



WUG-98-2024-30328

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

DATE OF MEETING: November 19, 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](mailto: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 board meeting of October 22, 2024.

**ACTION ITEMS**

- D. Appraisal District Policy update (*Rogelio Sandoval, Chief Appraiser*)

The board of directors may discuss and/or vote to authorize the chief appraiser to update district policies.

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

The board of directors may discuss and/or vote to authorize the chief appraiser to update the board of directors' manual.

F. GIS Mapping Software Maintenance Agreement Renewal  
(*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to renew the current maintenance agreement for the district's mapping software.

G. Zendesk Software Agreement (*Crystal Khantharoth, Finance Director*)

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into an agreement for customer interaction and workflow software.

H. Appraisal Review Board members for 2025 and 2026  
(*L. Christopher White*)

A resolution of the board of directors of the Bexar Appraisal District appointing new members and reappointing existing members to the Bexar Appraisal Review Board for the 2025 and 2026 tax years pursuant to Section 6.41 of the Texas Property Tax Code.

I. Appraisal Review Board Officers for 2025  
(*L. Christopher White*)

A resolution of the board of directors of the Bexar Appraisal District appointing the officers of the Bexar Appraisal Review Board for the 2025 tax year pursuant to Section 6.42 of the Texas Property Tax Code.

J. Agricultural Appraisal Advisory Board Reappointments  
(*Rogelio Sandoval, Chief Appraiser*)

Pursuant to Section 6.12, Texas Property Tax Code, the chief appraiser will seek the advice and consent of the Board of Directors in the reappointment of members to the Agricultural Advisory Board.

The Board of Directors may discuss and reappoint Molly Keck, Michael Echtle and Lloyd Padalecki for the 2025 and 2026 term.

**EXECUTIVE SESSION**

K. 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**

#### **L. 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 October 31, 2024
    - b. Statement of revenues and expenses through October 31, 2024
    - c. Designated cash funds report through October 31, 2024
  2. Appraisal Records (*Tommy Allison, Assistant Chief Appraiser*)
    - a. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2025 appraisal roll.
  3. District Operations (*Rogelio Sandoval, Chief Appraiser*)
-

a. The chief appraiser will inform the board of directors of an early district office closure on Friday December 6, 2024 for staff development.

M. 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.*

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BEXAR APPRAISAL DISTRICT  
BOARD OF DIRECTORS MEETING  
NOVEMBER 19, 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](mailto: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 board meeting of October 22, 2024

**MINUTES OF THE MEETING OF THE  
BEXAR APPRAISAL DISTRICT  
BOARD OF DIRECTORS  
OCTOBER 22, 2024**

The Board of Directors of the Bexar Appraisal District met for a meeting at 411 N. Frio in San Antonio, Texas on October 22, 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 2:02 p.m. and acknowledged the presence of the following directors:

Dr. Ralph Barksdale  
Mr. Robert Bruce  
Mr. Jon Fisher  
Mr. Dave Gannon  
Ms. Naomi Miller  
Ms. Rebecca Ruiz, arrived at 2:05pm.

**B. Public Comment Period**

Brandon Melland, In Person addressed the board stating they should set regular board meeting dates, include additional agriculture board information posted on the district website, provide updates on settled lawsuits against the county, and provide specific discussion subjects within executive session of the board meeting agenda.

**C. Minutes**

Mr. Jon Fisher made a motion to approve the minutes from the September 10, 2024 public hearing as written. Dr. Ralph Barksdale seconded the motion which was unanimously approved.

Ms. Naomi Miller made a motion to approve the minutes from the September 10, 2024 board meeting as written. Ms. Rebecca Ruiz seconded the motion which was unanimously approved.

Ms. Ruiz made a motion to approve the minutes from the September 16, 2024 board meeting as written. Dr. Barksdale seconded the motion which was unanimously approved.

**D. Contract – Group Insurance**

Ms. Laura McCloud, Human Resources Director, introduced Bill Rusteberg, Risk Manager.us, to present the group insurance benefits to the board. Mr. Rusteberg recommended Blue Cross Blue Shield of Texas as the district's medical carrier for 2025 and Humana as the dental carrier for 2025 and 2026.

Mr. Gannon asked for a motion. Mr. Bruce moved to approve the contract with Blue Cross Blue Shield for group insurance and Humana for dental insurance. Dr. Barksdale seconded the motion which was unanimously approved.

#### **E. Contract – Audit Services**

Ms. Khantharoth asked for board approval for the district to enter into a contract with abip PC for audit services in the amount of \$33,000 which will start January 1, 2025 through December 31, 2025.

Mr. Gannon asked for a motion. Ms. Miller approved the motion to approve the contract with apib PC for audit services. Ms. Ruiz seconded the motion which was unanimously approved.

#### **F. Contract – Security Services**

Ms. Khantharoth asked for board approval for the district to enter into a contract with Lt. Gabriel Villareal for security services in the amount of \$173,124 which will start January 1, 2025 through December 31, 2025.

Mr. Gannon asked for a motion. Dr. Barksdale moved to approve the contract with Lt. Gabriel Villareal for security services. Mr. Fisher seconded the motion which was unanimously approved.

#### **G. Contract – Temporary Services**

Ms. Khantharoth asked for board approval for the district to enter into a contract with Dependable Business Solutions for temporary services in the amount of \$185,000 which will start January 1, 2025 through December 31, 2025.

Mr. Gannon asked for a motion. Ms. Ruiz moved to approve the contract with Dependable Business Solutions for temporary services. Dr. Barksdale seconded the motion which was unanimously approved.

#### **H. Contract – Janitorial Services**

Ms. Khantharoth asked for board approval for the district to enter into a contract with Unified Service Associates for janitorial services in the amount of \$4,363 a month and \$52,356 per year which will start January 1, 2025 through December 31, 2025.

Mr. Gannon asked for a motion. Mr. Fisher moved to approve the contract with Unified Service Associates for janitorial services. Mr. Bruce seconded the motion which was unanimously approved.

#### **I. Contract – Aerial Orthophotography**

Ms. Khantharoth asked for board approval for the district to enter into a contract with Nearmap U.S. Inc. for aerial orthophotography in the amount of \$250,000 which will start January 1, 2025 through December 31, 2025.

Mr. Gannon asked for a motion. Ms. Miller moved to approve the contract with Nearmap U.S. Inc. for aerial orthophotography. Dr. Barksdale seconded the motion which was unanimously approved.

## **J. Board of Directors Manual**

Mr. Rogelio Sandoval, Chief Appraiser asked the board to table this item for November's meeting. Mr. Gannon confirmed this agenda item we be added to November's agenda for further discussion and approval.

## **K. Intent to Encumber Funds**

Mr. Sandoval informed the board of the district's intent to amend the 2024 operating budget to encumber funds for the following items: add \$560,000 to the Election Restricted Fund Reserve which is the estimated balance owed to the election department for the election and runoff. Add \$175,000 to the Litigation Expenses Restricted Fund Reserve which has a current balance of \$700,000 and with the encumbrance would bring that balance to \$875,000. Add \$65,000 to the Digital Orthophotography Restricted Fund Reserve which has a balance of \$100,000 and with the encumbrance would bring the balance to \$165,000. Add \$477,000 to the General Restricted Fund Reserve which has a balance of \$3,523,000 and with the encumbrance would bring the balance to \$4,000,000. Add \$77,000 to the Technology Restricted Fund Reserve which has a balance of \$275,000 and with the encumbrance would bring the balance to \$352,000.

Mr. Sandoval continued stating an anticipated surplus of \$721,000 would be returned to the taxing units. He added that the taxing units had 30 days to act and the district would be asking the board for approval to encumber the final total of \$1,354,000 in December.

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

Mr. Bruce asked that agenda item L be placed on the agenda for additional clarification of this section of the 2025-2026 reappraisal plan. Mr. Sandoval referred to Section 23.01E of the Texas Property Tax Code which states:

*If the appraised value of property in a tax year is lowered under Subtitle F, the appraised value of the property as finally determined under that subtitle is considered to be the appraised value of the property for that tax year. In the next tax year in which the property is appraised, the chief appraiser may not increase the appraised value of the property unless the increase by the chief appraiser is reasonably supported by clear and convincing evidence when all of the reliable and probative evidence in the record is considered as a whole.*

He continued stating any properties that were appealed in 2025 without changes in characteristics or new construction would roll into 2026, and any appeals for 2026 would be incorporated for 2027 when the district discussed that reappraisal plan in 2026. He added Section 23.01E mandated the district roll values when clear and convincing data is not provided.

## **M. Adjourn to Executive Session**

The board did not adjourn into Executive Session.

## **N. Chief Appraisal Reports**

### **1. Financial Condition**

Ms. Khantharoth presented the board with the funds investment reports from July, August, and September, focusing on the September financials. As of September 30, 2024, total deposits were \$14,411,431.97. The district was over collateralized by \$556,039.04 and year to date interest earned was \$212,994.28. Total revenues collected was \$26,190,953 with a surplus as of September 30<sup>th</sup> of \$8,503,044. She stated there was no changes to the designated cash funds as of September 30, 2024.

### **2. Appraisal Records**

Mr. Tommy Allison, Assistant Chief Appraiser, presented the board with the appraisal roll correction report for the third quarter of 2024 as authorized by Section 25.25b. This section allows the chief appraiser to make corrections to the appraisal roll as long as it does not increase the tax liability for the property owner.

Regarding the district's appraisal records, he informed the board the district is in their last quarter and had completed the 2024 appeal season. He noted there were 184,000 appeals that had been processed over 25 weeks and the district's deeds are 22 days of the county clerk's office.

### **3. Recognition**

Mr. Sandoval informed the board of the district's recognition as one of San Antonio Express News' Top Workplace for 2024 for the 6<sup>th</sup> year in a row and of the Texas Cyberstar Certificate which was awarded to the district by the Texas Department of Information Resources.

## **O. Additional Reports**

### **1. Community Outreach**

Mr. Sandoval presented the board with the 2024 Community Outreach Report for – August through November adding the district was scheduled to attend ten community outreach events. He noted Ms. Erika Hizek had asked the district to participate in the National Association of Residential Property Managers that is scheduled for November 13<sup>th</sup>.

### **2. Taxpayer Liaison**

Mr. L. Christopher White, Taxpayer Liaison, presented the board with his reports for September which included information regarding rescheduling, appointments of agents and complaints.

**P. Adjourn**

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

There being no further business, the October 22, 2024 board of directors meeting adjourned at 3:10 p.m.

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Date

**STAFF SUMMARY SHEET**

**ISSUE:** Appraisal District Policy update

The board of directors may discuss and/or vote to authorize the chief appraiser to update district policies.

## **SUMMARY SHEET**

### **TOPIC:**

Employee Policy Handbook

### **REQUEST:**

The District is updating the Employee Policy Handbook to become effective, January 1, 2025. The last update was January, 2022.

### **RECOMMENDATIONS:**

- Adding Mission Statement (pg. 4)
- Updated welcome message from Mr. Sandoval (pg. 5)
- Defining labor laws for non-exempt employees on overtime (sec 2.01- Employment Categories, pg. 7)
- Expanding on language for professional education and licensing for appraisers (sec 2.08 – Professional Education and Licensing, pg. 10)
- Auto Insurance requirements for staff receiving auto allowance (sec 3.03 – Use of Personal Vehicle for Business, pg.15)
- Bereavement leave day added for certain familial relationships (sec 4.09 – Bereavement Leave, pg. 22)
- Updating holidays – add President’s Day to correspond with Bexar County Tax Assessor closures to uniformly serve the public on the same business days (4.10 – Holidays, pg.22)
- Rename Personal and Festive days to Longevity Benefit for staff reaching service milestones (sec 4.11 – Longevity Benefit, pg. 22)
- Clarifying dress code, including piercings to foster support of personal expression (sec 5.02 – Dress Code, pg.24-25)
- Redefining social media policy with updates from Senate Bill 1893 (sec 5.10 – Social Media and Web Based Meeting Platforms, pg. 28-29)

# **BEXAR APPRAISAL DISTRICT EMPLOYEE HANDBOOK**

**January 2025**

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## ***Our Mission:***

***The Bexar Appraisal District is dedicated to promoting professionalism and ensuring public trust in the valuation profession. We are committed to provide the property owners and jurisdictions of Bexar County with an accurate and equitable certified appraisal roll while providing exceptional customer service.***

***Transparency. Trust. Teamwork.***

## **WELCOME**

Welcome to Bexar Appraisal District!

My team and I are very happy that you are now a part of the finest appraisal district in the state. At Bexar Appraisal, we believe that it takes every single employee to make us as successful as we've been. We hope you will take pride in being a member of our BCAD team. We also hope that you will quickly see that you and your fellow employees are our most valued resource. This handbook covers our policies and also outlines many of the programs and benefits available to eligible employees. We suggest that you become familiar with the handbook as soon as possible, as it will answer many questions about your employment at Bexar Appraisal District.

Lastly, we follow a code of ethics to guide our organization. Transparency, Trust and Teamwork. We pride ourselves in being **transparent** with our staff. As a result, we build **trust** with one another. Once that's been established, **teamwork** brings continued success.

We hope this is the beginning of a long and mutually beneficial working relationship.

Sincerely,

Rogelio Sandoval  
Chief Appraiser

## **1.00 INTRODUCTION**

### **1.01 Organizational Description**

#### **About Bexar Appraisal District**

The Bexar Appraisal District (the "District") is responsible for appraising all taxable property within Bexar County. The District appraises properties for taxing entities within Bexar County following Texas Property Tax Code and the Uniform Standards of Professional Appraisal practices (USPAP).

### **1.02 Nature of Employment**

All employees of the Bexar Appraisal District are employed at-will. Employees are free to resign from their employment at any time, and the District is free to terminate an employee's employment for any lawful reason, at any time, with or without cause or notice. This handbook is not a contract, and employees should not rely on anything contained in this employee handbook as binding on the District. All District employees will remain "at-will" employees for the duration of their employment. An employee's "at-will" status can never be altered or changed in any way by an oral or collateral statement or agreement, unless the statement or agreement is in writing signed by the Chief Appraiser, and expresses the intent to alter the "at-will" status.

In the event state or federal law differs from local policy and procedure, then state or federal law will take precedence.

The handbook is intended to acquaint employees with the District, and provide information about working conditions, employee benefits, and some of the policies affecting employment. All employees should read, understand, and comply with the provisions of the handbook. It is not meant to contain the answer to every question or to address every circumstance; rather it is a general guide. The Bexar Appraisal District reserves the right to change, add, or cancel policies or benefits at any time, with or without advanced notice.

### **1.03 Statement of Values**

The Bexar Appraisal District is dedicated to serving the interests of the taxpayers of Bexar County and the local taxing entities it serves. Employees are expected to be mindful to always use good judgment in order to support transparency, trust, and teamwork.

The District is committed to displaying integrity, honesty, responsibility, and respect at all times in support of our core values.

Effective ethics is an organizational effort involving the participation and support of every District employee. Thus, each employee is expected to adhere to the highest standards of ethical and professional behavior.

Adhering to our core values is crucial to the District's success; therefore, compliance with this policy is mandatory.

Initial: \_\_\_\_\_

## **2.00 EMPLOYMENT**

### **2.01 Employment Categories**

It is the intent of the District to clarify the definitions of employment classification so employees understand their employment status and benefit eligibility. These classifications do not guarantee employment for any specified period of time. Accordingly, the right to terminate the employment relationship at will, at any time, is retained by both the employee and the District.

Based upon the duties of the position, employees are classified as either NONEXEMPT or EXEMPT from federal and state wage and hour laws. Nonexempt employees are paid on an hourly basis and receive one and one-half times their regular rate of pay when they work more than 40 hours in a workweek. Exempt employees are paid on a salary basis and are expected to work beyond their normal work hours whenever necessary to accomplish the work of the District; they are not entitled to overtime compensation.

Employees also belong to one of the following employment categories:

**REGULAR FULL-TIME** employees are those who are regularly scheduled to work the Company's full-time schedule: thirty (30) or more hours a week. Generally, they are eligible for the District's benefit package, subject to the terms, conditions, and limitations of each benefit program.

**PART-TIME** employees are those who are regularly scheduled to work less than thirty (30) hours per week. They receive all legally mandated benefits (such as the TCDRS Retirement Plan), as well as paid vacation and sick leave after one year of service.

### **2.02 Equal Employment Opportunity**

To give equal employment and advancement opportunities to all people, employment decisions at Bexar Appraisal District are based on each person's performance, qualifications, and abilities. Bexar Appraisal District does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, sexual orientation, national origin, age, marital status, citizenship status, veteran-status, non-disqualifying disability, or any other characteristic protected by law.

Bexar Appraisal District's Equal Employment Opportunity (EEO) policy covers all employment practices, including selection, job assignment, promotions, compensation, discipline, termination, and access to benefits and training.

If you have a concern or question about any type of possible discrimination at work, talk with your immediate supervisor or the Human Resources Director. You will not be retaliated against for asking questions or reporting such behaviors. Any employee found to have engaged in discriminatory conduct or harassment will be subject to corrective/disciplinary action, up to and including termination of employment.

### **2.03 Americans with Disabilities Act (ADA)**

It is policy of the District that employees with a serious medical condition are allowed to continue working, provided the employee performs the essential job duties with or without reasonable

accommodation. Accommodation under the American's with Disabilities Act (ADA) does not imply a permanent contract of employment or revocation of the Employment-at-Will policy. Employees with a medical condition or a disability who seek a modification of their job description or a modification of the working conditions should request in writing such an accommodation from the Human Resources Director.

Medical documentation of the condition is required in order for the District to make an informed determination as to whether the requested accommodation can reasonably be granted. The employee may suggest the accommodation sought. However, the District retains the right to reject or substitute a suggested accommodation in compliance with the statutes as governed under the ADA. A written determination of whether a requested accommodation can be granted will be provided to the employee. The District will uphold all federal, state, and local statutes of employment opportunities for those who qualify under the law, without discrimination or retaliation.

## **2.04 Anti-Harassment/Anti-Discrimination**

The District is committed to maintaining a respectful workplace which includes a working environment that is free from all forms of discrimination and conduct that can be considered harassing, coercive, bullying, or disruptive based on a protected characteristic. This policy specifically prohibits discrimination or harassment based on gender, race, color, religion, national origin, age, disability, genetic information, refusal to submit to genetic testing, military status, and also prohibits retaliation against employees who engage in protected activity (*i.e.* opposition to prohibited discrimination or making a complaint of discrimination or harassment) or any other protected category under federal, state or local law. To reinforce this commitment, the District has developed a policy against conduct that could result in discriminatory harassment in the workplace and a reporting procedure for employees who have been subjected to or witnessed such conduct.

This policy applies to all work-related settings and activities, whether inside or outside the workplace, and includes business trips and business-related social events. It prohibits harassment or discrimination by employees as well as by non-employees (*e.g.*, contractors, vendors, customers, etc.). This policy also applies to all communications between employees, whether or not they occur at work. Furthermore, District property (*e.g.*, telephones, copy machines, facsimile machines, iPads, computers and computer applications such as e-mail and Internet access, etc.) may not be used to engage in conduct that violates this policy.

While this policy sets forth our goals of promoting a workplace that is free from discrimination or harassment, the policy is not designed or intended to limit our authority to discipline or take remedial action for workplace conduct we deem unacceptable (*e.g.*, bullying), regardless of whether the unacceptable conduct satisfies the definition of discrimination or harassment under this policy.

## **2.05 Sexual Harassment**

### **Discrimination or Harassment**

The District's policy against sexual harassment includes a prohibition against unwanted sexual advances or requests for sexual favors or other physical or verbal conduct of a sexual nature, when:

- submission to such conduct is made an expressed or implied condition of employment;
- submission to or rejection of such conduct is used as a basis for employment decisions affecting the individual who submits to or rejects such conduct; or
- such conduct has the purpose or effect of unreasonably interfering with an employee's work performance or creating an intimidating, hostile, humiliating, or offensive working environment.

Employees who believe they have been discriminated against or harassed based on a protected class such as race, gender, color, religion, national origin, age, disability, genetic information, military status or any other legal classification should follow the Complaint Procedure below.

### **Complaint Procedure**

For those employees who believe they are being discriminated against or harassed by another person in the workplace, the District recommends that the employee tell the other party in a clear and unambiguous manner that their conduct is unwelcome and that the behavior should stop immediately. However, if an employee is uncomfortable taking this action or if the conduct does not cease after advising the offending person(s) to stop, the employee should immediately complain to their department director or the Human Resources Director.

Directors who receive complaints or observe conduct prohibited by this policy are instructed to immediately report complaints or conduct to the Human Resources Director.

The employee may be asked to provide the complaint in writing. All reports of alleged harassment, sexual harassment or discrimination will be treated seriously. Complaints will be kept as confidential as possible and will be shared only with those who have a need to know. Depending on the circumstances, that could include the alleged harasser. Absolute confidentiality is not promised nor can it be assured.

In addition, the District does not condone retaliation against any employee for cooperating in an investigation. Further, the District will not retaliate against any employee for filing a good faith complaint of discrimination or harassment and will not tolerate or permit retaliation by management or co-workers. Employees who feel they have been retaliated against should notify the Human Resources Director immediately.

The District encourages all employees to immediately report incidents of discrimination, harassment, or retaliation so that complaints can be quickly and fairly resolved.

## **2.06 Recruiting**

The District is committed to hiring individuals best qualified for the stated opening as determined by the criteria reflected on job descriptions. Decisions regarding the recruitment, selection, and placement of employees are made on the basis of job-related criteria and business needs.

The District supports the advancement of employees when possible. Internal vacancy notices will be placed on the District's intranet for 72 hours (3 work days). Positions may be posted externally simultaneously.

Internal applicants must submit the Job Posting Application and their resume. To be eligible, an employee must have completed their engagement strategy period. Internal applicants under

current disciplinary actions (see Section 2.09) or not meeting expectations of job performance will not be considered and will be removed from consideration by the Human Resources Director.

Exceptions to the waiting period may be granted on a case-by-case basis at the discretion of the Chief Appraiser.

## **2.07 Engagement Strategy Period**

The District has an engagement strategy period for new employees and for current employees in new positions. During this period, the District will evaluate abilities and performance, including attendance to ensure the employee is able to perform their job satisfactorily.

The engagement strategy period for all new employees is 6 months after their hire date. The District also reserves the right to an extension of the engagement strategy period for further evaluation. The extension will be set for 90 days.

During the engagement strategy period, new employees are eligible for benefits required by law. They may also be eligible for other Bexar Appraisal District benefit programs, subject to the terms and conditions of each benefit program.

## **2.08 Professional Education and Licensing**

It is the responsibility of the District to prepare employees for required professional education and training courses. It is the employee's responsibility to successfully complete all licensing requirements. An employee who fails a required professional course will be scheduled by the District to repeat the course. Employees will be compensated for the time spent repeating the course but will be required to pay for the cost of the course or exam. An employee who fails a repeated course will be scheduled by the District for the additional repeat on the employee's own time and at the employee's expense. Failure to pass exams in the prescribed time or loss of licensing could result in reassignment or termination of employment.

Employees that take approved professional courses at their own expense will be given time off as scheduled by the director. To encourage professional development, the district provides stipends for licenses and/or designations that fall within the scope of job duties and responsibilities.

All employees registered with Texas Department of Licensing and Regulation ("TDLR") are responsible for familiarizing themselves with the rules and regulations governing their respective license and take personal responsibility in the maintaining of and in the timely renewal of their license.

Complaints filed with the TDLR against any employee must be reported to the Human Resources Director or the Chief Appraiser within 72 hours of receipt of complaint.

## **2.09 Discipline**

When appropriate, the District will follow progressive discipline procedures. This may include verbal warning(s), written warning(s), action plan, suspension or other forms of progressive actions up to and including termination. The specific type of disciplinary action to be taken will depend upon the circumstances and will be at the District's discretion. The Human Resources Director is to be advised of any personnel changes including disciplinary action.

## **2.10 Termination**

### **Voluntary Termination**

The District will consider an employee to have voluntarily terminated his or her employment if an employee does any of the following:

- Elects to resign from the District,
- Fails to return from an approved leave of absence on the date specified by the District,
- Fails to report for work without notice to the District for two (2) consecutive business days.

Employees voluntarily electing to resign are asked to submit their resignation in writing and provide a minimum of two weeks written notice. Employees classified as Exempt Level 1 must provide four weeks written notice. For Exempt Level 2 management, two weeks written notice is preferred.

### **Involuntary Termination**

An employee may be terminated involuntarily for reasons including, but not limited to misconduct, poor performance, attendance or other violations of the District's core values, rules of conduct, as well as a consequence of reorganizations, job eliminations, or lack of work. This list does not change the District's at-will provisions and the District reserves the right to discharge any employee with or without cause and with or without prior notice.

## **2.11 Work Schedules**

Bexar Appraisal District's normal business hours are 8am-5pm, Monday through Friday. The normal work schedule for all Bexar Appraisal District employees is 8 hours a day, 5 days a week. Department directors may schedule employees to best service the needs of the District and its customers.

Flexible scheduling or flextime (also called alternative work schedule) is available to eligible employees at their director's discretion. Employees must schedule their work hours between 7am-6pm.

Employees in certain positions may be permitted to work an alternative schedule throughout the year with the consent of their director and the Human Resources Director. An employee requesting an alternative work schedule must submit a Flex Schedule Agreement form with approvals by their immediate supervisor and appropriate management. Approval of the request will be based upon a number of factors to include the needs of the District, employee's job performance, attendance, and any disciplinary issues. The District will evaluate all flexible work arrangements as needs of the District dictate.

## **2.12 Remote Work**

Employees should not assume any specified period of time for working remotely and recognize that this plan is not designed to be a substitute for child care needs. BCAD reserves the right to require employees to return to regular, in-office arrangements at any time and notification may be on short notice. Employees will be notified as soon as reasonably possible to any

modifications to existing remote work arrangements based on ever changing circumstances, including business needs.

Remote work may not be available for all employees as there are some positions that require the employee to be physically present in the workplace at all times. The remote work option will be considered on a case by case basis, particularly for employees with less than one-year employment at the district or for those under disciplinary action. Remote work option is at the discretion and approval of the department director.

### **Expectations and Responsibilities for Employees Participating in Remote Work**

- Employees must be able to carry out the same duties, assignments, and other work obligations remotely as is expected when working on the District's premises.
- Inability to connect reliably and timely will require employees to return to office in a reasonable amount of time.
- Standards of performance and accountability measures, as set forth by the department director, remain unchanged during remote work. Employees who are not performing to expected levels while working remotely may be reassigned or may be subject to disciplinary action.
- Employees must be able to give their full attention to work assignments by minimizing distractions and plan for necessary childcare during normal work hours.
- Employees are required to attend virtual meetings, respond to emails and receive phone calls during normal work hours.
- Employees will maintain a safe work environment at all times and agree to be responsible for all District issued equipment and avoid any misuse as it applies to current District policies in place. Please refer to Section 5.08 in this handbook.
- During remote work, overtime is not allowed without director approval.
- Any deviations to regular work schedules must have advanced approval by management and any time that extends beyond normal lunch/break time should be submitted through replicon.
- Personal errands are prohibited during normal work hours with the exception of lunch/breaks, unless pre-approved by management.
- Abuse of time could result in termination of remote work arrangements or disciplinary action including termination.
- Employees may be required to report to work in office on a case by case basis. Failure to do so may result in disciplinary action and termination of remote work option.
- Injuries that occur to employees working remotely during their normal work hours should be reported immediately to Human Resources as any other workplace injury. Normal liability and worker's compensation provided to employees is extended while on remote work status.
- The District does not assume liability for injuries to third persons and/or members of the employee's family on his/her premises

## **2.13 Hiring Relatives**

The District will not hire an applicant who is related to a Bexar Appraisal District employee or member of the Board of Directors.

The District defines a relative as any person who is related to you by blood or marriage to include:

- Spouse
- Domestic Partners
- Parents
- Children
- Grandparents
- Grandchildren
- Brothers and sisters
- Nieces and nephews
- Aunts and Uncles
- First and Second Cousins

In the event of a marriage between two employees, the Chief Appraiser or the Human Resources Director must be notified immediately. Under no circumstances shall two relatives be able to work in the same chain of command or in a supervisory/lead position over one another. In this circumstance, the Chief Appraiser will attempt to find a suitable position elsewhere within the District for which one of the employees may be qualified to transfer. If there is no availability to transfer either employee, the affected employees will be permitted to determine which employee will resign.

## **2.14 Public Information**

As required by the Texas Public Information Act (Chapter 552 of the Texas Government Code) names, gender, ethnicity, salaries, titles and dates of employment must be made available upon request. Additionally, District communication made through personal devices to include personal email or cell phone is also subject to release under this act.

Section 552.024 of Texas Government Code excepts home addresses, home telephone numbers, emergency contact information and social security numbers from required public disclosure.

## **2.15 Open Door Policy**

Bexar Appraisal District believes that the work conditions, wages, and benefits it offers to its employees are competitive with those offered by other employers in this area and in this industry. If you have concerns, you are strongly encouraged to voice these concerns openly and directly to your immediate supervisor, the Human Resources Director or the Chief Appraiser. Our experience has shown that when employees deal openly and directly with supervisors, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that the District amply demonstrates its commitment to employees by responding effectively to employee concerns.

## **3.00 COMPENSATION**

### **3.01 Salary Administration**

Bexar Appraisal District maintains a salary administration program. The salary administration program ensures the District has consistent pay practices, complies with federal and state laws,

supports the District's commitment to Equal Employment Opportunity, and offers competitive salaries within the District's labor market.

Bexar Appraisal District is committed to paying equitable wages that are based on the requirements and responsibilities of each job. The District also strives to pay wages that are comparable to the wages paid to employees in similar jobs in other organizations in the area. Compensation for each job is based on several factors. The factors include the essential duties and responsibilities of the job, and salary survey data. The District periodically reviews the salary administration program and changes it as necessary.

The District may give merit-based pay adjustments to employees to recognize superior employee performance. These adjustments are based on a number of factors, including the information documented by formal performance evaluations.

Questions regarding compensation should be directed to the supervisor or the Human Resources Director.

### **3.02 Fair Labor Standards Act Safe Harbor for Exempt Employees**

It is the District's policy and practice to accurately compensate employees and to do so in compliance with all applicable state and federal laws. To ensure that you are paid properly and that no improper deductions are made, you must review your pay stubs promptly to identify and report all errors.

If you are classified as an exempt salaried employee, you will receive a salary which is intended to compensate you for all hours you may work for the District. The salary will be a predetermined amount that will not be subject to deductions for variations in the quantity or quality of the work you perform.

Under federal and state law, your salary is subject to certain deductions. For example, unless state law requires otherwise, your salary can be reduced for the following reasons:

- Full-day absences for personal reasons.
- Full-day absences for sickness or disability.
- Full-day disciplinary suspensions for infractions of our written policies and procedures.
- Family and Medical Leave absences (either full- or partial-day absences).
- To offset amounts received as payment for jury and witness fees or military pay.
- Any full day in which you do not perform any work.

Your salary may also be reduced for certain types of deductions, such as your portion of health, dental or life insurance premiums; state, federal or local taxes; social security; or voluntary contributions to a 401(k) or pension plan.

In any work week in which you performed any work, your salary will not be reduced for any of the following reasons:

- Partial day absences for personal reasons, sickness or disability.
- Your absence on a day because your employer has decided to close a facility on a scheduled work day.
- Absences for jury duty, attendance as a witness or military leave in any week in which you have performed any work.
- Any other deductions prohibited by state or federal law.

However, deductions may be made to your accrued leave for full- or partial-day absences for personal reasons, sickness or disability.

If you believe you have been subject to any improper deductions, you should immediately report the matter to the Finance Director or your supervisor.

### **3.03 Use of Personal Vehicle for Business**

Regular full-time employees required to travel in order to fulfill their job responsibilities will be provided an auto allowance and are required to maintain auto liability insurance and a safe driving record. Failure to provide requested auto liability insurance by renewal, may result in loss of auto allowance and may include disciplinary action. Employees must follow the local hand-held mobile communication device ordinance while driving to fulfill their job responsibilities.

Driving record background checks will be conducted by the HR Director, at regular occurring intervals, for each employee receiving an auto allowance at the time of verification. Employees whose driving record renders them unable to drive may be subject to reassignment or termination of employment.

### **3.04 Overtime**

Employees may be required to work overtime when necessitated by business needs. Any need for overtime will be determined by supervisor/directors and approved by the Chief Appraiser or Assistant Chief Appraiser. All hourly employees will receive time and one-half for any time worked over forty (40) hours in a seven (7) day workweek.

Employees may not work overtime hours without advance approval unless the immediate supervisor has received prior notification and has given approval of the overtime in advance of working it. Vacation hours, jury duty, sick leave, holidays or any other leave of absence will not be computed as hours worked for overtime pay purposes. Where state or federal law differs from District policy and procedures, it will take precedence and supersede District policies and procedures.

## **4.00 LEAVE**

### **4.01 Notification of Absences**

Timely and regular attendance is vital to the overall operation of the District (refer to Section 2.11). Employees unable to report to work as scheduled should notify their immediate supervisor as soon as possible. Requests for all types of leave are made to the employee's immediate supervisor through the electronic time and attendance system.

Unscheduled absences are absences that have not received approval from the supervisor/director no later than close of business on the work day before the absence occurs.

All exempt employees are required to work their full scheduled hours. Exempt employees who report to work late or leave earlier than their scheduled time may be charged vacation or sick leave, or may be required to make up the time during the workweek.

Any variations to an employee's schedule must be approved in advance by their supervisor/director.

Failure to report to work without notifying a supervisor/director will be grounds for disciplinary action, up to and including termination.

Attendance related infractions may be grounds for disciplinary action.

#### **4.02 Sick Leave**

The District provides paid sick days to full-time regular employees. Regular-full time employees become eligible for paid sick leave upon completion of six (6) months of continuous service. Eligible employees accrue sick days at the rate of four (4) hours per pay period. Part-time employees accrue sick time at the rate of two hours per pay period and are eligible for paid sick leave upon completion of one (1) year of service. Employees are permitted to accrue sick leave to a maximum of 480 hours. Employees who reach their maximum accrual will be paid at the end of each month for one-half of each hour accrued over 480 hours. Accrual of sick leave will resume when the employee's balance drops below the 480-hour maximum.

Employees who are voluntarily terminating employment, have been employed with the District for at least five (5) years, and provide the required amount of notice of their resignation (as required by level) will be paid for one-half of the accrued sick leave hours at the employee's current salary.

Employees who take three or more consecutive business days of sick leave are required to provide a physician's release to return-to-duty (including any required restrictions).

#### **4.03 Sick Leave Pool**

The District maintains a sick leave pool to benefit employees who have exhausted their accrued vacation and sick leave due to a non-work-related catastrophic illness or injury that requires the services of a licensed practitioner for a prolonged period of time.

Employees are eligible to donate up to 40 hours of sick leave to the pool on an annual basis, as long as a balance of 80 hours of sick leave is maintained. Employees are encouraged to donate accrued sick leave upon termination of employment.

Employees who accrue sick leave and who have been employed for a minimum of five (5) years are eligible to request leave from the sick leave pool. Employees are permitted to request the lesser of 1/3 of the available time in the sick leave pool or 360 hours (45 working days) per catastrophic illness/injury per year. Any employee not receiving the maximum 45 days, may request additional sick leave pool days not to exceed a total of 45 days in a calendar year per catastrophic illness or injury provided they have utilized 50% of the days granted from the sick leave pool in the initial request. Employees receiving a long-term disability benefit are not eligible for a sick leave pool benefit.

Requests for sick leave pool benefits must be submitted in writing to the Human Resources Director and approved by the Chief Appraiser and the Human Resources Director

#### 4.04 Family and Medical Leave

In accordance with the Family and Medical Leave Act (FMLA), the District grants leave to eligible employees for up to 12 weeks in a 12-month period and up to 26 weeks of leave in any 12-month period in compliance with the expansion of FMLA under the Support for Injured Service Members Act. The term "12-month period" is not a calendar year but rather calculated as the one-year period beginning on the date the employee begins his/her first Family and Medical Leave. To be eligible for FMLA leave, employees must have worked at the District for 12 months and have worked at least 1,250 hours in the 12-month period immediately before the date when the leave is requested to commence.

This FMLA leave is a guaranteed period of time eligible employees can be absent from work with job protection. Employees will be required to apply any accrued unused leave such as sick or vacation toward their 12-week allotment under the FMLA provisions. Employees may request or use FMLA leave to cover the time they need to be away from work for any of the following purposes:

- To care for a newborn child or a newly adopted or newly placed foster child, as long as the leave is taken in the year following the child's birth, adoption or placement.
- To care for a child, spouse or parent who has a serious health condition; or
- To provide employees time to attend to their own serious health condition that leaves them unable to perform their job.
- A covered family member's active duty or call to active duty in the Armed Forces (***Exigency Leave***)
- To care for an injured or ill service member (***Service Member Leave***)

A serious health condition is defined as a condition that requires inpatient care at a hospital, hospice or residential medical care facility, including any period of incapacity or any subsequent treatment in connection with such inpatient care or a condition that requires continuing care by a licensed health provider.

This policy covers illnesses of a serious and long-term nature, resulting in recurring or lengthy absences. Generally, a chronic or long-term health condition, which left untreated, would result in a period of incapacity of more than three days, would be considered a serious health condition.

The District will require an employee to provide a physician's certification of the serious health condition.

If an employee takes paid sick leave for a condition that progresses into a serious health condition and the employee requests FMLA leave as provided under this policy, the District may designate all or some portion of related leave taken as FMLA to the extent that the earlier leave meets the necessary qualifications.

##### **Exigency Leave**

An employee whose spouse, son, daughter or parent either has been notified of an impending call or order to active military duty or who is already on active duty due to service in a recognized reserve unit may take up to 12 weeks of leave for reasons related to or affected by the family member's call-up or service. Reasons related to the call-up or service includes helping the family member prepare for the departure of and caring for children of the service member. The leave may commence as soon as the individual receives the call up notice. (son or daughter for this

type of FMLA leave is defined the same as for child for other types of FMLA leave, with the exception that the person does not have to be a minor.) This type of leave would be counted toward the employee's 12-week maximum of FMLA leave in a 12-month period. Employees requesting this type of FMLA leave must provide proof of the qualifying family member's call-up or active military service before leave is granted.

### **Service Member Leave**

This leave may extend up to 26 weeks in a 12-month period for an employee whose spouse, son, daughter, parent or next-of-kin is injured or recovering from an injury suffered while on active military duty and who is unable to perform the duties of a service member's office, grade, rank or rating. Next-of-kin is defined as the closest blood relative of the injured or recovering service member. An employee is also eligible for this type of leave when the family service member is receiving medical treatment, recuperation or therapy, even if the service member is on a temporary disability retired list.

Employees requesting this type of FMLA leave must provide certification of the family member or next-of-kin's injury, recovery or need for care. This certification is not tied to a serious health condition as for other types of FMLA leave. This is the only type of FMLA leave that may extend an employee's leave entitlement beyond 12 weeks to 26 weeks. Other types of FMLA leave are included with this type of leave totaling 26 weeks. The 12-month period in which the 26 weeks may be taken is measured beginning with the first occurrence of the leave.

### **Additional Considerations**

If a husband and wife both work for the District and each wish to take leave for the birth of a child, adoption or placement of a child in foster care, or to care for a parent (but not a parent in-law) with a serious health condition, the husband and wife may only take a combined total of 12 weeks of leave.

Where possible, employees needing FMLA leave must give their supervisors 30 calendar days advance notice. Employees who cannot foresee the need for FMLA leave 30 days in advance must give as much notice as possible. This generally means notifying the District within one or two workdays of the time an employee first learns of the need for leave, unless extenuating circumstances exist. Employees are expected to comply with normal District guidelines on reporting absences.

Employees taking exigency leave, service member leave or leave because of their own or a relative's serious health condition may take their allotment of FMLA leave intermittently or in accordance with a reduced work schedule if this is medically necessary. Where employees have some control over the timing of their leave, they are expected to consult with their supervisor to try and arrange a mutually acceptable time. The District reserves the right to temporarily transfer the employee to an alternative temporary position with equivalent pay and benefits if the employee is qualified for that position and the temporary position better accommodates recurring periods of leave. Employees taking leave to care for a newborn or newly placed child do not have a legal right to take intermittent leave but may do so with the District's consent.

Employees must inform their supervisor if they should need family or medical leave and when they expect to be absent. Supervisors should not inquire about the reasons for the employee's leave request. Instead, to ensure the employee's privacy, the Human Resources Director will provide employees the required certification documents to be completed by the treating physician. The Human Resources Director is responsible for ensuring that all medical information provided by employees is maintained in confidence.

During FMLA leave, the District continues eligible employees' health care benefits, including medical benefits, dental and life insurance. During a period of FMLA leave, the employee on leave receives the same benefits and has the same payment obligations as employees who are working. This means that employees on FMLA leave must make arrangements with the District to continue paying dependent premiums. Coverage can be cancelled if an employee fails to pay the employee share of the premium within 30 days of the date it is due.

Employees must exhaust all accrued paid leave before going on an unpaid status. Employees on FMLA leave do not earn paid vacation and sick leave during the period of unpaid leave. However, employees on FMLA leave continue to be covered by the District's group health plan benefits on the same terms that are applicable for active employees. FMLA leave does not cause employees to lose any previously earned employment benefits.

On returning from an FMLA leave of absence, employees normally are restored to their original or equivalent positions with equivalent pay, benefits, and other employment terms. The only exception to this restoration procedure is for certain key employees, who are notified of their status when first requesting FMLA leave. Key employees who take FMLA leave are reinstated to their former or equivalent positions only if their reinstatement does not cause the District substantial hardship.

If an employee fails to return to work with the District following FMLA leave, or returns, but fails to remain at work for a minimum of 30 calendar days, the employee must repay premiums the District paid during the employee's unpaid FMLA.

In some circumstances, the District may allow employees who have exhausted the leave available to them under FMLA to take additional unpaid leave. The District does not guarantee that it will be able to re-employ individuals who take post-FMLA leave. Further, during a period of post-FMLA leave, an employee's health care benefits do not continue in force, unless the worker elects to pay the full cost of COBRA coverage. Employees should be aware that a lapse in benefits coverage or plan participation during a period of post-FMLA leave might affect a worker's coverage after the employee returns to work.

#### **4.05 Unpaid Leaves of Absence**

Employees may be granted an unpaid personal leave of absence for non-FMLA reasons in situations in which the District determines that an extended period of time away from the job will be in the best interest of the employee and the District. No leave of absence or combination of leaves of absence may exceed 180 days within a one year period, except those instances required by law.

Requests for unpaid personal leave or any extension of a personal leave should be submitted in writing to the HR Director thirty days prior to commencement of the leave period, or as soon as is practicable. The final decision concerning the request will be made by the Chief Appraiser. All employees on approved personal leave are expected to report any change in their need for leave or their intention to return to work to the HR Director.

Employees on personal leave will be required to use all earned vacation and sick days while on leave before going unpaid. Health insurance and other benefits will cease at the beginning of

unpaid leave and the employee becomes eligible for COBRA. Paid vacation and sick time do not accrue during periods of unpaid leave of absence.

Employees returning from a personal leave due to an illness or injury must provide a job-related release indicating their fitness-for-duty. Any restrictions must be noted on the release.

Employees on an authorized personal leave of absence may not perform work for any other employer that is considered by the District to be an actual or potential conflict of interest.

It is possible that an employee returning from a personal leave of absence may not be returned to the same job position that they held before taking leave. If an employee fails to return to work at the conclusion of an approved leave of absence, including any extension of the leave time, the employee will be considered to have voluntarily terminated employment with the District.

#### **4.06 Military Leave**

Bexar Appraisal District supports the efforts of its employees who participate in military activities as governed by the Uniformed Services Employment Reemployment Rights Act ("USERRA") and Veterans Reemployment Rights Statute (VRR). Full-time employees who voluntarily enter a military service or active duty in the armed forces of the United States will be granted an unpaid military leave of absence if notice is given to the employee's supervisor in writing at least two weeks in advance (or, if military orders require the employee to report in less than a two-week notice, as soon as reasonably practicable). District leaves do not accrue while on a military leave of absence.

An employee involuntarily called to active duty in the uniformed services will be granted a military leave if notice is given to the supervisors as soon as reasonably possible.

An employee who is required to report for any of the Reserve Branches or the National Guard will be granted an unpaid military leave of absence to participate in the regularly scheduled military training activity.

Military orders should be presented to the Human Resources Director so that arrangements for leave are made as early as possible before a departure.

#### **4.07 Jury Service**

The District grants paid leave to regular full-time employees called to jury duty. Employees should immediately provide their jury duty summons to their supervisor in order that arrangements may be made to cover the employee's position. When on jury duty, employees will be expected to work as much of their regularly scheduled shift as the jury duty schedule permits on a given day. Employees who are released from jury duty before the end of the workday should contact their supervisor and be available to work the remaining part of the day. Jury duty hours are counted as hours worked in the calculation of overtime hours.

## 4.08 Vacation

Paid vacation is earned based on employment classification, position level and years of service as follows:

<b>Non-Exempt Employees</b>	
<b>Continuous Years of Service</b>	<b>Amount Earned</b>
0-<5 years of service	.83 days per month (10 days per year)
5-<15 years of service	1.25 days per month (15 days per year)
15+ years of service	1.67 days per month (20 days per year)

<b>Exempt Employees Level 2:</b>	
<b>Continuous Years of Service</b>	<b>Amount Earned</b>
0-<5 years of service	1.25 days per month (15 days per year)
5+ years of service	1.67 days per month (20 days per year)

<b>Exempt Employees Level 1:</b>	
<b>Continuous Years of Service</b>	<b>Amount Earned</b>
All years of service	1.67 days per month (20 days per year)

Regular full-time employees will be eligible to use accrued vacation upon completion of six (6) months of service and part-time employees on completion of one (1) year of service. Accrued vacation is earned if employment begins before the 16<sup>th</sup> day of the month.

Employees are allowed to carry over up to 45 days of vacation at the end of each calendar year. Vacation in excess of 45 days will be forfeited as of January 1 of each year.

Members of the Executive team who are not able to take their accrued vacation may receive payment annually for up to ten (10) days of vacation in excess of the 45-day limit. Regular employees terminating employment who provide at least two (2) weeks written notice will be paid for up to 45 days of accrued, unused vacation. Exempt Level 1 employees who provide at least four (4) weeks written notice will be paid their balance not to exceed 45 days of accrued unused vacation.

#### **4.09 Bereavement Leave**

Employees may be granted up to three (3) days paid bereavement leave in the event of the death of a member of his/her immediate family: spouse, parent, or child. Two (2) days paid bereavement leave will be granted for the death of a grandparent, grandchild, brother, sister, mother or father-in-law. One (1) day paid bereavement leave will be granted for the death of a niece, nephew, aunt, or uncle. Employees requiring additional time off for bereavement leave may ask to use earned vacation or sick time.

#### **4.10 Holidays**

Bexar Appraisal District observes the following holidays:

- New Year's Day
- Martin Luther King Jr. Day
- President's Day
- Good Friday
- Battle of Flowers Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day and Day after Thanksgiving
- Christmas Day

Observed holidays that fall on Saturday will be recognized on Friday and those that fall on Sunday will be recognized on Monday.

At the discretion of the Board of Directors, additional holidays may be designated on an annual basis.

Unscheduled absences occurring the day before or after a District holiday will not be approved or paid without medical documentation. Unscheduled absences for reasons other than illness which are deemed to be of good cause and beyond the control of the employee will be considered by the department director on a case by case basis and may require documentation.

Holiday pay is not calculated as time worked for overtime purposes.

#### **4.11 Longevity Benefit**

In recognition of service time, employees who have completed five years of service with the District will be eligible for one day of paid personal leave per year. Employees who have completed ten years of service with the District will be eligible for a second paid personal leave day per year. Employees who have completed fifteen years of service with the District will be eligible for a third paid personal day per year. Personal day(s) cannot accrue and must be used as a full day (8 hours) in the calendar year in which it was earned. Upon termination of employment, for any reason, all accrued longevity benefits are forfeited. The employee is not entitled to any type of compensation for unused personal days.

#### **4.13 Inclement Weather**

Inclement weather days are those days in which school districts and/or the City of San Antonio and/or Bexar County have elected to close due to severe weather conditions that make travel hazardous.

In the event of inclement weather, the District will communicate a closure or delayed opening through multiple methods to include a recording on the District emergency phone line, email, text, posting closure on the district website or calls from a supervisor/director. Employees who do not report to work on days of delayed opening will be charged available vacation or sick time. All full-time employees will be paid for full day office closures.

#### **4.14 Leave for Instructor Teaching Time**

To support and encourage education programs, the Bexar Appraisal District will permit any employee who is approved as an instructor by the Property Tax Assistance Division of the Texas Comptroller to accrue Teaching Time Credits for instructing in-house PTAD approved core courses or exam reviews. Teaching credits are only to be utilized to account for time that the instructor teaches courses or seminars for other districts, state associations, or local chapters in lieu of taking accrued vacation for this purpose. Teaching Time Credits may not be used for any other purpose.

District staff instructors will accrue one-half hour for each hour of classes taught. Core course hours are listed on the TDLR Property Tax Professionals Core Education webpage. Teaching time credit hours for exam review classes are accrued at 12 for the Level 3 Review and 14 for the Level 4 Review, or 14 if the Review is combined with Level 3 and 4 Students

In the event an instructor teaches a course jointly, the co-instructors will accrue Teaching Time Credits at the rate of one-half hour for each hour the instructor teaches a core course or review class.

The employee must receive approval from their director in order to use Teaching Time Credits to instruct courses outside the District.

Upon termination of employment, all accrued or unused Teaching Time Credits are forfeited. The instructor is not entitled to any type of compensation for unused Teaching Time Credits.

### **5.00 PERSONAL CONDUCT AND AFFAIRS**

#### **5.01 Conflict of Interest**

District employees have a special responsibility to be fair and impartial in their dealings with those who have business with our organization. Conflicts of interest or favoritism cannot be tolerated and maintaining high standards of honesty, integrity and impartiality are essential and assure proper performance of business.

The following list includes examples of behavior or conduct, which may be grounds for disciplinary action up to and including termination:

- Engaging in relationships or activities which conflict or appear to conflict with carrying out of District duties and responsibilities.
- Providing services to outside concerns, which do business with the District, without prior specific written approval from the Chief Appraiser.
- Engaging in outside employment, which may discredit the District or affect how the employee carries out District duties.
- Using his/her association with the District in conducting personal affairs.
- Using any District asset for personal use.
- Borrowing or unauthorized use of District funds, supplies, equipment, or other property.
- Acceptance or offering of bribes and/or kickbacks to include any form of gifts, cash or merchandise.
- Disclosing, disseminating or otherwise publishing confidential District information without prior express written permission from the Chief Appraiser.

This list is not all-inclusive. Anyone having knowledge of violation is expected to report it immediately to a member of management or the Human Resources Director. District policy prohibits acts of intimidation, threats, coercion or discrimination against individuals providing information or assisting with an investigation.

All employees are required to complete a Financial Disclosure Form at the time of hire and as required thereafter. The Financial Disclosure discloses any possible conflicts of interest the employee may have through property ownership, outside employment or any activity which would affect an employee's impartiality while executing his/her official duties. Completion of this form will be considered a condition of employment.

Employees of the Bexar Appraisal District are prohibited from engaging in outside employment or other outside activity not compatible with the full and proper discharge of the duties and responsibilities of their employment at the District. Outside employment which tends to impair the employee's mental or physical capacity to perform their District job duties in an acceptable manner is prohibited.

All District employees who are considering outside employment or who already hold outside employment shall notify their director in writing of the details of the job, the name of the secondary employer, and obtain the approval of their director. The director will forward the notification to Human Resources for inclusion in the employee's personnel file.

Employees who resign or are terminated from employment with the District are prohibited from participating as a compensated fiduciary or tax agent in informal meetings with the District for a period of one (1) year from the last day of employment to avoid conflict of interest or ethical concerns.

## **5.02 Dress Code**

Employees of the District are expected to dress in a smart casual manner, in clothing that is neat, clean and conservative. Departmental needs may take precedence.

Appraisers who will be out in the field for the entire workday will be permitted to wear shorts (short-shorts and cutoffs prohibited).

Nose piercings are acceptable using small studs or clear stud retainers. All other facial piercing jewelry is prohibited. Non-compliant piercings must be removed or replaced with a clear retainer. Tattoos with inappropriate/ vulgar images or offensive language or gestures must be covered during the course of business.

### **5.03 Employee Conduct**

The District expects the highest standard of behavior from its employees. Employees are expected to comply with all work rules at all times. It is neither intended nor possible to state a rule for every situation or for every course of conduct, which may arise. Therefore, it is not implied that the following list contains all of the District rules, which are or may be in effect; neither should it be taken that any omission from this list implies permission or lack of authority for the District to take appropriate action against any employee. Furthermore, these rules are not intended to create and should not be relied upon as a basis for assuming a "for cause" requirement for termination or as otherwise altering the express policy of the District that the employment relationship be an employment-at-will relationship. Listed below are examples of unacceptable conduct:

- Discourtesy to a customer.
- Unauthorized removal or theft of property belonging to the District, another employee of the District, or a member of the public.
- Falsifying any District record or submission of false or misleading information or records pertaining to work, personnel, employment, attendance, time, medical insurance or other District matters.
- Insubordination, disrespectful conduct, and/or refusing to carry out any reasonable order to work on jobs assigned to you.
- Conduct or behavior deemed offensive or undesirable, including but not limited to: gossip, negative or derogatory comments, uncooperative behavior.
- Operating any District equipment unsafely.
- Possession of dangerous or unauthorized materials, such as explosives or firearms on District property or while offsite representing the District.
- Failing to perform work during work time.
- Threatening violence to any employee or member of the public.
- Fighting with another employee or member of the public on District time, property or while representing the District.
- Gambling or soliciting for gambling on District premises.
- Unauthorized absence from the work area during the workday and/or walking off the job without permission of the supervisor.
- Unsafe, deliberate or improper conduct leading to the damage or deliberate destruction of District property or the property of another employee.
- Unauthorized use of telephones, email system, postal resources (comment – to include shipping packages to the district i.e. ammunition), or other employer owned equipment, distribution, or removal from the premises of any District record or confidential information of any nature.
- Deliberately recording time for another employee or allowing another employee to record your time.
- Possession of or use of illegal drugs or an alcoholic beverage on District property to include offsite District displays/booths/shows, etc. at any time or reporting to work under the influence of either.
- Unwarranted absences or excessive number of absences.
- Dishonesty of any nature.

- Willful, deliberate or continued violation of any of the rules of the District.
- Boisterous or disruptive activity in the workplace.
- Unsatisfactory performance or conduct.
- Failure to comply with the requirements as specified in the handbook.

The list is not all-inclusive; it only serves to provide examples of the kind of unacceptable conduct. Employment with the District is at the mutual consent of the District and the employee, and either party may terminate that relationship at any time, with or without cause, and with or without advance notice.

#### **5.04 Tobacco and Vape-Free Workplace Policy**

Use of all forms of tobacco products (which includes Electronic Cigarettes) is prohibited on District property, without exception.

#### **5.05 Housekeeping**

Good housekeeping and neat work habits are important as they enhance morale, efficiency, and promote excellence in customer service. Work areas should be kept clean and free of clutter. Drinking and eating are prohibited during periods of direct customer or public contact and in any open public area where customers convene for assistance.

#### **5.06 Non-Solicitation**

Solicitation of employees by other employees is strictly prohibited during work time or within a District facility without approval of the Human Resources Director. Voluntary donations of nominal amounts when made for a fund-raising event or a special occasion such as marriage, illness, or retirement are permitted; however, no employee shall be forced to contribute to any fund or collection.

The distribution of literature by employees is forbidden during work time or in work areas. The posting of any leaflets, notices, literature, or other material on District property without the permission of the Human Resources Director is strictly prohibited.

#### **5.07 Monitoring and Recording**

SECTION 41.68 of the Property Tax Code of the State of Texas provides for the electronic recording of protest hearings and Board meetings due to the public nature of such proceedings.

In the course of everyday interaction there are many personal exchanges between employees not relevant to District business. Accordingly, employees are prohibited from electronically recording exchanges between employees.

The District prohibits the taking of photographs with personal cameras, cell phones or any other electronic device on District premises in order to secure employee privacy and business information. Any employee seeking to take photographs on site must first receive permission from the Chief Appraiser. Authorization to photograph may be granted on a limited basis by the Chief Appraiser for District sponsored events or business needs.

The District may conduct video surveillance of non-private workplace areas. Video monitoring is used to identify safety concerns, maintain quality control, detect theft and misconduct, and

discourage or prevent acts of harassment and workplace violence. Photographed or filmed images of employees may be used on the District's social media sites. Employee's names or other identifying information will not be shared without direct permission.

## **5.08 District Property**

The District provides equipment and supplies to its employees to support conducting job duties. In order to minimize expenditures for equipment and waste of supplies, employees are responsible for exercising the utmost care in using District property.

Particular care should be taken with all electronic and/or portable equipment used internally. Normal "wear and tear" of equipment is not unusual. Damage or loss of these items resulting from intentional acts, negligence, or carelessness is subject to review by the Information Systems Director and the Finance Director in which the employee may be subject to financial responsibility

In addition, employees are responsible for the care and secure handling of all electronic devices, confidential client files and other client information during external use. This will apply during all local or out of town travel. A police report must be filed in the event of theft of any electronic device during external use.

Furthermore, employees are prohibited from using district owned property and/or supplies for personal use or private income.

## **5.09 Information Technology Resources**

In order to enable employees to perform their job duties, the District provides employees with access to various electronic devices. The District also permits employees to use its computers for limited personal use where such use does not interfere with the employee's performance of his/her duties or violate other District policies.

It is the policy of the Bexar Appraisal District to comply with computer software copyrights and to adhere to the terms of all software licenses to which the District is a party.

District employees may not duplicate or install any software or related documentation unless expressly authorized to do so by the licensor and the District's Information Systems Director. Employees must also follow all software license agreements.

All software used in any hardware/leased owned by the Bexar Appraisal District must be purchased and/or installed through or with the approval of the Information Systems Director.

The information created and/or stored on District electronic devices, network storage, e-mail system or the Internet, whether related to District business or the employee's personal use, is the sole property of the District.

Passwords created by District employees for District devices and files must be recorded with the Information Systems Director. Even though the electronic devices and the information created and/or stored therein remains the property of the District, employees are not permitted to review another's information, unless required in the performance of the employee's duties or expressly permitted by the Assistant Chief Appraiser or Chief Appraiser.

In addition to providing employees with electronic devices, the District provides employees with access to e-mail and the Internet. The District actively monitors those activities to ensure the resource is properly utilized and to protect the computer systems from any security threats. Personal use of both is permitted within the confines of the district's core values and the following specific rules:

- Personal use must not interfere with or distract from work performance.
- Storage or transmittal of personal documents should be extremely limited.
- The e-mail or Internet may not be used to solicit for commercial ventures, religious or political causes or other purposes not approved by management.
- Sending harassing, obscene or offensive messages are strictly prohibited. Offensive messages are those containing sexual implications, racial slurs or any comments that offensively address someone's age, gender, sexual orientation, religion, political beliefs, national origin or disability.
- Visiting pornographic or offensive websites (as defined in #4) is prohibited.
- Downloading or sending of copyrighted materials or confidential information as protected under the federal and state laws are prohibited.
- Sending unsolicited junk mail or chain letters is prohibited.

Use of facilities and equipment is granted, subject to the District's right to monitor employees' use and the employee's continued employment constitutes their consent to such monitoring. **Employees have no expectation of privacy in any electronic-related activities.**

## **5.10 Social Media and Web Based Meeting Platforms**

The District understands that social media can be a fun and rewarding way for employees to share their life and opinions with family, friends and co-workers. However, use of social media also presents certain risks and carries with it certain responsibilities.

For the purpose of this policy *social media* includes all means of communicating or posting information or content of any sort on the Internet, including to the employee's own or someone else's web log or blog, journal or diary, personal web site, social networking or affinity web site, web bulletin board or a chat room, whether or not associated or affiliated with the Bexar Appraisal District as well as any other form of electronic communication.

The same principles and guidelines found in District policies apply to employees' activities online. Employees are solely responsible for what they post online. Before creating online content, employees should consider some of the risks and rewards that are involved.

All social media postings should be consistent with District policies prohibiting discrimination, harassment and retaliation, and those requiring confidentiality. Inappropriate postings that may include discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will not be tolerated.

Employees are prohibited from using District email addresses to register on social networks, blogs or other online tools used for personal use or tagging the District's official pages on personal posts. Employees are prohibited from posting on any social media platforms while wearing district attire without the consent of the Chief Appraiser. Only the Chief Appraiser or Assistant Chief

Appraiser or their designee is authorized to present the official position of the District or respond to any questions on behalf of the District in any form of media.

Employees are required to demonstrate respect and consideration for all parties when engaging in any meeting platform while conducting District business. During virtual meetings, employee behavior is subject to the same standard of conduct as stated in Section 5.03 and the same dress code as described in Section 5.02.

Violations of the anti-harassment/anti-discrimination policy (Section 2.04) that occur via use of email or social media are subject to discipline, up to and including termination, regardless of whether the activity occurs during working time or by use of District or personal property.

Pursuant to Chapter 620 of the Texas Government Code, use or installation of the video-sharing application TikTok or any successor application or service developed or provided by ByteDance Limited, or an entity owned by Byte Dance is prohibited on any device provided by the District. This prohibition also applies to any social media application or service specified by proclamation of the governor.

### **5.11 Political Involvement**

District employees are encouraged to participate in our electoral system. The District complies with all relevant laws regarding time off from work to vote. This policy applies to both primaries and elections at the federal, state, and local levels. The District's normal hours of operation ordinarily provide employees with sufficient time to vote, either before the start of or after the end of the workday.

District employees will not be allowed to perform or be involved in political campaigning or related activities during normal working hours or while on official duty. Additionally, no employee shall be required to participate in political campaigns, or related activities, as a condition to obtain or retain employment.

District employees seeking or accepting nomination to any public office may be granted leave of absence. Employees granted leave to run for elected office may be reinstated at the request of the employee or following the election process. An employee who is elected to office creating a conflict with the Bexar Appraisal District or elected to an office that is considered a full-time job must resign their position with the District.

### **5.12 Driver's Licenses and Arrest or Conviction for a DWI**

Employees driving a vehicle (personal or agency owned or leased) for Bexar Appraisal District business are responsible for driving in a safe, courteous, and defensive manner. All current traffic laws are expected to be followed and adhered to at all times. Accidents and citations that occur on District business should be reported to the supervisor immediately. Current proof of auto insurance must be provided to the Human Resources Department at renewal by employees receiving an auto allowance. Failure to provide timely proof of auto liability insurance may preclude the payment of auto allowance to an employee.

Problems with a driving record, license, or insurance must be reported immediately to the supervisor/director. Problems include, but are not limited to, revocation or suspension of driver's license, loss of auto insurance coverage, and any arrest or conviction including deferred adjudication related to operating a vehicle under the influence of alcohol, illegal substance, or

controlled substance. Failure to report any driving record problem within 72 hours will be grounds for disciplinary action including termination.

### **5.13 Employee Records and Personal Information**

An employee file will be maintained for each employee and is the exclusive property of the District.

To ensure the District's employee files are up-to-date and contain accurate, complete information, employees are asked to notify the Human Resources Director, in writing, of any changes that need to be made in the following categories:

- Name
- Telephone number
- Home address
- Beneficiary designations
- Individual to notify in case of an emergency
- Notification that may affect status of an employee's benefit plans

### **5.14 Gambling**

Gambling, including the operation of a gambling device, conducting a lottery, games for money (to include sporting event "pots" or "squares") or property, selling or purchasing number slips in Appraisal District work areas is prohibited. Fundraising activities for non-profit organizations, Employee Event Committee activities and/or charities authorized by the Chief Appraiser are excluded from this section.

### **5.15 Phone Calls and Online Activity**

District telephones and internet are to be used for District business. Personal use of District phones, computers, iPads or cell phones should be limited and not interfere with business operations. Excessive use of time on personal devices is prohibited.

The Bexar Appraisal District is committed to providing excellence in customer service. To ensure that the District's standards of excellence in customer service are being met; the District reserves the right and intends to exercise their right to monitor telephone calls on the district phone system. This includes reviewing internet searches and usage.

### **5.16 Parking**

Employees are required to park in assigned spaces designated as employee parking, including the temporary leased parking lot. Anyone seeking temporary exception must obtain approval from the Human Resources Director.

The District will not be liable for any damage or theft caused to any motor vehicle, or contents of vehicles parked on District property, assigned lots, or used in the course of District business.

### **5.17 Expression of Breast Milk**

The District provides a reasonable amount of break time to new mothers after the birth of their child for the purpose of expressing breast milk. A sanitary place will be provided to these mothers that meets federal guidelines. If you find yourself in need of such accommodations, inform your supervisor or the Human Resources Department.

## **6.00 GROUP BENEFITS**

### **6.01 Employee Retirement System**

Employees of the Bexar Appraisal District participate in the Texas County and District Retirement System ("TCDRS"). The provisions the plan can be found in the *TCDRS Guide to Member Benefits* located at [www.tcdrs.org](http://www.tcdrs.org).

All employees of the Bexar Appraisal District are required to become members of the TCDRS as a condition of employment. Employees contribute to the retirement system through salary deferrals on a payroll-by-payroll basis and the District contributes a Board approved percentage.

Bexar Appraisal District does not participate in the Social Security System except for contributions to Medicare.

### **6.02 Group Benefits**

Regular employees will be eligible to participate in the District's group benefit plans on the first of the month following 60 days of employment. The District currently offers paid medical, dental, long-term disability and life insurance for all regular employees normally scheduled to work 30 or more hours per week. The District offers dependent coverage and other types of insurance which are paid by the employee whose premium(s) will be payroll deducted.

All details regarding plans, coverage and cost are specified in the respective plan documents provided at the time of enrollment. Questions regarding group benefits should be directed to the Human Resources Director.

### **6.03 Retiree Medical Benefits**

In accordance with the Texas Local Government Code Section 175.001 pertaining to continued health coverage for retirees, the District will offer health benefit coverage to employees eligible to retire under the Texas County and District Retirement System unless the retiree is eligible for group health benefits coverage through another employer. A retiree may elect to cover the same dependents as when employed or may discontinue coverage for dependents. Eligible dependents not enrolled at time of eligibility may not be added at a later date.

Plan coverage offered to retirees will be the same as the health plan offered to current employees and will be available until the retiree is eligible for Medicare or becomes eligible for coverage through another group plan. Premiums for retiree medical coverage through the District will be the responsibility of the retiree. Coverage must be elected no later than the date of retirement. Otherwise, the benefit will not be available.

Executive management staff members (Directors and above) who retire with at least 15 years of service to the district are eligible for retiree insurance premiums to be paid by the district for the lesser period of five years from their retirement date or the date when the retiree becomes eligible

for Medicare. Paid health coverage for the retiree by the district ceases if the retiree becomes eligible for coverage through another group plan or health coverage is declined in writing by the retiree. The district will pay for group health benefit premiums for the retiree only and any elected coverage for eligible dependents will be the responsibility of the retiree.

## **7.00 Workplace Safety**

### **7.01 Drug and Alcohol Abuse**

It is the policy of the District that the use, possession, concealment, transportation, promotion, or sale of drugs and alcohol is strictly prohibited on any work site or facility used for business purposes under the scope of employment with the District.

Employees of the District are prohibited from working while under the influence of illegal drugs and alcoholic beverages.

The District offers an Employee Assistance Program that provides a confidential self-referral program to assist employees in dealing with alcohol and drug abuse problems. Employees should contact the Human Resources Director for more information.

#### **Assurance of Policy Compliance – Testing Criteria**

In order to assure that the above-stated policy is upheld to its fullest intent, the District may require, and rely on, drug screening tests to be conducted for the situations listed below:

- Immediately following any accident or incident. This may include all personnel assigned to the area/department where the accident or incident occurred.
- When an employee's director has a reasonable suspicion that an employee is using, or is under the influence of drugs or alcohol. "Reasonable suspicion" is a belief based on objective and articulate facts sufficient to lead a prudent director to suspect that the employee is using drugs or alcohol.
- When an employee is found in possession of suspected illicit or unauthorized drugs and/or alcohol, or when any of these items are found in an area controlled or used exclusively by designated employees.

The District requires that testing complies with federal and state laws and mandates designated physicians, laboratory, hospital or medical professionals to test and release test results to the District. All testing is done by a lab chosen by the District. Employees with confirmed positive test results can, at their option and expense, have a second confirmation test made on the same specimen. An employee is not allowed to submit another specimen for testing.

#### **Consequences of Policy Violation**

Employees will be subject to termination from employment with the District in case of the following instances that are considered violations of this Policy:

- Confirmed use of an illegal or unauthorized drug.
- Refusing to submit to drug screen tests specified in this Policy.
- Working while under the influence of drugs or alcohol.

## 7.02 Safety and Security

The District is committed to preventing workplace violence and maintaining a safe work environment for employees and customers. The District has adopted the following guidelines to deal with violence or threats of violence or intimidation that may occur during business hours or on its premises at any time.

All employees, including directors and temporary employees, should be treated with courtesy and respect at all times. Employees are expected to refrain from fighting, "horseplay," or other conduct that may be dangerous to themselves or others.

Conduct that threatens, intimidates, or coerces another employee, a customer, or a member of the public at any time, including off-duty periods, will not be tolerated.

All threats of (or actual) violence, both direct and indirect, should be reported as soon as possible to the employee's director or to the Human Resources Director. This includes threats by employees, as well as threats by customers, vendors, or other members of the public. When reporting a threat of violence, employees should be as specific and detailed as possible.

All suspicious individuals or activities should also be reported as soon as possible to security officer(s) on duty. Employees should not place themselves in peril and attempt to intercede in disturbances in the office, on District property, or in the course of business.

The District will promptly and thoroughly investigate all reports of threats of (or actual) violence and of suspicious individuals or activities. The identity of the individual making a report will be protected as much as is practical. In order to maintain workplace safety and the integrity of its investigation, the District may suspend employees, either with or without pay, pending investigation.

The District's effort to prevent the occurrence of violence in the workplace requires that employees follow these rules:

**Prohibited Weapons:** Bexar Appraisal District is committed to providing a safe environment for its employees and others visiting or performing work on District property. This commitment also applies to our employees as they work outside the office. To further our goal of providing a safe workplace, the District strictly prohibits possession, use and handling of a weapon or handgun by employees on District premises beyond the entrances to our building. This prohibition also applies to outside the building when employees are engaged in their job. This prohibition applies to all employees, including those who hold a License To Carry (LTC) or license to openly carry a handgun, and applies equally to concealed handguns and open carry. Employees are also prohibited from transporting and storing firearms in District-owned or District-leased vehicles and from possessing or using firearms or ammunition at any District-sponsored events.

**Important Note Regarding Concealed Weapons:** The District recognizes the right of its employees who have a license to carry a handgun or who otherwise lawfully possess a firearm to transport and store a firearm or ammunition in the employee's locked personal vehicle parked in the District parking lot(s) (per Texas Labor Code Section 52.061). However, an employee who wishes to exercise this right *must*:

- Hold a license to carry a handgun or otherwise lawfully possess the firearm.
- Store the firearm and/or ammunition in his/her locked, privately owned vehicle.

- Ensure the firearm is unloaded before the employee enters the District's property.
- Not handle (*i.e.*, unload, stow, display, hold, etc.) the firearm or ammunition at any time during working hours.

**Firearms in Restricted Areas:** Visitors to our building are not allowed to bring handguns into secured areas.

**Duty to Warn:** All employees have a duty to warn the District of any potential for violence in the workplace. All incidents of violence, threats of violence and harassment occurring at the workplace, regardless of whether the perpetrator is a coworker, customer, family, or friend, should be immediately reported to the employee's director or any member of executive management. Reports will be investigated and corrective action will be taken.

### 7.03 Security Inspections

The District wishes to maintain a work environment that is free of illegal drugs, alcohol, non-approved firearms, explosives, ammunition, or other improper materials. To this end the District prohibits the possession, transfer, sale or use of such materials on its premises. The District requires the cooperation of all employees in administering this policy. The work stations provided for the convenience of employees remain the sole property of the District. Accordingly, any agent or representative of the District can inspect them, as well as any personal articles found within them, at any time, either with or without prior notice.

### 7.04 Workers' Compensation

The District is a subscriber to workers' compensation insurance, which will provide care and treatment and a weekly subsidized income in the event an employee becomes disabled from an accident or an injury on the job. Failure to report an injury may prevent the employee from receiving benefits or a delay in the receipt of benefits.

Accidents or injuries that occur on the job, no matter how small, should be reported to the supervisor/director immediately followed by completion of an accident report form with Human Resources.

Employees who are on leave for a work-related injury or illness and are eligible to receive income benefits under workers' compensation will not be paid sick leave, vacation leave, or auto allowance. Sick and vacation accruals continue for employees receiving a Workers' Compensation benefit provided they have not exhausted their balances.

## EMPLOYEE ACKNOWLEDGEMENT FORM

The employee handbook describes important information about the Bexar Appraisal District. I understand that I should consult the Human Resources Director regarding any questions that are not answered in the handbook.

I understand that violations of the policies published in this handbook and otherwise communicated to me will result in disciplinary action up to and including termination.

I became an employee at Bexar Appraisal District voluntarily. I understand and acknowledge that there is no specified length to my employment at Bexar Appraisal District and that my employment is at will. I understand and acknowledge that "at will" means that I may terminate my employment at any time, with or without cause or advance notice. I also understand and acknowledge that "at will" means that Bexar Appraisal District may terminate my employment at any time, with or without cause or advance notice, as long as they do not violate federal or state laws.

I understand and acknowledge that there may be changes to the information, policies, and benefits in the handbook. The only exception is that Bexar Appraisal District will not change or cancel its employment-at-will policy. I understand that Bexar Appraisal District may add new policies to the handbook as well as replace, change, or cancel existing policies. I understand that I will be told about any handbook changes and I understand that handbook changes can only be authorized by the Board of Directors.

I understand and acknowledge that this handbook is not a contract of employment or a legal document. I have received the handbook or have been given access to an electronic copy and I understand that it is my responsibility to read and follow the policies contained in this handbook and any changes made to it.

EMPLOYEE'S NAME (printed): \_\_\_\_\_

EMPLOYEE'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

**STAFF SUMMARY SHEET**

**ISSUE:** Board of Directors Manual

The board of directors may discuss and/or vote to authorize the chief appraiser to update the board of directors' manual.

## **2025 Updates**

### **Policies and Procedures of the Bexar Appraisal District Board of Directors**

#### **1.5 and 1.6 Communications**

- Transmitted in writing, without comment, a complaint about the appraisal of a specific property by a property owner or a tax unit to the chief appraiser.
- Requests from a director for anything related to the operation of the district should be directed to the chief appraiser, or the person he designates.
- Directives should be made to the chief appraiser, and any report prepared for one director shall be delivered to all other directors.

#### **3.1 Regular Meetings**

- The board shall meet as needed, but not less than once each quarter, and will establish a meeting schedule at the first meeting of each year.

#### **3.6 Agenda Preparation**

- Written request by any director to the chair and the executive assistant, the chief appraiser shall post an agenda item contained in the written request provided it does not violate the ex parte communication provisions.
- To allow ample time for posting of the agenda and notification to the public and taxing units, agenda submissions from directors must be received two weeks prior to the scheduled board meeting. Submissions received after the deadline will be added to the following meeting's agenda.



# **POLICIES AND PROCEDURES OF THE BEXAR APPRAISAL DISTRICT BOARD OF DIRECTORS**

The Bexar Appraisal District Board of Directors policies and procedures may be revised as necessary by legislative requirements, operational updates, and in accordance with state law.

THESE RULES HAVE BEEN DULY PASSED, ADOPTED and APPROVED on this day

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**ARTICLE I**  
**RESPONSIBILITIES & DUTIES OF THE BOARD**

The Bexar Appraisal District ("the district") is governed by a board of directors ("the board" or "director") whose duties and authority are prescribed by the Texas Property Tax Code.

**1.1 Duties:** Directors should be committed to duty of care, duty of loyalty, and duty of obedience.

**1.2 Responsibilities:** The board's primary responsibility is establishing the appraisal district office, hiring a qualified chief appraiser, appointing the Bexar Appraisal Review Board (ARB) and a taxpayer liaison officer (TLO), and adopting the district's annual operating budget and biennial reappraisal plan. The board shall also retain a qualified financial auditor for an annual audit of district funds and solicit bids to designate a district depository to handle the district's funds. The board, with the advice and consent of the chief appraiser, shall also appoint members to the agricultural advisory board, approve contracts for the district, and set forth other important policies and procedures for the district.

The board does not appraise or review property values, hear protests, or make decisions regarding appraisal records. The board's appraisal authority is limited to adopting a biennial reappraisal plan and annual operating budget, contracting with another appraisal district or taxing unit to perform the district's duties, and authorizing the chief appraiser to enter into contract with a private appraisal firm to perform appraisal services. [Texas Property Tax Code §§ 6.05(i), 6.06(b), and 25.01(b)]

**1.3 Compensation:** Directors shall not be compensated for their service; however, they may receive reimbursement for actual and necessary expenses incurred in the performance of their duties. In the event travel is required for district business, the district will pay all applicable registration fees and hotel expenses, and a per diem as reflected in the current *Travel & Training Expense Form* for district employees.

**1.4 Training:** No later than 90 days after the date a director takes the oath of office or otherwise assumes responsibilities as a member of the board, each director must complete a training course regarding Open Meetings and Public Information through the website of the Attorney General of Texas. [Texas Government Code § 551.005 and 552.012];

Each director must provide a certificate of course completion to the executive assistant.

**1.5 Ex Parte Communications:** A member of the board commits a Class C misdemeanor offense by directly or indirectly communicating with the chief appraiser on any matter relating to the appraisal of property by the district. [Texas Property Tax Code § 6.15] Other than an informal hearing with the head of the relevant department of the protested property, this also applies to communications with district employees regarding appraisal matters subject to a protest filed by a board member with the ARB.

This does not apply to communications:

1. held in an open meeting of the board or in another public forum;
2. held in an executive session of the board held to consult with its attorney about pending litigation [Texas Property Tax Code § 6.15(a)(1-2) and (d)];
3. transmitted in writing, without comment, a complaint about the appraisal of a specific property by a property owner or a tax unit to the chief appraiser [Texas Property Tax Code § 6.15(c-1)]; or
4. routine communication between the chief appraiser and the Bexar County Tax Assess-or Collector pertaining to the administration of the appraisal roll, including the certification, correction, or collection of an account. [Texas Property Tax Code § 6.15(b),(c) and (d)]

A member of the board commits a Class A misdemeanor offense by communicating with a member of the Appraisal Review Board (ARB) with the intent to influence a decision by the ARB. [Texas Property Tax Code § 6.411(c-1)]

This does not apply to communications:

1. with the board's legal counsel;
2. during a hearing on a protest or other proceeding before the ARB;
3. in social conversation;
4. that are specifically limited to administrative, clerical or logistical matters relating to scheduling and administration of hearings, including the processing of documents and issuance of orders, notices, and subpoenas;
5. regarding the operation, appointment, composition or attendance at the training of the ARB; or
6. that are necessary to enable the board to determine whether or not to appoint, reappoint, or remove a member or officer of the ARB.

**1.6 Chief Appraiser Communications:** Requests from a director for anything related to the operation of the district should be directed to the chief appraiser, or the person he designates. A director shall not direct or require district employees to prepare reports or analysis of information in existing records or create a new record from information in existing records. Directives should be made to the chief appraiser, and any report prepared for one director shall be delivered to all other directors.

Matters that have been shared with the directors by the chief appraiser, or his designee, in executive session or identified as "For Board Members Only" are not to be shared with family members, community members, or others. Directors have a fiduciary responsibility to the district to safeguard its interests for the sake of the community and taxpayers. Divulging confidential information can jeopardize the legal position of the district and impede the fiduciary duty owed to the district. Any request by the public for such information should be directed to the district's public information officer.

To avoid ex parte communication, it is strongly recommended directors encourage their constituents and any member of the public to contact the chief appraiser directly.

**1.7 Prohibited Contracts:** The district may not enter into a contract with a director or with a business entity in which the director has substantial interest. Additionally, a taxing unit participating in the district may not enter into a contract with a director or with a business entity in which the director has a substantial interest relating to the performance of an activity governed by the Texas Property Tax Code. [Texas Property Tax Code § 6.036]

**1.8 Conflicts of Interests and Required Disclosures:** Directors are subject to the provisions of Chapters 171 and 176 of the Texas Local Government Code.

#### **CHAPTER 171, LOCAL GOVERNMENT CODE**

A director must file an affidavit disclosing they have substantial interest in a business entity or real property that is involved in a matter before the board. A director has substantial interest in a business if they own 10% or more of the voting stocks or shares, or owns 10% or more or \$15,000 or more of the fair market value of the business or received funds in the previous year of more than 10% of the director's gross income. A director has substantial interest in real property if the interest owned has a fair market value of more than \$2,500.

The director must disclose the nature and extent of the interest and must refrain from further participation in the matter, and the affidavit must be filed with the record keeper for the district before any vote or decision on the matter.

#### **CHAPTER 176, LOCAL GOVERNMENT CODE**

A director shall notify the chief appraiser and finance director, and file a sworn *Local Government Officer Conflicts Disclosure Statement*, if the director, or their family member, has an employment or other business relationship with a vendor seeking to enter into a contract with the district, entering into a contract with the district, or acting an agent in the business of the person who enters or seeks to enter into a contract with the district if:

1. the aforementioned relationship results in the director, or their family, receiving taxable income that exceeds \$2,500 during the 12-month period preceding the date the director becomes aware that the contract has been executed or the district is considering executing the contract; or
2. the aforementioned results in the director, or their family, receiving one or more gifts that have an aggregate value of more than \$1,000 in the 12-month period preceding the date the director becomes aware that the contract has been executed or the district is considering executing the contract.

The conflicts disclosure statement is not required when the gift accepted by the director, or their family, is given by a family member of the person accepting the gift, is a political contribution as defined under law, or is food, lodging, transportation, or entertainment accepted as a guest. The aforementioned disclosure statement is promulgated by the Ethics Commission. The statement must be filed by 5 pm on the seventh business day after the date the director becomes aware of the facts that require the statement.

The conflicts provision of Chapter 176 of the Local Government Code are extended to the chief appraiser, the assistant chief appraisers, and the finance director.

#### **OTHER PROVISIONS**

Directors are subject to other ethical and conflict prohibitions under Texas law, including but not limited to, prohibitions against nepotism, quid pro quo gifts, and using the office for personal gain. Directors should consult legal counsel with any questions to ensure that they are not engaging in any prohibited behavior.

**ARTICLE II**  
**ELIGIBILITY, APPOINTMENT AND ELECTION, TERMS, & GENERAL PROVISIONS**

The Bexar Appraisal District Board of Directors is comprised of nine members.

**2.1 Eligibility:** Directors must meet all the eligibility requirements contained in the Texas Property Tax Code. Those requirements are summarized below for convenience; however, the statutory language contained in the Property Tax Code controls eligibility to serve.

1. In order to be eligible to serve on the board as an appointed or elected member, a director must be a resident of and have resided in the district for at least two years immediately prior to the date of appointment. [Texas Property Tax Code § 6.03(a)].
2. An individual is ineligible to serve on the board if: [Texas Property Tax Code §§ 6.03, 6.035 and 6.036]
  - a. the individual has been an employee of the district at any time during the preceding three years;
  - b. the individual is an employee of a taxing unit that participates in the district, unless they are also a member of the governing body or an elected official of a taxing unit that participates in the district;
  - c. the individual has served as a member of the board for all or part of five terms, unless they were the county assessor-collector at the time;
  - d. the individual is related within the second degree by consanguinity or affinity, as determined by Chapter 573 of the Texas Government Code, to an individual who is engaged in the business of appraising property for compensation for use in proceedings under the Texas Property Tax Code or representing property owners for compensation in proceedings under the Property Tax Code in the district;
  - e. the individual has engaged in the business of appraising property for compensation for use in proceedings under the Texas Property Tax Code or has engaged in the business of representing property owners for compensation under the Texas Property Tax Code in the district in the preceding three years;
  - f. owns property on which delinquent taxes have been owed to a taxing unit in the district for more than 60 days after the date of service that the individual knew, or should have known, of the delinquency, unless specific exceptions stated in the Texas Property Tax Code are met; or
  - g. if the individual or a business entity in which the individual has substantial interest is party to a contract with the district or a taxing unit that participates in the district if the contract relates to the performance of an activity governed by the Texas Property Tax Code. Substantial interest is defined as combined ownership by the individual and his/her spouse in the amount of at least 10% of the voting stock or shares or the individual or his/her spouse is a partner, limited partner, or officer of the business.

**2.2 Appointment:** Five directors are nominated and appointed pursuant to resolution of a vote by the taxing units that participate in the district and are entitled to vote. [Texas Property Tax Code § 6.03]

Each taxing unit authorized to vote may nominate one candidate for each of the five positions by resolution of its governing body by October 15<sup>th</sup>. The chief appraiser shall prepare and deliver a ballot and voting entitlement to the presiding officer of each taxing unit by October 30<sup>th</sup>. After receiving the ballot, each taxing unit will cast its allotted votes by resolution of its governing body and submit the votes to the chief appraiser by December 15<sup>th</sup>.

**2.3 Election:** Three directors will be elected by majority vote of the county voters at the general election for state and county officers. [Texas Property Tax Code § 6.0301(c)]

**2.4 County Tax Assessor-Collector:** The county assessor-collector shall serve as an ex officio director.

**2.5 Terms:** *\* To implement the necessary term changes and as required by Section 5.13(d), Texas Property Tax Code, members appointed in the 2025 cycle shall draw lots at the first meeting of 2025 to determine which two shall serve a term of one year, beginning January 1st, 2025 and expiring December 31st, 2025, and which three shall serve a term of three years, beginning January 1st, 2025 and expiring December 31st, 2027.*

Appointed directors shall serve staggered four-year terms beginning January 1 of every other even numbered year. Elected directors, beginning on January 1, 2027, shall serve staggered terms, the length of which will be determined by the drawing of lots. Elected director terms will eventually be four-year terms beginning January 1 of every other odd-numbered year. [Texas Property Tax Code § 6.0301(e)]

**2.6 Officers:** The board shall elect a chair, vice-chair, and a secretary at the first open meeting of each calendar year to serve for one calendar year. [Texas Property Tax Code § 6.04]

The chair shall preside over all the meetings of the board and call special meetings of the board, if necessary. Along with the secretary, the chair will sign all legal instruments requiring board signature. The chair will also perform legal duties required by statute and have other powers and duties as prescribed by the board. The chair may vote on any matter coming before the board except as prohibited by statute. The chair may direct the posting of any agenda item.

The vice-chair shall preside over the meetings in the absence of the chair and exercise all powers incident and necessary to presiding over the meetings in the absence of the chair. In doing so, the vice-chair will sign all legal documents requiring board signatures and perform any other functions as prescribed by the board.

The secretary shall provide for the recording of all of the proceedings of the meetings and shall give and post notice of all meetings as required by law. The secretary shall preside over the meeting in the absence of both the chair and vice-chair. The board may authorize or delegate the chief appraiser, or an employee of the district, to perform tasks required by the board secretary, including but not limited to the preparation and submission of legal notices, and the actual recording and transcription of the proceedings of any meeting.

**2.7 Ad-hoc Committees:** The board may establish committees as needed to carry out its responsibilities. Committee members are approved by a majority vote of the board in an open meeting, and serve at the pleasure of the board chair.

**2.8 Board Vacancies:** In the event of a vacancy by an appointed director of the board, each taxing unit that is entitled participate in the appoint process may nominate a candidate by resolution of their governing body within 45 days of notification of the vacancy. The chief appraiser shall prepare and deliver a list of nominees to the board within five days and the board shall appoint one of the nominees to fill the vacancy by a majority vote. [Texas Property Tax Code § 6.0301(f)]

In the event of a vacancy by an elected director, the board shall appoint by majority vote a person to fill the vacancy. [Texas Property Tax Code § 6.0301(g)]

**2.9 Recall:** The governing body of a taxing unit may recall an appointed director for whom the taxing unit cast any of its votes in the appointment of the board. The recall must be in the form of a resolution filed with the chief appraiser. The chief appraiser shall deliver written notice of the filing with the presiding officer of each taxing unit.

Elected directors cannot be recalled by a taxing unit. [Texas Property Tax Code § 6.033]

**ARTICLE III**  
**MEETINGS OF THE BOARD OF DIRECTORS**

The Bexar Appraisal District Board of Directors shall meet on the second Tuesday of every month as needed.

**3.1 Regular Meeting:** The board shall meet as needed, but not less than once each quarter, and will establish a meeting schedule at the first meeting of each year. During a tax unit appointment year, the December meeting must be held after December 15th to accommodate the voting deadline.

**3.2 Special and/or Emergency Meetings:** Special or emergency meetings of the board may be called by the chair, or by the chief appraiser with approval from the chair. Emergency meetings may be called provided they meet the requirements of Texas Government Code § 551.045.

**3.3 Place:** Meetings of the board, regular or special, must be held within the district's boundaries at a public place capable of accommodating the expected public attendance. The regular place for the board's meetings shall be at the district's office located at 411 North Frio, San Antonio, Texas 78207; however, the board may designate an alternate location if the need arises. The location of the meeting shall be set by the chair, unless set by a vote of the members of the board.

**3.4 Quorum:** At all meetings of the board, the presence of at least five directors is required and shall constitute a quorum for the transaction of business. As long as quorum is present, the act of a majority of the directors present at a meeting shall constitute an act of the board.

The board may conduct a meeting by videoconference call, provided that the board complies with all requirements of the Texas Open Meetings Act in general and Texas Government Code § 551.127 in particular.

**3.5 Notice:** Meeting notices will be posted at least 72 hours before the scheduled meeting time as specified by Texas Government Code §§ 551.043 and 551.054. Members of the board and participating taxing units shall be notified at least three days in advance of regular or special meetings of the board. Notice of emergency meetings must be given at least four (4) hours in advance of the meeting time. Notice of regular or special meetings will be posted outside the district and on the district's official internet website.

**3.6 Agenda Preparation:** In consultation with the chair, the chief appraiser shall prepare the agenda for all meetings of the board. The chief appraiser may post an agenda item as needed. Additionally, on written request by any director to the chair and the executive assistant, the chief appraiser shall post an agenda item contained in the written request provided it does not violate the ex parte communication provisions.

To allow ample time for posting of the agenda and notification to the public and taxing units, agenda submissions from directors must be received two weeks prior to the scheduled board meeting. Submissions received after the deadline will be added to the following meeting's agenda.

**3.7 Rules:** Except as directed in these rules or by statute, meetings of the board shall be conducted by Robert's Rules of Order (latest revised edition). However, a failure to adhere to Robert's Rules of Order will not render void or voidable an action taken by the board in a properly noticed public meeting approved by a majority of the quorum present. At the board's discretion, discussion may be limited to agenda items. These rules of the board may be altered, amended or repealed and new rules adopted by the board at any meeting at which a quorum is present, provided notice of the proposed alteration is issued in conformity with the rules of the board and applicable law.

**3.8 Public Comment:** It is the policy of the board to provide the public with a reasonable opportunity to address the board on the subject of policies and procedures of the district, the Bexar Appraisal District Appraisal Review Board, and on any issue under the board's jurisdiction. The written public notices of the board's meetings shall contain instruction on how to sign up for public comment.

At each regularly scheduled meeting, the chair of the board shall announce that comments received timely via email at [bod@bcad.org](mailto:bod@bcad.org) shall be read into the record for up to three minutes, and that individuals wishing to address the board on such policies, procedures or issues in person may have three minutes to speak. Additional time for public comment may be granted at the discretion of the chair. If a large number of persons wish to speak to the board, the board may vote to reduce each person's time for speaking as may be reasonably necessary to allow the board to complete its business and adjourn the meeting at a reasonable time. Public comment received via email will be shared with the board as soon as possible. [Texas Property Tax Code § 6.04(d)]

**3.9 Executive Session:** For an executive or closed session, the board will follow the procedures authorized by law for exclusion of the public in deliberations under Chapter 551 of the Texas Government Code Sections 551.071, 551.072, 551.074, and 551.076. Certified minutes will be kept, except for private consultation with legal counsel under 551.071.

Matters that have been shared with the directors by the chief appraiser, or his designee, in executive session are not to be shared with family members, community members, or others.

No person other than a board member is allowed to attend an executive or closed session unless that person's participation is consistent with the reason for the executive or closed session and the board deems that person's participation to be necessary to the matter under consideration.

**3.10 Budget Hearings:** Each year, the board shall prepare an annual operating budget by September 15 each year in accordance with Texas Tax Code § 6.06.

The chief appraiser shall prepare the proposed budget and schedule a meeting of the board's budget ad hoc committee so that the preliminary budget can be presented to the board and other eligible and interested parties before June 15th.

The board shall approve the final operating budget by September 15<sup>th</sup> each year. Prior to approval of the budget the board must hold a public hearing and give notice of the time, date and place of such public hearing to the taxing units and the public at least 10 days in advance.

The budget shall include the following:

- each proposed employee position with salary range and benefits
- each proposed capital expenditure
- an estimate of the budget to be allocated to each taxing unit
- a list of obligated reserve funds, and
- other items necessary for CAD operations including contract payments for services, funds for ARB operations, reimbursement for Board of Director expenses, employee education expenses, legal fees and expenses incurred by the appraisal district and the ARB.

This proposed budget will be sent to all taxing entities for their review. If a majority of the voting taxing units veto the proposed budget, a new budget must be adopted within 30 days. Based on changes to the proposed budget as approved by the Board of Directors, the Chief Appraiser shall prepare the budget and present it for final Board approval as required by statute.

The Board shall amend the budget, if necessary, but must deliver a written copy of the proposed amendment to the taxing entities not later than the 30th day before the date the Board acts on it.

When there are unobligated funds left at the end of the CAD budget year, the Board may vote to move the funds into reserves for a replacement account, disaster account or other account. These funds are considered obligated to be spent and are not required to be refunded or credited back to the taxing units. An expenditure a CAD has committed during the fiscal year to meet or secure an obligation is an expenditure that is obligated to be spent under subsection 6.06(j) of the Texas Property Tax Code.

The Chief Appraiser may make budget line-item transfers if these items are located within the same expense category. The district's main expense categories include:

- Personnel
- Materials & Supplies
- Services
- Debt Service
- Capital Outlay

Expenses made between the main categories require Board of Director approval.

Once the board has completed its budget estimates, the secretary shall notify all taxing units participating in the district of the amount of payment due if the board subsequently adopts the estimate as its official budget. The Bexar Appraisal District Board of Directors has elected to waive the penalty and interest on a delinquent payment made under Texas Tax Code § 6.06(k). The board reserves the right to re-impose the penalty and interest on a delinquent payment if it becomes clear that the failure to pay is not supported by good cause.

The district is allowed to amend its budget at any time provided the board notifies the taxing units at least 30 days in advance of approving an amendment. [Texas Property Tax Code § 6.06] Any year end surplus amount due to be returned to a taxing unit that is below \$100 will be credited to the taxing unit's calculated budget levy for the subsequent year. [Texas Tax Code § 6.07(j)]

**3.11 Reappraisal Plan Hearings:** Every even-numbered year, the board shall develop a written plan for the periodic reappraisal of all property within the boundaries of the district according to the requirements of Texas Property Tax Code §§ 6.05(i) and 25.18.

The board does not appraise or review property values, hear protests, or make decisions regarding appraisal records. The board's appraisal authority is limited to adopting a biennial reappraisal plan and annual operating budget, contracting with another appraisal district or taxing unit to perform the district's duties, and authorizing the chief appraiser to enter into contract with a private appraisal firm to perform appraisal services. [Texas Property Tax Code §§ 6.05(i), 6.06(b), and 25.01(b)]

The board shall approve the reappraisal plan September 15<sup>th</sup> of every even-numbered year. Prior to approval of the reappraisal plan the board must hold a public hearing and give notice of the time, date and place to the taxing units at least 10 days in advance.

**ARTICLE IV**  
**GENERAL POLICY AND PROCEDURE FOR PUBLIC ACCESS**  
**TO THE BOARD OF DIRECTORS**

It is the policy of the board to provide the public with a reasonable opportunity to address the board on the subject of policies and procedures of the district, the Bexar Appraisal District Appraisal Review Board, and on any issue under the board's jurisdiction.

**4.1 General Policy:** Members of the public can contact the board by email at [bod@bcad.org](mailto:bod@bcad.org), by mail sent to Bexar Appraisal District, Post Office Box 830248, San Antonio, TX, 78283-0248, or by phone through the executive assistant.

**4.2 Taxpayer Liaison Officer:** The TLO handles public access and informational matters and resolves complaints that fall outside the jurisdiction of the Appraisal Review Board. The TLO will report to the board on the number, nature and status of resolution on any complaints.

**4.3 Assistance to the TLO:** At all times pursuant to Section 6.052(a) of the Texas Property Tax Code, the TLO remains the administrator of the public access functions required by Sections 6.04(d)-(e) of the Texas Property Tax Code and pursuant to policy enumerated at Articles 5.1 through 5.2 herein. The Customer Information and Assistance Director shall assist the TLO in the practical and detailed coordination of the aforementioned public access functions and, in the absence of the TLO, may assist the public in ensuring access to the Board.

**4.4 Need for Interpreter:** If a person who does not speak English or Spanish wishes to address the board at a meeting, and that person is unable to bring an interpreter, the person should notify the TLO as soon as reasonably possible prior to the meeting so arrangements for an interpreter can be made.

If an interpreter cannot be secured in time for the meeting, one will be secured for the next regular board meeting. The TLO shall inform the board at the meeting of the request received and the reason for the inability to provide an interpreter. This same procedure applies to anyone who communicates by sign language. [Texas Property Tax Code § 6.04(e)]

**4.5 Access by Disabled Persons Generally:** To the extent practicable, the TLO shall make sure that the district's office where the board holds its meetings is accessible to persons in wheelchairs and other persons with disabilities that affect their mobility. The measures to be taken by the TLO shall include, but need not be limited to, the following:

1. the reservation of at least two parking spaces for handicapped persons (as close as possible to the entrance to the district's office);
2. the installation of necessary ramps inside and outside the district's office; and
3. the installation of railings and other modifications necessary to provide access to the district's restrooms.

If a person has a disability that prevents that person from entering the district's office or the room where the board's meeting is being held, or that otherwise prevents the person from having access to the board, the person should notify the TLO in writing as soon as reasonably possible. The notice should describe the person's disability and the manner in which it prevents the person from having access to the board's location. [Texas Property Tax Code § 6.04(e)]

Upon receiving such a notice, the TLO shall determine whether the person's access to the Board's location can be reasonably accommodated:

1. by some temporary modification of the district's office that is practicable under the circumstances;
2. by some other means of assistance from the employees of the district that is practicable and safe under the circumstances; or
3. by having the board relocate its meeting to some other room or part of the district's office.

If the person cannot be given access to the board in such a manner, the TLO shall arrange for the person to address the board by telephone from some other location using a speakerphone. Under such circumstances, the TLO shall inform the board at the meeting of the reasons that the person was not able to address the board in person.

**4.6 Notice of Accessibility to the Public:** The written public notices of the board's meetings shall contain in English and Spanish a brief description of the board's policy concerning public access to the board, as follows:

*"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 (TLO) 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."*

Notice of accessibility to the public will also be posted on the district's internet website.

**4.7 Resolving Complaints:** A complaint may be filed with the Board regarding any matter the Board has authority to resolve. The board will consider complaints about itself,

the district, the Appraisal Review Board, or any of the following persons, if the action which is the subject of the complaint was taken in such person's official capacity:

1. a member of the Board of Directors;
2. a member of the Appraisal Review Board;
3. the chief appraiser;
4. any employee of the Bexar Appraisal District; however, addressing the complaint falls under the purview of the chief appraiser;
5. taxpayer liaison officer; and
6. any private person, firm, or business who, by contract, performs contractual functions for the Bexar Appraisal District.

The Board generally does not have authority over the substance of challenges, protests or motions before the ARB. Those matters should be resolved through the administrative and post-administrative remedies contained in the Texas Property Tax Code.

A complaint must be filed in writing and addressed to the chair of the board of directors, the board itself, or the TLO. The chair of the board at any time may refer a complaint received since the board's last regular meeting to the TLO for investigation. Complaints may be sent by email or regular mail to:

Bexar Appraisal District  
Post Office Box 830248  
San Antonio, TX 78283-0248

In response to each complaint referred to the TLO by the board or by the chair, the TLO shall investigate the validity of the complaint, conduct an investigation, and attempt to resolve the complaint. Each employee and official of the district shall cooperate fully with an investigation conducted by the TLO.

At each regular meeting, the board shall request the TLO report on the status of all the pending and resolved complaints that have been filed with the board. The board's deliberations at its meetings with respect to complaints shall occur in open session or executive session as authorized by the Texas Open Meetings Act.

**4.8 Pending Complaints:** When a complaint is pending, at least once each calendar quarter, the board shall notify the parties to the complaint (both the complaining party and the party against whom the complaint is filed) in writing of the status of the complaint unless such notice would jeopardize and undercover investigation. The board shall notify the parties when a complaint is finally resolved. The TLO shall prepare proposed notices for consideration by the board, and shall deliver the notices approved by the board.

**ARTICLE V**  
**BOARD OF DIRECTORS ACKNOWLEDGES REGULATION OF**

## **APPRAISERS BY THE TEXAS DEPARTMENT OF LICENSING AND REGULATION**

The board acknowledges that every appraiser on staff who engages in the practice of property tax appraisal is required to be registered with The Texas Department of Licensing and Regulation (TDLR) and is required to keep the registration current and in good standing.

**5.1** The Bexar Appraisal District Board of Directors finds that the funding authorized in this Article V of the rules is in furtherance of a public purpose. Under Article V, an expenditure above \$50,000 will require board consent.

**5.2** Each appraiser is required to achieve the required continuing education credits to keep the registration current under the law, and to maintain a level of professionalism at all times. To that end, the board will provide the funding necessary in its annual budget to fund initial and successive registration, so long as the employee is actively engaged in property tax appraisal on behalf of the district, and remains in good standing with the district and TDLR. The board will further fund all training required for certification and recertification for every appraiser in good standing with the district and TDLR.

**5.3.** The board recognizes that TDLR has an enforcement procedure to handle all complaints filed against registrants. The board is advised that every complaint filed against a registrant can initiate an open investigation where findings of facts and circumstances are sought. These investigations include TDLR investigative staff as well as prosecutorial staff to make the investigations pursuant to law. The board in recognition of the level of investigation, prosecution, and enforcement of TDLR's rules hereby authorizes the chief appraiser to exercise all necessary discretionary decision-making, take all steps necessary to investigate and respond to said complaints, including but not limited to, retaining legal counsel to defend district staff during any such investigations. The chief appraiser will actively monitor the proceeding(s) and keep the board apprised as necessary when an open investigation exists, and in accordance with the district's current finance policy will seek approval from the board for any legal costs, including attorney fees, exceeding \$50,000.

**5.4.** The board further acknowledges that the district will not provide legal representation to any employee of the district whose conduct is determined wrongful and/or whose employment is terminated by the district.

**STAFF SUMMARY SHEET**

**ISSUE:** GIS Mapping Software Maintenance Agreement Renewal

The board of directors may discuss and/or vote to authorize the chief appraiser to renew the current maintenance agreement for the district's mapping software.



**Bexar Appraisal District**

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

DATE: 11/19/2024

**TYPE:**

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

**SERVICE/PRODUCT:**

Software Maintenance for ARCInfo Mapping

**VENDOR NAME:**

ESRI

**CONTRACT AMOUNT:**

\$66,990

**LOWEST BID/PROPOSAL:**

- Yes
- N/A
- No. If not, why Sole Source

**PERIOD COVERED:**

January 31, 2025 - January 30, 2026

**LOCAL COMPANY:**

Yes

**REFERENCES:**

Yes

**NUMBER OF BIDS:**

Sole Source

**CURRENT VENDOR:**

ESRI

**BUDGETED AMOUNT:**

\$70,000

**ORIGINATING DEPT.:**

Information Systems

**REVIEWED/APPROVED BY:**

Finance Director

Chief Appraiser



Esri Inc  
380 New York St  
Redlands CA 92373-8118

## **Subject: Renewal Quotation**

**Date:** 10/28/2024  
**To:** Scott Griscom  
**Organization:** Bexar County Appraisal District  
Information Systems  
**Fax #:** 210-242-2455 **Phone #:** 210) 242-2525

**From:** Barbara Walker  
**Fax #:** 909-307-3083 **Phone #:** + 19093693936 Ext. 3936  
**Email:** bwalker@esri.com

Number of pages transmitted  
(including this cover sheet): 5

Quotation #26246873  
Document Date: 10/28/2024

Please find the attached quotation for your forthcoming term. Keeping your term current may entitle you to exclusive benefits, and if you choose to discontinue your coverage, you will become ineligible for these valuable benefits and services.

If your quote is regarding software maintenance renewal, visit the following website for details regarding the maintenance program benefits at your licensing level  
<http://www.esri.com/apps/products/maintenance/qualifying.cfm>

All maintenance fees from the date of discontinuation will be due and payable if you decide to reactivate your coverage at a later date.

Please note: Certain programs and license types may have varying benefits. Complimentary User Conference registrations, software support, and software and data updates are not included in all programs.

Customers who have multiple copies of certain Esri licenses may have the option of supporting some of their licenses with secondary maintenance.

For information about the terms of use for Esri products as well as purchase order terms and conditions, please visit  
<http://www.esri.com/legal/licensing/software-license.html>

If you have any questions or need additional information, please contact Customer Service at 888-377-4575 option 5.



**esri**

380 New York St  
Redlands, CA 92373-8118  
Phone: + 190938939363936  
Fax #: 909-307-3083

# Quotation

Date: 10/28/2024

Quotation Number: 26246873

Contract Number: 00298018.1

Bexar County Appraisal District  
Information Systems  
PO Box 830248  
San Antonio TX 78283-0248  
Attn: Scott Griscom  
Email: sgriscom@bcad.org  
Phone: 210-242-2525  
Customer Number: [REDACTED]

For questions regarding this document, please contact Customer Service at 888-377-4575.

**Send Purchase Orders To:**  
Environmental Systems Research Institute, Inc.  
380 New York Street  
Redlands, CA 92373-8100  
Attn: Barbara Walker  
**Please include the following remittance address on your Purchase Order:**  
Environmental Systems Research Institute, Inc.  
P.O. Box 741076  
Los Angeles, CA 90074-1076

Item	Qty	Material#	Unit Price	Extended Price
<b>Subject to terms and conditions of State of Texas DIR-CPO-4699</b>				
10	2	52384 ArcGIS Desktop Advanced Concurrent Use Primary Maintenance Start Date: 01/31/2025 End Date: 01/30/2026 Subscription ID: [REDACTED]	3,501.06	7,002.12
1010	18	52385 ArcGIS Desktop Advanced Concurrent Use Secondary Maintenance Start Date: 01/31/2025 End Date: 01/30/2026 Subscription ID: [REDACTED]	1,410.50	25,389.00
2010	1	87232 ArcGIS Spatial Analyst for Desktop Concurrent Use Primary Maintenance Start Date: 01/31/2025 End Date: 01/30/2026	584.35	584.35
3010	1	87233	231.73	231.73

Please note Esri has introduced a price change and this quote reflects current pricing for your organization. It is important to us that we are able to continue to deliver value through enhancements to products, solutions, and capabilities.

Your renewal provides access to all the benefits you are familiar with, which you can review at <https://go.esri.com/maintenance>  
For questions related to the price change, please reach out to your assigned Esri Account Manager.

**Quotation is valid for 90 days from document date.**

Any estimated sales and/or use tax has been calculated as of the date of this quotation and is merely provided as a convenience for your organization's budgetary purposes. Esri reserves the right to adjust and collect sales and/or use tax at the actual date of invoicing. If your organization is tax exempt or pays state taxes directly, then prior to invoicing, your organization must provide Esri with a copy of a current tax exemption certificate issued by your state's taxing authority for the given jurisdiction.

Esri may charge a fee to cover expenses related to any customer requirement to use a proprietary vendor management, procurement, or invoice program.

To expedite your order, please reference your customer number and this quotation number on your purchase order.



**esri**

380 New York St  
Redlands, CA 92373-8118  
Phone: + 190938938383836  
Fax #: 909-307-3083

# Quotation

Page 2

Date: 10/28/2024

Quotation Number: 26246873

Contract Number: 00298018.1

Item	Qty	Material#	Unit Price	Extended Price
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ArcGIS Spatial Analyst for Desktop Concurrent Use Secondary Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

4010	1	87198	584.35	584.35
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ArcGIS 3D Analyst for Desktop Concurrent Use Primary Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

5010	1	87199	231.73	231.73
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ArcGIS 3D Analyst for Desktop Concurrent Use Secondary Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

6010	1	100571	584.35	584.35
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ArcGIS Network Analyst for Desktop Concurrent Use Primary Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

7010	1	162284	584.35	584.35
------	---	--------	--------	--------

ArcGIS Image Analyst for ArcGIS Pro Concurrent Use Primary Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

8010	3	161328	5,944.25	17,832.75
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ArcGIS Enterprise Standard Up to Four Cores Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

9010	1	161339	5,767.94	5,767.94
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ArcGIS Image Server Up to Four Cores Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026

10010	4	161393	1,460.88	5,843.52
-------	---	--------	----------	----------

ArcGIS Image Server Additional Core (up to 32 per server) Maintenance

Start Date: 01/31/2025

End Date: 01/30/2026



**esri**

380 New York St  
Redlands, CA 92373-8118  
Phone: + 190936939383938  
Fax #: 909-307-3083

## Quotation

Page 3

Date: 10/28/2024

Quotation Number: 26246873

Contract Number: 00298018.1

Item Qty Material#

Unit Price

Extended Price

11010	1	109839	2,354.00	2,354.00
ArcGIS for Server Enterprise Standard Up to Four Cores Migrated Maintenance				
Start Date: 01/31/2025				
End Date: 01/30/2026				

Item Subtotal	66,990.19
Estimated Tax	0.00
<b>Total</b>	<b>USD 66,990.19</b>

DUNS/CEC: 06-313-4175 CAGE: 0AMS3



**esri**

380 New York St  
Redlands, CA 92373-8118  
Phone: + 190936939363936  
Fax #: 909-307-3083

# Quotation

Page 4

<b>Date:</b> 10/28/2024	<b>Quotation No:</b> 26246873	<b>Customer No:</b> [REDACTED]	<b>Contract No:</b> 00296018.1
<b>Item</b>	<b>Qty</b>	<b>Material#</b>	<b>Unit Price</b> <b>Extended Price</b>

Renew online by using a credit card, purchase order, or by requesting an invoice at <https://www.esri.com/en-us/quote-order/renew>.

If there are any changes required to your quotation please respond to this email and indicate any changes in your invoice authorization.

If you choose to discontinue your support, you will become ineligible for support benefits and services. All maintenance fees from the date of discontinuation will be due and payable if you decide to reactivate your support coverage at a later date.

The items on this quotation are subject to and governed by the terms of this quotation, the most current product specific scope of use document found at <http://assets.esri.com/content/dam/esrisites/media/legal/product-specific-terms-of-use/e300.pdf>, and your applicable signed agreement with Esri. If no such agreement covers any item quoted, then Esri's standard terms and conditions found at <http://assets.esri.com/content/dam/esrisites/media/legal/ma-full/ma-full.pdf> apply to your purchase of that item. Federal government entities and government prime contractors authorized under FAR 51.1 may purchase under the terms of Esri's GSA Federal Supply Schedule. Supplemental terms and conditions found at <http://www.esri.com/en-us/legal/terms/state-supplemental> apply to some state and local government purchases. All terms of this quotation will be incorporated into and become part of any additional agreement regarding Esri's offerings. Acceptance of this quotation is limited to the terms of this quotation. Esri objects to and expressly rejects any different or additional terms contained in any purchase order, offer, or confirmation sent to or to be sent by buyer. Unless prohibited by law, the quotation information is confidential and may not be copied or released other than for the express purpose of system selection and purchase/license. The information may not be given to outside parties or used for any other purpose without consent from Esri. Delivery is FOB Origin.

In order to expedite processing, please reference the quotation number and any/all applicable Esri contract number(s) (e.g. MPA, EA, GSA, BPA) on your ordering document.

**STAFF SUMMARY SHEET**

**ISSUE:** Zendesk Software Agreement

The board of directors may discuss and/or vote to authorize the chief appraiser to enter into an agreement for customer interaction and workflow software.



**Bexar Appraisal District**

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

DATE: 11/19/2024

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

SERVICE/PRODUCT: Zendesk Suite

VENDOR NAME: Satrde

CONTRACT AMOUNT: \$92,886

LOWEST BID/PROPOSAL:  Yes  
 N/A  
 No. If not, why DIR-CPO- 5337 Best Value

PERIOD COVERED: November 20, 2024- January 19, 2026

REFERENCES:  Yes

NUMBER OF BIDS: N/A

CURRENT VENDOR: \_\_\_\_\_

ORIGINATING DEPT.: Information Systems

REVIEWED/APPROVED BY:

Director [Signature]

Finance Director [Signature]

Chief Appraiser [Signature]

# SATRDÉ Quote 26161



### Subscriber Information:

**County of Bexar Appraisal District**  
411 North Frio  
San Antonio  
Texas 78207  
United States of America

**Date:** 11/01/2024  
**Quote valid until:** 11/20/2024

**Contract:** DIR - CPO -5337

**Contact person:** Paul Thepuatrakul

### Subscription Details

Currency: USD

Payment Frequency: Annually

Service Start Date: 11/20/2024

Service End Date: 01/19/2026

Product name and additional info	Quantity	Price	Disc.	Price after discount	Sum
Zendesk Product - Zendesk Suite Professional (per agent) + Omnichannel support (email, voice, chat, messaging, self-service, agent workspace, basic reporting); + Self-service and automation (light agents, advanced Guide services); and + Deeper collaboration, routing, and analytics (community forums, IVR routing, side conversations, customizable dashboards, HIPAA, data center locality).	80	115.00	-29.565217%	81.00	90,720.00

# licenses for 12 months = quantity

**Product Start Date:** 11/20/2024  
**Product End Date:** 01/19/2026

Zendesk TALK Usage Credits	1,000	0.01	-100%	0.00	0.00
Zendesk TALK Usage Credits					

**Product Start Date:** 11/20/2024  
**Product End Date:** 01/19/2026

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174 Saundersville Road | Suite 202  
Hendersonville Tennessee 37075 United States of America

**Phone:** (615) 585-4469  
**E-mail:** support@satrde.com  
**satrde.com**

**JPMorgan Chase Bank NA**  
**Routing:** ██████████  
**Account #:** ██████████

Product name and additional info	Quantity	Price	Disc.	Price after discount	Sum
Premier Essentials Regular Subscription Premier Essentials Regular Subscription	1	1,296.00		1,296.00	18,144.00
<b>Product Start Date:</b> 11/20/2024 <b>Product End Date:</b> 01/19/2026					
One Time Discount First Invoice Only	1	-23,328.00		-23,328.00	-23,328.00
<b>Product Start Date:</b> 11/20/2024 <b>Product End Date:</b> 01/19/2026					
Zendesk Launch - Gold Timeline: Up to 4 Weeks (Recommended)	1	7,500.00	-2%	7,350.00	7,350.00
<b>People:</b> Solution Architect, Solution Consultant and Success Manager  <b>For:</b> Small to medium teams new to Zendesk (~10-15 Agents)  <b>Customers who purchase:</b> Growth or Professional Zendesk Suite plans  1 - 2 channel launches  Teams needing expert guidance with configuring Zendesk  <b>Product Start Date:</b> 11/20/2024 <b>Product End Date:</b> 01/20/2025					
				<b>Subtotal:</b>	<b>92,886.00</b>
				<b>Tax:</b>	<b>0.00</b>
				<b>Total (USD):</b>	<b>92,886.00</b>

**Comment:** Contract: DIR-CPO-5337

Notwithstanding anything to the contrary in the Agreement, Subscriber's Subscription Term shall not renew automatically.

Notwithstanding any other term in the Reseller Subscription Services Agreement between Zendesk and Subscriber, the Reseller Subscription Services Agreement shall be governed by the laws of the state in which Subscriber is located.

Notwithstanding any other term in the Reseller Subscription Services Agreement between Zendesk and Subscriber, Subscriber's indemnification obligations are only applicable to the extent permitted by law.

In the event the Reseller Subscription Services Agreement between Zendesk and Subscriber or any information provided

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 Hendersonville Tennessee 37075 United States of America

**Phone:** (615) 585-4469  
**E-mail:** support@satrde.com  
 satrde.com

**JPMorgan Chase Bank NA**  
**Routing:** ██████████  
**Account #:** ██████████

by Zendesk becomes subject to an open records request, such as a Freedom of Information Act or equivalent request (a "Request"), Subscriber will contest such Request and notify Zendesk immediately so We can seek protection from disclosure. Subscriber acknowledges and agrees that it will seek to obtain any available statutory exemption to the Request, including any exemptions for confidential or security information. Subscriber acknowledges and agrees that Zendesk's security information, including its independent third party audit reports (e.g. SOC 2 Type II), constitutes Zendesk's Confidential Business Information (as defined in the Reseller Subscription Services Agreement) which is highly sensitive and which would cause irreparable harm to Zendesk if disclosed.

Notwithstanding anything to the contrary in the Reseller Subscription Services Agreement between Zendesk and Subscriber and the Data Protection Agreement between Zendesk and Subscriber (if applicable), Applicable Data Protection Law means any state privacy law in a state where Zendesk Processes personal information on behalf of Subscriber.

Subscriber grants Zendesk the right to use Subscriber's name, logo, and a description of Subscriber's use case to refer to Subscriber on Zendesk's website, earnings releases and calls, or marketing or promotional materials, subject to any standard usage guidelines that Subscriber's marketing team expressly provides to Zendesk at logos@zendesk.com.

Subscriber's Service Plan includes optional functionality to automate End-User resolutions without human Agent involvement ("Automated Resolutions"). Subscriber may receive an allowance of Automated Resolutions as part of a Service Plan, and/or purchase Automated Resolutions on a standalone basis (collectively, "Automated Resolution Allowance"). If Subscriber elects to use Automated Resolutions, and exceeds the Automated Resolution Allowance in a given month, Subscriber will be subject to and agrees to pay for the additional Automated Resolution usage monthly in arrears ("Pay-as-you-go Fees"). If your Subscription is purchased via an Authorized Reseller, Pay-as-you-go Fees shall be invoiced to you by the Authorized Reseller.

Please see here for more information on determining your Automated Resolution Allowance, measuring and monitoring your use of Automated Resolutions, Pay-as-you-go Fees, and when your allotments expire: About automated resolutions for AI agents <https://support.zendesk.com/hc/en-us/articles/5352026794010-About-automated-resolutions-for-AI-agents>

**SIGNATURES**

By signing this Form the Subscriber authorizes that it has read it and agrees to its terms. Alternatively, Subscriber's submission of a signed purchase order to SATRDÉ in accordance with the specifications provided herein shall be considered acceptance of this Form. In the event of any inconsistency or conflict between the terms of this Order Form and the terms of any signed purchase order, the terms of this Order Form shall control.

Client Signature:

Title:

Print Name:

Date:

**SATRDÉ**  
174 Saundersville Road | Suite 202  
Hendersonville Tennessee 37075 United States of  
America

Phone: (615) 585-4469  
E-mail: support@satrde.com  
satrde.com

JPMorgan Chase Bank NA  
Routing: ██████████  
Account #: ██████████

## Statement of Work

This Statement of Work (SOW) is between County of Bexar Appraisal District ("Client") and SATRDÉ ("Consultant"), effective Date (the "Agreement").

This SOW # 001 (hereinafter called the "SOW"), effective as of 11/20/2024, is entered into by and between Consultant and Client, and is subject to the terms and conditions specified below. The Exhibit(s) to this SOW, if any, shall be deemed to be a part hereof. In the event of any inconsistencies between the terms of the body of this SOW and the terms of the Exhibit(s) hereto, the terms of the body of this SOW shall prevail.

### Period of Performance

The Services shall commence on 11/20/2024 and shall continue through 01/19/2026.

### Engagement Resources

If the identified Resources are not available to complete the project, Consultant will submit names and resumes to Client for replacement recommendation. Client shall have final approval for replacements and if no replacement is acceptable to Client, this SOW may be delayed or terminated at Client's choice.

Dustin Swayne – Principal with SATRDÉ – Project Manager and Solutions Consultant – Certified Zendesk Support Administrator, Implementer, and Solution Consultant. 7+ years of experience with Zendesk Suite products.

Clay Phillips – Principal with SATRDÉ – Soft Skills Training Manager and Consultant – 20+ yrs. experience in training over 6,500 professionals.

Lisa Howard - Solution Consultant with SATRDÉ - Certified Zendesk Support Administrator and Solution Consultant - 35+ years of IT and project management experience in the public sector.

### Learn and Create Phase:

We'll work to understand your audience and current experience. Through our use-case focused sessions, we'll align your business objectives to a design.

### Key activities:

- Project kick off
- Identify project and enablement team
- Training (on-demand)
- Learn workshops
- Functional design
  - Includes Configuration of Zendesk products for Support, Guide, Chat, Talk, Collaboration and Explore.
    - **Support**
      - Users (add groups, define custom roles, set business schedules, customize user fields, create organization fields, create organizations)
      - Brands (add brands, add support addresses, create custom ticket fields, create ticket form(s))
      - Settings (configure security settings and end-user settings)
      - Extensions (add marketplace apps, 3rd party integrations, setup targets for external teams)
      - Workflows (Create skills for routing, triggers, automations, SLA policies, views, macros)
      - Access (Configure single sign-on, add agents, assign agents to skills, train agents, import end-users)
    - **Guide**
      - Users (Set Guide roles for agents, create user segments, create management permissions)
      - Design (Branding for helpcenter, customizations for helpcenter)
      - KB and community (Add categories, sections, and KB content, set team publishing workflows, configure answer bot, create a community, setup google analytics, configure content moderation)
    - **Chat**

### SATRDÉ

174 Saundersville Road | Suite 202  
Hendersonville Tennessee 37075 United States of  
America

Phone: (615) 585-4469

E-mail: support@satrde.com

satrde.com

JPMorgan Chase Bank NA

Routing: ██████████

Account #: ██████████

- Users (Define custom chat roles, add chat agents, create departments)
- Workflows (Create schedules, configure chat routing, configure offline form settings, create triggers, create shortcuts)
- **Talk**
  - Preparation (Prepare your network, talk number availability, add talk numbers, add address)
  - Global Settings (Configure general settings, create talk greetings, configure IVR)
  - Number Settings (Configure individual number settings, configure overflow number, configure voicemail options, enable callback, set up a failover number, enable text for SMS support)
- **Explore**
  - Configuring reports/visualizations for management
- Strategic Client Discovery Discussions
  - Will include calls to consult and inform client of options when configuring Zendesk products that will best fit their strategic plan.
- Implementation Activities
- Agent and Admin Testing Activities

**Launch Phase:**

Focus is organizational readiness. We'll work with you to ensure you are ready for go live and know how to get support if you need it.

**Key activities:**

- Agent and Admin Training via Zoom Interactive Calls
- Launch
- Go-Live Assistance

**Manage Phase:**

Our Project Manager will partner with your project lead to keep our engagement on track and help you to anticipate and manage change within your organization.

**Key recurring activities:**

- Project plan
- Project status
- Change and risk management
- Optimization Calls

**Deliverable Materials**

Materials to be delivered will include any documentation necessary to empower client teams to effectively and efficiently conduct business within their Zendesk instance.

**Consultant Responsibilities**

The Consultant shall assign qualified personnel to perform professional Services concerning the Project. In the performance of professional Services, Consultant will use that level of care and skill ordinarily exercised by reputable members of Consultant's profession currently practicing in the same locality under similar conditions. Except for the warranties provided in the Agreement, no other representation, guarantee or warranty, express or implied, is included or intended in this agreement or in any communication (oral or written) report, opinion, document or instrument of service. The Consultant is an independent Consultant and as such is not an employee of the Client.

**Client Responsibilities**

Client acknowledges that the successful and timely rendering of the Services will require the good faith cooperation of Client. Client shall fully cooperate with Consultant, including without limitation, by: (a) providing Consultant with all information as may be reasonably required by Consultant; and (b) making available to Consultant at least one employee, consultant or director of Client, reasonably acceptable to Consultant, who shall have substantial relevant knowledge and experience to act as a Project Manager in connection with the rendering of the Services. The name of Client's Project Manager should be set forth in the applicable Statement of Work. All estimated dates specified in a Statement of Work shall be extended by delays caused by Client, including without limitation, Client's submission of Change Requests which

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Routing: [REDACTED]  
Account #: [REDACTED]

impact Consultant's normal schedule.

#### **Fee Schedule**

This SOW will be conducted on a fixed fee basis. The total value for the Services pursuant to this SOW shall not exceed 92,886.00 unless otherwise agreed to by both parties via the project change control procedure, as outlined within. A PCR will be issued specifying the amended value.

Consultant will provide up to 3 resources to complete this statement of work and activities outlined in the Scope of Work section above.

#### **Invoice Procedures**

Client will be invoiced for the consulting services and T&L expenses. Standard Consultant invoicing is assumed to be acceptable. Invoices are due upon receipt.

Invoices shall be submitted in arrears, referencing this Client's SOW Number to the address indicated above. The invoice will reflect charges for the time period being billed. Terms of payment for invoice are due upon receipt by Client of a proper invoice. Consultant shall provide Client with sufficient details to support its invoices, including expense receipts and justifications for authorized expenses, unless otherwise agreed to by the parties. Payments for undisputed services invoiced that are not received within 30-days from date of invoice will be subject to a 1.5% penalty per calendar month or the maximum allowed by law, whichever is less.

#### **Completion Criteria**

Consultant shall have fulfilled its obligations when any one of the following first occurs:

- Consultant accomplishes the Consultant activities described within this SOW, including delivery to Client of the materials listed in the Section entitled "Deliverable Materials," and Client accepts such activities and materials without unreasonable objections. No response from Client within 2-business days of deliverables being delivered by Consultant is deemed acceptance.
- Consultant and/or Client has the right to cancel services or deliverables not yet provided with 20 business days advance written notice to the other party.

#### **Project Change Control Procedure**



The following process will be followed if a change to this SOW is required:

- A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the project.
- The designated Project Manager of the requesting party (Consultant or Client) will review the proposed change and determine whether to submit the request to the other party.
- Both Project Managers will review the proposed change and approve it for further investigation or reject it. Consultant and Client will mutually agree upon any charges for such investigation, if any. If the investigation is authorized, the Client Project Managers will sign the PCR, which will constitute approval for the investigation charges. Consultant will invoice Client for any such charges. The investigation will determine the effect that the implementation of the PCR will have on SOW price, schedule and other terms and conditions of the Agreement.
- Upon completion of the investigation, both parties will review the impact of the proposed change and, if mutually agreed, a Change Authorization will be executed.
- A written Change Authorization and/or PCR must be signed by both parties to authorize implementation of the investigated changes.

#### **SATRDÉ**

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Routing:   
Account #: 

Contract  
DIR CPO 5337  
[Link to Contract Document](#)  
[Link to Terms and Conditions](#)

## Launch framework



### Learn

We'll work to understand your audience and current experience. Through our use-case focused sessions, we'll align your business objectives to a design.

**Key activities:**

- Project kick off
- Identify project and enablement team
- Training (on-demand)
- Learn workshops
- Functional design
- Change and communication plans



### Create

Our experts will work with you through the optimization of your Zendesk based on the design and complete solution validation.

**Key activities:**

- Configuration & build
- User acceptance testing (UAT)



### Launch

Focus is organizational readiness. We'll work with you to ensure you are ready for go live and know how to get support if you need it.

**Key activities:**

- Agent and Admin Training
- Launch (celebrate!)
- Go live assistance



### Manage

Our Zendesk Engagement Manager will partner with your project lead to keep our engagement on track and help you to anticipate and manage change within your organization.

**Key recurring activities:**

- Project plan
- Project status
- Change and risk management

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174 Saundersville Road | Suite 202  
Hendersonville Tennessee 37075 United States of  
America

Phone: (615) 585-4469  
E-mail: [support@satrde.com](mailto:support@satrde.com)  
[satrde.com](http://satrde.com)

JPMorgan Chase Bank NA  
Routing: **021000021**  
Account #: **000000000000000000000000**

**STAFF SUMMARY SHEET**

**ISSUE:** Appraisal Review Board members for 2025 and 2026

A resolution of the board of directors of the Bexar Appraisal District appointing new members and reappointing existing members to the Bexar Appraisal Review Board for the 2025 and 2026 tax years pursuant to Section 6.41 of the Texas Property Tax Code.

**RESOLUTION OF THE BOARD OF DIRECTORS  
OF BEXAR APPRAISAL DISTRICT  
RESOLUTION NO 2024-0007**

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE BEXAR APPRAISAL DISTRICT APPOINTING NEW MEMBERS AND REAPPOINTING EXISTING MEMBERS TO THE BEXAR APPRAISAL REVIEW BOARD FOR THE 2025 AND 2026 TAX YEARS PURSUANT TO SECTION 6.41 OF THE TEXAS PROPERTY TAX CODE

WHEREAS, the Board of Directors of the Bexar Appraisal District is considered the applicable appointing authority to appoint members to the Bexar Appraisal Review Board pursuant to Section 6.0301 of the Texas Property Tax Code;

WHEREAS, the Board of Directors appointed a subcommittee of its membership to review applications for appointment to the Bexar Appraisal Review Board;

WHEREAS, the subcommittee made recommendations to the Board of Directors at its open meeting on September 10, 2024 concerning the membership of the Bexar Appraisal Review Board and subsequently reviewed applications and interviewed applicants on November 6 and 7, 2024;

WHEREAS, the Board of Directors may appoint new members, and reappoint current members, to the Bexar Appraisal Review Board;

WHEREAS, the number of terms to which an individual can be appointed to serve on the Appraisal Review Board is limited to three terms of two years each; and

WHEREAS, pursuant to Section 6.41 (d-2-1) of the Texas Property Tax Code, the appointments must be accomplished by majority vote, with at least two members of the majority being elected members of the Board of Directors;

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Bexar Appraisal District that the following individuals are appointed to a first term on the Bexar Appraisal Review Board and said term is to commence on January 1, 2025 and end on December 31, 2026: William Abercrombie, Margarita Cantu, Thomas G. Carter, Vivian M. Donaldson, Lester Earls, Teresa Elhabr, Hallie Guevara, Joyce Haley, Magdalena L. Hernandez, Edgar Meyers, Peggy M. Miller, Jonathan Mitchell, Robert Nino, Kathleen Parra, and Linda Smith.

NOW, THEREFORE, BE IT FURTHER RESOLVED by the Board of Directors of the Bexar Appraisal District that the following individuals are appointed to a first term on the Bexar Appraisal Review Board and said term is to commence on January 1, 2025 and end on December 31, 2025: Mary T. Corcoran, and Yadira Moreno.

NOW, THEREFORE, BE IT FURTHER RESOLVED by the Board of Directors of the Bexar Appraisal District that the following individuals are appointed to a second term on the Bexar Appraisal Review Board and said term is to commence on January 1, 2025 and end on December 31, 2026: Juanito Bazan, Julie Charlton-Crawford, Nora Flanagan, Daniel George, Sean P. Martinez, Jennifer Oakley, Gerardo A. Reyes, and Norma A. Smith.

NOW, THEREFORE, BE IT FURTHER RESOLVED by the Board of Directors of the Bexar Appraisal District that the following individuals are appointed to a third and final term on

the Bexar Appraisal Review Board and said term is to commence on January 1, 2025 and end on December 31, 2026: Diane G. De La Fuente, Barbara Greene, Melba Susan Hahn, Katrinka Hansen, Abel Hernandez, Terry Ivy, Edward Moreno, Norma Morin, Raul Quintanilla, and Roger Trevino.

NOW, THEREFORE, BE IT FURTHER RESOLVED by the Board of Directors of the Bexar Appraisal District that the following individuals are appointed to a third and final term on the Bexar Appraisal Review Board and said term is to commence on January 1, 2025 and end on December 31, 2025: Janice Hardeman.

DULY PASSED, ADOPTED, and APPROVED on \_\_\_\_\_.

BEXAR APPRAISAL DISTRICT

BY: \_\_\_\_\_  
Chairman, Board of Directors

ATTEST: \_\_\_\_\_  
Secretary, Board of Directors

**STAFF SUMMARY SHEET**

**ISSUE:** Appraisal Review Board Officers for 2025

A resolution of the board of directors of the Bexar Appraisal District appointing the officers of the Bexar Appraisal Review Board for the 2025 tax year pursuant to Section 6.42 of the Texas Property Tax Code.

**RESOLUTION OF THE BOARD OF DIRECTORS  
OF BEXAR APPRAISAL DISTRICT  
RESOLUTION NO 2024-0008**

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE BEXAR APPRAISAL DISTRICT APPOINTING THE OFFICERS OF THE BEXAR APPRAISAL REVIEW BOARD FOR THE 2025 TAX YEAR PURSUANT TO SECTION 6.42 OF THE TEXAS PROPERTY TAX CODE

WHEREAS, the Board of Directors of the Bexar Appraisal District is required to appoint the chair and secretary of the Bexar Appraisal Review Board;

WHEREAS, the Board of Directors appointed a subcommittee of its membership to review applications for officers of the 2025 Bexar Appraisal Review Board;

WHEREAS, the subcommittee made recommendations to the Board of Directors at its open meeting on September 10, 2024 concerning the membership of the Bexar Appraisal Review Board and subsequently reviewed applications and interviewed applicants on November 6, 2024;

WHEREAS, the appointments must be accomplished by resolution of a majority of the Board of Directors, pursuant to 6.42(a), Texas Property Tax Code;

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Bexar Appraisal District that Daniel George be appointed as Chair and Nora Flanagan be appointed as Secretary of the Bexar Appraisal Review Board for Tax Year 2025.

DULY PASSED, ADOPTED, and APPROVED on \_\_\_\_\_.

BEXAR APPRAISAL DISTRICT

BY: \_\_\_\_\_  
Chairman, Board of Directors

ATTEST: \_\_\_\_\_  
Secretary, Board of Directors

**STAFF SUMMARY SHEET**

**ISSUE:** Agricultural Appraisal Advisory Board Reappointments

Pursuant to Section 6.12, Texas Property Tax Code, the chief appraiser will seek the advice and consent of the Board of Directors in the reappointment of members to the Agricultural Advisory Board.

The Board of Directors may discuss and reappoint Molly Keck, Michael Echte and Lloyd Padalecki for the 2025 and 2026 term.

**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 October 31, 2024
  - b. Statement of revenues and expenses through October 31, 2024
  - c. Designated cash funds report through October 31, 2024
2. Appraisal Records
  - a. The board of directors will receive an overview of the property tax calendar and an update on the status of work regarding the 2025 appraisal roll.
3. District Operations
  - a. The chief appraiser will inform the board of directors of an early district office closure on Friday December 6, 2024 for staff development.



**Bexar Appraisal District**  
**Balance Sheet**  
*As of 10/31/2024*

	<u>August</u>	<u>September</u>	<u>October</u>
<b>ASSETS</b>			
Cash and Short Term Investments	\$9,846,190.03	\$14,411,431.97	\$12,672,573.02
Accounts Receivable	46,742.00	202,173.00	8,489.00
Employee Advances	0.00	0.00	330.68
Prepaid Expenses	68,922.40	68,922.40	68,922.40
<b>Total Current Assets</b>	<b>9,961,854.43</b>	<b>14,682,527.37</b>	<b>12,750,315.10</b>
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
<b>Total Non- Current Assets</b>	<b>11,719,576.09</b>	<b>11,719,576.09</b>	<b>11,719,576.09</b>
<b>Total Assets</b>	<b>21,681,430.52</b>	<b>26,402,103.46</b>	<b>24,469,891.19</b>
<b>LIABILITIES</b>			
Accounts Payable	240,458.79	240,511.74	240,154.87
<b>Total Current Liabilities</b>	<b>240,458.79</b>	<b>240,511.74</b>	<b>240,154.87</b>
Non-Current Sick & Vacation Accrual	1,333,236.29	1,333,236.29	1,333,236.29
<b>Total Liabilities</b>	<b>1,573,695.08</b>	<b>1,573,748.03</b>	<b>1,573,391.16</b>
<b>Equity</b>			
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)	3,379,590.33	8,100,210.32	6,168,354.92
<b>Total Equity</b>	<b>20,107,735.44</b>	<b>24,828,355.43</b>	<b>22,896,500.03</b>
<b>Total Liabilities and Equity</b>	<b>\$21,681,430.52</b>	<b>\$26,402,103.46</b>	<b>\$24,469,891.19</b>

**BEXAR APPRAISAL DISTRICT**  
**Funds Investment Report**  
**10/31/2024**

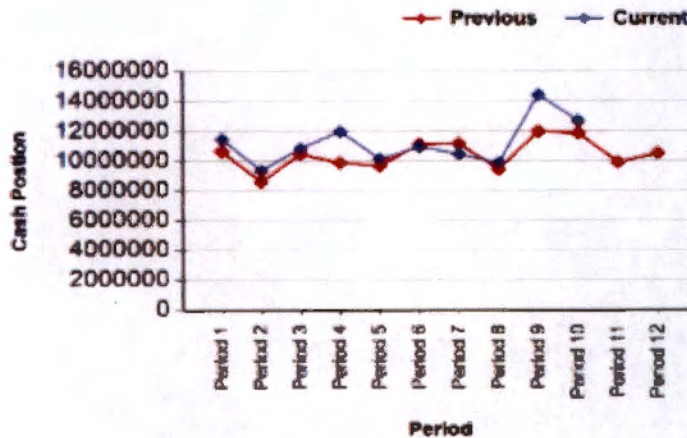
		<b>% RATE</b>	
Cash - Operating Account	\$ 2,215,606.19	0%	
	\$ 10,456,966.83	3.17%	
<b>Total Deposits</b>	<b>\$ 12,672,573.02</b>		
Pledged Collateral:			
FDIC	\$ 250,000.00		Year-To-Date Interest Earned \$ 240,995.76
FMV	\$ 17,523,852.49		
<b>Total Collateral</b>	<b>\$ 17,773,852.49</b>		
<b>Collateral Over (Under)</b>	<b>\$ 5,101,279.47</b>		<b>138% FMV Less FDIC per investment Policy</b>

Other Rate Comparisons	
TexPool	90 day T-Bill
4.92%	4.57%

**Cash Position**

This Period	Current	Previous	Change	% Change
vs. Last Period	\$ 12,672,573.00	\$ 14,411,432.00	\$ 1,738,859.00	12.07%
vs. This Period Last Year	\$ 12,672,573.00	\$ 11,888,790.00	\$ 783,783.00	6.59%

**Cash Position Detail**



Signed by: *Cynthia Kline*  
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**  
*Summary of All Units*  
**Comparison of Budget and Actual Revenues**  
*For the Ten Months Ending 10/31/2024*

	<u>2024</u> <u>BUDGET</u>	<u>CURRENT</u> <u>MONTH</u>	<u>YEAR TO</u> <u>DATE</u>	<u>YTD</u> <u>%</u>	<u>(OVER)</u> <u>UNDER</u>
<b><u>TAXING UNITS</u></b>					
Alamo Community College District	\$1,882,552	\$0	\$1,882,552	(100%)	\$0
City of Alamo Heights	42,554	0	42,556	(100%)	(2)
Alamo Heights ISD	412,643	0	412,644	(100%)	(1)
City of Balcones Heights	11,556	0	11,556	(100%)	0
Bexar County	3,219,990	0	3,219,992	(100%)	(2)
Bexar County Emer Serv Dist#1	9,669	0	9,668	(100%)	1
Bexar County Emer Serv Dist#2	75,388	0	75,388	(100%)	0
Bexar County Emer Serv Dist#3	39,426	0	39,428	(100%)	(2)
Bexar County Emer Serv Dist#5	19,674	0	19,676	(100%)	(2)
Bexar County Emer Serv Dist#6	8,532	0	8,532	(100%)	0
Bexar County Flood	281,179	0	281,180	(100%)	(1)
Bexar County Emer Serv Dist#7	32,317	0	32,316	(100%)	1
Bexar County Emer Serv Dist#8	10,264	0	10,264	(100%)	0
Bexar County Emer Serv Dist#4	13,030	0	13,032	(100%)	(2)
Bexar County Emer Serv Dist#10	13,495	0	13,496	(100%)	(1)
Boerne ISD	166,443	(200)	166,444	(100%)	(1)
Bexar County Emer Serv Dist#11	11,815	0	11,816	(100%)	(1)
Bexar County Emer Serv Dist#12	8,713	0	8,712	(100%)	1
City of Castle Hills	25,181	0	25,180	(100%)	1
City of China Grove	2,068	0	2,068	(100%)	0
Cibolo Canyon	46,510	0	46,512	(100%)	(2)
Comal ISD	196,097	0	196,096	(100%)	1
City of Converse	59,178	0	59,180	(100%)	(2)
Crosswinds at South Lake SID	4,757	0	4,756	(100%)	1
East Central ISD	346,252	0	346,252	(100%)	0
Edgewood ISD	122,260	0	122,260	(100%)	0
City of Elmendorf	4,990	0	4,992	(100%)	(2)
City of Fair Oaks Ranch	24,767	0	24,768	(100%)	(1)
Floresville ISD	155	0	156	(101%)	(1)
City of Grey Forest	336	0	336	(100%)	0
Harlandale ISD	163,651	0	163,652	(100%)	(1)
City of Helotes	25,750	0	25,752	(100%)	(2)
Hill Country Village	3,542	0	3,544	(100%)	(2)
Town of Hollywood Park	18,588	0	18,588	(100%)	0
Judson ISD	786,170	0	786,172	(100%)	(2)
City of Kirby	17,451	0	17,452	(100%)	(1)
City of Leon Valley	33,144	0	33,144	(100%)	0
City of Live Oak	40,228	0	40,228	(100%)	0
City of Lytle	26	0	28	(108%)	(2)
Medina Valley ISD	165,486	0	165,488	(100%)	(2)
Northeast ISD	2,629,167	0	2,629,168	(100%)	(1)
Northside ISD	3,962,442	0	3,962,444	(100%)	(2)
City of Olmos Park	21,174	0	21,176	(100%)	(2)
City of San Antonio	4,318,829	0	4,318,828	(100%)	1
San Antonio ISD	1,689,791	0	1,689,792	(100%)	(1)
San Antonio MUD #1	1,267	0	1,268	(100%)	(1)
San Antonio River Authority	240,435	0	240,436	(100%)	(1)
City of Sandy Oaks	3,025	0	3,024	(100%)	1

**BEXAR APPRAISAL DISTRICT**  
*Summary of All Units*  
**Comparison of Budget and Actual Revenues**  
*For the Ten Months Ending 10/31/2024*

	<b>2024 BUDGET</b>	<b>CURRENT MONTH</b>	<b>YEAR TO DATE</b>	<b>YTD %</b>	<b>(OVER) UNDER</b>
City of Schertz	17,606	0	17,608	(100%)	(2)
Schertz-Cibolo-Univ City ISD	76,164	0	76,164	(100%)	0
City of Selma	11,117	0	11,116	(100%)	1
City of Shavano Park	25,827	0	25,828	(100%)	(1)
City of Somerset	5,326	0	5,328	(100%)	(2)
Somerset ISD	32,859	0	32,860	(100%)	(1)
South San Antonio ISD	160,523	0	160,524	(100%)	(1)
Southside ISD	138,780	0	138,780	(100%)	0
Southwest ISD	402,870	0	402,828	(100%)	42
City of St. Hedwig	6,437	0	6,436	(100%)	1
City of Terrell Hills	37,099	0	37,100	(100%)	(1)
Universal City	55,636	0	55,636	(100%)	0
University Health System	3,621,541	0	3,621,541	(100%)	0
Westside 211 SID	9,230	0	9,232	(100%)	(2)
City of Windcrest	20,372	0	20,372	(100%)	0
Clear Water Creek SID	26	0	28	(108%)	(2)
Stolte Ranch SID	672	0	672	(100%)	0
Tally Road SID	853	0	852	(100%)	1
Westpoint SID	9,669	0	9,668	(100%)	1
Redbird Ranch	5,248	0	5,248	(100%)	0
Bexar County Emer Serv Dist#9	2,017	0	2,016	(100%)	1
Tres Laurels SID	52	0	52	(100%)	0
Landon Ridge SID	465	0	464	(100%)	1
Lemon Creek SID	207	0	208	(100%)	(1)
Briggs Ranch SID	388	0	388	(100%)	0
Saphire Grove SID	129	0	128	(99%)	1
Grace Gardens SID	78	0	80	(103%)	(2)
Briggs Ranch II SID	52	0	52	(100%)	0
<b>TOTAL TAX UNIT LEVY</b>	<b>25,853,200</b>	<b>(200)</b>	<b>25,853,201</b>	<b>100%</b>	<b>(1)</b>
Other Revenues	20,000	3,951	125,630	(628%)	(105,630)
Other Revenues - Information Systems	8,000	521	3,400	(43%)	4,600
Interest Revenues	20,000	28,001	240,996	(1205%)	(220,996)
<b>TOTAL OTHER REVENUES</b>	<b>48,000</b>	<b>32,473</b>	<b>370,025</b>	<b>771%</b>	<b>(322,025)</b>
<b>TOTAL REVENUES COLLECTED</b>	<b>25,901,200</b>	<b>32,273</b>	<b>26,223,226</b>	<b>101%</b>	<b>(322,026)</b>

**BEXAR APPRAISAL DISTRICT**  
*Summary of All Units*  
**Comparison of Budget and Actual Revenues**  
*For the Ten Months Ending 10/31/2024*

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<b><u>OPERATING EXPENDITURES</u></b>					
Advertising Public Notices	63,000	2,157	54,857	87%	8,143
Auto Allowance	892,800	75,373	764,426	86%	128,374
Stipend	32,000	2,626	22,587	71%	9,413
Copier Costs	47,981	3,185	29,136	61%	18,845
Copier, FAX, & Printer Supplies	54,445	4,416	24,429	45%	30,016
Employee Recognition/Awards	50,000	4,859	19,076	38%	30,924
Equipment Maintenance	350	0	0	0	350
Forms Creation	366,775	3,190	193,332	53%	173,443
General Insurance	45,000	0	43,024	96%	1,976
Map Production & Supplies	4,550	0	1,605	35%	2,945
Mileage Reimbursements	4,000	0	206	5%	3,794
Office Building Expense	250,000	28,070	204,883	82%	45,117
Offsite Storage	25,000	1,250	16,993	68%	8,007
Office Supplies	84,980	6,785	65,639	77%	19,341
Postage	694,362	24,731	495,489	71%	198,873
Professional Dues	29,402	180	12,178	41%	17,224
Publications	292,950	18,992	176,071	60%	116,879
Security	300,000	33,937	243,422	81%	56,578
Telephone	93,000	5,257	63,310	68%	29,690
Training	263,458	11,747	105,212	40%	158,246
Utilities	125,000	8,535	78,828	63%	46,172
Worker's Compensation	50,000	(50)	45,268	91%	4,732
Contingency	250,000	0	248,258	99%	1,742
<b>TOTAL OPERATING EXPENDITURES</b>	<b>4,019,053</b>	<b>235,238</b>	<b>2,908,228</b>	<b>72%</b>	<b>1,110,825</b>
<b><u>CAPITAL EXPENDITURES</u></b>					
<b>FURNITURE:</b>					
Executive Services	1,500	0	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	365	1,750	50%	1,750
Personal Property	4,500	(270)	0	0	4,500
Legal	2,000	0	4,160	208%	(2,160)
<b>EQUIPMENT:</b>					
Information Services	112,000	5,319	36,108	32%	75,892
CAMA Hardware	15,000	0	3,840	26%	11,160
<b>TOTAL CAPITAL EXPENDITURES</b>	<b>164,500</b>	<b>5,414</b>	<b>56,672</b>	<b>34%</b>	<b>107,828</b>

**BEXAR APPRAISAL DISTRICT**  
*Summary of All Units*  
**Comparison of Budget and Actual Revenues**  
*For the Ten Months Ending 10/31/2024*

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<b><u>EMPLOYEE EXPENDITURES:</u></b>					
Salaries, Regular	12,310,629	953,458	9,653,578	78%	2,657,051
Salaries, Overtime	166,350	623	82,320	49%	84,030
Retirement	2,057,710	167,959	1,734,833	84%	322,877
Payroll Taxes	31,428	124	22,809	73%	8,619
Group Medical Insurance	1,984,670	115,335	1,122,248	57%	862,422
Life Insurance	77,345	4,824	41,866	54%	35,479
Medicare Taxes	192,772	14,722	152,159	79%	40,613
TCDRS Retiree COLA	275,000	0	0	0	275,000
Sick Leave Buy Back Fund	50,000	4,678	106,625	213%	(56,625)
Departure Contingency	70,000	908	90,417	129%	(20,417)
<b>TOTAL EMPLOYEE EXPENDITURES</b>	<b>17,215,904</b>	<b>1,262,632</b>	<b>13,006,856</b>	<b>76%</b>	<b>4,209,048</b>
<b><u>CONTRACT SERVICES:</u></b>					
Valuation Oil & Gas	38,000	0	44,860	118%	(6,860)
Valuation Telecommunications Accounts	40,000	0	14,472	36%	25,528
Accounting & Auditing	50,000	943	45,694	91%	4,306
Legal Services	1,100,000	60,336	837,140	76%	262,860
Consulting Studies	40,000	304	17,130	43%	22,870
Taxpayer Liasion Officer	30,000	4,470	29,184	97%	816
Contract Services Contingency	45,800	522	609	1%	45,191
Temporary Services	189,500	10,141	172,906	91%	16,594
<b>TOTAL CONTRACT SERV. EXP</b>	<b>1,533,300</b>	<b>76,716</b>	<b>1,161,994</b>	<b>76%</b>	<b>371,306</b>
<b><u>INFO. SYSTEMS EXPENDITURES</u></b>					
Leases	74,580	1,922	56,755	76%	17,825
Software Maintenance	423,330	28,256	385,160	91%	38,170
Hardware Maintenance	43,000	0	12,786	30%	30,214
IS Supplies	60,000	515	16,692	28%	43,308
IS Services	35,600	891	12,734	36%	22,866
<b>TOTAL INFO. SYSTEMS EXP.</b>	<b>636,510</b>	<b>31,584</b>	<b>484,127</b>	<b>76%</b>	<b>152,383</b>
<b><u>PROJECT EXPENDITURES:</u></b>					
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	206,591	103%	(5,435)
Server Infrastructure Upgrade	100,000	0	0	0	100,000
Technology Improvements	200,000	0	3,800	2%	196,200
CAMA Software	583,502	125,041	493,666	85%	89,836
CAMA Enhancements	100,000	100,000	100,000	100%	0
<b>TOTAL PROJECT EXPENDITURES</b>	<b>1,434,658</b>	<b>228,982</b>	<b>1,044,058</b>	<b>73%</b>	<b>390,600</b>
<b><u>OTHER EXPENDITURES:</u></b>					
Board of Directors Expenses	4,000	0	1,233	31%	2,767
Chief Appraiser Expense	8,000	397	3,990	50%	4,010
<b>TOTAL OTHER EXPENDITURES</b>	<b>12,000</b>	<b>397</b>	<b>5,223</b>	<b>44%</b>	<b>6,777</b>

**BEXAR APPRAISAL DISTRICT**  
*Summary of All Units*  
**Comparison of Budget and Actual Revenues**  
*For the Ten Months Ending 10/31/2024*

	<u>2024 BUDGET</u>	<u>CURRENT MONTH</u>	<u>YEAR TO DATE</u>	<u>YTD %</u>	<u>(OVER) UNDER</u>
<b><u>A.R.B EXPENDITURES</u></b>					
Compensation	630,000	96,120	784,808	125%	(154,808)
Training	6,925	0	2,900	42%	4,025
Postage	181,850	25,445	189,810	104%	(7,960)
Legal Services	65,000	1,600	7,363	11%	57,637
Contingency	1,500	0	0	0	1,500
<b>TOTAL A.R.B EXPENDITURES</b>	<b>885,275</b>	<b>123,165</b>	<b>984,881</b>	<b>111%</b>	<b>(99,606)</b>
<b>TOTAL EXPENDITURES</b>	<b>25,901,200</b>	<b>1,964,129</b>	<b>19,652,038</b>	<b>76%</b>	<b>6,249,162</b>
<b>REVENUES OVER EXPENDITURES</b>	<b>0</b>	<b>1,931,855</b>	<b>(6,571,189)</b>	<b>0</b>	<b>6,571,189</b>

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

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

		GENERAL RESTRICTED ELECTION	
DATE	PAYEE	PURPOSE	AMOUNT
8/8/2024	Run off election deposit		(434,584.13)
31-Oct	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-Oct	Balance Forward		\$ 100,000.00
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 100,000.00

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

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

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

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

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

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

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

		DESIGNATED - CDLA Referrals	
DATE	PAYEE	PURPOSE	AMOUNT
31-Oct	Balance Forward		\$ 96,891.28
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ 96,891.28

		DESIGNATED - FINICE	
DATE	PAYEE	PURPOSE	AMOUNT
31-Oct	Balance Forward		\$ 18,610.51
31-Oct			\$ (18,610.51)
	ITEMIZED MONTHLY TOTAL		-
	ITEMIZED YTD TOTAL		\$ -

**BEXAR APPRAISAL DISTRICT**  
*Comparison of Current Year*  
*Prior Year-Income Statement*  
 For the Ten Months Ending 10/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<b>TAXING UNITS</b>					
Alamo Community College District	\$1,882,552	\$1,882,552	\$1,515,376	\$0	\$0
City of Alamo Heights	42,554	42,556	36,788	0	0
Alamo Heights ISD	412,643	412,644	434,400	0	0
City of Balcones Heights	11,556	11,556	9,024	0	0
Bexar County	3,219,990	3,219,992	2,580,568	0	0
Bexar County Emer Serv Dist#1	9,669	9,668	7,608	0	0
Bexar County Emer Serv Dist#2	75,388	75,388	59,940	0	0
Bexar County Emer Serv Dist#3	39,426	39,428	32,652	0	0
Bexar County Emer Serv Dist#5	19,674	19,676	13,868	0	0
Bexar County Emer Serv Dist#6	8,532	8,532	6,544	0	0
Bexar County Flood	281,179	281,180	225,236	0	0
Bexar County Emer Serv Dist#7	32,317	32,316	24,668	0	0
Bexar County Emer Serv Dist#8	10,264	10,264	7,892	0	0
Bexar County Emer Serv Dist#4	13,030	13,032	10,608	0	0
Bexar County Emer Serv Dist#10	13,495	13,496	10,136	0	0
Boerne ISD	166,443	166,444	179,400	(200)	0
Bexar County Emer Serv Dist#11	11,815	11,816	9,404	0	0
Bexar County Emer Serv Dist#12	8,713	8,712	6,404	0	0
City of Castle Hills	25,181	25,180	20,012	0	0
City of China Grove	2,068	2,068	1,700	0	0
Cibolo Canyon	46,510	46,512	34,164	0	0
Comal ISD	196,097	196,096	216,824	0	0
City of Converse	59,178	59,180	45,340	0	0
Crosswinds at South Lake SID	4,757	4,756	2,576	0	0
East Central ISD	346,252	346,252	332,736	0	0
Edgewood ISD	122,260	122,260	116,525	0	(1,847)
City of Elmendorf	4,990	4,992	3,804	0	0
City of Fair Oaks Ranch	24,767	24,768	21,144	0	0
Floresville ISD	155	156	140	0	0
City of Grey Forest	336	336	284	0	0
Harlandale ISD	163,651	163,652	170,088	0	0
City of Helotes	25,750	25,752	21,404	0	0
Hill Country Village	3,542	3,544	2,928	0	0
Town of Hollywood Park	18,588	18,588	15,924	0	0
Judson ISD	786,170	786,172	818,172	0	0
City of Kirby	17,451	17,452	15,004	0	0
City of Leon Valley	33,144	33,144	28,824	0	0
City of Live Oak	40,228	40,228	34,496	0	0
City of Lytle	26	28	24	0	0
Medina Valley ISD	165,486	165,488	137,436	0	0
Northeast ISD	2,629,167	2,629,168	2,829,168	0	0
Northside ISD	3,962,442	3,962,444	4,184,496	0	0
City of Olmos Park	21,174	21,176	16,184	0	0
City of San Antonio	4,318,829	4,318,828	3,596,000	0	0
San Antonio ISD	1,689,791	1,689,792	1,700,304	0	0
San Antonio MUD #1	1,267	1,268	1,512	0	0

**BEXAR APPRAISAL DISTRICT**  
*Comparison of Current Year*  
*Prior Year-Income Statement*  
 For the Ten Months Ending 10/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
San Antonio River Authority	240,435	240,436	195,772	0	0
City of Sandy Oaks	3,025	3,024	2,480	0	0
City of Schertz	17,606	17,608	14,036	0	0
Schertz-Cibolo-Univ City ISD	76,164	76,164	77,616	0	0
City of Selma	11,117	11,116	9,024	0	0
City of Shavano Park	25,827	25,828	20,696	0	0
City of Somerset	5,326	5,328	4,252	0	0
Somerset ISD	32,859	32,860	34,472	0	0
South San Antonio ISD	160,523	160,524	156,292	0	0
Southside ISD	138,780	138,780	128,104	0	0
Southwest ISD	402,870	402,828	372,688	0	0
City of St. Hedwig	6,437	6,436	5,104	0	0
City of Terrell Hills	37,099	37,100	31,068	0	0
Universal City	55,636	55,636	47,728	0	0
University Health System	3,621,541	3,621,541	2,956,352	0	0
Westside 211 SID	9,230	9,232	6,472	0	0
City of Windcrest	20,372	20,372	16,588	0	0
Clear Water Creek SID	26	28	0	0	0
Stolte Ranch SID	672	672	308	0	0
Tally Road SID	853	852	188	0	0
Westpoint SID	9,669	9,668	3,944	0	0
Redbird Ranch	5,248	5,248	1,652	0	0
Bexar County Emer Serv Dist#9	2,017	2,016	1,632	0	0
Tres Laurels SID	52	52	48	0	0
Landon Ridge SID	465	464	380	0	0
Lemon Creek SID	207	208	140	0	0
Briggs Ranch SID	388	388	188	0	0
Saphire Grove SID	129	128	0	0	0
Grace Gardens SID	78	80	0	0	0
Briggs Ranch II SID	52	52	0	0	0
<b>TOTAL TAX UNIT LEVY</b>	<b>25,853,200</b>	<b>25,853,201</b>	<b>23,624,953</b>	<b>(200)</b>	<b>(1,847)</b>
Other Revenues	20,000	125,630	89,559	3,951	3,097
Other Revenues - Information Systems	8,000	3,400	3,263	521	182
Interest Revenues	20,000	240,996	193,603	28,001	25,005
<b>TOTAL OTHER REVENUES</b>	<b>48,000</b>	<b>370,026</b>	<b>286,425</b>	<b>32,473</b>	<b>28,284</b>
<b>TOTAL REVENUES COLLECTED</b>	<b>25,901,200</b>	<b>26,223,226</b>	<b>23,911,378</b>	<b>32,273</b>	<b>26,438</b>

**BEXAR APPRAISAL DISTRICT**  
*Comparison of Current Year*  
*Prior Year-Income Statement*  
 For the Ten Months Ending 10/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<b><u>OPERATING EXPENDITURES</u></b>					
Advertising Public Notices	63,000	54,857	56,988	2,157	5,723
Auto Allowance	892,800	764,426	550,690	75,373	54,700
Stipend	32,000	22,587	14,167	2,626	1,417
Copier Costs	47,981	29,136	28,276	3,185	3,178
Copier, FAX, & Printer Supplies	54,445	24,429	33,812	4,416	1,886
Employee Recognition/Awards	50,000	19,076	27,504	4,859	12,509
Equipment Maintenance	350	0	0	0	0
Forms Creation	366,775	193,332	240,560	3,190	0
General Insurance	45,000	43,024	44,390	0	0
Map Production & Supplies	4,550	1,605	1,626	0	0
Mileage Reimbursements	4,000	206	507	0	0
Office Building Expense	250,000	204,883	242,421	28,070	17,499
Offsite Storage	25,000	16,993	17,499	1,250	1,561
Office Supplies	84,980	65,639	71,830	6,785	8,323
Postage	694,362	495,489	656,018	24,731	(22,351)
Professional Dues	29,402	12,178	12,275	180	45
Publications	292,950	176,071	136,922	18,992	8,466
Security	300,000	243,422	206,992	33,937	23,665
Telephone	93,000	63,310	59,286	5,257	13,173
Training	263,458	105,212	134,117	11,747	10,892
Utilities	125,000	78,828	81,048	8,535	9,974
Worker's Compensation	50,000	45,268	37,220	(50)	(50)
Contingency	250,000	248,258	250,000	0	0
<b>TOTAL OPERATING EXPENDITURES</b>	<b>4,019,053</b>	<b>2,908,228</b>	<b>2,904,147</b>	<b>235,238</b>	<b>150,608</b>
<b><u>CAPITAL EXPENDITURES</u></b>					
<b>FURNITURE:</b>					
Executive Services	1,500	1,725	4,486	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	0
Commercial	3,500	1,750	0	365	0
Personal Property	4,500	0	0	(270)	0
Legal	2,000	4,160	0	0	0
<b>EQUIPMENT:</b>					
Information Services	112,000	36,108	134,051	5,319	11,261
CAMA Hardware	15,000	3,840	6,941	0	0
<b>TOTAL CAPITAL EXPENDITURES</b>	<b>164,500</b>	<b>56,672</b>	<b>173,863</b>	<b>5,414</b>	<b>11,261</b>

**BEXAR APPRAISAL DISTRICT**  
*Comparison of Current Year*  
*Prior Year-Income Statement*  
 For the Ten Months Ending 10/31/2024

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<b><u>EMPLOYEE EXPENDITURES:</u></b>					
Salaries, Regular	12,310,629	9,653,578	8,565,542	953,458	883,825
Salaries, Overtime	166,350	82,320	204,873	623	14,107
Retirement	2,057,710	1,734,833	1,588,558	167,959	155,070
Payroll Taxes	31,428	22,809	5,682	124	(17)
Group Medical Insurance	1,984,670	1,122,248	1,016,599	115,335	103,973
Life Insurance	77,345	41,866	37,841	4,824	4,356
Medicare Taxes	192,772	152,159	133,269	14,722	13,591
TCDRS Retiree COLA	275,000	0	0	0	0
Sick Leave Buy Back Fund	50,000	106,625	49,092	4,678	4,356
Departure Contingency	70,000	90,417	19,465	908	0
<b>TOTAL EMPLOYEE EXPENDITURES</b>	<b>17,215,904</b>	<b>13,006,856</b>	<b>11,620,921</b>	<b>1,262,632</b>	<b>1,179,262</b>
<b><u>CONTRACT SERVICES:</u></b>					
Valuation Oil & Gas	38,000	44,860	28,400	0	0
Valuation Telecommunications Accounts	40,000	14,472	27,050	0	13,525
Accounting & Auditing	50,000	45,694	48,018	943	882
Legal Services	1,100,000	837,140	1,002,598	60,336	115,489
Consulting Studies	40,000	17,130	16,774	304	304
Taxpayer Liasion Officer	30,000	29,184	24,053	4,470	3,764
Contract Services Contingency	45,800	609	55,211	522	90
Temporary Services	189,500	172,906	109,547	10,141	7,779
<b>TOTAL CONTRACT SERV. EXP</b>	<b>1,533,300</b>	<b>1,161,994</b>	<b>1,311,651</b>	<b>76,716</b>	<b>141,833</b>
<b><u>INFO. SYSTEMS EXPENDITURES</u></b>					
Leases	74,580	56,755	49,225	1,922	1,694
Software Maintenance	423,330	385,160	336,863	28,256	16,482
Hardware Maintenance	43,000	12,786	52,810	0	0
IS Supplies	60,000	16,692	41,792	515	555
IS Services	35,600	12,734	21,818	891	163
<b>TOTAL INFO. SYSTEMS EXP.</b>	<b>636,510</b>	<b>484,127</b>	<b>502,508</b>	<b>31,584</b>	<b>18,894</b>
<b><u>PROJECT EXPENDITURES:</u></b>					
Aerial Maps	240,000	240,000	3,397	0	0
Homestead Audit /Outreach	10,000	0	0	0	0
Field Device Maintenance	201,156	206,591	182,267	3,942	4,665
Server Infrastructure Upgrade	100,000	0	0	0	0
Technology Improvements	200,000	3,800	7,800	0	2,800
CAMA Software	583,502	493,666	493,460	125,041	130,644
CAMA Enhancements	100,000	100,000	0	100,000	0
<b>TOTAL PROJECT EXPENDITURES</b>	<b>1,434,658</b>	<b>1,044,058</b>	<b>686,925</b>	<b>228,982</b>	<b>138,109</b>
<b><u>OTHER EXPENDITURES:</u></b>					
Board of Directors Expenses	4,000	1,233	2,944	0	0
Chief Appraiser Expense	8,000	3,990	6,360	397	443
<b>TOTAL OTHER EXPENDITURES</b>	<b>12,000</b>	<b>5,223</b>	<b>9,303</b>	<b>397</b>	<b>443</b>

**BEXAR APPRAISAL DISTRICT**  
*Comparison of Current Year*  
*Prior Year-Income Statement*  
*For the Ten Months Ending 10/31/2024*

	2024 BUDGET	CURRENT YTD	2023 YTD	CURR MONTH	2023 MONTH
<b><u>A.R.B EXPENDITURES</u></b>					
Compensation	630,000	784,808	740,113	96,120	137,568
Training	6,925	2,900	5,450	0	0
Postage	181,850	189,810	176,469	25,445	22,351
Legal Services	65,000	7,363	8,100	1,600	0
Contingency	1,500	0	0	0	0
<b>TOTAL A.R.B EXPENDITURES</b>	<b>885,275</b>	<b>984,881</b>	<b>930,131</b>	<b>123,165</b>	<b>159,918</b>
<b>TOTAL EXPENDITURES</b>	<b>25,901,200</b>	<b>19,652,038</b>	<b>18,139,450</b>	<b>1,964,129</b>	<b>1,800,328</b>
<b>REVENUES OVER EXPENDITURES</b>	<b>0</b>	<b>(6,571,189)</b>	<b>(5,771,929)</b>	<b>1,931,855</b>	<b>1,773,891</b>

**STAFF SUMMARY SHEET**

**ISSUE:** Adjourn