental Insurance

We reviewed two dental insurance proposals received as a result of the RFP process:

1. Humana (Incumbent)
2. MetLife

Humana is offering two renewal options each tied to multi-year rate guarantees. Option 1 provides a two-year rate guarantee with a 15% increase in premiums over current. Option 2 provides a three-year rate guarantee with a 19.7% increase in premiums over current.

The Humana dental program includes additional coverage beyond the annual plan maximum which no other vendor has offered.

MetLife is matching current benefits with the exception of the extended benefit provision Humana is offering. Premiums are 16.72% over current and includes an annual rate increase cap of no more than 7% for year 2 and 3.

The Bexar Appraisal District insurance committee recommends award of the Humana proposal Option 1 with a 2-year rate guarantee.

Sincerely,

William Rusteberg

William Rusteberg
Risk Manager Tx. Lic. 149261

2025 Bexar Appraisal District Medical - Plan 1

	BCBS		BCBS		Curative		Baseline Visit Care Navigator
	Current 2025 Rate Cap 9.5%		Renewal BEST & FINAL		PPO		
Premiums							
Employee Only 159	\$607.02		\$634.34		\$551.69		\$551.69
Employee + Spouse 4	\$1,214.04		\$1,268.67		\$1,103.39		\$1,103.39
Employee + Child(ren) 11	\$1,153.34		\$1,205.24		\$1,048.22		\$1,048.22
Employee + Family 4	\$1,942.46		\$2,029.87		\$1,765.42		\$1,765.42
Estimated Annual Premium	\$1,461,947		\$1,527,742		\$1,328,692		\$1,328,692
Percentage Change	0.00%		4.50%		-9.11%		-9.11%
Dollar Change	\$0		\$65,795		\$0		\$0
	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network
Deductible							
Individual	\$1,000	\$5,000	\$1,000	\$5,000	\$5,000	\$10,000	\$0
Family	\$2,000	\$10,000	\$2,000	\$10,000	\$10,000	\$20,000	\$0
Coinsurance	80%	50%	80%	50%	80%	50%	0%
Annual Out-of-Pocket Maximum							
Individual	\$4,000	\$10,000	\$4,000	\$10,000	\$7,500	\$15,000	\$0
Family	\$8,000	\$20,000	\$8,000	\$20,000	\$15,000	\$30,000	\$0
PCP Office Co-Pay	\$25	50%	\$25	50%	\$25/Ded	\$50/Ded	\$0
SP Office Co-Pay	\$50	50%	\$50	50%	\$50/Ded	\$100/Ded	\$0
Urgent Care Co-Pay: (Non-Hospital)	\$75	50%	\$75	50%	80%/Ded	50%/Ded	\$0
Telehealth Co-Pay	\$25	N/A	\$25	N/A	\$0 Co-Pay	NC	\$0
Hospitalization	80%	50%/\$250	80%	50%/\$250	80%/Ded	50%/Ded	0%
Emergency Room							
Facility	\$250 + 80%		\$250 + 80%		80%/Ded		\$0
ER Physician	80%	80%	80%	80%	80%/Ded		\$0
Physician In-Patient	80%	50%	80%	50%	80%/Ded	50%/Ded	\$0
Physical Medicine Services	\$25	50%	\$25	50%	80%/Ded	50%/Ded	\$0
Deductible Apply	No	Yes	No	Yes	Yes	Yes	0%
Number of Visits PCY	35	35	35	35	20	20	NA
Preventative Care - PCP & SP (Occurrence Limits may Apply)	100%	50%	100%	50%	100%	50%	\$0
Prescription Drugs							
Retail - 30 Day / MO 90 Day	Retail	MO	Retail	MO	Retail	MO	Retail
Generic	\$5	\$13	\$5	\$13	\$50/Ded	\$50/\$150/Ded	\$0
Preferred Brand	\$30	\$75	\$30	\$75	\$50/Ded	\$50/\$150/Ded	\$0
Non Preferred	\$65	\$162.50	\$65	\$162.50	\$100/Ded	\$100/\$300/Ded	\$50
Specialty	\$150/\$500		\$150/\$500		25%/Ded	25%/Ded	\$250

**2025 Bexar Appraisal District
Medical - Plan 1**

	BCBS	BCBS	Curative	
	Current 2025 Rate Cap 9.5%	Renewal BEST & FINAL	PPO	Baseline Visit Care Navigator
Network:	BlueChoice PPO	Blue Choice PPO	First Health	First Health
	www.bcbstx.com		www.providerlocator.firsthealth.com	
Rx:	Prime Therapeutics	Prime Therapeutics	Curative Rx	Curative Rx
Telehealth:	Included in Premium	Included in Premium	NormanMD	NormanMD
Service Representative:	Anabel Chavez	Anabel Chavez	LouAnn Nitchell	LouAnn Nitchell
COBRA:	Yes	Yes	No	No
Cost:	\$75/\$10/\$10	\$75/\$10/\$10	N/A	N/A
Wellness Program:	Yes	Yes	Yes	Yes
Cost:	Included in Premium	Included in Premium	Included in Premium	Included in Premium
Employee Assistance Program:	Yes - 5 Sessions	Yes - 5 Sessions	No	No
Cost: #PEPM	Included in Premium	Included in Premium	N/A	N/A
24 Hour Nurse Line:	Included in Wellness	Included in Wellness	NormanMD	NormanMD
Actively at Work Waived:	Yes	Yes	Yes	Yes
Pooling Point:	\$75,000	\$90,000	None	None
Trend Factor:	Not Provided	8.6%/14.5%	Industry Average	Industry Average
Deductible Carryover	Yes - 4th Quarter	No	No	No
Transition Credit	Yes - \$40,000	Yes-\$40,000	\$15,000	\$15,000
2026 Rate Cap	Yes - 9.5%	No	Yes-10%	Yes-10%

**2025 Bexar Appraisal District
Medical - Plan 2**

	Current		Renewal		Curative		Baseline Visit Care Navigator
	BCBS 2025 Rate Cap 9.5%		BCBS BEST & FINAL		PPO		
Premiums							
Employee Only 4	\$558.02		\$583.13		\$551.69		\$551.69
Employee + Spouse 1	\$1,116.04		\$1,166.26		\$1,103.39		\$1,103.39
Employee + Child(ren) 9	\$1,060.24		\$1,107.95		\$1,048.22		\$1,048.22
Employee + Family 2	\$1,785.66		\$1,866.01		\$1,765.42		\$1,765.42
Estimated Annual Premium	\$197,539		\$206,428		\$195,300		\$195,300
Percentage Change	0.00%		4.50%		-1.13%		-1.13%
Dollar Change	\$0		\$8,889		-\$2,240		-\$2,240
	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network
Deductible							
Individual	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$10,000	\$0
Family	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$20,000	\$0
Coinsurance	80%	50%	80%	50%	80%	50%	0%
Annual Out-of-Pocket Maximum							
Individual	\$6,350	\$10,000	\$6,350	\$10,000	\$7,500	\$15,000	\$0
Family	\$12,700	\$20,000	\$12,700	\$20,000	\$15,000	\$30,000	\$0
PCP Office Co-Pay	\$35	50%	\$35	50%	\$25/Ded	\$50/Ded	\$0
SP Office Co-Pay	\$70	50%	\$35/\$70	50%	80%/Ded	50%/Ded	\$0
Urgent Care Co-Pay: (Non-Hospital)	\$75	50%	\$75	50%	\$50/Ded	50%/Ded	
Telehealth Co-Pay:	\$35	N/A	\$35	50%	80%/Ded	50%/Ded	0%
Hospitalization	80%	50%	80%	50%	80%	50%	0%
Emergency Room							
Facility	\$250 + 80%		\$250 + 80%		80%/Ded		\$0
ER Physician	80%		80%		80%/Ded		\$0
Physician In-Patient	80%	50%	80%	50%	80%/Ded	50%/Ded	\$0
Physical Medicine Services	\$35	50%	\$35	50%	80%/Ded	50%/Ded	\$0
Deductible Apply	No	Yes	No	Yes	Yes	Yes	0%
Number of Visits PCY	35	35	35	35	20	20	NA
Preventative Care - PCP & SP	100%	50%	100%	50%	100%	50%	\$0
Prescription Drugs							
Retail - 30 Day / MO 90 Day	Retail	MO	Retail	MO	Retail	MO	Retail
Generic	\$5	\$12.50	\$5	\$12.50	\$50/Ded	\$50/\$150/Ded	\$0
Preferred Brand	\$30	\$75	\$30	\$75	\$50/Ded	\$50/\$150/Ded	\$0
Non Preferred	\$65	\$162.50	\$65	\$162.50	\$100/Ded	\$100/\$300/Ded	\$50
Specialty	\$5,\$150,\$500		\$5,\$150,\$500		25%/Ded	25%/Ded	\$250

**2025 Bexar Appraisal District
Medical - Plan 2**

	Current	Renewal	Curative	
	BCBS	BCBS	PPO	Baseline Visit
	2025 Rate Cap 9.5%	BEST & FINAL		Care Navigator
Network:	BlueChoice PPO	Blue Choice PPO	First Health	First Health
Rx:	Prime Therapeutics	Prime Therapeutics	Curative Rx	Curative Rx
Telehealth:	Included in Premium	Included in Premium	NormanMD	NormanMD
Service Representative:	Anabel Chavez	Anabel Chavez	LouAnn Nitchell	LouAnn Nitchell
COBRA:	Yes	Yes	No	No
Cost:	\$75/\$10/\$10	\$75/\$10/\$10	N/A	N/A
Wellness Program:	Yes	Yes	Yes	Yes
Cost:	Included in Premium	Included in Premium	Included in Premium	Included in Premium
Employee Assistance Program:	Yes - 5 Sessions	Yes - 5 Sessions	No	No
Cost: #PEPM	Included in Premium	Included in Premium	N/A	N/A
24 Hour Nurse Line:	Included in Wellness	Included in Wellness	NormanMD	NormanMD
Actively at Work Waived:	Yes	Yes	Yes	Yes
Pooling Point:	\$75,000	\$90,000	None	None
Trend Factor:	Not Provided	8.6%/14.5%	Industry Average	Industry Average
Deductible Carryover	Yes - 4th Quarter	No	No	No
Transition Credit	Yes - \$40,000	Yes-\$40,000	\$15,000	\$15,000
2026 Rate Cap	Yes - 9.5%	No	Yes-10%	Yes-10%

STAFF SUMMARY SHEET

ISSUE: Contract – Audit Services

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for audit services.



Bexar Appraisal District

**Board of Directors
Summary Report for Approval
of Bids, Contracts and Agreements**

DATE: 10/22/2024

TYPE: IFB - Invitation for Bid
 RFP - Request for Proposal
 Contract/Agreement

SERVICE/PRODUCT: Audit Services

VENDOR NAME: abip PC

CONTRACT AMOUNT: \$33,000

LOWEST BID/PROPOSAL: Yes
 N/A 2nd year renewal
 No. If not, why _____

PERIOD COVERED: January 1, 2025 - December 31, 2025

REFERENCES: Yes

NUMBER OF BIDS: _____

CURRENT VENDOR: abip PC

BUDGETED AMOUNT: \$50,000

ORIGINATING DEPT.: Executive Services

REVIEWED/APPROVED BY:
Finance Director *Crystal Hunt*
Chief Appraiser *[Signature]*

STAFF SUMMARY SHEET

ISSUE: Contract – Security Services

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for security services.



Bexar Appraisal District

**Board of Directors
Summary Report for Approval
of Bids, Contracts and Agreements**

DATE: 10/22/2024

TYPE: IFB - Invitation for Bid
 RFP - Request for Proposal
 Contract/Agreement

SERVICE/PRODUCT: Security Services

VENDOR NAME: Lt. Gabriel Villarreal

CONTRACT AMOUNT: \$173,124

LOWEST BID/PROPOSAL: Yes
 N/A 2nd year renewal
 No. If not, why _____

PERIOD COVERED: January 1, 2025- December 31,2025

LOCAL COMPANY: Yes

REFERENCES: Yes

CURRENT VENDOR: Lt. Gabriel Villarreal

BUDGETED AMOUNT: \$300,000

ORIGINATING DEPT.: Information Systems

REVIEWED/APPROVED BY:
Department Director [Signature]
Finance Director [Signature]
Chief Appraiser [Signature]

STAFF SUMMARY SHEET

ISSUE: Contract – Temporary Services

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for temporary services.



Bexar Appraisal District

**Board of Directors
Summary Report for Approval
of Bids, Contracts and Agreements**

DATE: 10/22/2024

TYPE: IFB - Invitation for Bid
 RFP - Request for Proposal
 Contract/Agreement

SERVICE/PRODUCT: Temporary Services

VENDOR NAME: Dependable Business Solutions

CONTRACT AMOUNT: \$185,000

LOWEST BID/PROPOSAL: Yes
 N/A 2nd year extension
 No. If not, why _____

PERIOD COVERED: January 1, 2025 - December 31, 2025

LOCAL COMPANY: Yes

REFERENCES: Yes

NUMBER OF BIDS: _____

CURRENT VENDOR: Dependable Business Solutions

BUDGETED AMOUNT: \$196,000

ORIGINATING DEPT.: Executive Services

REVIEWED/APPROVED BY:

Finance Director

Cynthia K...

Chief Appraiser

[Signature]

STAFF SUMMARY SHEET

ISSUE: Contract – Janitorial Services

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for janitorial services.



Bexar Appraisal District

**Board of Directors
Summary Report for Approval
of Bids, Contracts and Agreements**

DATE: 10/22/2024

TYPE: IFB - Invitation for Bid
 RFP - Request for Proposal
 Contract/Agreement

SERVICE/PRODUCT: Janitorial Services

VENDOR NAME: Unified Service Associates

CONTRACT AMOUNT: \$4,363 per month / \$52,356 per year

LOWEST BID/PROPOSAL: Yes
 N/A 3rd Final Year
 No. If not, why _____

PERIOD COVERED: January 1, 2025 - December 31, 2025

REFERENCES: Yes

NUMBER OF BIDS: _____

CURRENT VENDOR: Unified Service Associates

BUDGETED AMOUNT: \$54,000

ORIGINATING DEPT.: Executive Services

REVIEWED/APPROVED BY:
Finance Director Cynthia K. Hunt
Chief Appraiser [Signature]

STAFF SUMMARY SHEET

ISSUE: Contract – Aerial Orthophotography

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into a contract for aerial orthophotography.



Bexar Appraisal District

**Board of Directors
Summary Report for Approval
of Bids, Contracts and Agreements**

DATE: 10/22/2024

TYPE: IFB - Invitation for Bid
 RFP - Request for Proposal
 Contract/Agreement

SERVICE/PRODUCT: Aerial Orthophotography

VENDOR NAME: Nearmap U.S. Inc.

CONTRACT AMOUNT: \$250,000

LOWEST BID/PROPOSAL: Yes
 N/A 2nd year
 No. If not, why _____

PERIOD COVERED: 1/01/25 - 12/31/25

LOCAL COMPANY: Yes

REFERENCES: Yes

CURRENT VENDOR: Nearmap U.S. Inc.

BUDGETED AMOUNT: \$250,000

ORIGINATING DEPT.: Geographic Information Services

REVIEWED/APPROVED BY:
Department Manager [Signature]
Finance Director [Signature]
Chief Appraiser [Signature]

STAFF SUMMARY SHEET

ISSUE: Board of Directors Manual

The board of directors may discuss and update meeting dates and communication methods among all board members and the district.

MEETING OF THE BOARD OF DIRECTORS

When possible, meetings will be held at 2:00 pm on the second Tuesday of every month as needed but not less than once a quarter. Meetings take place at the district's office located at 411 North Frio, San Antonio, TX 78207.

During a tax unit election year, the December meeting will be held as soon as possible after the December 15th voting deadline.

Anticipated Meeting Dates for 2025

January 14

February 11

March 11

April 8

May 13

June 10

July 8

August 12

September 9

October 14

November 11

December 9

**Meeting dates and times are as needed and subject to change.*

STAFF SUMMARY SHEET

ISSUE: Intent to Encumber Funds

The chief appraiser will inform the board of directors of the district's intent to amend the 2024 operating budget and encumber funds.

Budget Surplus and Desired Encumbrances

The Bexar Appraisal District anticipates a budget surplus of unexpended funds from the 2024 budget of approximately \$2,075,000. The surplus exists due to two primary factors: anticipated costs that never materialized and several staff positions that were unfilled for part of the year. As permitted by Section 6.06 of the Tax Code, staff requests that the board of directors amend the 2024 budget to encumber funds for the following items:

Add \$560,000 to the Election Restricted Fund Reserve

In the second special session of the 88th Legislature, SB2 was passed that contains a provision changing the make-up of the appraisal district's board of directors in populous counties. Counties having a population of greater than 75,000 will now have 3 members of their board of directors popularly elected by majority vote at the general election for state and county officers. The first election took place in May of 2024 and then the directors will be elected in the general election beginning in November of 2026. The estimated balance owed to the election department for the election and run off is approximately \$560,000.

Add \$175,000 to the Litigation Expenses Restricted Fund Reserve

Litigation and the associated cost to manage it has increased significantly over the past several years. Litigation volume has ballooned and is expected to increase further in the coming years. The balance of the Litigation Expenses Restricted Fund Reserve is currently \$700,000 as of September 30, 2024 and after the addition of \$175,000, the balance will be \$875,000. Adding to this reserve will allow us to mitigate unforeseen costs or awards for plaintiff's attorney's fees that may exceed budgeted amounts.

Add \$65,000 to the Digital Orthophotography Restricted Fund Reserve

A Digital Orthophotography Restricted fund was started in 2020 and as of September 30, 2024 has a Fund Reserve Balance of \$100,000 after the addition of \$65,000 the balance will be \$165,000. The funds added will enhance our current platform by adding to the Districts system of aerial imagery by georeferencing current sketches over aerial images.

Add \$477,000 to the General Restricted Fund Reserve

As requested by our auditors, there is a desire for the district to have three months' worth of expenditures in reserve. To this end, the district staff would like to take \$477,000 of this year's surplus and add this to the General Restricted Fund Reserve to work toward this goal. The General Restricted Fund Reserve balance is currently \$3,523,000 as of September 30, 2024 and after the addition of \$477,000 the balance will be \$4,000,000. Three months' worth of operating expenses are estimated to be approximately \$6,475,300.

Add \$77,000 to the Technology Restricted Fund Reserve

The technology restricted fund has a balance of \$275,000 after the addition of \$77,000 the balance will be \$352,000. The funds added will enhance our current technology platform. The District is evaluating intake and workflow software utilized for customer interaction. This will add to processing and communication efficiency for staff.

STAFF SUMMARY SHEET

ISSUE: Clarification of the reappraisal plan regarding properties protested in 2026.

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.

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 July, August, and September 2024
 - b. Statement of revenues and expenses through September 30, 2024
 - c. Designated cash funds report through September 30, 2024
2. Appraisal Records
 - a. Presentation of the appraisal roll report for the third quarter of the 2024 tax years as authorized by Section 25.25(b), Texas Property Tax Code
 - b. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2024/2025 appraisal roll.
3. Recognition
 - a. The chief appraiser will inform the board of directors of the district's recognition as one of San Antonio Express News' Top Workplaces for 2024.

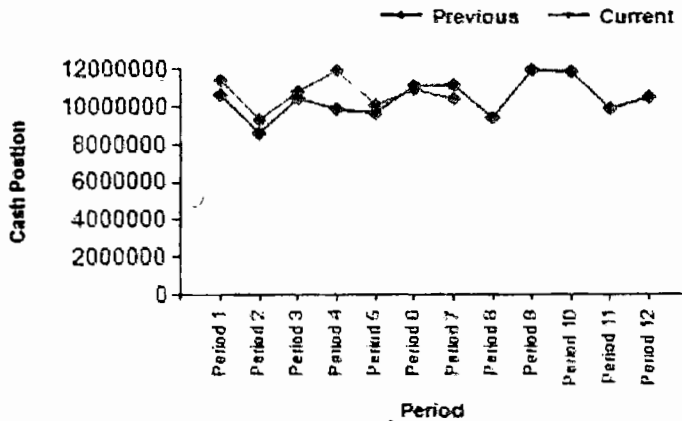
BEXAR APPRAISAL DISTRICT
Funds Investment Report
7/31/2024

Cash - Operating Account	\$	2,061,305.20	<u>% RATE</u>	0%	<table border="1"> <tr> <th colspan="2">Other Rate Comparisons</th> </tr> <tr> <td>TexPool</td> <td>90 day T-Bill</td> </tr> <tr> <td>5.32%</td> <td>5.29%</td> </tr> </table>	Other Rate Comparisons		TexPool	90 day T-Bill	5.32%	5.29%
Other Rate Comparisons											
TexPool	90 day T-Bill										
5.32%	5.29%										
	\$	8,382,813.02	3.27%								
Total Deposits	\$	10,444,118.22									
Pledged Collateral:											
FDIC	\$	250,000.00	Year-To-Date Interest Earned	\$ 166,841.95							
FMV	\$	13,714,878.87									
Total Collateral	\$	13,964,878.87									
Collateral Over (Under)	\$	3,520,760.65	131% FMV Less FDIC	per investment Policy							

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 10,444,118.00	\$ 10,935,873.00	\$ 491,755.00 ↓	4.50%
vs. This Period Last Year	\$ 10,444,118.00	\$ 11,184,342.00	\$ 740,224.00 ↓	6.62%

Cash Position Detail



Signed by: *Cristina P. [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: August 2022 with TML



Bexar Appraisal District
Balance Sheet
As of 7/31/2024

	<u>May</u>	<u>June</u>	<u>July</u>
ASSETS			
Cash and Short Term Investments	\$10,121,121.70	\$10,935,873.24	\$10,444,118.22
Accounts Receivable	28,569.00	2,649,077.00	1,212,962.00
Employee Advances	0.00	500.00	0.00
Prepaid Expenses	68,922.40	68,922.40	68,922.40
Total Current Assets	10,218,613.10	13,654,372.64	11,726,002.62
General Fixed Assets	4,636,800.67	4,636,800.67	4,636,800.67
Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Non-Current Portion Sick & Vacation	1,333,236.29	1,333,236.29	1,333,236.29
Total Non- Current Assets	11,719,576.09	11,719,576.09	11,719,576.09
Total Assets	21,938,189.19	25,373,948.73	23,445,578.71
LIABILITIES			
Accounts Payable	265,118.47	249,670.34	244,254.09
Total Current Liabilities	265,118.47	249,670.34	244,254.09
Non-Current Sick & Vacation Accrual	1,333,236.29	1,333,236.29	1,333,236.29
Total Liabilities	1,598,354.76	1,582,906.63	1,577,490.38
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	4,636,800.67	4,636,800.67
General Restricted Reserve Fund	3,523,000.00	3,523,000.00	3,523,000.00
Designated - Digital Orthophotography	100,000.00	100,000.00	100,000.00
Designated - Litigation Expenses	700,000.00	700,000.00	700,000.00
Designated - Retirement Funding	112,654.16	112,654.16	112,654.16
Designated - Technology Reserve	275,000.00	275,000.00	275,000.00
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	500,000.00	65,415.87	65,415.87
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	783,998.05	0.00	0.00
Net Profit/(Loss)	2,379,496.63	7,049,286.48	5,126,332.71
Total Equity	20,326,223.92	23,777,431.59	21,854,477.82
Total Liabilities and Equity	221,924,578.68	225,360,338.22	223,431,968.20

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Seven Months Ending 7/31/2024

<u>TAXING UNITS</u>	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
Alamo Community College District	\$1,882,552	\$0	\$1,411,914	(75%)	\$470,638
City of Alamo Heights	42,554	0	31,917	(75%)	10,637
Alamo Heights ISD	412,643	0	309,483	(75%)	103,160
City of Balcones Heights	11,556	0	8,667	(75%)	2,889
Bexar County	3,219,990	0	2,414,994	(75%)	804,996
Bexar County Emer Serv Dist#1	9,669	0	7,251	(75%)	2,418
Bexar County Emer Serv Dist#2	75,388	0	56,541	(75%)	18,847
Bexar County Emer Serv Dist#3	39,426	0	29,571	(75%)	9,855
Bexar County Emer Serv Dist#5	19,674	0	14,757	(75%)	4,917
Bexar County Emer Serv Dist#6	8,532	0	6,399	(75%)	2,133
Bexar County Flood	281,179	0	210,885	(75%)	70,294
Bexar County Emer Serv Dist#7	32,317	0	24,237	(75%)	8,080
Bexar County Emer Serv Dist#8	10,264	0	7,698	(75%)	2,566
Bexar County Emer Serv Dist#4	13,030	0	9,774	(75%)	3,256
Bexar County Emer Serv Dist#10	13,495	0	10,122	(75%)	3,373
Boerne ISD	166,443	0	124,833	(75%)	41,610
Bexar County Emer Serv Dist#11	11,815	0	8,862	(75%)	2,953
Bexar County Emer Serv Dist#12	8,713	0	6,534	(75%)	2,179
City of Castle Hills	25,181	0	18,885	(75%)	6,296
City of China Grove	2,068	0	1,551	(75%)	517
Cibolo Canyon	46,510	0	34,884	(75%)	11,626
Comal ISD	196,097	0	147,072	(75%)	49,025
City of Converse	59,178	0	44,385	(75%)	14,793
Crosswinds at South Lake SID	4,757	0	3,567	(75%)	1,190
East Central ISD	346,252	0	259,689	(75%)	86,563
Edgewood ISD	122,260	0	91,695	(75%)	30,565
City of Elmendorf	4,990	0	3,744	(75%)	1,246
City of Fair Oaks Ranch	24,767	0	18,576	(75%)	6,191
Floresville ISD	155	0	117	(75%)	38
City of Grey Forest	336	0	252	(75%)	84
Harlandale ISD	163,651	0	122,739	(75%)	40,912
City of Helotes	25,750	0	19,314	(75%)	6,436
Hill Country Village	3,542	0	2,658	(75%)	884
Town of Hollywood Park	18,588	0	13,941	(75%)	4,647
Judson ISD	786,170	0	589,629	(75%)	196,541
City of Kirby	17,451	0	13,089	(75%)	4,362
City of Leon Valley	33,144	0	24,858	(75%)	8,286
City of Live Oak	40,228	0	30,171	(75%)	10,057
City of Lytle	26	0	21	(81%)	5
Medina Valley ISD	165,486	0	124,116	(75%)	41,370
Northeast ISD	2,629,167	0	1,971,876	(75%)	657,291
Northside ISD	3,962,442	0	2,971,833	(75%)	990,609
City of Olmos Park	21,174	0	15,882	(75%)	5,292
City of San Antonio	4,318,829	0	3,239,121	(75%)	1,079,708
San Antonio ISD	1,689,791	0	1,267,344	(75%)	422,447
San Antonio MUD #1	1,267	0	951	(75%)	316
San Antonio River Authority	240,435	0	180,327	(75%)	60,108
City of Sandy Oaks	3,025	0	2,268	(75%)	757

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT MONTH	YEAR TO DATE	YTD %	(OVER) UNDER
City of Schertz	17,606	0	13,206	(75%)	4,400
Schertz-Cibolo-Univ City ISD	76,164	0	57,123	(75%)	19,041
City of Selma	11,117	0	8,337	(75%)	2,780
City of Shavano Park	25,827	0	19,371	(75%)	6,456
City of Somerset	5,326	0	3,996	(75%)	1,330
Somerset ISD	32,859	0	24,645	(75%)	8,214
South San Antonio ISD	160,523	0	120,393	(75%)	40,130
Southside ISD	138,780	0	104,085	(75%)	34,695
Southwest ISD	402,870	0	302,121	(75%)	100,749
City of St. Hedwig	6,437	0	4,827	(75%)	1,610
City of Terrell Hills	37,099	0	27,825	(75%)	9,274
Universal City	55,636	0	41,727	(75%)	13,909
University Health System	3,621,541	0	2,716,137	(75%)	905,404
Westside 211 SID	9,230	0	6,924	(75%)	2,306
City of Windcrest	20,372	0	15,279	(75%)	5,093
Clear Water Creek SID	26	0	21	(81%)	5
Stolte Ranch SID	672	0	504	(75%)	168
Tally Road SID	853	0	639	(75%)	214
Westpoint SID	9,669	0	7,251	(75%)	2,418
Redbird Ranch	5,248	0	3,936	(75%)	1,312
Bexar County Emer Serv Dist#9	2,017	0	1,512	(75%)	505
Tres Laurels SID	52	0	39	(75%)	13
Landon Ridge SID	465	0	348	(75%)	117
Lemon Creek SID	207	0	156	(75%)	51
Briggs Ranch SID	388	0	291	(75%)	97
Saphire Grove SID	129	0	96	(74%)	33
Grace Gardens SID	78	0	60	(77%)	18
Briggs Ranch II SID	52	0	39	(75%)	13
TOTAL TAX UNIT LEVY	25,853,200	0	19,389,882	75%	6,463,318
Other Revenues	20,000	7,199	121,679	(608%)	(101,679)
Other Revenues - Information Systems	8,000	188	2,596	(32%)	5,404
Interest Revenues	20,000	22,800	166,842	(834%)	(146,842)
TOTAL OTHER REVENUES	48,000	30,187	291,117	606%	(243,117)
TOTAL REVENUES COLLECTED	25,901,200	30,187	19,680,999	76%	6,220,201

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Seven Months Ending 7/31/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	0	43,426	69%	19,574
Auto Allowance	892,800	75,267	539,120	60%	353,680
Stipend	32,000	2,500	14,959	47%	17,041
Copier Costs	47,981	3,027	18,747	39%	29,234
Copier, FAX, & Printer Supplies	54,445	1,732	16,637	31%	37,808
Employee Recognition/Awards	50,000	300	11,903	24%	38,097
Equipment Maintenance	350	0	0	0	350
Forms Creation	366,775	6,323	190,141	52%	176,634
General Insurance	45,000	0	42,905	95%	2,095
Map Production & Supplies	4,550	1,487	1,723	38%	2,827
Mileage Reimbursements	4,000	6	206	5%	3,794
Office Building Expense	250,000	24,832	140,894	56%	109,106
Offsite Storage	25,000	2,162	11,843	47%	13,157
Office Supplies	84,980	5,396	52,969	62%	32,011
Postage	694,362	9,472	430,086	62%	264,276
Professional Dues	29,402	375	11,948	41%	17,454
Publications	292,950	20,431	132,876	45%	160,074
Security	300,000	37,863	151,352	50%	148,649
Telephone	93,000	15,398	47,319	51%	45,681
Training	263,458	8,103	77,375	29%	186,083
Utilities	125,000	10,266	50,556	40%	74,444
Worker's Compensation	50,000	(50)	45,418	91%	4,582
Contingency	250,000	0	248,258	99%	1,742
TOTAL OPERATING EXPENDITURES	4,019,053	224,890	2,280,659	57%	1,738,394
<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	15,000	0	8,395	56%	6,605
Residential	10,000	0	694	7%	9,306
Commercial	3,500	0	1,385	40%	2,115
Personal Property	4,500	0	0	0	4,500
Legal	2,000	0	469	23%	1,531
EQUIPMENT:					
Information Services	112,000	0	21,648	19%	90,352
CAMA Hardware	15,000	0	3,840	26%	11,160
TOTAL CAPITAL EXPENDITURES	164,500	0	36,431	22%	128,069
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	957,059	6,786,577	55%	5,524,052
Salaries, Overtime	166,350	15,702	80,119	48%	86,231
Retirement	2,057,710	170,724	1,230,429	60%	827,281
Payroll Taxes	31,428	201	22,621	72%	8,807
Group Medical Insurance	1,984,670	115,752	769,947	39%	1,214,723
Life Insurance	77,345	4,804	31,048	40%	46,297
Medicare Taxes	192,772	14,987	107,927	56%	84,845

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT MONTH	YEAR TO DATE	YTD %	(OVER) UNDER
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	4,623	92,723	185%	(42,723)
Departure Contingency	70,000	0	89,211	127%	(19,211)
TOTAL EMPLOYEE EXPENDITURES	17,215,904	1,283,853	9,210,601	54%	8,005,303
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	0	34,731	91%	3,269
Valuation Telecommunications Accounts	40,000	0	0	0	40,000
Accounting & Auditing	50,000	2,415	42,832	86%	7,168
Legal Services	1,100,000	52,080	607,660	55%	492,340
Consulting Studies	40,000	6,804	16,218	41%	23,782
Taxpayer Liasion Officer	30,000	5,176	16,445	55%	13,555
Contract Services Contingency	45,800	120	87	0	45,713
Temporary Services	189,500	26,871	135,811	72%	53,689
TOTAL CONTRACT SERV. EXP	1,533,300	93,465	853,783	56%	679,517
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	74,580	2,966	37,779	51%	36,801
Software Maintenance	423,330	7,409	348,556	82%	74,774
Hardware Maintenance	43,000	0	12,786	30%	30,214
IS Supplies	60,000	1,673	14,766	25%	45,234
IS Services	35,600	263	10,419	29%	25,181
TOTAL INFO. SYSTEMS EXP.	636,510	12,311	424,306	67%	212,204
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	0	240,000	100%	0
Homestead Audit /Outreach	10,000	0	0	0	10,000
Field Device Maintenance	201,156	3,942	194,761	97%	6,395
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	200,000	0	3,800	2%	196,200
CAMA Software	583,502	121,827	366,835	63%	216,667
CAMA Enhancements	100,000	0	0	0	100,000
TOTAL PROJECT EXPENDITURES	1,434,658	125,769	805,396	56%	629,262
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	0	1,233	31%	2,767
Chief Appraiser Expense	8,000	192	2,492	31%	5,508
TOTAL OTHER EXPENDITURES	12,000	192	3,724	31%	8,276

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Seven Months Ending 7/31/2024

	<u>2024 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	630,000	167,770	423,650	67%	206,350
Training	6,925	0	2,900	42%	4,025
Postage	181,850	41,033	104,618	58%	77,232
Legal Services	65,000	3,859	5,763	9%	59,237
Contingency	1,500	0	0	0	1,500
TOTAL A.R.B EXPENDITURES	885,275	212,661	536,931	61%	348,344
TOTAL EXPENDITURES	25,901,200	1,953,141	14,151,832	55%	11,749,368
REVENUES OVER EXPENDITURES	0	1,922,954	(5,529,167)	0	5,529,167

BEKAR APPRAISAL DISTRICT
STATEMENT OF EXPENDITURES FOR
DESIGNATED CASH FUNDS (MODIFIED ACCRUAL BASIS)
FOR THE MONTH ENDED July 31, 2024

		GENERAL RESTRICTED FUND	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 3,523,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 3,523,000.00

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
6/3/2024	Run off election deposit		(434,584.13)
31-Jul	Funds added		\$ 500,000.00
	ITEMIZED MONTHLY TOTAL		65,415.87
	ITEMIZED YTD TOTAL		\$ 65,415.87

		DESIGNATED - DIGITAL/ORTHO PHOTOGRAPHY	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 100,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 100,000.00

		DESIGNATED - LITIGATION EXPENSES	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 700,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 700,000.00

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

		DESIGNATED - RETIREMENT FUNDING	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 112,654.16
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 112,654.16

		DESIGNATED - TECHNOLOGY RESERVE	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 275,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 275,000.00

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

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

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

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

		DESIGNATED - Other	
DATE	PAYEE	PURPOSE	AMOUNT
31-Jul	Balance Forward		\$ 13,610.51
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 13,610.51

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
 For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>TAXING UNITS</u>					
Alamo Community College District	\$1,882,552	\$1,411,914	\$1,136,532	\$0	\$0
City of Alamo Heights	42,554	31,917	27,591	0	0
Alamo Heights ISD	412,643	309,483	325,800	0	0
City of Balcones Heights	11,556	8,667	6,768	0	0
Bexar County	3,219,990	2,414,994	1,935,426	0	0
Bexar County Emer Serv Dist#1	9,669	7,251	5,706	0	0
Bexar County Emer Serv Dist#2	75,388	56,541	44,955	0	0
Bexar County Emer Serv Dist#3	39,426	29,571	24,489	0	0
Bexar County Emer Serv Dist#5	19,674	14,757	10,401	0	0
Bexar County Emer Serv Dist#6	8,532	6,399	4,908	0	0
Bexar County Flood	281,179	210,885	168,927	0	0
Bexar County Emer Serv Dist#7	32,317	24,237	18,501	0	0
Bexar County Emer Serv Dist#8	10,264	7,698	5,919	0	0
Bexar County Emer Serv Dist#4	13,030	9,774	7,956	0	0
Bexar County Emer Serv Dist#10	13,495	10,122	7,602	0	0
Boerne ISD	166,443	124,833	134,550	0	0
Bexar County Emer Serv Dist#11	11,815	8,862	7,053	0	0
Bexar County Emer Serv Dist#12	8,713	6,534	4,803	0	0
City of Castle Hills	25,181	18,885	15,009	0	0
City of China Grove	2,068	1,551	1,275	0	0
Cibolo Canyon	46,510	34,884	25,623	0	0
Comal ISD	196,097	147,072	162,618	0	0
City of Converse	59,178	44,385	34,005	0	0
Crosswinds at South Lake SID	4,757	3,567	1,932	0	0
East Central ISD	346,252	259,689	249,552	0	0
Edgewood ISD	122,260	91,695	88,779	0	0
City of Elmendorf	4,990	3,744	2,853	0	0
City of Fair Oaks Ranch	24,767	18,576	15,858	0	0
Floresville ISD	155	117	105	0	0
City of Grey Forest	336	252	213	0	0
Harlandale ISD	163,651	122,739	127,566	0	0
City of Helotes	25,750	19,314	16,053	0	0
Hill Country Village	3,542	2,658	2,196	0	0
Town of Hollywood Park	18,588	13,941	11,943	0	0
Judson ISD	786,170	589,629	613,629	0	0
City of Kirby	17,451	13,089	11,253	0	0
City of Leon Valley	33,144	24,858	21,618	0	0
City of Live Oak	40,228	30,171	25,872	0	0
City of Lytle	26	21	18	0	0
Medina Valley ISD	165,486	124,116	103,077	0	0
Northeast ISD	2,629,167	1,971,876	2,121,876	0	0
Northside ISD	3,962,442	2,971,833	3,138,372	0	0
City of Olmos Park	21,174	15,882	12,138	0	0
City of San Antonio	4,318,829	3,239,121	2,697,000	0	0
San Antonio ISD	1,689,791	1,267,344	1,275,228	0	0
San Antonio MUD #1	1,267	951	1,134	0	0

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
San Antonio River Authority	240,435	180,327	146,829	0	0
City of Sandy Oaks	3,025	2,268	1,860	0	0
City of Schertz	17,606	13,206	10,527	0	0
Schertz-Cibolo-Univ City ISD	76,164	57,123	58,212	0	0
City of Selma	11,117	8,337	6,768	0	0
City of Shavano Park	25,827	19,371	15,522	0	0
City of Somerset	5,326	3,996	3,189	0	0
Somerset ISD	32,859	24,645	25,854	0	0
South San Antonio ISD	160,523	120,393	117,219	0	0
Southside ISD	138,780	104,085	96,078	0	0
Southwest ISD	402,870	302,121	279,516	0	0
City of St. Hedwig	6,437	4,827	3,828	0	0
City of Terrell Hills	37,099	27,825	23,301	0	0
Universal City	55,636	41,727	35,796	0	0
University Health System	3,621,541	2,716,137	2,217,264	0	0
Westside 211 SID	9,230	6,924	4,854	0	0
City of Windcrest	20,372	15,279	12,441	0	0
Clear Water Creek SID	26	21	0	0	0
Stolte Ranch SID	672	504	231	0	0
Tally Road SID	853	639	141	0	0
Westpoint SID	9,669	7,251	2,958	0	0
Redbird Ranch	5,248	3,936	1,239	0	0
Bexar County Emer Serv Dist#9	2,017	1,512	1,224	0	0
Tres Laurels SID	52	39	36	0	0
Landon Ridge SID	465	348	285	0	0
Lemon Creek SID	207	156	105	0	0
Briggs Ranch SID	388	291	141	0	0
Saphire Grove SID	129	96	0	0	0
Grace Gardens SID	78	60	0	0	0
Briggs Ranch II SID	52	39	0	0	0
TOTAL TAX UNIT LEVY	25,853,200	19,389,882	17,720,100	0	0
Other Revenues	20,000	121,679	86,441	7,199	10,394
Other Revenues - Information Systems	8,000	2,596	2,674	188	338
Interest Revenues	20,000	166,842	125,262	22,800	23,742
TOTAL OTHER REVENUES	48,000	291,117	214,377	30,187	34,474
TOTAL REVENUES COLLECTED	25,901,200	19,680,999	17,934,477	30,187	34,474

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	43,426	41,732	0	0
Auto Allowance	892,800	539,120	384,974	75,267	55,903
Stipend	32,000	14,959	9,917	2,500	1,417
Copier Costs	47,981	18,747	19,063	3,027	3,462
Copier, FAX, & Printer Supplies	54,445	16,637	25,062	1,732	2,626
Employee Recognition/Awards	50,000	11,903	14,847	300	0
Equipment Maintenance	350	0	0	0	0
Forms Creation	366,775	190,141	191,215	6,323	10,103
General Insurance	45,000	42,905	44,390	0	2,478
Map Production & Supplies	4,550	1,723	1,626	1,487	1,626
Mileage Reimbursements	4,000	206	398	6	0
Office Building Expense	250,000	140,894	150,724	24,832	15,885
Offsite Storage	25,000	11,843	12,276	2,162	1,696
Office Supplies	84,980	52,969	56,776	5,396	6,265
Postage	694,362	430,086	659,855	9,472	51,793
Professional Dues	29,402	11,948	11,400	375	45
Publications	292,950	132,876	94,430	20,431	8,741
Security	300,000	151,352	125,414	37,863	25,719
Telephone	93,000	47,319	39,609	15,398	4,950
Training	263,458	77,375	101,196	8,103	1,726
Utilities	125,000	50,556	49,934	10,266	10,831
Worker's Compensation	50,000	45,418	37,470	(50)	(50)
Contingency	250,000	248,258	250,000	0	0
TOTAL OPERATING EXPENDITURES	4,019,053	2,280,659	2,322,308	224,890	205,216
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	4,185	0	0
Information Services	500	0	777	0	0
Geographic Info. Systems	500	0	0	0	0
Customer Info & Assist	15,000	8,395	0	0	0
Residential	10,000	694	0	0	0
Commercial	3,500	1,385	0	0	0
Personal Property	4,500	0	0	0	0
Legal	2,000	469	0	0	0
EQUIPMENT:					
Information Services	112,000	21,648	120,718	0	0
CAMA Hardware	15,000	3,840	6,941	0	6,941
TOTAL CAPITAL EXPENDITURES	164,500	36,431	132,621	0	6,941
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	6,786,577	5,941,511	957,059	868,324
Salaries, Overtime	166,350	80,119	151,804	15,702	24,207
Retirement	2,057,710	1,230,429	1,125,595	170,724	155,139
Payroll Taxes	31,428	22,621	1,259	201	32
Group Medical Insurance	1,984,670	769,947	695,106	115,752	102,575

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
Life Insurance	77,345	31,048	20,595	4,804	4,253
Medicare Taxes	192,772	107,927	92,712	14,987	13,594
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	92,723	37,478	4,623	5,884
Departure Contingency	70,000	89,211	18,388	0	3,098
TOTAL EMPLOYEE EXPENDITURES	17,215,904	9,210,601	8,084,450	1,283,853	1,177,105
CONTRACT SERVICES:					
Valuation Oil & Gas	38,000	34,731	28,400	0	9,467
Valuation Telecommunications Accounts	40,000	0	13,525	0	0
Accounting & Auditing	50,000	42,832	45,375	2,415	9,320
Legal Services	1,100,000	607,660	646,199	52,080	108,107
Consulting Studies	40,000	16,218	15,862	6,804	6,804
Taxpayer Liasion Officer	30,000	16,445	13,466	5,176	3,294
Contract Services Contingency	45,800	87	54,821	120	40
Temporary Services	189,500	135,811	81,833	26,871	5,963
TOTAL CONTRACT SERV. EXP	1,533,300	853,783	899,482	93,465	142,995
INFO. SYSTEMS EXPENDITURES					
Leases	74,580	37,779	43,614	2,966	2,359
Software Maintenance	423,330	348,556	308,247	7,409	8,427
Hardware Maintenance	43,000	12,786	52,810	0	0
IS Supplies	60,000	14,766	25,693	1,673	723
IS Services	35,600	10,419	10,664	263	768
TOTAL INFO. SYSTEMS EXP.	636,510	424,306	441,029	12,311	12,277
PROJECT EXPENDITURES:					
Aerial Maps	240,000	240,000	3,397	0	0
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	201,156	194,761	169,867	3,942	3,832
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	200,000	3,800	0	0	0
CAMA Software	583,502	366,835	362,817	121,827	120,644
CAMA Enhancements	100,000	0	0	0	0
TOTAL PROJECT EXPENDITURES	1,434,658	805,396	536,081	125,769	124,476
OTHER EXPENDITURES:					
Board of Directors Expenses	4,000	1,233	2,944	0	0
Chief Appraiser Expense	8,000	2,492	4,609	192	417
TOTAL OTHER EXPENDITURES	12,000	3,724	7,553	192	417

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Seven Months Ending 7/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>A.R.B EXPENDITURES</u>					
Compensation	630,000	423,650	324,013	167,770	159,900
Training	6,925	2,900	5,450	0	0
Postage	181,850	104,618	79,790	41,033	32,758
Legal Services	65,000	5,763	5,100	3,859	0
Contingency	1,500	0	0	0	0
TOTAL A.R.B EXPENDITURES	885,275	536,931	414,353	212,661	192,658
TOTAL EXPENDITURES	25,901,200	14,151,832	12,837,877	1,953,141	1,862,085
REVENUES OVER EXPENDITURES	0	(5,529,167)	(5,096,600)	1,922,954	1,827,611

BEXAR APPRAISAL DISTRICT
Funds Investment Report
8/31/2024

Cash - Operating Account	\$	1,440,514.39	<u>% RATE</u>
	\$	8,405,675.64	0%
Total Deposits	\$	9,846,190.03	3.17%

Other Rate Comparisons	
TexPool	90 day T-Bill
5.30%	5.18%

Pledged Collateral:

FDIC	\$	250,000.00
FMV	\$	13,795,082.28
Total Collateral	\$	14,045,082.28

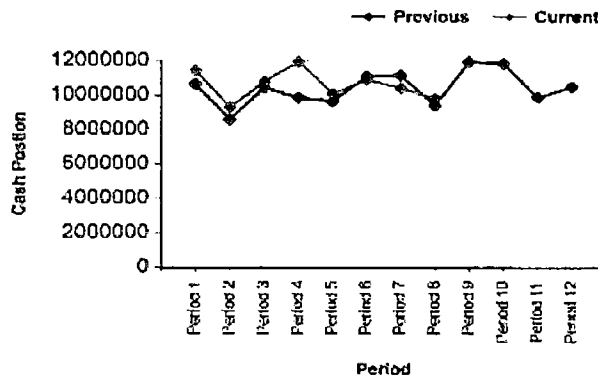
Year-To-Date Interest Earned \$ 189,704.57

Collateral Over (Under) \$ 4,198,892.25 140% FMV Less FDIC per investment Policy

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 9,846,190.00	\$ 10,444,116.00	\$ 597,926.00 *	5.73%
vs. This Period Last Year	\$ 9,846,190.00	\$ 9,436,755.00	\$ 409,435.00 *	4.34%

Cash Position Detail



Signed by: *Cynthia K. [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: August 2022 with TML



Bexar Appraisal District
Balance Sheet
 As of 8/31/2024

	<u>June</u>	<u>July</u>	<u>August</u>
ASSETS			
Cash and Short Term Investments	\$10,935,873.24	\$10,444,118.22	\$9,846,190.03
Accounts Receivable	2,649,077.00	1,212,962.00	46,742.00
Employee Advances	500.00	0.00	0.00
Prepaid Expenses	68,922.40	68,922.40	68,922.40
Total Current Assets	13,654,372.64	11,726,002.62	9,961,854.43
General Fixed Assets	4,636,800.67	4,636,800.67	4,636,800.67
Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Non-Current Portion Sick & Vacation	1,333,236.29	1,333,236.29	1,333,236.29
Total Non- Current Assets	11,719,576.09	11,719,576.09	11,719,576.09
Total Assets	<u>25,373,948.73</u>	<u>23,445,578.71</u>	<u>21,681,430.52</u>
LIABILITIES			
Accounts Payable	249,670.34	244,254.09	240,458.79
Total Current Liabilities	249,670.34	244,254.09	240,458.79
Non-Current Sick & Vacation Accrual	1,333,236.29	1,333,236.29	1,333,236.29
Total Liabilities	1,582,906.63	1,577,490.38	1,573,695.08
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	4,636,800.67	4,636,800.67
General Restricted Reserve Fund	3,523,000.00	3,523,000.00	3,523,000.00
Designated - Digital Orthophotography	100,000.00	100,000.00	100,000.00
Designated - Litigation Expenses	700,000.00	700,000.00	700,000.00
Designated - Retirement Funding	112,654.16	112,654.16	112,654.16
Designated - Technology Reserve	275,000.00	275,000.00	275,000.00
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	65,415.87	65,415.87
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	0.00
Net Profit/(Loss)	7,049,286.48	5,126,332.71	3,379,590.33
Total Equity	23,777,431.59	21,854,477.82	20,107,735.44
Total Liabilities and Equity	<u>\$25,360,338.22</u>	<u>\$23,431,968.20</u>	<u>\$21,681,430.52</u>

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Eight Months Ending 8/31/2024

<u>TAXING UNITS</u>	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
Alamo Community College District	\$1,882,552	\$0	\$1,411,914	(75%)	\$470,638
City of Alamo Heights	42,554	0	31,917	(75%)	10,637
Alamo Heights ISD	412,643	0	309,483	(75%)	103,160
City of Balcones Heights	11,556	0	8,667	(75%)	2,889
Bexar County	3,219,990	0	2,414,994	(75%)	804,996
Bexar County Emer Serv Dist#1	9,669	0	7,251	(75%)	2,418
Bexar County Emer Serv Dist#2	75,388	0	56,541	(75%)	18,847
Bexar County Emer Serv Dist#3	39,426	0	29,571	(75%)	9,855
Bexar County Emer Serv Dist#5	19,674	0	14,757	(75%)	4,917
Bexar County Emer Serv Dist#6	8,532	0	6,399	(75%)	2,133
Bexar County Flood	281,179	0	210,885	(75%)	70,294
Bexar County Emer Serv Dist#7	32,317	0	24,237	(75%)	8,080
Bexar County Emer Serv Dist#8	10,264	0	7,698	(75%)	2,566
Bexar County Emer Serv Dist#4	13,030	0	9,774	(75%)	3,256
Bexar County Emer Serv Dist#10	13,495	0	10,122	(75%)	3,373
Boerne ISD	166,443	0	124,833	(75%)	41,610
Bexar County Emer Serv Dist#11	11,815	0	8,862	(75%)	2,953
Bexar County Emer Serv Dist#12	8,713	0	6,534	(75%)	2,179
City of Castle Hills	25,181	0	18,885	(75%)	6,296
City of China Grove	2,068	0	1,551	(75%)	517
Cibolo Canyon	46,510	0	34,884	(75%)	11,626
Comal ISD	196,097	0	147,072	(75%)	49,025
City of Converse	59,178	0	44,385	(75%)	14,793
Crosswinds at South Lake SID	4,757	0	3,567	(75%)	1,190
East Central ISD	346,252	0	259,689	(75%)	86,563
Edgewood ISD	122,260	0	91,695	(75%)	30,565
City of Elmendorf	4,990	0	3,744	(75%)	1,246
City of Fair Oaks Ranch	24,767	0	18,576	(75%)	6,191
Floresville ISD	155	0	117	(75%)	38
City of Grey Forest	336	0	252	(75%)	84
Harlandale ISD	163,651	0	122,739	(75%)	40,912
City of Helotes	25,750	0	19,314	(75%)	6,436
Hill Country Village	3,542	0	2,658	(75%)	884
Town of Hollywood Park	18,588	0	13,941	(75%)	4,647
Judson ISD	786,170	0	589,629	(75%)	196,541
City of Kirby	17,451	0	13,089	(75%)	4,362
City of Leon Valley	33,144	0	24,858	(75%)	8,286
City of Live Oak	40,228	0	30,171	(75%)	10,057
City of Lytle	26	0	21	(81%)	5
Medina Valley ISD	165,486	0	124,116	(75%)	41,370
Northeast ISD	2,629,167	0	1,971,876	(75%)	657,291
Northside ISD	3,962,442	0	2,971,833	(75%)	990,609
City of Olmos Park	21,174	0	15,882	(75%)	5,292
City of San Antonio	4,318,829	0	3,239,121	(75%)	1,079,708
San Antonio ISD	1,689,791	0	1,267,344	(75%)	422,447
San Antonio MUD #1	1,267	0	951	(75%)	316
San Antonio River Authority	240,435	0	180,327	(75%)	60,108

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Eight Months Ending 8/31/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
City of Sandy Oaks	3,025	0	2,268	(75%)	757
City of Schertz	17,606	0	13,206	(75%)	4,400
Schertz-Cibolo-Univ City ISD	76,164	0	57,123	(75%)	19,041
City of Selma	11,117	0	8,337	(75%)	2,780
City of Shavano Park	25,827	0	19,371	(75%)	6,456
City of Somerset	5,326	0	3,996	(75%)	1,330
Somerset ISD	32,859	0	24,645	(75%)	8,214
South San Antonio ISD	160,523	0	120,393	(75%)	40,130
Southside ISD	138,780	0	104,085	(75%)	34,695
Southwest ISD	402,870	0	302,121	(75%)	100,749
City of St. Hedwig	6,437	0	4,827	(75%)	1,610
City of Terrell Hills	37,099	0	27,825	(75%)	9,274
Universal City	55,636	0	41,727	(75%)	13,909
University Health System	3,621,541	0	2,716,137	(75%)	905,404
Westside 211 SID	9,230	0	6,924	(75%)	2,306
City of Windcrest	20,372	0	15,279	(75%)	5,093
Clear Water Creek SID	26	0	21	(81%)	5
Stolte Ranch SID	672	0	504	(75%)	168
Tally Road SID	853	0	639	(75%)	214
Westpoint SID	9,669	0	7,251	(75%)	2,418
Redbird Ranch	5,248	0	3,936	(75%)	1,312
Bexar County Emer Serv Dist#9	2,017	0	1,512	(75%)	505
Tres Laurels SID	52	0	39	(75%)	13
Landon Ridge SID	465	0	348	(75%)	117
Lemon Creek SID	207	0	156	(75%)	51
Briggs Ranch SID	388	0	291	(75%)	97
Saphire Grove SID	129	0	96	(74%)	33
Grace Gardens SID	78	0	60	(77%)	18
Briggs Ranch II SID	52	0	39	(75%)	13
TOTAL TAX UNIT LEVY	25,853,200	0	19,389,882	75%	6,463,318
Other Revenues	20,000	0	121,679	(608%)	(101,679)
Other Revenues - Information Systems	8,000	278	2,873	(36%)	5,127
Interest Revenues	20,000	22,863	189,705	(949%)	(169,705)
TOTAL OTHER REVENUES	48,000	23,140	314,257	655%	(266,257)
TOTAL REVENUES COLLECTED	25,901,200	23,140	19,704,139	76%	6,197,061

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Eight Months Ending 8/31/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	899	44,325	70%	18,675
Auto Allowance	892,800	75,267	614,387	69%	278,413
Stipend	32,000	2,501	17,460	55%	14,540
Copier Costs	47,981	4,025	22,772	47%	25,209
Copier, FAX, & Printer Supplies	54,445	1,313	17,949	33%	36,496
Employee Recognition/Awards	50,000	2,315	14,218	28%	35,782
Equipment Maintenance	350	0	0	0	350
Forms Creation	366,775	0	190,141	52%	176,634
General Insurance	45,000	0	42,905	95%	2,095
Map Production & Supplies	4,550	0	1,723	38%	2,827
Mileage Reimbursements	4,000	0	206	5%	3,794
Office Building Expense	250,000	11,842	152,736	61%	97,264
Offsite Storage	25,000	2,188	14,030	56%	10,970
Office Supplies	84,980	3,883	56,852	67%	28,128
Postage	694,362	64,328	494,414	71%	199,948
Professional Dues	29,402	5	11,953	41%	17,449
Publications	292,950	9,585	142,461	49%	150,489
Security	300,000	31,909	183,260	61%	116,740
Telephone	93,000	5,504	52,823	57%	40,177
Training	263,458	8,315	85,690	33%	177,768
Utilities	125,000	9,315	59,871	48%	65,129
Worker's Compensation	50,000	(50)	45,368	91%	4,632
Contingency	250,000	0	248,258	99%	1,742
TOTAL OPERATING EXPENDITURES	4,019,053	233,144	2,513,803	63%	1,505,250
<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	15,000	0	8,395	56%	6,605
Residential	10,000	0	694	7%	9,306
Commercial	3,500	0	1,385	40%	2,115
Personal Property	4,500	0	0	0	4,500
Legal	2,000	0	469	23%	1,531
EQUIPMENT:					
Information Services	112,000	10,087	31,735	28%	80,265
CAMA Hardware	15,000	0	3,840	26%	11,160
TOTAL CAPITAL EXPENDITURES	164,500	10,087	46,518	28%	117,982

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Eight Months Ending 8/31/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	957,480	7,744,057	63%	4,566,572
Salaries, Overtime	166,350	261	80,380	48%	85,970
Retirement	2,057,710	168,269	1,398,698	68%	659,012
Payroll Taxes	31,428	53	22,674	72%	8,754
Group Medical Insurance	1,984,670	119,188	889,134	45%	1,095,536
Life Insurance	77,345	1,125	32,172	42%	45,173
Medicare Taxes	192,772	14,768	122,695	64%	70,077
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	4,467	97,190	194%	(47,190)
Departure Contingency	70,000	0	89,211	127%	(19,211)
TOTAL EMPLOYEE EXPENDITURES	17,215,904	1,265,610	10,476,211	61%	6,739,693
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	0	34,731	91%	3,269
Valuation Telecommunications Accounts	40,000	0	0	0	40,000
Accounting & Auditing	50,000	961	43,793	88%	6,207
Legal Services	1,100,000	54,335	661,995	60%	438,005
Consulting Studies	40,000	304	16,522	41%	23,478
Taxpayer Liasion Officer	30,000	3,764	20,209	67%	9,791
Contract Services Contingency	45,800	0	87	0	45,713
Temporary Services	189,500	12,288	148,098	78%	41,402
TOTAL CONTRACT SERV. EXP	1,533,300	71,652	925,435	60%	607,865
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	74,580	15,668	53,448	72%	21,133
Software Maintenance	423,330	5,801	354,357	84%	68,973
Hardware Maintenance	43,000	0	12,786	30%	30,214
IS Supplies	60,000	873	15,639	26%	44,361
IS Services	35,600	(342)	10,077	28%	25,523
TOTAL INFO. SYSTEMS EXP.	636,510	22,000	446,306	70%	190,204
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	0	240,000	100%	0
Homestead Audit /Outreach	10,000	0	0	0	10,000
Field Device Maintenance	201,156	3,941	198,702	99%	2,454
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	200,000	0	3,800	2%	196,200
CAMA Software	583,502	1,791	368,626	63%	214,876
CAMA Enhancements	100,000	0	0	0	100,000
TOTAL PROJECT EXPENDITURES	1,434,658	5,732	811,128	57%	623,530
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	0	1,233	31%	2,767
Chief Appraiser Expense	8,000	324	2,816	35%	5,184
TOTAL OTHER EXPENDITURES	12,000	324	4,049	34%	7,951

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Eight Months Ending 8/31/2024

	<u>2024 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	630,000	125,668	549,318	87%	80,683
Training	6,925	0	2,900	42%	4,025
Postage	181,850	35,667	140,285	77%	41,565
Legal Services	65,000	0	5,763	9%	59,237
Contingency	1,500	0	0	0	1,500
<u>TOTAL A.R.B EXPENDITURES</u>	<u>885,275</u>	<u>161,334</u>	<u>698,266</u>	<u>79%</u>	<u>187,009</u>
<u>TOTAL EXPENDITURES</u>	<u>25,901,200</u>	<u>1,769,883</u>	<u>15,921,715</u>	<u>61%</u>	<u>9,979,485</u>
<u>REVENUES OVER EXPENDITURES</u>	<u>0</u>	<u>1,746,742</u>	<u>(3,782,424)</u>	<u>0</u>	<u>3,782,424</u>

BEKAR APPRAISAL DISTRICT
STATEMENT OF EXPENDITURES FOR
DESIGNATED CASH FUNDS (MODIFIED ACCRUAL BASIS)
FOR THE MONTH ENDED August 31, 2024

		GENERAL RESTRICTED FUND	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 3,523,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 3,523,000.00

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
6/3/2024	Run off election deposit		(434,584.13)
31-Aug	Funds added		\$ 500,000.00
	ITEMIZED MONTHLY TOTAL		\$ 65,415.87
	ITEMIZED YTD TOTAL		\$ 65,415.87

		DESIGNATED - DIGITAL ORTHOPHOTOGRAPHY	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 100,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 100,000.00

		DESIGNATED - LITIGATION EXPENSES	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 700,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 700,000.00

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

		DESIGNATED - RETIREMENT FUNDING	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 112,654.16
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 112,654.16

		DESIGNATED - TECHNOLOGY RESERVE	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 275,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 275,000.00

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

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

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

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

		COUNTY DEBT	
DATE	PAYEE	PURPOSE	AMOUNT
31-Aug	Balance Forward		\$ 13,610.51
31-Aug			\$ (13,610.51)
	ITEMIZED MONTHLY TOTAL		\$ -
	ITEMIZED YTD TOTAL		\$ -

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Eight Months Ending 8/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>TAXING UNITS</u>					
Alamo Community College District	\$1,882,552	\$1,411,914	\$1,136,532	\$0	\$0
City of Alamo Heights	42,554	31,917	27,591	0	0
Alamo Heights ISD	412,643	309,483	325,800	0	0
City of Balcones Heights	11,556	8,667	6,768	0	0
Bexar County	3,219,990	2,414,994	1,935,426	0	0
Bexar County Emer Serv Dist#1	9,669	7,251	5,706	0	0
Bexar County Emer Serv Dist#2	75,388	56,541	44,955	0	0
Bexar County Emer Serv Dist#3	39,426	29,571	24,489	0	0
Bexar County Emer Serv Dist#5	19,674	14,757	10,401	0	0
Bexar County Emer Serv Dist#6	8,532	6,399	4,908	0	0
Bexar County Flood	281,179	210,885	168,927	0	0
Bexar County Emer Serv Dist#7	32,317	24,237	18,501	0	0
Bexar County Emer Serv Dist#8	10,264	7,698	5,919	0	0
Bexar County Emer Serv Dist#4	13,030	9,774	7,956	0	0
Bexar County Emer Serv Dist#10	13,495	10,122	7,602	0	0
Boerne ISD	166,443	124,833	134,550	0	0
Bexar County Emer Serv Dist#11	11,815	8,862	7,053	0	0
Bexar County Emer Serv Dist#12	8,713	6,534	4,803	0	0
City of Castle Hills	25,181	18,885	15,009	0	0
City of China Grove	2,068	1,551	1,275	0	0
Cibolo Canyon	46,510	34,884	25,623	0	0
Comal ISD	196,097	147,072	162,618	0	0
City of Converse	59,178	44,385	34,005	0	0
Crosswinds at South Lake SID	4,757	3,567	1,932	0	0
East Central ISD	346,252	259,689	249,552	0	0
Edgewood ISD	122,260	91,695	88,779	0	0
City of Elmendorf	4,990	3,744	2,853	0	0
City of Fair Oaks Ranch	24,767	18,576	15,858	0	0
Floresville ISD	155	117	105	0	0
City of Grey Forest	336	252	213	0	0
Harlandale ISD	163,651	122,739	127,566	0	0
City of Helotes	25,750	19,314	16,053	0	0
Hill Country Village	3,542	2,658	2,196	0	0
Town of Hollywood Park	18,588	13,941	11,943	0	0
Judson ISD	786,170	589,629	613,629	0	0
City of Kirby	17,451	13,089	11,253	0	0
City of Leon Valley	33,144	24,858	21,618	0	0
City of Live Oak	40,228	30,171	25,872	0	0
City of Lytle	26	21	18	0	0
Medina Valley ISD	165,486	124,116	103,077	0	0
Northeast ISD	2,629,167	1,971,876	2,121,876	0	0
Northside ISD	3,962,442	2,971,833	3,138,372	0	0
City of Olmos Park	21,174	15,882	12,138	0	0
City of San Antonio	4,318,829	3,239,121	2,697,000	0	0
San Antonio ISD	1,689,791	1,267,344	1,275,228	0	0
San Antonio MUD #1	1,267	951	1,134	0	0

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Eight Months Ending 8/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
San Antonio River Authority	240,435	180,327	146,829	0	0
City of Sandy Oaks	3,025	2,268	1,860	0	0
City of Schertz	17,606	13,206	10,527	0	0
Schertz-Cibolo-Univ City ISD	76,164	57,123	58,212	0	0
City of Selma	11,117	8,337	6,768	0	0
City of Shavano Park	25,827	19,371	15,522	0	0
City of Somerset	5,326	3,996	3,189	0	0
Somerset ISD	32,859	24,645	25,854	0	0
South San Antonio ISD	160,523	120,393	117,219	0	0
Southside ISD	138,780	104,085	96,078	0	0
Southwest ISD	402,870	302,121	279,516	0	0
City of St. Hedwig	6,437	4,827	3,828	0	0
City of Terrell Hills	37,099	27,825	23,301	0	0
Universal City	55,636	41,727	35,796	0	0
University Health System	3,621,541	2,716,137	2,217,264	0	0
Westside 211 SID	9,230	6,924	4,854	0	0
City of Windcrest	20,372	15,279	12,441	0	0
Clear Water Creek SID	26	21	0	0	0
Stolte Ranch SID	672	504	231	0	0
Tally Road SID	853	639	141	0	0
Westpoint SID	9,669	7,251	2,958	0	0
Redbird Ranch	5,248	3,936	1,239	0	0
Bexar County Emer Serv Dist#9	2,017	1,512	1,224	0	0
Tres Laurels SID	52	39	36	0	0
Landon Ridge SID	465	348	285	0	0
Lemon Creek SID	207	156	105	0	0
Briggs Ranch SID	388	291	141	0	0
Saphire Grove SID	129	96	0	0	0
Grace Gardens SID	78	60	0	0	0
Briggs Ranch II SID	52	39	0	0	0
TOTAL TAX UNIT LEVY	25,853,200	19,389,882	17,720,100	0	0
Other Revenues	20,000	121,679	86,441	0	0
Other Revenues - Information Systems	8,000	2,873	2,779	278	105
Interest Revenues	20,000	189,705	148,863	22,863	23,601
TOTAL OTHER REVENUES	48,000	314,257	238,083	23,140	23,706
TOTAL REVENUES COLLECTED	25,901,200	19,704,139	17,958,183	23,140	23,706

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Eight Months Ending 8/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	44,325	41,732	899	0
Auto Allowance	892,800	614,387	440,740	75,267	55,767
Stipend	32,000	17,460	11,333	2,501	1,417
Copier Costs	47,981	22,772	22,092	4,025	3,029
Copier, FAX, & Printer Supplies	54,445	17,949	29,805	1,313	4,743
Employee Recognition/Awards	50,000	14,218	14,847	2,315	0
Equipment Maintenance	350	0	0	0	0
Forms Creation	366,775	190,141	235,177	0	43,962
General Insurance	45,000	42,905	44,390	0	0
Map Production & Supplies	4,550	1,723	1,626	0	0
Mileage Reimbursements	4,000	206	491	0	93
Office Building Expense	250,000	152,736	175,668	11,842	24,944
Offsite Storage	25,000	14,030	14,158	2,188	1,882
Office Supplies	84,980	56,852	59,657	3,883	2,881
Postage	694,362	494,414	666,079	64,328	6,224
Professional Dues	29,402	11,953	12,085	5	685
Publications	292,950	142,461	119,773	9,585	25,342
Security	300,000	183,260	159,585	31,909	34,171
Telephone	93,000	52,823	42,852	5,504	3,243
Training	263,458	85,690	114,143	8,315	12,947
Utilities	125,000	59,871	49,318	9,315	(616)
Worker's Compensation	50,000	45,368	37,320	(50)	(150)
Contingency	250,000	248,258	250,000	0	0
<u>TOTAL OPERATING EXPENDITURES</u>	<u>4,019,053</u>	<u>2,513,803</u>	<u>2,542,872</u>	<u>233,144</u>	<u>220,564</u>
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	0	4,185	0	0
Information Services	500	0	777	0	0
Geographic Info. Systems	500	0	0	0	0
Customer Info & Assist	15,000	8,395	0	0	0
Residential	10,000	694	27,607	0	27,607
Commercial	3,500	1,385	0	0	0
Personal Property	4,500	0	0	0	0
Legal	2,000	469	0	0	0
EQUIPMENT:					
Information Services	112,000	31,735	122,790	10,087	2,072
CAMA Hardware	15,000	3,840	6,941	0	0
<u>TOTAL CAPITAL EXPENDITURES</u>	<u>164,500</u>	<u>46,518</u>	<u>162,301</u>	<u>10,087</u>	<u>29,679</u>

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Eight Months Ending 8/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	7,744,057	6,804,062	957,480	862,551
Salaries, Overtime	166,350	80,380	172,038	261	20,233
Retirement	2,057,710	1,398,698	1,278,475	168,269	152,879
Payroll Taxes	31,428	22,674	1,267	53	8
Group Medical Insurance	1,984,670	889,134	803,249	119,188	108,143
Life Insurance	77,345	32,172	29,057	1,125	8,462
Medicare Taxes	192,772	122,695	106,091	14,768	13,379
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	97,190	41,386	4,467	3,908
Departure Contingency	70,000	89,211	19,380	0	992
TOTAL EMPLOYEE EXPENDITURES	17,215,904	10,476,211	9,255,006	1,265,610	1,170,556
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	34,731	28,400	0	0
Valuation Telecommunications Accounts	40,000	0	13,525	0	0
Accounting & Auditing	50,000	43,793	46,240	961	865
Legal Services	1,100,000	661,995	768,214	54,335	122,015
Consulting Studies	40,000	16,522	16,166	304	304
Taxpayer Liasion Officer	30,000	20,209	16,524	3,764	3,058
Contract Services Contingency	45,800	87	55,060	0	239
Temporary Services	189,500	148,098	92,697	12,288	10,864
TOTAL CONTRACT SERV. EXP	1,533,300	925,435	1,036,828	71,652	137,346
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	74,580	53,448	45,908	15,668	2,294
Software Maintenance	423,330	354,357	318,816	5,801	10,569
Hardware Maintenance	43,000	12,786	52,810	0	0
IS Supplies	60,000	15,639	36,425	873	10,732
IS Services	35,600	10,077	21,184	(342)	10,520
TOTAL INFO. SYSTEMS EXP.	636,510	446,306	475,144	22,000	34,115
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	240,000	3,397	0	0
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	201,156	198,702	173,775	3,941	3,908
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	200,000	3,800	3,800	0	3,800
CAMA Software	583,502	368,626	362,817	1,791	0
CAMA Enhancements	100,000	0	0	0	0
TOTAL PROJECT EXPENDITURES	1,434,658	811,128	543,789	5,732	7,708
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	1,233	2,944	0	0
Chief Appraiser Expense	8,000	2,816	5,090	324	481
TOTAL OTHER EXPENDITURES	12,000	4,049	8,034	324	481

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Eight Months Ending 8/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>A.R.B EXPENDITURES</u>					
Compensation	630,000	549,318	464,485	125,668	140,473
Training	6,925	2,900	5,450	0	0
Postage	181,850	140,285	133,321	35,667	53,531
Legal Services	65,000	5,763	8,100	0	3,000
Contingency	1,500	0	0	0	0
<u>TOTAL A.R.B EXPENDITURES</u>	<u>885,275</u>	<u>698,266</u>	<u>611,356</u>	<u>161,334</u>	<u>197,003</u>
<u>TOTAL EXPENDITURES</u>	<u>25,901,200</u>	<u>15,921,715</u>	<u>14,635,329</u>	<u>1,769,883</u>	<u>1,797,453</u>
<u>REVENUES OVER EXPENDITURES</u>	<u>0</u>	<u>(3,782,424)</u>	<u>(3,322,854)</u>	<u>1,746,742</u>	<u>1,773,746</u>

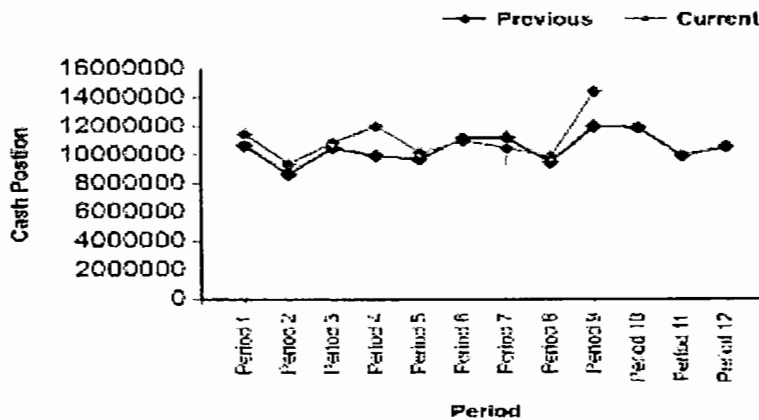
BEXAR APPRAISAL DISTRICT
Funds Investment Report
9/30/2024

Cash - Operating Account	\$	3,982,466.62	<u>% RATE</u>	0%	<table border="1"> <tr> <th colspan="2">Other Rate Comparisons</th> </tr> <tr> <td>TexPool</td> <td>90 day T-Bill</td> </tr> <tr> <td>4.98%</td> <td>4.46%</td> </tr> </table>	Other Rate Comparisons		TexPool	90 day T-Bill	4.98%	4.46%
Other Rate Comparisons											
TexPool	90 day T-Bill										
4.98%	4.46%										
	\$	10,428,965.35		3.17%							
Total Deposits	\$	14,411,431.97									
Pledged Collateral:											
FDIC	\$	250,000.00	Year-To-Date Interest Earned	\$	212,994.28						
FMV	\$	14,717,471.01									
Total Collateral	\$	14,967,471.01									
Collateral Over (Under)	\$	556,039.04	102% FMV Less FDIC	per investment Policy							

Cash Position

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 14,411,432.00	\$ 9,848,190.00	\$ 4,565,242.00	46.37%
vs. This Period Last Year	\$ 14,411,432.00	\$ 11,991,593.00	\$ 2,419,839.00	20.18%

Cash Position Detail



Signed by: *Cristina Khalil*
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 9/30/2024

	<u>July</u>	<u>August</u>	<u>September</u>
ASSETS			
Cash and Short Term Investments	\$10,444,118.22	\$9,846,190.03	\$14,411,431.97
Accounts Receivable	1,212,962.00	46,742.00	202,173.00
Prepaid Expenses	68,922.40	68,922.40	68,922.40
Total Current Assets	11,726,002.62	9,961,854.43	14,682,527.37
General Fixed Assets	4,636,800.67	4,636,800.67	4,636,800.67
Fixed Assets-Building	5,749,539.13	5,749,539.13	5,749,539.13
Non-Current Portion Sick & Vacation	1,333,236.29	1,333,236.29	1,333,236.29
Total Non- Current Assets	11,719,576.09	11,719,576.09	11,719,576.09
Total Assets	23,445,578.71	21,681,430.52	26,402,103.46
LIABILITIES			
Accounts Payable	244,254.09	240,458.79	240,511.74
Total Current Liabilities	244,254.09	240,458.79	240,511.74
Non-Current Sick & Vacation Accrual	1,333,236.29	1,333,236.29	1,333,236.29
Total Liabilities	1,577,490.38	1,573,695.08	1,573,748.03
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	4,636,800.67	4,636,800.67
General Restricted Reserve Fund	3,523,000.00	3,523,000.00	3,523,000.00
Designated - Digital Orthophotography	100,000.00	100,000.00	100,000.00
Designated - Litigation Expenses	700,000.00	700,000.00	700,000.00
Designated - Retirement Funding	112,654.16	112,654.16	112,654.16
Designated - Technology Reserve	275,000.00	275,000.00	275,000.00
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	65,415.87	65,415.87
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	0.00
Net Profit/(Loss)	5,126,332.71	3,379,590.33	8,100,210.32
Total Equity	21,854,477.82	20,107,735.44	24,828,355.43
Total Liabilities and Equity	\$23,431,968.20	\$21,681,430.52	\$26,402,103.46

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Nine Months Ending 9/30/2024

<u>TAXING UNITS</u>	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
Alamo Community College District	\$1,882,552	\$470,638	\$1,882,552	(100%)	\$0
City of Alamo Heights	42,554	10,639	42,556	(100%)	(2)
Alamo Heights ISD	412,643	103,161	412,644	(100%)	(1)
City of Balcones Heights	11,556	2,889	11,556	(100%)	0
Bexar County	3,219,990	804,998	3,219,992	(100%)	(2)
Bexar County Emer Serv Dist#1	9,669	2,417	9,668	(100%)	1
Bexar County Emer Serv Dist#2	75,388	18,847	75,388	(100%)	0
Bexar County Emer Serv Dist#3	39,426	9,857	39,428	(100%)	(2)
Bexar County Emer Serv Dist#5	19,674	4,919	19,676	(100%)	(2)
Bexar County Emer Serv Dist#6	8,532	2,133	8,532	(100%)	0
Bexar County Flood	281,179	70,295	281,180	(100%)	(1)
Bexar County Emer Serv Dist#7	32,317	8,079	32,316	(100%)	1
Bexar County Emer Serv Dist#8	10,264	2,566	10,264	(100%)	0
Bexar County Emer Serv Dist#4	13,030	3,258	13,032	(100%)	(2)
Bexar County Emer Serv Dist#10	13,495	3,374	13,496	(100%)	(1)
Boerne ISD	166,443	41,811	166,644	(100%)	(201)
Bexar County Emer Serv Dist#11	11,815	2,954	11,816	(100%)	(1)
Bexar County Emer Serv Dist#12	8,713	2,178	8,712	(100%)	1
City of Castle Hills	25,181	6,295	25,180	(100%)	1
City of China Grove	2,068	517	2,068	(100%)	0
Cibolo Canyon	46,510	11,628	46,512	(100%)	(2)
Comal ISD	196,097	49,024	196,096	(100%)	1
City of Converse	59,178	14,795	59,180	(100%)	(2)
Crosswinds at South Lake SID	4,757	1,189	4,756	(100%)	1
East Central ISD	346,252	86,563	346,252	(100%)	0
Edgewood ISD	122,260	30,565	122,260	(100%)	0
City of Elmendorf	4,990	1,248	4,992	(100%)	(2)
City of Fair Oaks Ranch	24,767	6,192	24,768	(100%)	(1)
Floresville ISD	155	39	156	(101%)	(1)
City of Grey Forest	336	84	336	(100%)	0
Harlandale ISD	163,651	40,913	163,652	(100%)	(1)
City of Helotes	25,750	6,438	25,752	(100%)	(2)
Hill Country Village	3,542	886	3,544	(100%)	(2)
Town of Hollywood Park	18,588	4,647	18,588	(100%)	0
Judson ISD	786,170	196,543	786,172	(100%)	(2)
City of Kirby	17,451	4,363	17,452	(100%)	(1)
City of Leon Valley	33,144	8,286	33,144	(100%)	0
City of Live Oak	40,228	10,057	40,228	(100%)	0
City of Lytle	26	7	28	(108%)	(2)
Medina Valley ISD	165,486	41,372	165,488	(100%)	(2)
Northeast ISD	2,629,167	657,292	2,629,168	(100%)	(1)
Northside ISD	3,962,442	990,611	3,962,444	(100%)	(2)
City of Olmos Park	21,174	5,294	21,176	(100%)	(2)
City of San Antonio	4,318,829	1,079,707	4,318,828	(100%)	1
San Antonio ISD	1,689,791	422,448	1,689,792	(100%)	(1)
San Antonio MUD #1	1,267	317	1,268	(100%)	(1)
San Antonio River Authority	240,435	60,109	240,436	(100%)	(1)
City of Sandy Oaks	3,025	756	3,024	(100%)	1

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Nine Months Ending 9/30/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
City of Schertz	17,606	4,402	17,608	(100%)	(2)
Schertz-Cibolo-Univ City ISD	76,164	19,041	76,164	(100%)	0
City of Selma	11,117	2,779	11,116	(100%)	1
City of Shavano Park	25,827	6,457	25,828	(100%)	(1)
City of Somerset	5,326	1,332	5,328	(100%)	(2)
Somerset ISD	32,859	8,215	32,860	(100%)	(1)
South San Antonio ISD	160,523	40,131	160,524	(100%)	(1)
Southside ISD	138,780	34,695	138,780	(100%)	0
Southwest ISD	402,870	100,707	402,828	(100%)	42
City of St. Hedwig	6,437	1,609	6,436	(100%)	1
City of Terrell Hills	37,099	9,275	37,100	(100%)	(1)
Universal City	55,636	13,909	55,636	(100%)	0
University Health System	3,621,541	905,404	3,621,541	(100%)	0
Westside 211 SID	9,230	2,308	9,232	(100%)	(2)
City of Windcrest	20,372	5,093	20,372	(100%)	0
Clear Water Creek SID	26	7	28	(108%)	(2)
Stolte Ranch SID	672	168	672	(100%)	0
Tally Road SID	853	213	852	(100%)	1
Westpoint SID	9,669	2,417	9,668	(100%)	1
Redbird Ranch	5,248	1,312	5,248	(100%)	0
Bexar County Emer Serv Dist#9	2,017	504	2,016	(100%)	1
Tres Laurels SID	52	13	52	(100%)	0
Landon Ridge SID	465	116	464	(100%)	1
Lemon Creek SID	207	52	208	(100%)	(1)
Briggs Ranch SID	388	97	388	(100%)	0
Sapphire Grove SID	129	32	128	(99%)	1
Grace Gardens SID	78	20	80	(103%)	(2)
Briggs Ranch II SID	52	13	52	(100%)	0
TOTAL TAX UNIT LEVY	25,853,200	6,463,519	25,853,401	100%	(201)
Other Revenues	20,000	0	121,679	(608%)	(101,679)
Other Revenues - Information Systems	8,000	6	2,879	(36%)	5,121
Interest Revenues	20,000	23,290	212,994	(1065%)	(192,994)
TOTAL OTHER REVENUES	48,000	23,295	337,552	703%	(289,552)
TOTAL REVENUES COLLECTED	25,901,200	6,486,814	26,190,953	101%	(289,753)

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Nine Months Ending 9/30/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	8,375	52,700	84%	10,300
Auto Allowance	892,800	74,667	689,054	77%	203,746
Stipend	32,000	2,501	19,961	62%	12,039
Copier Costs	47,981	3,179	25,951	54%	22,030
Copier, FAX, & Printer Supplies	54,445	2,064	20,013	37%	34,432
Employee Recognition/Awards	50,000	0	14,218	28%	35,782
Equipment Maintenance	350	0	0	0	350
Forms Creation	366,775	0	190,141	52%	176,634
General Insurance	45,000	119	43,024	96%	1,976
Map Production & Supplies	4,550	(118)	1,605	35%	2,945
Mileage Reimbursements	4,000	0	206	5%	3,794
Office Building Expense	250,000	24,077	176,813	71%	73,187
Offsite Storage	25,000	1,713	15,743	63%	9,257
Office Supplies	84,980	2,002	58,854	69%	26,126
Postage	694,362	(23,656)	470,758	68%	223,604
Professional Dues	29,402	45	11,998	41%	17,404
Publications	292,950	14,618	157,078	54%	135,872
Security	300,000	26,225	209,485	70%	90,515
Telephone	93,000	5,230	58,053	62%	34,947
Training	263,458	7,775	93,466	35%	169,993
Utilities	125,000	10,423	70,293	56%	54,707
Worker's Compensation	50,000	(50)	45,318	91%	4,682
Contingency	250,000	0	248,258	99%	1,742
TOTAL OPERATING EXPENDITURES	4,019,053	159,187	2,672,990	67%	1,346,063
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	1,725	1,725	115%	(225)
Information Services	500	0	0	0	500
Geographic Info. Systems	500	0	0	0	500
Customer Info & Assist	15,000	0	8,395	56%	6,605
Residential	10,000	0	694	7%	9,306
Commercial	3,500	0	1,385	40%	2,115
Personal Property	4,500	270	270	6%	4,230
Legal	2,000	3,691	4,160	208%	(2,160)
EQUIPMENT:					
Information Services	112,000	(946)	30,789	27%	81,211
CAMA Hardware	15,000	0	3,840	26%	11,160
TOTAL CAPITAL EXPENDITURES	164,500	4,739	51,257	31%	113,243

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Nine Months Ending 9/30/2024

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	956,063	8,700,121	71%	3,610,508
Salaries, Overtime	166,350	1,318	81,697	49%	84,653
Retirement	2,057,710	168,176	1,566,874	76%	490,836
Payroll Taxes	31,428	11	22,685	72%	8,743
Group Medical Insurance	1,984,670	117,778	1,006,912	51%	977,758
Life Insurance	77,345	4,869	37,041	48%	40,304
Medicare Taxes	192,772	14,742	137,437	71%	55,335
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	4,757	101,947	204%	(51,947)
Departure Contingency	70,000	298	89,509	128%	(19,509)
TOTAL EMPLOYEE EXPENDITURES	17,215,904	1,268,013	11,744,224	68%	5,471,680
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	10,129	44,860	118%	(6,860)
Valuation Telecommunications Accounts	40,000	14,472	14,472	36%	25,528
Accounting & Auditing	50,000	958	44,751	90%	5,249
Legal Services	1,100,000	114,809	776,803	71%	323,197
Consulting Studies	40,000	304	16,826	42%	23,174
Taxpayer Liasion Officer	30,000	4,505	24,714	82%	5,286
Contract Services Contingency	45,800	0	87	0	45,713
Temporary Services	189,500	14,666	162,765	86%	26,735
TOTAL CONTRACT SERV. EXP	1,533,300	159,843	1,085,278	71%	448,022
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	74,580	1,385	54,833	74%	19,748
Software Maintenance	423,330	2,548	356,904	84%	66,426
Hardware Maintenance	43,000	0	12,786	30%	30,214
IS Supplies	60,000	538	16,177	27%	43,823
IS Services	35,600	1,766	11,843	33%	23,757
TOTAL INFO. SYSTEMS EXP.	636,510	6,237	452,543	71%	183,967
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	0	240,000	100%	0
Homestead Audit /Outreach	10,000	0	0	0	10,000
Field Device Maintenance	201,156	3,947	202,649	101%	(1,493)
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	200,000	0	3,800	2%	196,200
CAMA Software	583,502	0	368,626	63%	214,876
CAMA Enhancements	100,000	0	0	0	100,000
TOTAL PROJECT EXPENDITURES	1,434,658	3,947	815,075	57%	619,583
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	0	1,233	31%	2,767
Chief Appraiser Expense	8,000	778	3,594	45%	4,406
TOTAL OTHER EXPENDITURES	12,000	778	4,826	40%	7,174

BEXAR APPRAISAL DISTRICT
Summary of All Units
Comparison of Budget and Actual Revenues
For the Nine Months Ending 9/30/2024

	<u>2024 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	630,000	139,370	688,688	109%	(58,688)
Training	6,925	0	2,900	42%	4,025
Postage	181,850	24,080	164,365	90%	17,485
Legal Services	65,000	0	5,763	9%	59,237
Contingency	1,500	0	0	0	1,500
<u>TOTAL A.R.B EXPENDITURES</u>	<u>885,275</u>	<u>163,450</u>	<u>861,715</u>	<u>97%</u>	<u>23,560</u>
<u>TOTAL EXPENDITURES</u>	<u>25,901,200</u>	<u>1,766,194</u>	<u>17,687,909</u>	<u>68%</u>	<u>8,213,291</u>
<u>REVENUES OVER EXPENDITURES</u>	<u>0</u>	<u>(4,720,620)</u>	<u>(8,503,044)</u>	<u>0</u>	<u>8,503,044</u>

BEKAR APPRAISAL DISTRICT
STATEMENT OF EXPENDITURES FOR
DESIGNATED CASH FUNDS (MODIFIED ACCRUAL BASIS)
FOR THE MONTH ENDED September 30, 2024

		GENERAL RESTRICTED FUND	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 3,523,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 3,523,000.00

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
6/3/2024	Run off election deposit		(434,584.13)
30-Sep	Funds added		\$ 500,000.00
	ITEMIZED MONTHLY TOTAL		63,415.87
	ITEMIZED YTD TOTAL		\$ 63,415.87

		DESIGNATED - DIGITAL ORTHOPHOTOGRAPHY	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 100,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 100,000.00

		DESIGNATED - LITIGATION EXPENSES	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 700,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 700,000.00

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

		DESIGNATED - EQUIPMENT PURCHASES	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 112,654.16
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 112,654.16

		DESIGNATED - TECHNOLOGY RESERVE	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 275,000.00
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 275,000.00

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

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

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

		DESIGNATED - COLA Retention	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 96,891.28
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ 96,891.28

		DESIGNATED - FINANCE	
DATE	PAYEE	PURPOSE	AMOUNT
30-Sep	Balance Forward		\$ 13,610.51
30-Sep			\$ (13,610.51)
	ITEMIZED MONTHLY TOTAL		
	ITEMIZED YTD TOTAL		\$ -

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Nine Months Ending 9/30/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
TAXING UNITS					
Alamo Community College District	\$1,882,552	\$1,882,552	\$1,515,376	\$470,638	\$378,844
City of Alamo Heights	42,554	42,556	36,788	10,639	9,197
Alamo Heights ISD	412,643	412,644	434,400	103,161	108,600
City of Balcones Heights	11,556	11,556	9,024	2,889	2,256
Bexar County	3,219,990	3,219,992	2,580,568	804,998	645,142
Bexar County Emer Serv Dist#1	9,669	9,668	7,608	2,417	1,902
Bexar County Emer Serv Dist#2	75,388	75,388	59,940	18,847	14,985
Bexar County Emer Serv Dist#3	39,426	39,428	32,652	9,857	8,163
Bexar County Emer Serv Dist#5	19,674	19,676	13,868	4,919	3,467
Bexar County Emer Serv Dist#6	8,532	8,532	6,544	2,133	1,636
Bexar County Flood	281,179	281,180	225,236	70,295	56,309
Bexar County Emer Serv Dist#7	32,317	32,316	24,668	8,079	6,167
Bexar County Emer Serv Dist#8	10,264	10,264	7,892	2,566	1,973
Bexar County Emer Serv Dist#4	13,030	13,032	10,608	3,258	2,652
Bexar County Emer Serv Dist#10	13,495	13,496	10,136	3,374	2,534
Boerne ISD	166,443	166,644	179,400	41,811	44,850
Bexar County Emer Serv Dist#11	11,815	11,816	9,404	2,954	2,351
Bexar County Emer Serv Dist#12	8,713	8,712	6,404	2,178	1,601
City of Castle Hills	25,181	25,180	20,012	6,295	5,003
City of China Grove	2,068	2,068	1,700	517	425
Cibolo Canyon	46,510	46,512	34,164	11,628	8,541
Comal ISD	196,097	196,096	216,824	49,024	54,206
City of Converse	59,178	59,180	45,340	14,795	11,335
Crosswinds at South Lake SID	4,757	4,756	2,576	1,189	644
East Central ISD	346,252	346,252	332,736	86,563	83,184
Edgewood ISD	122,260	122,260	118,372	30,565	29,593
City of Elmendorf	4,990	4,992	3,804	1,248	951
City of Fair Oaks Ranch	24,767	24,768	21,144	6,192	5,286
Floresville ISD	155	156	140	39	35
City of Grey Forest	336	336	284	84	71
Harlandale ISD	163,651	163,652	170,088	40,913	42,522
City of Helotes	25,750	25,752	21,404	6,438	5,351
Hill Country Village	3,542	3,544	2,928	886	732
Town of Hollywood Park	18,588	18,588	15,924	4,647	3,981
Judson ISD	786,170	786,172	818,172	196,543	204,543
City of Kirby	17,451	17,452	15,004	4,363	3,751
City of Leon Valley	33,144	33,144	28,824	8,286	7,206
City of Live Oak	40,228	40,228	34,496	10,057	8,624
City of Lytle	26	28	24	7	6
Medina Valley ISD	165,486	165,488	137,436	41,372	34,359
Northeast ISD	2,629,167	2,629,168	2,829,168	657,292	707,292
Northside ISD	3,962,442	3,962,444	4,184,496	990,611	1,046,124
City of Olmos Park	21,174	21,176	16,184	5,294	4,046
City of San Antonio	4,318,829	4,318,828	3,596,000	1,079,707	899,000
San Antonio ISD	1,689,791	1,689,792	1,700,304	422,448	425,076
San Antonio MUD #1	1,267	1,268	1,512	317	378
San Antonio River Authority	240,435	240,436	195,772	60,109	48,943

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Nine Months Ending 9/30/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
City of Sandy Oaks	3,025	3,024	2,480	756	620
City of Schertz	17,606	17,608	14,036	4,402	3,509
Schertz-Cibolo-Univ City ISD	76,164	76,164	77,616	19,041	19,404
City of Selma	11,117	11,116	9,024	2,779	2,256
City of Shavano Park	25,827	25,828	20,696	6,457	5,174
City of Somerset	5,326	5,328	4,252	1,332	1,063
Somerset ISD	32,859	32,860	34,472	8,215	8,618
South San Antonio ISD	160,523	160,524	156,292	40,131	39,073
Southside ISD	138,780	138,780	128,104	34,695	32,026
Southwest ISD	402,870	402,828	372,688	100,707	93,172
City of St. Hedwig	6,437	6,436	5,104	1,609	1,276
City of Terrell Hills	37,099	37,100	31,068	9,275	7,767
Universal City	55,636	55,636	47,728	13,909	11,932
University Health System	3,621,541	3,621,541	2,956,352	905,404	739,088
Westside 211 SID	9,230	9,232	6,472	2,308	1,618
City of Windcrest	20,372	20,372	16,588	5,093	4,147
Clear Water Creek SID	26	28	0	7	0
Stolte Ranch SID	672	672	308	168	77
Tally Road SID	853	852	188	213	47
Westpoint SID	9,669	9,668	3,944	2,417	986
Redbird Ranch	5,248	5,248	1,652	1,312	413
Bexar County Emer Serv Dist#9	2,017	2,016	1,632	504	408
Tres Laurels SID	52	52	48	13	12
Landon Ridge SID	465	464	380	116	95
Lemon Creek SID	207	208	140	52	35
Briggs Ranch SID	388	388	188	97	47
Sapphire Grove SID	129	128	0	32	0
Grace Gardens SID	78	80	0	20	0
Briggs Ranch II SID	52	52	0	13	0
TOTAL TAX UNIT LEVY	25,853,200	25,853,401	23,626,800	6,463,519	5,906,700
Other Revenues	20,000	121,679	86,461	0	20
Other Revenues - Information Systems	8,000	2,879	3,081	6	302
Interest Revenues	20,000	212,994	168,598	23,290	19,735
TOTAL OTHER REVENUES	48,000	337,552	258,141	23,295	20,057
TOTAL REVENUES COLLECTED	25,901,200	26,190,953	23,884,941	6,486,814	5,926,757

BEXAR APPRAISAL DISTRICT
 Comparison of Current Year
 Prior Year-Income Statement
 For the Nine Months Ending 9/30/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>OPERATING EXPENDITURES</u>					
Advertising Public Notices	63,000	52,700	51,265	8,375	9,533
Auto Allowance	892,800	689,054	495,990	74,667	55,250
Stipend	32,000	19,961	12,750	2,501	1,417
Copier Costs	47,981	25,951	25,098	3,179	3,007
Copier, FAX, & Printer Supplies	54,445	20,013	31,926	2,064	2,121
Employee Recognition/Awards	50,000	14,218	14,996	0	149
Equipment Maintenance	350	0	0	0	0
Forms Creation	366,775	190,141	240,560	0	5,383
General Insurance	45,000	43,024	44,390	119	0
Map Production & Supplies	4,550	1,605	1,626	(118)	0
Mileage Reimbursements	4,000	206	507	0	16
Office Building Expense	250,000	176,813	224,922	24,077	49,254
Offsite Storage	25,000	15,743	15,938	1,713	1,781
Office Supplies	84,980	58,854	63,507	2,002	3,850
Postage	694,362	470,758	678,368	(23,656)	12,289
Professional Dues	29,402	11,998	12,230	45	145
Publications	292,950	157,078	128,455	14,618	8,682
Security	300,000	209,485	183,327	26,225	23,742
Telephone	93,000	58,053	46,114	5,230	3,262
Training	263,458	93,466	123,224	7,775	9,081
Utilities	125,000	70,293	71,074	10,423	21,756
Worker's Compensation	50,000	45,318	37,270	(50)	(50)
Contingency	250,000	248,258	250,000	0	0
TOTAL OPERATING EXPENDITURES	4,019,053	2,672,990	2,753,539	159,187	210,667
<u>CAPITAL EXPENDITURES</u>					
FURNITURE:					
Executive Services	1,500	1,725	4,486	1,725	301
Information Services	500	0	777	0	0
Geographic Info. Systems	500	0	0	0	0
Customer Info & Assist	15,000	8,395	0	0	0
Residential	10,000	694	27,607	0	0
Commercial	3,500	1,385	0	0	0
Personal Property	4,500	270	0	270	0
Legal	2,000	4,160	0	3,691	0
EQUIPMENT:					
Information Services	112,000	30,789	122,790	(946)	0
CAMA Hardware	15,000	3,840	6,941	0	0
TOTAL CAPITAL EXPENDITURES	164,500	51,257	162,602	4,739	301

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Nine Months Ending 9/30/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>EMPLOYEE EXPENDITURES:</u>					
Salaries, Regular	12,310,629	8,700,121	7,681,717	956,063	877,655
Salaries, Overtime	166,350	81,697	190,766	1,318	18,728
Retirement	2,057,710	1,566,874	1,433,488	168,176	155,014
Payroll Taxes	31,428	22,685	5,699	11	4,432
Group Medical Insurance	1,984,670	1,006,912	912,626	117,778	109,377
Life Insurance	77,345	37,041	33,485	4,869	4,428
Medicare Taxes	192,772	137,437	119,678	14,742	13,586
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	101,947	44,736	4,757	3,349
Departure Contingency	70,000	89,509	19,465	298	84
TOTAL EMPLOYEE EXPENDITURES	17,215,904	11,744,224	10,441,659	1,268,013	1,186,653
<u>CONTRACT SERVICES:</u>					
Valuation Oil & Gas	38,000	44,860	28,400	10,129	0
Valuation Telecommunications Accounts	40,000	14,472	13,525	14,472	0
Accounting & Auditing	50,000	44,751	47,136	958	895
Legal Services	1,100,000	776,803	887,108	114,809	118,894
Consulting Studies	40,000	16,826	16,470	304	304
Taxpayer Liasion Officer	30,000	24,714	20,289	4,505	3,764
Contract Services Contingency	45,800	87	55,122	0	62
Temporary Services	189,500	162,765	101,768	14,666	9,071
TOTAL CONTRACT SERV. EXP	1,533,300	1,085,278	1,169,819	159,843	132,991
<u>INFO. SYSTEMS EXPENDITURES</u>					
Leases	74,580	54,833	47,531	1,385	1,623
Software Maintenance	423,330	356,904	320,382	2,548	1,565
Hardware Maintenance	43,000	12,786	52,810	0	0
IS Supplies	60,000	16,177	41,236	538	4,811
IS Services	35,600	11,843	21,655	1,766	471
TOTAL INFO. SYSTEMS EXP.	636,510	452,543	483,615	6,237	8,471
<u>PROJECT EXPENDITURES:</u>					
Aerial Maps	240,000	240,000	3,397	0	0
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	201,156	202,649	177,602	3,947	3,827
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	200,000	3,800	5,000	0	1,200
CAMA Software	583,502	368,626	362,817	0	0
CAMA Enhancements	100,000	0	0	0	0
TOTAL PROJECT EXPENDITURES	1,434,658	815,075	548,816	3,947	5,027
<u>OTHER EXPENDITURES:</u>					
Board of Directors Expenses	4,000	1,233	2,944	0	0
Chief Appraiser Expense	8,000	3,594	5,916	778	826
TOTAL OTHER EXPENDITURES	12,000	4,826	8,860	778	826

BEXAR APPRAISAL DISTRICT
Comparison of Current Year
Prior Year-Income Statement
For the Nine Months Ending 9/30/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<u>A.R.B EXPENDITURES</u>					
Compensation	630,000	688,688	602,545	139,370	138,060
Training	6,925	2,900	5,450	0	0
Postage	181,850	164,365	154,118	24,080	20,796
Legal Services	65,000	5,763	8,100	0	0
Contingency	1,500	0	0	0	0
<u>TOTAL A.R.B EXPENDITURES</u>	<u>885,275</u>	<u>861,715</u>	<u>770,213</u>	<u>163,450</u>	<u>158,856</u>
<u>TOTAL EXPENDITURES</u>	<u>25,901,200</u>	<u>17,687,909</u>	<u>16,339,121</u>	<u>1,766,194</u>	<u>1,703,792</u>
<u>REVENUES OVER EXPENDITURES</u>	<u>0</u>	<u>(8,503,044)</u>	<u>(7,545,819)</u>	<u>(4,720,620)</u>	<u>(4,222,966)</u>

**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
1260425	00000-126-0425	MOON NAILS & SPA 19239 STONE OAK PKWY STE 107 FURN FIXT EQPT SUP	MOON NAILS & SPA	2024	268	09/23/2024	2525B	Account Deleted	DELETE ACCOUNT PER CHIEF APPRAISERS MOTION//JWM	\$18,830	\$18,830	\$18,830	\$0	\$0	\$0	09/23/2024

STAFF SUMMARY SHEET

ISSUE: Additional Reports

The board of directors will receive the following reports:

1. Community Outreach
2. Taxpayer Liaison Reports

2024 Community Outreach Report – August through November

Date: October 8, 2024

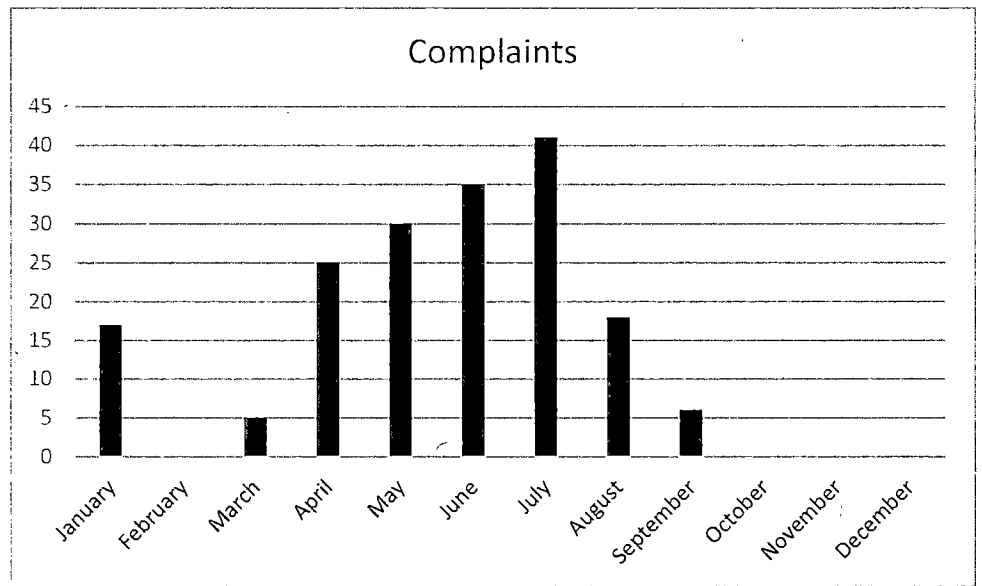
To: Board of Directors
Rogelio Sandoval, Chief Appraiser

From: Jennifer Rodriguez, Communications Director

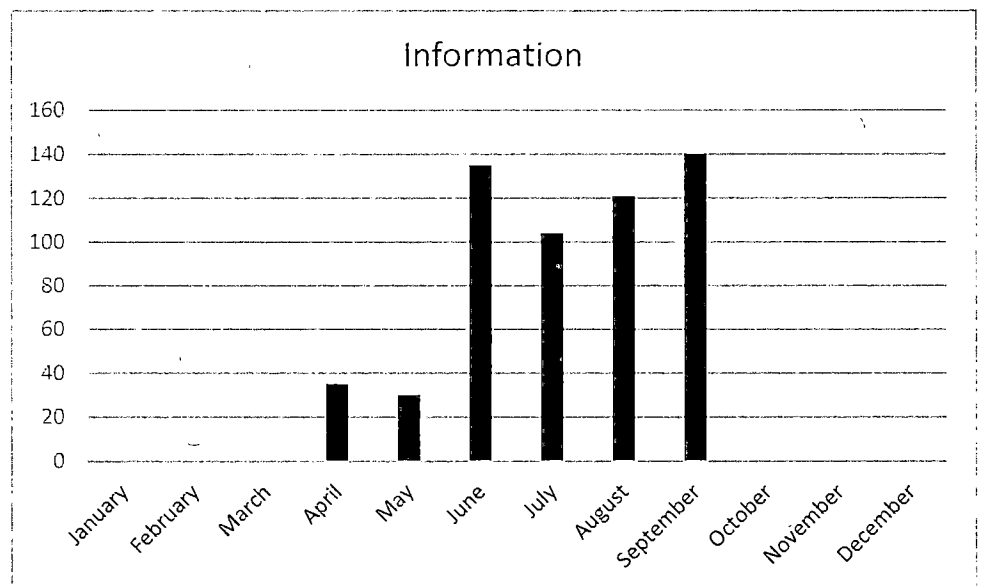
Date	Program	Presenter	Topic
08/14/24	Habitat for Humanity	Leo Herrera, Jessica Ochoa & Gloria Ramirez	Presentation - Taxpayer Rights, Remedies and Responsibilities: Exemptions (English & Spanish)
09/04/24	San Antonio Real Estate Investors Association	Rogelio Sandoval	Lunch and Learn Q&A
09/19/24	JR Real Estate	Jennifer Rodriguez	Presentation – General appraisal, exemption and protest information
09/26/24	Coliseum Oaks HOA	Jennifer Rodriguez	Presentation – General appraisal, exemption and protest information
10/02/24	San Antonio Oasis	Jennifer Rodriguez	Presentation – General appraisal, exemption and protest information
10/09/24	Habitat for Humanity	Virginia De La O & Leo Herrera	Presentation - Taxpayer Rights, Remedies and Responsibilities: Exemptions (English & Spanish)

10/18/24	Texas Association of Property Tax Professionals Annual Conference	Rogelio Sandoval	Chief Appraiser Panel
10/26/24	2024 Texas Veterans Service Fair	Monica Martinez, Jennifer Rodriguez, Rogelio Sandoval & Marcella Trevino	Presentation & resource table- General appraisal, exemption and protest information
10/25/24	Mexican American Unity Council	Virginia De La O & Jennifer Rodriguez	Presentation & resource table- General appraisal, exemption and protest information
11/13/24	National Association of Residential Property Managers	Jahnya Parker, Jennifer Rodriguez & Rogelio Sandoval	Resource Table - General appraisal, exemption and protest information

Month	Complaints
January	17
February	
March	5
April	25
May	30
June	35
July	41
August	18
September	6
October	
November	
December	



Month	Information
January	
February	
March	
April	35
May	30
June	135
July	104
August	121
September	140
October	
November	
December	



Jimmy L. Saiz

From: Tax Payer. Liaison
Sent: Monday, September 30, 2024 3:26 PM
To: Jimmy L. Saiz
Subject: TPL Reports Calendar
Attachments: TPL Reports Calendar.ics; Sept TLO Reports.docx

TPL Reports Calendar

Sunday, September 1, 2024 – Monday, September 30, 2024

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

(Adjusted for Daylight Saving Time)

September 2024

Su Mo Tu We Th Fr Sa

	<u>1</u>	<u>2</u>	<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>	<u>13</u>	<u>14</u>
<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	
<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	
<u>29</u>	<u>30</u>						

▲	<u>PID: 661918</u>	Tue, Sep 3	9:00 AM – 9:30 AM
	<u>PID: 541131</u>		9:30 AM – 10:00 AM
	<u>PID: 506479</u>		1:30 PM – 3:00 PM
	<u>PID: 547686</u>		1:30 PM – 3:00 PM
	<u>PID: 643634</u>		1:30 PM – 3:00 PM

▲	<u>PID: 242994</u>	Wed, Sep 4	8:00 AM – 8:30 AM
	<u>PID: 551776</u>		8:00 AM – 8:30 AM
	<u>PID: 562807</u>		8:30 AM – 9:00 AM
	<u>PID: 705571</u>		8:30 AM – 9:00 AM
	<u>PID: 688395</u>		9:00 AM – 9:30 AM
	<u>PID: 553054</u>		9:30 AM – 10:00 AM
	<u>PID: 1128062</u>		9:30 AM – 11:00 AM
	<u>PID: 349319</u>		12:30 PM – 1:00 PM

▲	<u>PID: 1217975</u>	Thu, Sep 5	8:30 AM – 9:00 AM
	<u>PID: 452065</u>		9:00 AM – 9:30 AM
	<u>PID: 114737</u>	Thu, Sep 5 to Tue, Sep 10	2:00 PM – 8:00 AM

△	<u>PID: 1083247</u>	Fri, Sep 6	8:00 AM – 8:30 AM
	<u>PID: 349413</u>		2:00 PM – 2:30 PM
<hr/>			
△	<u>PID: 600275</u>	Mon, Sep 9	8:00 AM – 8:30 AM
	<u>PID: 628350</u>		8:00 AM – 8:30 AM
	<u>PID: 397900</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 8:30 AM
	<u>PID: 104348</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1076801</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1085953</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1085954</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1111558</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1148032</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1287666</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1366997</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 175221</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 268825</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 269314</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 270498</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 270547</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 270552</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 347820</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 383416</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 397761</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 397892</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 406554</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 434316</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 464315</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 476274</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 530431</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 531320</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 657007</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 750340</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 347846</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 270534</u>	Mon, Sep 9 to Tue, Sep 10	8:00 AM – 9:00 AM
	<u>PID: 1175637</u>		3:00 PM – 3:30 PM
	<u>PID: 1175637</u>		4:00 PM – 4:30 PM
<hr/>			
△	<u>PID: 648573</u>	Tue, Sep 10	9:00 AM – 9:30 AM
	<u>PID: 558791</u>		10:00 AM – 10:30 AM
	<u>PID: 1049899</u>		1:00 PM – 1:30 PM
	<u>PID: 534008</u>		1:00 PM – 1:30 PM
	<u>PID: 654075</u>		1:00 PM – 1:30 PM

	<u>PID: 225877</u>		1:45 PM – 2:45 PM
	<u>PID: 399525</u>		3:30 PM – 4:00 PM
	<u>PID: 399532</u>		3:30 PM – 4:00 PM
<hr/>			
▲	<u>PID: 399532</u>	Wed, Sep 11	9:00 AM – 9:30 AM
	<u>PID: 399525</u>		9:00 AM – 9:30 AM
	<u>PID: 1310522</u>		9:30 AM – 10:00 AM
	<u>PID: 1062902</u>		11:00 AM – 11:30 AM
	<u>PID: 126727</u>		4:00 PM – 4:30 PM
	<u>PID: 290740</u>		4:00 PM – 4:30 PM
	<u>PID: 290743</u>		4:00 PM – 4:30 PM
	<u>PID: 335061</u>		4:15 PM – 5:15 PM
<hr/>			
▲	<u>PID: 451147</u>	Thu, Sep 12	10:20 AM – 3:12 PM
	<u>PID: 382425</u>		10:30 AM – 3:00 PM
	<u>PID: 1300125</u>		1:00 PM – 1:30 PM
	<u>PID: 502797</u>		2:30 PM – 3:00 PM
<hr/>			
▲	<u>PID: 558014</u>	Fri, Sep 13	9:00 AM – 9:30 AM
	<u>PID: 1266809</u>		1:00 PM – 1:30 PM
	<u>PID: 1174869</u>		2:00 PM – 2:30 PM
<hr/>			
▲	<u>PID: 114676</u>	Mon, Sep 16	9:00 AM – 9:30 AM
<hr/>			
▲	<u>PID: 523288</u>	Tue, Sep 17	9:00 AM – 9:30 AM
<hr/>			
▲	<u>PID: 171920</u>	Wed, Sep 18	9:00 AM – 9:30 AM
	<u>PID: 340131</u>		11:00 AM – 11:30 AM
	<u>PID: 1058196</u>		1:00 PM – 1:30 PM
	<u>PID: 1058197</u>		1:00 PM – 1:30 PM
	<u>PID: 1058198</u>		1:00 PM – 1:30 PM
	<u>PID: 1119684</u>		1:00 PM – 1:30 PM
	<u>PID: 1125317</u>		1:00 PM – 1:30 PM
	<u>PID: 1128143</u>		1:00 PM – 1:30 PM
	<u>PID: 1137587</u>		1:00 PM – 1:30 PM
	<u>PID: 122749</u>		1:00 PM – 1:30 PM
	<u>PID: 534821</u>		1:00 PM – 1:30 PM
	<u>PID: 575971</u>		1:00 PM – 1:30 PM
	<u>PID: 593404</u>		1:30 PM – 2:00 PM
	<u>PID: 746601</u>		2:30 PM – 3:00 PM
	<u>PID: 1364220</u>		3:44 PM – 4:30 PM

▲	<u>PID: 122741</u>	Thu, Sep 19	9:00 AM – 9:30 AM
	<u>PID: 129233</u>		2:41 PM – 3:41 PM
▲	<u>PID: 680076</u>	Fri, Sep 20	9:00 AM – 3:00 PM
	<u>PID: 712571</u>		9:30 AM – 10:00 AM
	<u>PID: 144770</u>		10:30 AM – 11:00 AM
	<u>PID: 388980</u>		11:00 AM – 11:30 AM
	<u>PID: 304492</u>		2:00 PM – 2:30 PM
	<u>PID: 1255645</u>		2:30 PM – 3:00 PM
	<u>PID: 1005757</u>		2:30 PM – 3:00 PM
	<u>PID: 1045896</u>		3:30 PM – 4:00 PM
	<u>PID: 1077192</u>		3:30 PM – 4:00 PM
	<u>PID: 1100245</u>		3:30 PM – 4:00 PM
	<u>PID: 556211</u>		3:30 PM – 4:00 PM
▲	<u>PID: 186116</u>	Mon, Sep 23	8:00 AM – 8:30 AM
	<u>PID: 1396223</u>		10:00 AM – 10:30 AM
	<u>PID: 346618</u>		10:30 AM – 11:00 AM
	<u>PID: 346618</u>		1:00 PM – 1:30 PM
	<u>PID: 159373</u>		1:30 PM – 2:30 PM
	<u>PID: 144770</u>		2:00 PM – 2:30 PM
	<u>PID: 388980</u>		2:30 PM – 3:00 PM
	<u>PID: 702432</u>		2:45 PM – 3:15 PM
	<u>PID: 203772</u>		2:48 PM – 3:18 PM
	<u>PID: 168381</u>		3:30 PM – 4:00 PM
	<u>PID: 388980</u>		3:30 PM – 4:00 PM
▲	<u>PID: 1341499</u>	Tue, Sep 24	9:30 AM – 10:00 AM
	<u>PID: 389094</u>		1:00 PM – 2:00 PM
	<u>PID: 1122759</u>		3:00 PM – 3:30 PM
	<u>PID: 747193</u>		3:00 PM – 3:30 PM
	<u>PID: 137349</u>		3:30 PM – 4:00 PM
	<u>PID: 518305</u>		3:30 PM – 4:00 PM
	<u>PID: 137349</u>		4:00 PM – 4:30 PM
	<u>PID: 389094</u>		4:30 PM – 5:00 PM
▲	<u>PID: 543883</u>	Wed, Sep 25	10:30 AM – 11:00 AM
	<u>PID: 262504</u>		1:30 PM – 2:00 PM
▲	<u>PID: 304635</u>	Thu, Sep 26	1:00 PM – 1:30 PM
	<u>PID: 493226</u>		1:30 PM – 2:00 PM
	<u>PID: 253644</u>		2:30 PM – 3:30 PM

▲	<u>PID: 1148846</u>	Fri, Sep 27 to	Mon, Sep 30	2:00 PM – 8:00 AM
	<u>PID: 449898</u>	Fri, Sep 27 to	Mon, Sep 30	2:00 PM – 8:00 AM
	<u>PID: 495961</u>	Fri, Sep 27 to	Mon, Sep 30	2:00 PM – 8:00 AM
	<u>PID: 560208</u>	Fri, Sep 27 to	Mon, Sep 30	2:00 PM – 8:00 AM
	<u>PID: 564292</u>	Fri, Sep 27 to	Mon, Sep 30	2:00 PM – 8:00 AM

▲	<u>PID: 1054243</u>	Sat, Sep 28 to	Mon, Sep 30	At 10:00 AM
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▲	<u>PID: 1326587</u>	Mon, Sep 30	9:00 AM – 9:30 AM
	<u>PID: 1326849</u>		9:00 AM – 9:30 AM
	<u>PID: 1337940</u>		9:00 AM – 9:30 AM
	<u>PID: 169068</u>		9:00 AM – 9:30 AM
	<u>PID: 218511</u>		9:00 AM – 9:30 AM
	<u>PID: 312609</u>		9:00 AM – 9:30 AM
	<u>PID: 688167</u>		9:00 AM – 9:30 AM
	<u>PID: 716884</u>		9:00 AM – 9:30 AM
	<u>PID: 520503</u>		1:00 PM – 1:30 PM
	<u>PID: 656589</u>		1:30 PM – 2:00 PM
	<u>PID: 609033</u>		2:00 PM – 2:30 PM
	<u>PID: 604128</u>		2:30 PM – 3:00 PM
	<u>PID: 604128</u>		2:30 PM – 3:00 PM

Details

Tuesday, September 3, 2024

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 661918
REQUEST TYPE: APPOINTMENT OF AGENT

▲ **Time** 9:30 AM – 10:00 AM
Subject PID: 541131
REQUEST TYPE: APOINTMENT OF AGENT

▲ **Time** 1:30 PM – 3:00 PM
Subject PID: 506479
REQUEST TYPE: COMPLAINT

▲ **Time** 1:30 PM – 3:00 PM
Subject PID: 547686
REQUEST TYPE: COMPLAINT

▲ **Time** 1:30 PM – 3:00 PM
Subject PID: 643634
REQUEST TYPE: COMPLAINT

Wednesday, September 4, 2024

△ **Time** 8:00 AM – 8:30 AM
Subject PID: 242994
REQUEST TYPE: RESCHEDULE

△ **Time** 8:00 AM – 8:30 AM
Subject PID: 551776
REQUEST TYPE: RESCHEDULE

△ **Time** 8:30 AM – 9:00 AM
Subject PID: 562807
REQUEST TYPE: RESCHEDULE

△ **Time** 8:30 AM – 9:00 AM
Subject PID: 705571
REQUEST TYPE: RESCHEDULE

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 688395
REQUEST TYPE: RESCHEDULE

△ **Time** 9:30 AM – 10:00 AM
Subject PID: 553054
REQUEST TYPE: RESCHEDULE

△ **Time** 9:30 AM – 11:00 AM
Subject PID: 1128062
REQUEST TYPE: RESCHEULE

△ **Time** 12:30 PM – 1:00 PM
Subject PID: 349319
REQUEST TYPE: OVER 65 TAX CEILING CERTIFICATE

Thursday, September 5, 2024

△ **Time** 8:30 AM – 9:00 AM
Subject PID: 1217975
REQUEST TYPE: LATE HEARING

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 452065
REQUEST TYPE: RESCHEULE

△ **Time** 9/5/2024 2:00 PM – 9/10/2024 8:00 AM
Subject PID: 114737
REQUEST TYPE: LATE HEARING

Friday, September 6, 2024

△ **Time** 8:00 AM – 8:30 AM
Subject PID: 1083247
REQUEST TYPE: HOMESTEAD EXEMPTION APPLICATION

△ **Time** 2:00 PM – 2:30 PM
Subject PID: 349413
REQUEST TYPE: RESCHEULE

Monday, September 9, 2024

△ **Time** 8:00 AM – 8:30 AM
Subject PID: 600275
REQUEST TYPE: REVOCATION OF APPOINTMENT OF AGENT

△ **Time** 8:00 AM – 8:30 AM
Subject PID: 628350
REQUEST TYPE: HOMESTEAD EXEMPTION

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 8:30 AM
Subject PID: 397900
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 104348
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1076801
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1085953
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1085954
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1111558
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1148032
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1287666
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 1366997
REQUEST TYPE: RESCHEDULE

△ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 175221
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 268825
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 269314
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 270498
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 270547
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 270552
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 347820
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 383416
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 397761
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 397892
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 406554
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 434316
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 464315
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 476274
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 530431
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 531320
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 657007
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 750340
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID: 347846
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/9/2024 8:00 AM – 9/10/2024 9:00 AM
Subject PID; 270534
REQUEST TYPE: RESCHEDULE

▲ **Time** 3:00 PM – 3:30 PM
Subject PID: 1175637
REQUEST TYPE: RESCHEDULE

▲ **Time** 4:00 PM – 4:30 PM
Subject PID: 1175637
REQUEST TYPE: RESCHEULE

Tuesday, September 10, 2024

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 648573
REQUEST TYPE: RESCHEDULE

▲ **Time** 10:00 AM – 10:30 AM
Subject PID: 558791
REQUEST TYPE: RESCHEULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1049899
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 534008
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 654075

▲ **Time** 1:45 PM – 2:45 PM
Subject PID: 225877
REQUEST TYPE: RESCHEULE

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 399525
REQUEST TYPE: RESCHEULE

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 399532
REQUEST TYPE: RESCHEULE

Wednesday, September 11, 2024

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 399532
REQUEST TYPE: RESCHEULE

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 399525
REQUEST TYPE: RESCHEULE

▲ **Time** 9:30 AM – 10:00 AM
Subject PID: 1310522
REQUEST TYPE: RESCHEULE

▲ **Time** 11:00 AM – 11:30 AM
Subject PID: 1062902
REQUEST TYPE: RESCHEULE

▲ **Time** 4:00 PM – 4:30 PM
Subject PID: 126727
REQUEST TYPE: RESCHEULE

▲ **Time** 4:00 PM – 4:30 PM
Subject PID: 290740
REQUEST TYPE: RESCHEDULE

▲ **Time** 4:00 PM – 4:30 PM
Subject PID: 290743
REQUEST TYPE: RESCHEDULE

▲ **Time** 4:15 PM – 5:15 PM
Subject PID: 335061
REQUEST TYPE: RESCHEDULE

Thursday, September 12, 2024

▲ **Time** 10:20 AM – 3:12 PM
Subject PID: 451147
REQUEST TYPE: APPOINTMENT OF AGENT

△ **Time** 10:30 AM – 3:00 PM
Subject PID: 382425
REQUEST TYPE: APPOINTMENT OF AGENT

△ **Time** 1:00 PM – 1:30 PM
Subject PID: 1300125
REQUEST TYPE: RESCHEULE

△ **Time** 2:30 PM – 3:00 PM
Subject PID: 502797
REQUEST TYPE: RESCHEDULE

Friday, September 13, 2024

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 558014
REQUEST TYPE: RESCHEDULE

△ **Time** 1:00 PM – 1:30 PM
Subject PID: 1266809
REQUEST TYPE: HOMESTEAD EXEMPTION

△ **Time** 2:00 PM – 2:30 PM
Subject PID: 1174869
REQUEST TYPE: RESCHEDULE

Monday, September 16, 2024

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 114676
REQUEST TYPE: RESCHEDULE

Tuesday, September 17, 2024

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 523288
REQUEST TYPE: RESCHEULE

Wednesday, September 18, 2024

△ **Time** 9:00 AM – 9:30 AM
Subject PID: 171920
REQUEST TYPE: RESCHEDULE

△ **Time** 11:00 AM – 11:30 AM
Subject PID: 340131
REQUEST TYPE: APPOINTMENT OF AGENT

△ **Time** 1:00 PM – 1:30 PM
Subject PID: 1058196
REQUEST TYPE: RESCHEDULE

△ **Time** 1:00 PM – 1:30 PM
Subject PID: 1058197
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1058198
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1119684
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1125317
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1128143
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 1137587
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 122749
REQUEST TYPE: APPOINTMENT OF AGENT

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 534821
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 575971
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:30 PM – 2:00 PM
Subject PID: 593404
REQUEST TYPE: RESCHEDULE

▲ **Time** 2:30 PM – 3:00 PM
Subject PID: 746601
REQUEST TYPE: INFORMATION

▲ **Time** 3:44 PM – 4:30 PM
Subject PID: 1364220
REQUEST TYPE: LATE HEARING

Thursday, September 19, 2024

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 122741
REQUEST TYPE: APPOINTMENT OF AGENT

▲ **Time** 2:41 PM – 3:41 PM
Subject PID: 129233
REQUEST TYPE: RESCHEULE

Friday, September 20, 2024

▲ **Time** 9:00 AM – 3:00 PM
Subject PID: 680076
REQUEST TYPE: EXEMPTION APPLICATION

▲ **Time** 9:30 AM – 10:00 AM
Subject PID: 712571
REQUEST TYPE: COMPLAINT

▲ **Time** 10:30 AM – 11:00 AM
Subject PID: 144770
REQUEST TYPE: INFORMATION

▲ **Time** 11:00 AM – 11:30 AM
Subject PID: 388980
REQUEST TYPE: INFORMATION

▲ **Time** 2:00 PM – 2:30 PM
Subject PID: 304492
REQUEST TYPE: RESCHEDULE

▲ **Time** 2:30 PM – 3:00 PM
Subject PID: 1255645
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 2:30 PM – 3:00 PM
Subject PID: 1005757
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 1045896
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 1077192
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 1100245
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 556211
REQUEST TYPE: WITHDRAW HEARING

Monday, September 23, 2024

▲ **Time** 8:00 AM – 8:30 AM
Subject PID: 186116
REQUEST TYPE: COMPLAINT

▲ **Time** 10:00 AM – 10:30 AM

Subject PID: 1396223
REQUEST TYPE: INFORMATION

▲ **Time** 10:30 AM – 11:00 AM
Subject PID: 346618
REQUEST TYPE: INFORMATION

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 346618
REQUEST TYPE: DV EXEMPTION APPLICATION

▲ **Time** 1:30 PM – 2:30 PM
Subject PID: 159373
REQUEST TYPE: INFORMATION

▲ **Time** 2:00 PM – 2:30 PM
Subject PID: 144770
REQUEST TYPE: INFORMATION

▲ **Time** 2:30 PM – 3:00 PM
Subject PID: 388980
REQUEST TYPE: RESCHEDULE

▲ **Time** 2:45 PM – 3:15 PM
Subject PID: 702432
REQUEST TYPE: INFORMATION

▲ **Time** 2:48 PM – 3:18 PM
Subject PID: 203772
REQUEST TYPE: RESCHEDULE

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 168381
REQUEST TYPE: RESCHEDULE

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 388980
REQUEST TYPE: RESCHEDULE

Tuesday, September 24, 2024

▲ **Time** 9:30 AM – 10:00 AM
Subject PID: 1341499
REQUEST TYPE: RESCHEDULE

▲ **Time** 1:00 PM – 2:00 PM
Subject PID: 389094
REQUEST TYPE: COMPLAINT

▲ **Time** 3:00 PM – 3:30 PM
Subject PID: 1122759
REQUEST TYPE: RESCHEDULE

▲ **Time** 3:00 PM – 3:30 PM
Subject PID: 747193
REQUEST TYPE: RESCHEDULE

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 137349
REQUEST TYPE: LATE HEARING

▲ **Time** 3:30 PM – 4:00 PM
Subject PID: 518305
REQUEST TYPE: RESCHEDULE

▲ **Time** 4:00 PM – 4:30 PM
Subject PID: 137349
REQUEST TYPE: HOMESTEAD EXEMPTION

▲ **Time** 4:30 PM – 5:00 PM
Subject PID: 389094
REQUEST TYPE: RESCHEDULE

Wednesday, September 25, 2024

▲ **Time** 10:30 AM – 11:00 AM
Subject PID: 543883
REQUEST TYPE: RESCHEULE

▲ **Time** 1:30 PM – 2:00 PM
Subject PID: 262504
REQUEST TYPE: RESCHEULE

Thursday, September 26, 2024

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 304635
REQUEST TYPE: ERROR REPORT

▲ **Time** 1:30 PM – 2:00 PM
Subject PID: 493226
REQUEST TYPE: ERROR REPORT

▲ **Time** 2:30 PM – 3:30 PM
Subject PID: 253644
REQUEST TYPE: INFORMATION

Friday, September 27, 2024

▲ **Time** 9/27/2024 2:00 PM – 9/30/2024 8:00 AM
Subject PID: 1148846
REQUESST TYPE: RESCHEDULE

▲ **Time** 9/27/2024 2:00 PM – 9/30/2024 8:00 AM
Subject PID: 449898
REQUESST TYPE: RESCHEDULE

▲ **Time** 9/27/2024 2:00 PM – 9/30/2024 8:00 AM

Subject PID: 495961
REQUEST TYPE: RESCHEDULE

▲ **Time** 9/27/2024 2:00 PM – 9/30/2024 8:00 AM
Subject PID: 560208
REQUESST TYPE: RESCHEDULE

▲ **Time** 9/27/2024 2:00 PM – 9/30/2024 8:00 AM
Subject PID: 564292
REQUEST TYPE: RESCHEDULE

Saturday, September 28, 2024

▲ **Time** 9/28/2024 10:00 AM – 9/30/2024 10:00 AM
Subject PID: 1054243
REQUESST TYPE: RESCHEDULE

Monday, September 30, 2024

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 1326587
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 1326849
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 1337940
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 169068
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 218511
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 312609
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 688167
REQUEST TYPE: WITHDRAW HEARING

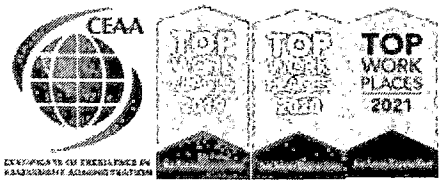
▲ **Time** 9:00 AM – 9:30 AM
Subject PID: 716884
REQUEST TYPE: WITHDRAW HEARING

▲ **Time** 1:00 PM – 1:30 PM
Subject PID: 520503
REQUESST TYPE: RESCHEDULE

▲	Time 1:30 PM – 2:00 PM Subject PID: 656589 REQUESST TYPE: RESCHEDULE
▲	Time 2:00 PM – 2:30 PM Subject PID: 609033 REQUESST TYPE: RESCHEDULE
▲	Time 2:30 PM – 3:00 PM Subject PID: 604128 REQUESST TYPE: RESCHEDULE
▲	Time 2:30 PM – 3:00 PM Subject PID: 604128 REQUESST TYPE: RESCHEDULE



Bexar Appraisal District
L. Chris White
TaxPayer Liason Officer
Office: 210-242-2510
Fax: 210-242-2454



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STAFF SUMMARY SHEET

ISSUE: Adjourn