

**CALDWELL COUNTY APPRAISAL DISTRICT  
BOARD OF DIRECTORS  
AMENDED AGENDA  
NOTICE OF REGULAR MEETING  
ON AUGUST 18, 2020**

NOTICE IS HEREBY GIVEN PURSUANT TO THE REQUIREMENTS OF SECTION 551.001 *ET SEQ.*, TEXAS GOVERNMENT CODE, THAT THE BOARD OF DIRECTORS OF THE CALDWELL COUNTY APPRAISAL DISTRICT WILL MEET IN REGULAR SESSION, TUESDAY, AUGUST 18, 2020, AT 6:00 P.M. IN THE CALDWELL COUNTY APPRAISAL DISTRICT OFFICE AT 211 BUFKIN LANE, LOCKHART, TEXAS. THIS NOTICE SUPERSEDES THE PREVIOUSLY-POSTED NOTICE OF THE AUGUST 18, 2020 MEETING. THE AGENDA IS AS FOLLOWS:

CALL TO ORDER

1. Public Comments. *At this time comments will be taken from the audience and comments may not exceed 6 minutes. To address the Board, please submit a Public Comment form to the Board Secretary prior to the start of the meeting.*
2. Collection Report July 2020.

DISCUSSION/ACTION

3. Consideration of and possible approval of Minutes of July 28, 2020 meeting.
4. Consideration of and possible approval of Financial Report July, 2020.
5. Delivery of report identifying properties with main area and no utility packages.
6. Consideration and possible action regarding retention of an appraisal firm to provide commercial appraisal services to the Appraisal District.
7. Consideration and possible action regarding a proposal for outside vendor or vendors to identify property and property ownership omitted from the appraisal roll.
8. Discussion and consideration regarding the adoption 2020 Appraisal and Collection Budgets.
9. Discussion and possible consideration of CCAD mission statement.
10. Discussion and possible consideration of CCAD web design.
11. Chief Appraiser's Report.
  - a. Appraisal update.
  - b. Collection update.
  - c. Special meeting September 1, 2020.
12. Board requests for future agenda items. *(No action or discussion may occur during this item)*
13. Adjourn.

If, during the course of the meeting, discussion of any item on the agenda should be held in a closed meeting, the Board will conduct a closed meeting in accordance with the Texas Open Meetings Act, Government Code, Chapter 551, Subchapters D and E, including but not limited to consultation with counsel under section 551.071 and personnel-related matters authorized by section 551.074. Before any closed meeting is convened, the presiding officer will publicly identify the section or sections of the Act authorizing the closed meeting. All final votes, actions, or decisions will be taken in open meeting.

**CALDWELL COUNTY APPRAISAL DISTRICT  
BOARD OF DIRECTORS  
AMENDED AGENDA  
AUGUST 18, 2020**

**CALL TO ORDER**

1. Public Comments.
2. Collection Report July 2020.  
2a-2b

**DISCUSSION/ACTION**

3. Consideration of and possible approval of Minutes of July 28, 2020 meeting.  
3a-3c
4. Consideration of and possible approval of Financial Report July, 2020.  
4a-4i
5. Delivery of report identifying properties with main area and no utility packages.  
Handout
6. Discussion and possible action regarding retention of an appraisal firm to provide commercial appraisal services to the Appraisal District.  
6a-6v
7. Consideration and possible action regarding a proposal for outside vendor or vendors to identify property and property ownership omitted from the appraisal roll.  
7a-7z
8. Discussion and consideration regarding the adoption 2020 Appraisal and Collection Budgets.  
8a-8e
9. Discussion and possible consideration of CCAD mission statement.  
9a
10. Discussion and possible consideration of CCAD web design.
11. Chief Appraiser's Report.
  - a. Appraisal update.
  - b. Collection update.
  - c. Special meeting September 1, 2020.
12. Board requests for future agenda items.
13. Adjourn.

## July 2020 Collections Report

### Collections

Current Collections(2019)	\$ 263,806.19	Due to the fiscal year change for SLH & SLU these collections do not include 2019 taxes for Lockhart ISD & Luling ISD
Penalties & Interest	\$ <u>32,893.90</u>	
Total	\$ 296,700.09	
Delinquent Collections(2018 & Prior)	\$ 329,170.96	This includes collections for the year 2019 for Lockhart ISD & Luling ISD
Penalties & Interest	\$ <u>71,380.44</u>	
Total	\$ 400,551.40	
<b>Total Current/Delq.</b>	<b>\$ 697,251.49</b>	Lockhart ISD & Luling ISD Fiscal Year is 7/1 to 6/30

### Current Balance (2019)

Total 2019 Levy    \$29,542,331.09  
 Adjustments        \$        306.58  
 Collections YTD    \$28,146,309.24 **95.27%**

**Balance                \$ 1,396,328.43**

### Delinquent Balance (2018 & Prior)

Beginning Balance \$6,915,654.91  
 Adjustments        \$ <79,688.28>  
 Collections YTD    \$1,435,868.64 **21.00%**

**Balance                \$5,400,097.99**

**Last year at this time Current Collections was 95.92%**

\*The Lockhart ISD & Luling ISD 2019 levy, adjustments, and collections were taken out of the Current Balance column and put into the Delinquent Balance column.

### Payment Agreements

Total Agreements (as of the 1<sup>st</sup> of the month) - 188

New Agreements - 42

Agreements Paid in Full - 15

Defaulted Agreements (as of the end of the month) - 4

\*When payment agreements are defaulted, they are given to the Delinquent Tax Attorney.

# Payment Agreements 2020

Month	Total Agreements (as of 1st of the Month)	New Agreements	Agreements Paid In Full	Defaulted Agreements
January	209	16	17	6
February	202	28	13	8
March	209	17	11	5
April	210	11	10	0
May	211	18	13	5
June	211	16	30	9
July	188	42	15	4
August				
September				
October				
November				
December				

**CALDWELL COUNTY APPRAISAL DISTRICT  
BOARD OF DIRECTORS  
MINUTES  
JULY 28, 2020**

The Board of Directors of the Caldwell County Appraisal District met in regular session on July 28, 2020 at 6:00 PM in the Caldwell County Appraisal District office located at 211 Bufkin, Lockhart, TX.

Those in attendance were board members Lee Rust, Alfredo Munoz, Kathy Haigler, Sonja Villalobos, Chief Appraiser Shanna Ramzinski, Administrative Assistant/Recording Secretary Phyllis Fischer, Legal Counsel James Evans. Sally Daniel absent.

**CALL TO ORDER**

**PUBLIC HEARING**

Item #1. Public Hearing on the Proposed 2021 Appraisal District and Collection Budgets.

Lee Rust read into record a letter from the City of Luling. There was discussion pertaining to the letter and the entities disapproving the proposed budget.

**REGULAR MEETING**

Item #2. Public Comments.

No comments.

Item #3. Quarterly Delinquent Tax Collection Report.

Sam Turner of Linebarger, Grogan Law Firm presented the Quarterly Delinquent Tax Collection Report.

Item #4. 911 Quarterly Report.

Jaclyn Archer, GIS/911 Coordinator, presented the 911 Quarterly Report.

Item #5. Collection Report June 2020.

Shanna Ramzinski presented the June 2020 Collection Report.

**DISCUSSION/ACTION**

Item #10. Consideration of and possible action regarding contract for appraisal services with Eagle Property Tax Appraisal & Consulting Inc.

Gary Zeitler of Eagle Property Tax Appraisal & Consulting Inc. presented information pertaining to Eagle Consulting.

Kathy Haigler made a motion, seconded by Alfredo Munoz, to accept the contract with Eagle Property Tax Appraisal & Consulting, Inc. Motion failed 2-2-1.

There was more discussion – possibly a 1-year contract with an option to renew or an option for review each year.

Item to be placed on August agenda.

Item #11. Consideration of and possible action regarding property which may have been omitted from appraisal roll.

Tony Miller, local landman, presented information to the board. Jerry Hinkle of Hinkle Surveying presented information to the board. Daily rate from Mr. Miller.

Lee Rust made a motion, seconded by Sonja Villalobos, to ask James Evans to draft an initial contract between the District and Mr. Miller for an hourly rate. Motioned failed 2-2-1.

There was more discussion pertaining to ownership research.

Item #6. Consideration of and possible approval of Minutes of June 30, 2020 meeting.

Alfredo Munoz made a motion, seconded by Kathy Haigler, to approve the Minutes of June 30, 2020. Motion carried 4-0-1.

Item #7. Consideration of and possible approval of Financial Report June 2020.

Lee Rust made a motion, seconded by Alfred Munoz, to approve the Financial Report of June 2020. Motion carried 4-0-1.

Item #8. Discussion and consideration regarding the 2021 Appraisal and Collection Budgets.

Kathy Haigler made a motion, seconded by Alfredo Munoz, to modify line item #79003 Vehicle to \$0 and the modify line item #72524 Maint – Vehicle to \$12,500. Lee Rust amended the motion, seconded by Sonja Villalobos, to modify line item #72524 Maint – Vehicle to \$11,500. Motion failed 2-2-1. There was then a vote on the original amendment and the motion passed 3-1-1.

There was discussion on health insurance premiums.

Kathy Haigler made a motion, seconded by Alfredo Munoz to approve the budget. Motion failed 2-2-1.

Sonja Villalobos requested more discussion. Kathy Haigler requested a salary comparison of 3%, 4% and 5% increases.

Item to be placed on August agenda.

Lee Rust made a motion, seconded by Sonja Villalobos to reconsider Item #11. Motion carried 4-0-1. Kathy Haigler made a motion, seconded by Alfredo Munoz, to advertise in the Lockhart and Luling papers for services to research omitted property throughout the county. Motion carried 4-0-1.

Kathy Haigler made a motion, seconded by Alfredo Munoz to reconsider Item #10. Sonja Villalobos made a motion, seconded by Lee Rust to receive bids for Item #10. Motion carried 4-0-1.

Item #9. Consideration of and possible action regarding adopting amendment to retain excess funds remaining from the 2019 budget allocation payments from taxing entities.

Shanna Ramzinski presented the amendment to retain excess funds remaining from the 2019 budget allocation payments from taxing entities.

Lee Rust made a motion, seconded by Sonja Villalobos, to adopt the amendment to retain excess funds remaining from the 2019 budget allocation payments from taxing entities. Motion carried 4-0-1.

Item #12. Consideration of and possible action regarding annual longevity compensation policy.

Shanna Ramzinski presented the annual longevity compensation policy. Kathy Haigler made a motion, seconded by Alfredo Munoz, to adopt the annual longevity compensation policy. Motion carried 3-1-1.

Item #13. Discussion and possible action regarding utility packages on the appraisal roll.

There was discussion regarding utility packages on the appraisal roll. Matthew Allen spoke on the item. Lee Rust made a motion, seconded by Kathy Haigler, asking Matthew to run a report detailing what accounts in the system have an improvement with a main area but no utility package. Motion carried 4-0-1.

Item #14. Consideration of and possible action regarding CCAD web design.

Discussion regarding CCAD website and future design.

Item #15. Consideration of and possible action regarding CCAD mission statement.

Discussion on updating CCAD mission statement as proposed by Sonja Villalobos.

Item # 16. Chief Appraiser's Report.

- a. Appraisal update – ARB hearings are ongoing; the rolls were certified on 7/17, The rolls were delivered to the entities, appraisers are busy with hearings and evidence packets.
- b. Collection update – Vicki Schneider and Shanna are working on the effective tax rates.

The quarterly employee award was given to Matthew Allen.

Item #17. Board requests for future agenda items.

Items #8, #10, #11, #13, #14, #15

Item #18. Adjourn.

Alfredo Munoz made a motion, seconded by Lee Rust, to adjourn.

Meeting adjourned at 9:14 PM.

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Board Chairman

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Secretary

Caldwell County Appraisal District  
**EXPENSE STATEMENT- APPRAISAL**  
 For the Seven Months Ending July 31, 2020

	Current Month	YTD ACTUAL	YTD BUDGET	UNENCUMBERED	%	
70101	CHIEF APPRAISER	\$ 6,540.42	\$ 45,782.94	\$ 78,485.00	32,702.06	41.67
70102	DEPUTY CHIEF APPRAISER	3,764.58	26,352.06	45,175.00	18,822.94	41.67
70103	SYSTEM MGR/MAPPER	5,292.26	37,045.82	63,507.00	26,461.18	41.67
70105	FIELD APPRAISER II	2,641.66	19,584.22	33,885.00	14,300.78	42.20
70106	SENIOR APPRAISER I	3,652.66	25,568.62	43,832.00	18,263.38	41.67
70107	SENIOR APPRAISER II	2,823.76	6,541.97	41,597.00	35,055.03	84.27
70108	FIELD APPRAISER I	2,641.66	17,394.81	34,568.00	17,173.19	49.68
70109	FIELD APPRAISER III	2,707.76	18,954.32	32,493.00	13,538.68	41.67
70111	ADMINISTRATIVE ASST.	4,169.16	29,184.12	50,030.00	20,845.88	41.67
70112	DATA ENTRY TECHNICIAN	2,509.58	17,567.06	30,115.00	12,547.94	41.67
70113	SUPPORT TECH	3,063.84	21,446.88	36,766.00	15,319.12	41.67
70120	911/GIS	1,076.24	9,819.13	39,734.00	29,914.87	75.29
70135	PAYROLL CONTINGENCY	0.00	0.00	2,000.00	2,000.00	100.00
	<b>TOTAL WAGES AND SALARIES</b>	<b>40,883.58</b>	<b>275,241.95</b>	<b>532,187.00</b>	<b>256,945.05</b>	<b>48.28</b>
71000	PAYROLL TAX	3,870.65	22,087.53	45,000.00	22,912.47	50.92
71002	RETIREMENT / EMPLOYER	3,853.29	27,335.87	51,000.00	23,664.13	46.40
71004	HEALTH BENEFITS	7,472.42	45,758.63	107,400.00	61,641.37	57.39
71005	WORKERS COMP	0.00	(131.00)	2,750.00	2,881.00	104.76
71006	UNEMPLOYMENT	(76.63)	146.80	4,000.00	3,853.20	96.33
	<b>DEDUCTIONS / BENEFITS</b>	<b>15,119.73</b>	<b>95,197.83</b>	<b>210,150.00</b>	<b>114,952.17</b>	<b>54.70</b>
72000	APPR ENGINEERS	0.00	30,937.50	42,000.00	11,062.50	26.34
72001	APPR REVIEW BOARD	8,939.20	10,770.03	24,000.00	13,229.97	55.12
72002	AUDIT	0.00	6,100.00	6,200.00	100.00	1.61
72003	BOARD OF DIRECTORS	25.00	578.98	1,790.00	1,211.02	67.65
72004	DATA PROCESSING SERVICES	995.95	39,458.34	51,400.00	11,941.66	23.23
72007	JANITORIAL SERVICES	264.11	1,848.77	6,200.00	4,351.23	70.18
72008	LEGAL SERVICES	159.29	2,325.22	27,000.00	24,674.78	91.39
	<b>TOTAL SERVICES</b>	<b>10,383.55</b>	<b>92,018.84</b>	<b>158,590.00</b>	<b>66,571.16</b>	<b>41.98</b>
72500	BOND CHIEF/NOTARY	0.00	0.00	250.00	250.00	100.00
72501	MEMBERSHIP BTPE/TBPC	100.00	2,222.50	3,800.00	1,577.50	41.51
72502	COMPUTER SUPPLIES	0.00	1,267.89	7,000.00	5,732.11	81.89
72504	EDUCATION / FEES	0.00	3,820.00	8,000.00	4,180.00	52.25
72505	INSURANCE LIABILITY	0.00	200.00	1,750.00	1,550.00	88.57
72506	INSURANCE BUILDING/ CONTE	0.00	0.00	4,100.00	4,100.00	100.00
72507	LEGAL NOTICES / PRINTING	3.00	13,308.39	15,200.00	1,891.61	12.44
72508	MAINT - HARDWARE & EQUIP	800.00	2,400.00	8,700.00	6,300.00	72.41
72509	MAINT - OFFICE EQUIPMENT	0.00	0.00	1,000.00	1,000.00	100.00
72510	MILEAGE & TRAVEL	75.15	1,112.59	5,000.00	3,887.41	77.75
72511	OFFICE SUPPLIES	728.95	1,779.89	7,800.00	6,020.11	77.18
72512	POSTAGE	2,310.00	18,076.37	26,200.00	8,123.63	31.01
72513	POSTAGE METER/BOX RENTAL	0.00	2,170.70	4,425.00	2,254.30	50.94
72514	SUBSCRIPTION & BOOKS	38.00	5,025.65	6,860.00	1,834.35	26.74
72515	RENTAL COPIER	199.16	1,210.69	2,650.00	1,439.31	54.31
72516	ELECTRICITY	471.59	3,229.20	9,000.00	5,770.80	64.12
72517	TELEPHONE	887.10	5,316.94	13,400.00	8,083.06	60.32
72518	WATER & SEWER	282.81	1,854.71	3,500.00	1,645.29	47.01
72519	MORTGAGE	4,527.30	31,691.10	54,520.00	22,828.90	41.87
72520	BUILDING MAINT	434.94	2,194.62	5,000.00	2,805.38	56.11
72523	FUEL - VEHICLE	21.38	1,733.44	7,200.00	5,466.56	75.92
72524	MAINT. - VEHICLE	0.00	6,038.68	6,200.00	161.32	2.60
72525	INS - VEHICLE	0.00	0.00	2,400.00	2,400.00	100.00

For Management Purposes Only



Caldwell County Appraisal District  
**EXPENSE STATEMENT- APPRAISAL**  
 For the Seven Months Ending July 31, 2020

	<u>Current Month</u>	<u>YTD ACTUAL</u>	<u>YTD BUDGET</u>	<u>UNENCUMBERED</u>	%
TOTAL GENERAL EXPENSES	10,879.38	104,653.36	203,955.00	99,301.64	48.69
79000 OFFICE EQUIPMENT	1,376.54	4,201.49	5,000.00	798.51	15.97
79001 COMPUTER EQUIPMENT	55.23	4,690.83	28,500.00	23,809.17	83.54
79002 BUILDING EXPENSE	0.00	0.00	5,000.00	5,000.00	100.00
79003 VEHICLE	0.00	0.00	25,000.00	25,000.00	100.00
79990 CONTINGENCY	0.00	(2,252.35)	10,000.00	12,252.35	122.52
TOTAL CAPITAL INVESTMENT	1,431.77	6,639.97	73,500.00	66,860.03	90.97
TOTAL EXPENSES	\$ (78,698.01)	\$ (573,751.95)	\$ (1,178,382.)	(604,630.05)	51.31

Caldwell County Appraisal District  
**EXPENSE STATEMENT - COLLECTION**  
 For the Seven Months Ending July 31, 2020

	Current Month	YTD ACTUAL	YTD BUDGET	UNENCUMBERED	%
90-70120 DEPUTY TAX COLLECTOR	\$ 4,418.42	\$ 30,928.94	\$ 53,021.00	22,092.06	41.67
90-70121 COLLECTION SPECIALIST	2,933.34	20,533.38	35,200.00	14,666.62	41.67
90-70126 PUBLIC ASSISTANT	2,276.34	15,934.38	27,316.00	11,381.62	41.67
90-70135 PAYROLL CONTINGENCY	0.00	0.00	0.00	0.00	0.00
<b>TOTAL WAGES AND SALARIES</b>	<b>9,628.10</b>	<b>67,396.70</b>	<b>115,537.00</b>	<b>48,140.30</b>	<b>41.67</b>
90-71000 PAYROLL TAX	728.98	5,105.16	9,250.00	4,144.84	44.81
90-71002 RETIREMENT/EMPLOYER	913.70	6,395.90	11,500.00	5,104.10	44.38
90-71004 HEALTH BENEFITS	1,398.71	9,569.28	27,700.00	18,130.72	65.45
90-71005 WORKER COMP	0.00	0.00	875.00	875.00	100.00
90-71006 UNEMPLOYMENT	(21.78)	30.21	3,375.00	3,344.79	99.10
<b>DEDUCTIONS / BENEFITS</b>	<b>3,019.61</b>	<b>21,100.55</b>	<b>52,700.00</b>	<b>31,599.45</b>	<b>59.96</b>
90-72002 AUDIT	0.00	1,700.00	1,800.00	100.00	5.56
90-72004 DATA PROCESSING SERVICES	0.00	14,317.58	19,450.00	5,132.42	26.39
90-72005 COUNTY EMPLOYEE CONTRACT	1,335.12	9,345.84	17,500.00	8,154.16	46.60
90-72007 JANITORIAL SERVICE	78.89	552.23	2,500.00	1,947.77	77.91
90-72008 LEGAL SERVICES	0.00	0.00	2,500.00	2,500.00	100.00
<b>TOTAL SERVICES</b>	<b>1,414.01</b>	<b>25,915.65</b>	<b>43,750.00</b>	<b>17,834.35</b>	<b>40.76</b>
90-72500 BOND/ NOTARY	0.00	71.00	200.00	129.00	64.50
90-72501 MEMBERSHIP BTPE/TBPC	0.00	145.00	700.00	555.00	79.29
90-72502 COMPUTER SUPPLIES	0.00	58.50	2,300.00	2,241.50	97.46
90-72504 EDUCATION & FEES	0.00	1,170.00	3,400.00	2,230.00	65.59
90-72505 INSURANCE - LIABILITY	0.00	0.00	850.00	850.00	100.00
90-72506 INSURANCE BUILDING/CONTENT	0.00	0.00	1,300.00	1,300.00	100.00
90-72507 LEGAL NOTICES/PRINTING	0.00	33.75	10,300.00	10,266.25	99.67
90-72508 MAINT - HARDWARE/EQUIP	0.00	0.00	2,600.00	2,600.00	100.00
90-72509 MAINT - OFFICE EQUIP	1,055.00	1,055.00	1,500.00	445.00	29.67
90-72510 MILEAGE & TRAVEL	60.95	256.45	2,800.00	2,543.55	90.84
90-72511 OFFICE SUPPLIES	188.82	653.55	3,200.00	2,546.45	79.58
90-72512 POSTAGE	690.00	2,070.00	15,000.00	12,930.00	86.20
90-72513 POSTAGE METER/BOX RENTAL	0.00	566.54	1,400.00	833.46	59.53
90-72515 RENTAL - COPIER	0.00	443.19	1,800.00	1,356.81	75.38
90-72516 ELECTRICITY	140.86	964.56	3,000.00	2,035.44	67.85
90-72517 TELEPHONE	276.01	1,652.01	3,400.00	1,747.99	51.41
90-72518 WATER & SEWER	84.48	554.02	1,200.00	645.98	53.83
90-72519 MORTGAGE	1,352.31	9,466.17	16,500.00	7,033.83	42.63
90-72520 BUILDING MAINT.	97.06	622.68	2,100.00	1,477.32	70.35
<b>TOTAL GENERAL EXPENSES</b>	<b>3,945.49</b>	<b>19,782.42</b>	<b>73,550.00</b>	<b>53,767.58</b>	<b>73.10</b>
90-79000 OFFICE EQUIPMENT	411.18	447.97	2,000.00	1,552.03	77.60
90-79001 COMPUTER EQUIPMENT	16.50	130.30	9,200.00	9,069.70	98.58
90-79002 BUILDING EXPENSE	0.00	0.00	2,200.00	2,200.00	100.00
90-79990 CONTINGENCY	0.00	(500.52)	3,000.00	3,500.52	116.68
<b>TOTAL CAPITAL INVESTMENTS</b>	<b>427.68</b>	<b>77.75</b>	<b>16,400.00</b>	<b>16,322.25</b>	<b>99.53</b>
<b>TOTAL EXPENSES</b>	<b>\$ (18,434.89)</b>	<b>\$ (134,273.07)</b>	<b>\$ (301,937.00)</b>	<b>(167,663.93)</b>	<b>55.53</b>

Caldwell County Appraisal District  
**INCOME STATEMENT- APPRAISAL**  
 For the Seven Months Ending July 31, 2020

	Current Month	YTD ACTUAL	YTD BUDGET	UNENCUMBERE	%
<b>Revenues</b>					
CITY OF LOCKHART	\$ 0.00	\$ 74,315.94	\$ 99,087.94	24,772.00	25.00
CITY OF LULING	0.00	20,437.20	27,249.59	6,812.39	25.00
CITY OF MARTINDALE	0.00	5,046.60	6,728.81	1,682.21	25.00
CITY OF MUSTANG RIDGE	0.00	1,909.83	2,546.44	636.61	25.00
CITY OF NIEDERWALD	0.00	605.85	807.79	201.94	25.00
CITY OF UHLAND	0.00	533.52	533.52	0.00	0.00
CALDWELL COUNTY	0.00	290,116.17	386,821.58	96,705.41	25.00
LOCKHART ISD	0.00	300,925.29	401,233.71	100,308.42	25.00
LULING ISD	0.00	76,379.61	101,839.47	25,459.86	25.00
PRAIRIE LEA ISD	0.00	15,938.82	21,251.76	5,312.94	25.00
PLUM CREEK CONS DIST	0.00	5,074.14	6,765.51	1,691.37	25.00
PLUM CREEK UNDERGROU	0.00	4,731.18	6,308.24	1,577.06	25.00
GONZALES ISD	0.00	6,020.46	8,027.30	2,006.84	25.00
WEALDER ISD	0.00	3,690.48	4,920.63	1,230.15	25.00
SAN MARCOS ISD	0.00	33,575.31	44,767.08	11,191.77	25.00
HAYS ISD	0.00	7,984.38	10,645.84	2,661.46	25.00
GONZALES COUNTY UWD	0.00	118.08	157.42	39.34	24.99
CALDWELL-HAYS ESD1	0.00	6,811.14	9,081.53	2,270.39	25.00
CITY OF SAN MARCOS	0.00	2,608.08	3,477.42	869.34	25.00
CALDWELL ESD #2	0.00	1,923.51	2,564.67	641.16	25.00
CALDWELL ESD #3	0.00	1,837.26	2,449.66	612.40	25.00
CALDWELL ESD #4	0.00	1,926.60	2,568.79	642.19	25.00
AUSTIN COMMUNITY COLL	0.00	560.46	747.29	186.83	25.00
<b>Total Revenues</b>	<b>0.00</b>	<b>863,069.91</b>	<b>1,150,581.99</b>	<b>287,512.08</b>	<b>24.99</b>
<b>TOTAL BUDGET REV</b>	<b>\$ 0.00</b>	<b>\$ 863,069.91</b>	<b>\$ 1,150,581.99</b>	<b>287,512.08</b>	<b>24.99</b>
COPIES MISC REVENUE	\$ (111.00)	\$ (1,074.45)	\$ 0.00	1,074.45	0.00
INTEREST INCOME REVENU	(260.71)	(2,849.92)	0.00	2,849.92	0.00
<b>TOTAL OTHER REVENUE</b>	<b>(371.71)</b>	<b>(3,924.37)</b>	<b>0.00</b>	<b>3,924.37</b>	<b>0.00</b>

Caldwell County Appraisal District  
**INCOME STATEMENT- COLLECTION**  
 For the Seven Months Ending July 31, 2020

	Current Month	YTD ACTUAL	YTD BUDGET	UNENCUMBERE	%
<b>Revenues</b>					
CITY OF LOCKHART	\$ 0.00	\$ 20,333.28	\$ 27,111.04	6,777.76	25.00
CITY OF LULING	0.00	5,670.09	7,560.12	1,890.03	25.00
CITY OF MARTINDALE	0.00	1,380.78	1,841.04	460.26	25.00
CITY OF MUSTANG RIDGE	0.00	522.54	696.72	174.18	25.00
CITY OF NIEDERWALD	0.00	165.75	221.02	55.27	25.01
CITY OF UHLAND	0.00	145.96	145.97	0.01	0.01
CALDWELL COUNTY	0.00	79,377.51	105,836.67	26,459.16	25.00
LOCKHART ISD	0.00	82,334.94	109,779.91	27,444.97	25.00
LULING ISD	0.00	24,302.76	32,403.66	8,100.90	25.00
PRAIRIE LEA ISD	0.00	6,120.87	8,161.16	2,040.29	25.00
PLUM CREEK CONS DIST	0.00	1,388.31	1,851.08	462.77	25.00
PLUM CREEK UNDERGROUND	0.00	1,294.47	1,725.97	431.50	25.00
GONZALES COUNTY UWD	0.00	32.31	43.07	10.76	24.98
CALDWELL-HAYS ESD1	0.00	1,863.57	2,484.76	621.19	25.00
CALDWELL ESD #2	0.00	526.29	701.71	175.42	25.00
CALDWELL ESD #3	0.00	502.68	670.24	167.56	25.00
CALDWELL ESD #4	0.00	527.13	702.84	175.71	25.00
<b>Total Revenues</b>	<b>0.00</b>	<b>226,489.24</b>	<b>301,936.98</b>	<b>75,447.74</b>	<b>24.99</b>
TAX CERTIFICATES	(110.00)	(690.00)	0.00	690.00	0.00
<b>TOTAL TAX CERT. REVENUE</b>	<b>(110.00)</b>	<b>(690.00)</b>	<b>0.00</b>	<b>690.00</b>	<b>0.00</b>
<b>TOTAL BUDGET REVENUE</b>	<b>\$ 110.00</b>	<b>\$ 227,179.24</b>	<b>\$ 301,936.98</b>	<b>74,757.74</b>	<b>24.76</b>
RETURN CHECK FEE	\$ (75.00)	\$ (550.00)	\$ 0.00	550.00	0.00
BUS PP RENDITION PENALTY	(17.63)	(1,219.09)	0.00	1,219.09	0.00
OFFICE RENTAL INCOME	(100.00)	(700.00)	0.00	700.00	0.00
<b>TOTAL OTHER REVENUE</b>	<b>(192.63)</b>	<b>(2,469.09)</b>	<b>0.00</b>	<b>2,469.09</b>	<b>0.00</b>
DELINQUENT ATTORNEY FEES- L	(67,760.56)	(67,760.56)	0.00	67,760.56	0.00
DELINQUENT ATTORNEY FEES- P	(8,294.69)	(8,294.69)	0.00	8,294.69	0.00
DELINQUENT ABSTRACT FEES- L	(475.00)	(475.00)	0.00	475.00	0.00
DELINQUENT ABSTRACT FEES- P	0.00	0.00	0.00	0.00	0.00
<b>TOTAL DELINQUENT ATTORNEY</b>	<b>(76,530.25)</b>	<b>(76,530.25)</b>	<b>0.00</b>	<b>76,530.25</b>	<b>0.00</b>

**Caldwell County Appraisal District  
Cash Disbursements Journal  
For the Period From Jul 1, 2020 to Jul 31, 2020**

Filter Criteria includes: Report order is by Date. Report is printed in Detail Format.

Date	Check #	Account ID	Line Description	Debit Amount	Credit Amount
7/1/20	008999	71004	AUG 2020 AD&D - APPR	8.54	
		90-71004	AUG 2020 AD&D - COLL	2.12	
		71004	AUG 2020 LIFE - APPR	72.59	
		90-71004	AUG 2020 LIFE - COLL	18.02	
		30029	JUL 2020 DENTAL PAYABLE	392.55	
		30027	JUL 2020 VISION PAYABLE	107.27	
		10000	UHS Premium Billing		601.09
7/1/20	009000	72515	INV #010707844 JUN 2020 APPR COPY CHARGES	199.16	
		10000	XEROX CORP		199.16
7/1/20	009005	72511	WATER DELIVERYX2 - APPR	41.56	
		90-72511	WATER DELIVERYX2 - COLL	12.42	
		10000	HILL COUNTRY SPRINGS		53.98
7/9/20	008949	72511	SHIRT EMBROIDERY	40.00	
		10000	LOGOS		40.00
7/9/20	008950	72520	AC REPAIR WORK	110.00	
		10000	Logic Mechanical Inc		110.00
7/9/20	008951	30027	JUNE 2020 INS PAYABLE	343.05	
			INV#356666		
		71004	JUNE 2020 CANCER - APPR	149.36	
		90-71004	JUNE 2020 CANCER - COLL	49.79	
		10000	AFLAC INS.		542.20
7/9/20	008952	71004	JUL 2020 HEALTH INS - APPR	7,138.34	
		90-71004	JUL 2020 HEALTH INS - COLL	1,300.13	
		30028	JUN 2020 MED PAYABLE	559.97	
		10000	UNITED HEATHCARE SERVICES		8,998.44
7/9/20	008953	72007	INV #15411 JUL 2020 JANITORIAL SERVICES - APPR	264.11	
		90-72007	INV #15411 JUL 2020 JANITORIAL SERVICES - COLL	78.89	
		10000	Buildingstars		343.00
7/9/20	008954	90-72005	JUL 2020 LULING EMPLOYEE SALARY	1,335.12	
		10000	CALDWELL COUNTY TREASURER		1,335.12

**Caldwell County Appraisal District  
Cash Disbursements Journal  
For the Period From Jul 1, 2020 to Jul 31, 2020**

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7/9/20	008955	72523	JUNE 2020 FUEL REIMBURSEMENT	21.38	
		10000	CALDWELL COUNTY TREASURER		21.38
7/9/20	008956	72001	ARB EXPENSES	89.20	
		72004	SAGE ACCOUNTING ANNUAL FEE	995.95	
		72511	OFFICE SUPPLIES - APPR	335.91	
		90-72511	OFFICE SUPPLIES - COLL	83.37	
		72517	RING CENTRAL - APPR	537.08	
		90-72517	RING CENTRAL - COLL	160.43	
		72520	BLDG MAINT - APPR	13.09	
		90-72520	BLDG MAINT - COLL	3.91	
		79000	OFFICE EQUIP - APPR	1,376.54	
		90-79000	OFFICE EQUIP - COLL	411.18	
		79001	COMP EQUIP - APPR	55.23	
		90-79001	COMP EQUIP - COLL	16.50	
		10000	CARD SERVICE CENTER		4,078.39
7/9/20	008957	72508	MAY 2020 COMPUTER SERVICES	400.00	
		10000	N Metzler Consulting		400.00
7/9/20	008958	90-72517	JUL 2020 LINE CHARGE LULING	115.58	
		10000	SPECTRUM BUSINESS		115.58
7/9/20	008959	71006	2020 QTR2 UNEMPL FUND - APPR	218.44	
		90-71006	2020 QTR2 UNEMPL FUND - COLL	51.99	
		10000	Texas Assoc. of Counties		270.43
7/10/20	008960	72512	JUN 2020 POSTAGE REFILL - APPR	2,310.00	
		90-72512	JUN 2020 POSTAGE REFILL - COLL	690.00	
		10000	PITNEY BOWES		3,000.00
7/10/20	008961	72511	JUN 2020 POSTAGE MACH SEALER - APPR	55.96	
		90-72511	JUN 2020 POSTAGE MACH SEALER - COLL	16.71	
		10000	Pitney Bowes Inc.		72.67
7/10/20	008962	72517	JUL 2020 IPAD UNITS APPRAISERS	234.44	
		10000	AT&T Mobility		234.44

**Caldwell County Appraisal District  
Cash Disbursements Journal  
For the Period From Jul 1, 2020 to Jul 31, 2020**

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Date	Check #	Account ID	Line Description	Debit Amount	Credit Amount
7/10/20	008963	72008	JUN 2020 LEGAL SERVICES	96.00	
		10000	ARNOLD & PLACEK, PC		96.00
7/10/20	008964	72008	JUN 2020 LEGAL SERVICES	63.29	
		10000	LOW SWINNEY EVANS & JAMES PLLC		63.29
7/10/20	008965	72514	2020 ANNUAL SUBSCRIPTION	38.00	
		10000	LULING NEWSBOY		38.00
7/10/20	008966	72501	REGISTRATION - JRC	100.00	
		10000	Texas Dept. of Licensing and Regulation		100.00
7/10/20	008967	72510	JUNE 2020 MILEAGE REIMBURSEMENT	55.20	
		10000	Christie Gibson		55.20
7/10/20	008968	72510	APR/MAY/JUN MILEAGE REIMBURSEMENT	19.95	
		10000	Phyllis Fischer		19.95
7/13/20	008969	71004	JUL 2020 AD&D - APPR	7.89	
		90-71004	JUL 2020 AD&D - COLL	2.11	
		71004	JUL 2020 LIFE - APPR	67.14	
		90-71004	JUL 2020 LIFE - COLL	18.01	
		30029	JUN 2020 DENTAL PAYABLE	305.06	
		30027	JUN 2020 VISION PAYABLE	114.63	
		10000	UHS Premium Billing		514.84
7/15/20	008975	72003	REIMBURSEMENT - BGM B/D	25.00	
		10000	Kristie Wimberly		25.00
7/15/20	008976	90-72510	APR, MAY, JUN 2020 MILEAGE REIMBURSEMENT	60.95	
		10000	Vicki Schneider		60.95
7/15/20	008979	72517	JUL 2020 LINE CHARGE - LOCKHART SPECTRUM BUSINESS	115.58	
		10000			115.58
7/15/20	008980	72520	INV #666590866-3 3RD QTR 2020 PEST CONTROL SERVICES	65.45	
		90-72520	INV #666590866-3 3RD QTR 2020 PEST CONTROL	19.55	

**Caldwell County Appraisal District  
Cash Disbursements Journal  
For the Period From Jul 1, 2020 to Jul 31, 2020**

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Date	Check #	Account ID	Line Description	Debit Amount	Credit Amount
		10000	PEST CONTROL SERVICES ABC Home & Commercial Services		85.00
7/23/20	008981	72519	JUL 2020 BUILDING LOAN PAYMENT - APPR	4,527.30	
		90-72519	JUL 2020 BUILDING LOAN PAYMENT - COLL	1,352.31	
		10000	First Lockhart National Bank		5,879.61
7/23/20	008982	72508	INV #2020-07-01-CCAD JUN 2020 COMPUTER SERVICES	400.00	
		10000	N Metzler Consulting		400.00
7/23/20	008983	72516	JUN 2020 ELECTRICITY - APPR	471.59	
		90-72516	JUN 2020 ELECTRICITY- COLL	140.86	
		72518	JUN 2020 WATER & SEWER - APPR	282.81	
		90-72518	JUN 2020 WATER & SEWER - COLL	84.48	
		10000	City of Lockhart		979.74
7/23/20	008984	90-72509	INV #1370535, 1370802 SERV/MAINT JETSCAN	1,055.00	
		10000	Cummins-Allison Corp.		1,055.00
7/23/20	008985	72511	OFFICE SUPPLIES - APPR	255.52	
		90-72511	OFFICE SUPPLIES - COLL	76.32	
		10000	OFFICE DEPOT		331.84
7/23/20	008986	72507	INV #41916 CLASSIFIED AD	3.00	
		10000	Texas Assoc. Appraisal Districts		3.00
7/23/20	008987	72520	AUG 2020 LAWN SERVICES - APPR	246.40	
		90-72520	AUG 2020 LAWN SERVICES - COLL	73.60	
		10000	Jesus Gonzales		320.00
7/27/20	008988	71004	PCORI FEE - APPR	28.56	
		90-71004	PCORI FEE - COLL	8.53	
		10000	Department Of Treasury IRS		37.09
	<b>Total</b>			<b>30,595.97</b>	<b>30,595.97</b>



## Shanna

---

**From:** Admin Assistant <AdminAssist@pyleswhatley.com>  
**Sent:** Wednesday, August 12, 2020 3:57 PM  
**To:** Shanna  
**Subject:** CCAD Reappraisal Plan for 2019 and 2020  
**Attachments:** Caldwell RFQ 2020.pdf

See attached our proposal for the requested Commercial and Industrial Valuation Services. Please confirm receipt.  
Thank you for your consideration,

*Jo Gandolfi*

Administrative Assistant  
Pyles Whatley Corporation  
16910 Dallas Parkway #100  
Dallas, Texas 75248

Thank you,

*Jo Gandolfi*

Administrative Assistant  
Pyles Whatley Corporation  
16910 Dallas Parkway #100  
Dallas, Texas 75248

August 12, 2020

Caldwell County Appraisal District  
Attn: Shanna Ramzinski, R.P.A., C.T.A., R.T.A.  
211 Bufkin Lane  
Lockhart, TX 78644  
Phone: 512-398-5550 Fac: 512-398-5551  
Email: [shannar@caldwellcad.org](mailto:shannar@caldwellcad.org)

Re: Caldwell County Reappraisal Plan for Tax Years 2019 and 2020

Dear Ms. Shanna Ramzinski,


Pursuant to your recent request for Commercial and Industrial Property Valuation Services, Pyles Whatley would like to provide our Real Estate Appraisal Services. Our firm provides a full range of appraisal, appraisal review, real estate consultant services for both financial and public/governmental organizations, including but not limited to single family residences, retail, office and industrial developments, both existing and proposed, as well as hospitality and multi-family developments, and subdivision analyses. An equal focus of the firm is right-of-way appraisals and eminent domain proceedings.

Pyles Whatley pledges 100% firsthand involvement and intimate knowledge of all aspects of every property we are assigned. Our comprehensive appraisals reflect all pertinent aspects of each property. Personal attention and accountability allow us a degree of responsiveness to our clients that is unmatched in the industry.

If we can be of further assistance, or if you have any questions, please do not hesitate to contact our office.

Sincerely,

**PYLES WHATLEY**



**Kreg Hodge**  
President and Senior Appraiser

**EXPERIENCE**

**Professional and Technical Expertise in Appraisal Services**

Our firm proves competent in conducting fee simple interest appraisals related to the following property types: residential, commercial, industrial, multi-family, floodplain, lease, and right-of-way. Our firm's clients include numerous right-of-way companies, city municipalities in the Dallas/Fort Worth area and throughout Texas, North Texas Municipal Water District, Texas Department of Transportation, and financial institutions nationwide. Examples of such compositions are listed below:

Property Type	Project Name	Client Contact	Client Name	Phone number	Completion Date
Single Family Residence	SFR, Dallas, Tx	Ann Carraway Bruce	City of Dallas	(214) 671-9379	18-Mar
Apartment Building	4 Condo Units	Jamie Ramirez	Cathay Bank	(626) 582-7213	19-Oct
Commercial	Marinas & Lots	Angela Rodriguez	City of Dallas	(214) 948-4159	19-Oct
Industrial	IH 635 Project	Mike Norris	TxDOT	(214) 320-4494	18-Jan
Floodplain	IH 35 Cooke Co.	Mike Norris	TxDOT	(214) 320-4494	19-Nov
Lease	IH 635 Project	Mike Norris	TxDOT	(214) 320-4494	18-Jan
Right-of-Way	Proposed Easement – UP Railroad	Todd Wright	City of Dallas	(214) 671-9049	19-Sep
Rural	300 acres	Haskell Co.	Capital Farm Credit	(940) 422-4323	2016
Rural	1100+ acres	Hardeman Co.	First Capital Bank	(940) 663-5311	2016-2018
Rural	1400+ acres	Haskell Co.	Vista Bank	(806) 771-9500	2017-2019

Pyles Whatley has provided a full range of appraisal services for various municipalities and governmental organizations numbering over 600 appraisal reports during the last 24 months. Our appraisers have extensive experience in eminent domain valuations, report updates, and expert witness testimony (including Special Commissioners Hearings, and trials). When the need arrives, Pyles Whatley will appear before the Appraisal Valuation Board for a fee of \$50 per hour. As a firm, we are prepared to accommodate your project beyond the initial valuations.

## **PROJECT APPROACH and ADAPTABILITY**

### **Proposed plan**

Our methodology will incorporate a combination of cost valuation guides regional standards for construction costs as well as analysis and modification, if necessary, and confirmation and support of any replacement cost estimate from a licensed contractor under our employ. Each individual estimate of property improvement will be thoroughly inspected and valued as new as well as assigned an appropriate and supported factor of depreciation, yielding a commensurate tax value.

As a result of our available staff, multiple appraisers will be deployed on a regional basis, each focusing on a particular property type, with supervisory attention paid to each property inspection and review upon completion of individual reports. Senior staff will guide logistics in terms of geographic inspection schedules and assign property types in accordance with difficulty and respective expertise held by each appraiser. Inspections will be conducted by staff as well as supervisory appraisers along with industry experts should the property necessitate. Following full inspection of groups of similar properties, both regionally and by property type, are accomplished, report compilation will commence. Rotating staff will be on the ground accomplishing inspections as well as completion of reports, with reviews of all reports addressed by additional licensed senior staff appraisers.

Initial plans are to perform bimonthly inspections of groups of properties over a four-day period, rotating between two groups of appraisers, to complete the entirety of the portfolio of properties on a consistent and regular basis. The goal is to complete one-third of the 1,170 commercial appraisals each year for an annual total of \$175,000. The entire project is proposed at \$525,000. Complex and simple appraisals exist in each geographic area. A schedule of complex and simple appraisal types will be identified and slated for completion with regularity.

Each property will be personally inspected by the project manager to ensure consistency as well as competency in all assessments/estimates, as well as congruity in construction classes and perceived and observed condition. The project manager will guide all operations including personal inspections, completion of reports in a timely and regular manner, as well as applicable review procedures and final delivery of all reports. The project manager will further schedule all inspections with The County, formulate all logistical planning based on regional influence as well as property segment. Comprehensive and long-term plans will be made available to The County upon commencement of inspection times for ease of planning and scheduling. Additionally, housing and working space will be procured by respondent upon award at their own expense to ensure efficiency and proximity to all operations.

### **The Project Manager**

Kreg Hodge, will be the point of contact for Pyles Whatley and the alternate contact will be Jason Secrest, MAI. Upon receipt of an executed engagement by Caldwell County Appraisal District, our office will respond within one business day confirming receipt and commencement of the assignment. The Task Order will be initiated, with appropriate support staff contacted and apprised of the scope of work, due date and manner in which the assignment will be necessarily carried out to completion.

Contact information is as follows:

Phone: 214-340-5880 office

Fax number: 214-340-5422

Email address: kreg@pyleswhatley.com

Office is located at: PYLES WHATLEY  
16910 Dallas Parkway, Suite 100  
Dallas, Texas 75248

### **Our Quality Control**

Pyles Whatley pledges 100% firsthand involvement and intimate knowledge of all aspects of every property we are assigned. Our comprehensive appraisals reflect all pertinent aspects of each property. Personal attention and accountability allow us a degree of responsiveness to our clients that is unmatched in the industry.

A few key steps that ensure our success are:

- Assignments will be allocated by the Project Manager taking into consideration current workload and project deadlines.
- A CCAD database will be created and organized by the property address or type
- Weekly all-staff status meetings ensure the Task Orders are progressing as scheduled and any obstacles are addressed in a collaborative manner.
- Individual staff meeting occurs periodically throughout the project, managing the progression of appraisals.
- Each appraisal report is internally reviewed to verify it meets the appraisal requirements set forth by The County's engagement letter and written in conformance with USPAP Standard prescribed by the Appraisal Standards Board of the Appraisal Foundation.

Appraisal reports are professionally produced by administrative staff and sent to appropriate client contact. Upon review by CCAD, should there be comments concerning the submitted appraisal, our office will respond to review comments within one business day. All efforts are consistently made between our office and CCAD at commencement, during, and following completion, that each assignment has met or exceeded the Scope of Work, and to the satisfaction of all persons and department management within Caldwell County Appraisal District.

### **Our Adaptability**

The most frequent problem that any firm encounters while working any project is simply “Life”. We find that regardless of planning and logistics, particularly when the team includes families, unforeseen occurrences are likely and frequent. In the last twelve months, we have seen occasions pop-up in which team members have been unavoidably diverted from projects for a number of reasons, whether it is family or health related, or particularly the ongoing pandemic. To mitigate these situations, we have expanded and diversified our group, to allow for flexibility and a very “nimble” operation. Our team features professionals in several different locations across the region, as well as several different and diverse backgrounds and circumstances, allowing us to pivot, and support those areas of our operation that need attention in a rapid and focused manner.

More specifically, due to a statewide shortage of surveyors, we have had to proceed with projects with incomplete survey data or surveys with an error. These issues tend to increase our delivery time. When this occurs Pyles Whatley addresses the concern/issue with the client as soon as it is discovered and provides interim recommendations toward finishing the project while changes are being made. By working simultaneously with the client and surveyors, we are able to deliver the completed appraisal reports timely, thus reducing any further delay to the project.

**BACKGROUND**

**Firm History**

Pyles Whatley was founded in 1983 by Wendell Pyles, MAI and Jan Whatley, MAI. Upon the passing of Mr. Whatley in 2013, and the retirement of Mr. Pyles in 2018, the company matured into JJKR Group Inc. dba Pyles Whatley as registered with the Texas Secretary of State. We are a corporation wholly owned by the following (4) Partners: Robert Kreg Hodge, (President), Jason Secrest, MAI, (Principal), Jace Whatley, MAI, (Principal), and Richard McBride, (Principal). Our firm consists of 20 employees most of which are based in our office in Dallas, Texas.

Pyles Whatley has performed professional appraisal services for numerous state agencies, such as Texas Department of Transportation, North Texas Municipal Water District, Atmos Energy, Oncor Electric Delivery and the Veterans Land Board. Federal agencies include Dallas Fort Worth International Airport, under Federal Transportation Authority. Our continued work with these agencies proves we comply with all applicable Federal, State and Agency standards.

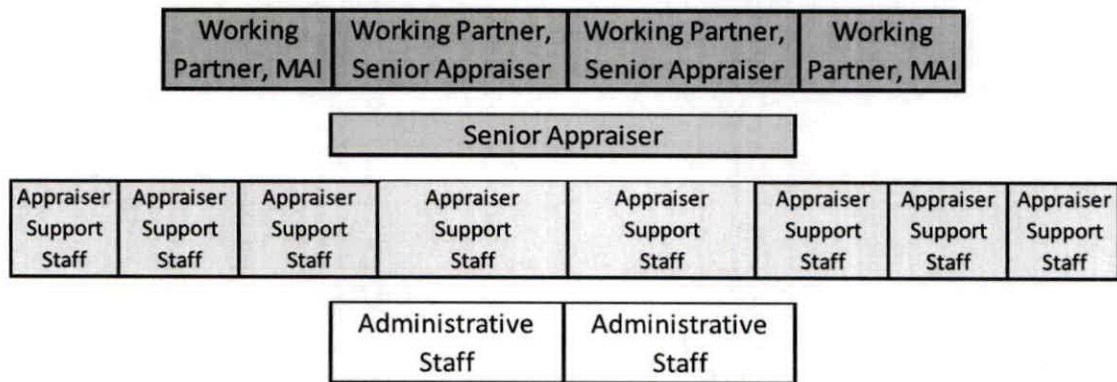
**Headquarters & Mailing Address:**

PYLES WHATLEY  
16910 Dallas Parkway, Suite 100  
Dallas, Texas 75248

Email: [Appraisals@pyleswhatley.com](mailto:Appraisals@pyleswhatley.com)  
Website: [www.pyleswhatley.com](http://www.pyleswhatley.com)

**QUALIFICATIONS**

Pyles Whatley has thirteen (13) appraisers holding professional licenses. The firm's senior appraisers: Jason Secrest, MAI, Robert Kreg Hodge, Jace Whatley, MAI, Richard McBride, and Kathleen Foley, will be assigned to Caldwell County Appraisal District, as well as the administrative and support staff. Please see our team hierarchy below and the attached résumé for each partner and senior appraiser.





**RÉSUMÉ**

**JACE C. WHATLEY, MAI – Principal / Senior Appraiser:** Principal of Pyles Whatley. Appraisal assignments include retail centers, restaurants, convenience stores, office buildings, and various commercial and industrial properties. Additional consulting assignments include condemnation and right-of-way work.

**Experience:** Appraiser with PYLES WHATLEY since January 2009 (11 years).

**Education:** University of Texas at Austin, 2004-2008

- ❖ McCombs School of Business: Bachelor of Business Administration
  - Major: Finance, Minor: Accounting
- ❖ Numerous Appraisal Courses offered by the Appraisal Institute

**Professional Licenses:**

- ❖ Certified General Real Estate Appraiser, State of Texas #TX-1380205-G

**Affiliations:**

- ❖ Appraisal Institute
  - ❖ Member – Appraisal Institute (MAI). The Appraisal Institute conducts a program of continuing education for its designated members. Members who meet the minimum standards of this program are awarded periodic educational certification, and I am currently certified under this program.
- ❖ International Right of Way, Chapter 36, Member
  - ❖ Professional Development Committee, August 2017-Current
  - ❖ Program Chair, August 2012-June 2014, August 2015-June 2016
  - Historian, August 2014-June 201

**Appraiser’s Certifications / Designations**



**RÉSUMÉ**

**JASON A. SECREST, MAI - Principal / Senior Appraiser:** Principal of Pyles Whatley. Appraisal assignments entail on-site inspection, market research, data analysis, and valuation. Completed assignments include the following: shopping centers, retail and industrial properties, multi-family residential, office buildings, land development, subdivision analyses, right-of-way (condemnation) projects, conservation easements, expert witness testimony, and market analyses.

**Experience:** Appraiser with PYLES-WHATLEY from 2004 to 2007 and since 2010 to present (13 years).

- ❖ Appraised commercial properties, with JACKSON HOLE REAL ESTATE & APPRAISAL from 2007 to 2010.
- ❖ Six-years' experience in Information Technology and Telecommunications industries as a financial consultant and negotiator, with ELECTRONIC DATA SYSTEMS (EDS).

**Education:** Bachelor of Science – Business Finance, Brigham Young University, 1998

- ❖ Completed numerous appraisal courses and seminars conducted by the Appraisal Institute and various real estate and financial organizations.

**Professional Licenses:**

- ❖ State of Texas: Certified General Real Estate Appraiser: #TX 1337373 G
- ❖ State of Oklahoma: Certified General Real Estate Appraiser: #13437CGA

**Affiliations:**

- ❖ Appraisal Institute – MAI Designated Member
- ❖ International Right of Way Association, Chapter 36 – Member

**Appraiser's Certifications / Designations for Pyles Whatley**



**RÉSUMÉ**

**ROBERT K. HODGE - Principal / Senior Appraiser:** Principal of Pyles Whatley. Appraisal assignments include retail centers, office buildings, motels, both existing and proposed, various commercial and industrial properties. Additional consulting assignments include condemnation and right-of-way work and other various consulting assignments.

**Experience:** Appraiser with PYLES WHATLEY since April 2006 (14 years).

- ❖ Over ten years' experience in accounting, banking, lending and real estate.

**Education:** Stephen F. Austin State University, 1992-1994

Philosophy, General Studies

- ❖ North Texas Chapter of the Appraisal Institute
  - Appraisal Principles, National USPAP
- ❖ Northern California Chapter of the Appraisal Institute
  - Appraisal Procedures
- ❖ Chapter 46- International Right of Way Association
  - Basic Appraisal Principles

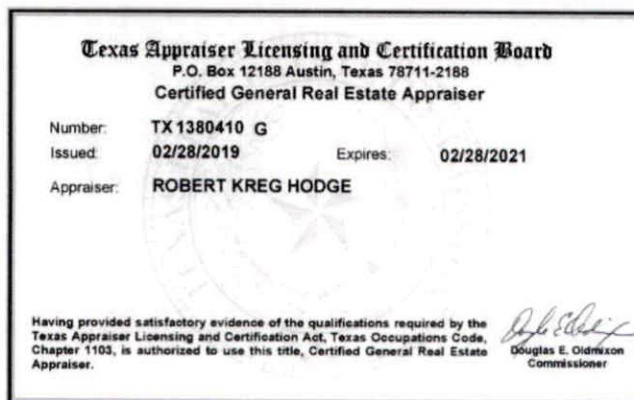
**Professional Licenses:**

- ❖ Certified General Appraiser State of Texas 1380410
- ❖ Certified General Appraiser State of Oklahoma 13119CGA
- ❖ Certified General Appraiser State of Arkansas SL4124
- ❖ Certified General Appraiser State of Louisiana G4070

**Affiliations:**

- ❖ Appraisal Institute – Practicing Affiliate
- ❖ International Right of Way Association, Chapter 36 – Member

**Appraiser's Certifications / Designations**



**RÉSUMÉ**

**RICHARD C. MCBRIDE - Principal / Senior Appraiser:** Principal of Pyles Whatley. Appraisal assignments include retail centers, existing and proposed office buildings, commercial and industrial properties, self-storage facilities, automobile dealerships, single-family and multi-family residential properties, and vacant land. Additional consulting assignments include condemnation and right-of-way work, and other various consulting assignments.

**Experience:** Appraiser with PYLES WHATLEY since 2007 (13 years).

- ❖ Over thirteen years' experience in electronics manufacturing industry in Process Development and Management.

**Education:** Richland College, 1992-1994

- Engineering
- General studies

- ❖ Numerous Appraisal Courses offered by the Appraisal Institute
- ❖ Right-of-way courses offered by the International Right of Way Association

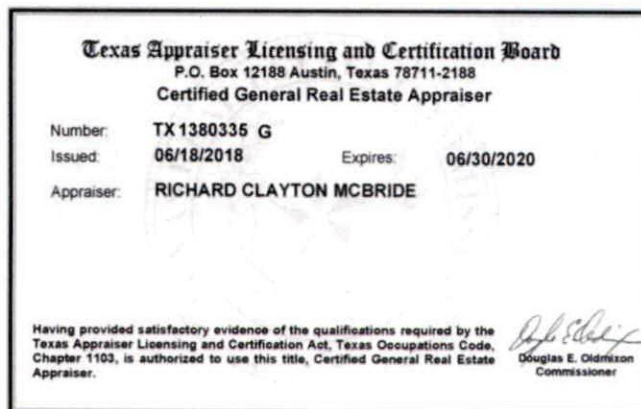
**Professional Licenses:**

- ❖ Texas Appraiser Licensing and Certification Board
  - *Certified General Real Estate Appraiser #TX-1380335-G*

**Affiliations:**

- ❖ Appraisal Institute – Practicing Affiliate
- ❖ International Right of Way Association, Chapter 36 – Member

**Appraiser's Certifications / Designations**



**RÉSUMÉ**

**KATHLEEN A. FOLEY - Senior Appraiser:** Appraisal assignments include retail centers, office buildings, commercial and industrial properties, vacant land and multi-family residential. Additional consulting assignments include condemnation and right-of-way work.

**Experience:** Appraiser with PYLES WHATLEY since October 2017 (3 years).

- ❖ Independent appraiser 1996-2017
- ❖ Las Vegas Appraisal, Inc. 1993-1996

**Education:** University of Nevada, Las Vegas  
o Bachelor of Science

- ❖ Numerous Appraisal Courses offered by the Appraisal Institute
- ❖ Right-of-way courses offered by the International Right of Way Association

**Professional Licenses:**

- ❖ Texas Appraiser Licensing and Certification Board  
*Certified General Real Estate Appraiser #TX 1380509-G*
- ❖ Nevada Real Estate Division  
*Certified General Real Estate Appraiser NV# A.0002152-CG*
- ❖ Texas Real Estate Commission  
*Real Estate Broker #TX 696961*
- ❖ Nevada Real Estate Division  
*Broker Salesperson NV# BS.0034463*

**Affiliations:**

- ❖ Appraisal Institute – Practicing Affiliate
- ❖ International Right of Way Association - *Member at Large*
- ❖

**Appraiser's Certifications / Designations for Pyles Whatley (cont.d)**



REC'D AUG 11 2020

**CONTRACT FOR APPRAISAL SERVICES**

STATE OF TEXAS §

COUNTY OF CALDWELL §

This Contract for Appraisal Services (“the Agreement”) is made and entered into by and between CALDWELL COUNTY APPRAISAL DISTRICT, duly organized and operating pursuant to the provisions of the Texas Property Tax Code, acting by and through its governing body, the Board of Directors (“the Appraisal District”), and EAGLE PROPERTY TAX APPRAISAL & CONSULTING, INC., a professional appraisal firm (“the Appraisal Firm”).

**RECITALS**

WHEREAS, the Constitution of Texas specifically provides that taxation shall be equal and uniform and that property shall be taxed according to its value to be ascertained as provided by law; and,

WHEREAS, the Texas Legislature following the constitutional mandate of equality and uniformity enacted the Texas Property Tax Code (“the Code”); and,

WHEREAS, Title 1, Chapter 6, Section 6.01 of the Code established an Appraisal District in each County in the State with responsibility for appraising all taxable property in the Appraisal District for ad valorem tax purposes for all taxing units in the district; and,

WHEREAS, Title I, Chapter 6, Section 6.03 of the Code provides for the election of a Board of Directors to serve as the governing body of the Appraisal District; and,

WHEREAS, Title I, Chapter 25, Section 25.01 (b) of the Code empowers the Board of Directors to contract with a private appraisal firm to perform appraisal services for the District; and,

WHEREAS, Title I, Section 25.18 (b) of the Code requires reappraisal of all real property at least once every three years; and,

WHEREAS, the Appraisal District has determined that it would be wise and in the best interest of the Appraisal District to employ experts skilled in the matter of appraising and valuing certain hereinafter described property located within the boundaries of the Appraisal District and subject to ad valorem taxes in said district, and to compile taxation data relating thereto for use of the Appraisal District Board of Directors and the Appraisal Review Board of said district; and,

WHEREAS, the Board of Directors has found and determined and does hereby find and determine that the Appraisal Firm has special skill and experience so as to enable the Appraisal Firm to compile such taxation data, and that the Appraisal Firm should be retained by this Appraisal District to assist it and its staff to comply with the uniformity and equality provisions of the Texas Constitution and the statutory provisions of the Texas Property Tax Code.

NOW THEREFORE, THE PARTIES HERETO HAVE AGREED AND DO CONTRACT AS FOLLOWS:

ARTICLE 1

DEFINITIONS

- 1.01 **Appraisal District.** “Appraisal District” shall mean the Caldwell County Appraisal District.
- 1.02 **Appraisal Firm.** “Appraisal Firm” shall mean Eagle Property Tax Appraisal & Consulting, Inc., a professional appraisal firm.
- 1.03 **Properties to be Appraised.** “Properties to be Appraised” by the Appraisal Firm under the terms of this Agreement are as follows:
- a. Review and appraise all accounts in Category “B” and one-third as directed by the Appraisal District of category “F” as such categories have been determined by the Comptroller of Public Accounts for the tax year 2020 and for tax years 2021, 2022 and 2023 (“Term”) as set out in the District’s reappraisal plan. Train and mentor a staff member in the completion of these tasks as needed.
  - b. This contract will be accomplished with the necessary Appraisal Firm staff in the Appraisal District as needed.
- 1.04 **Term.** The “Term” of this Agreement shall be the tax years 2021, 2022 and 2023.

ARTICLE 2

APPRAISAL FIRM’S COVENANTS

- 2.01 **Appraisal Firm Responsibilities.** The Appraisal Firm agrees as follows:
- a. That it does not and will not boycott Israel at any time during the term of this contract per Chapter 2270 of the Texas Government Code.
  - b. That it does not and will not do business with any organization that appears on the Texas Comptroller’s list of foreign terrorist organizations per Chapter 2270 F of the Texas Government Code.
  - c. That it is well and fully advised as to the meaning and application of the ad valorem tax laws of the State of Texas and that its appraisal will comply with such statutes and laws

- d. That it will appraise, for the Term, all of the above listed and described properties located in the Appraisal District for ad valorem tax purposes at market value as that term is defined in section 1.04(7) of the Texas Property Tax Code: and, in the process of so doing, will gather and compile as of January 1<sup>st</sup> of each years all information and data reasonably needed and reasonably available pertaining to the market value of such properties and furnish such data and information to the Appraisal District for the purpose of equalizing valuations of such properties with other properties in the district for each year covered by this contract. That it will provide to the Appraisal District copies of all appraisals, together with supporting data, in the format in which they are maintained by the Appraisal Firm or requested by the Appraisal District, and such records shall be considered public information unless otherwise specifically exempt from public disclosure pursuant to law. All data or information voluntarily provided by the taxpayer will be held under the statutory confidentiality protection provided by sections 22.27 and 25.195(b) of the Texas Property Tax Code. The data or information obtained by the Appraisal Firm from any property owner for the appraisal of property will be held as confidential and will be disclosed only as authorized in writing by the appraisal district under section 552.149 of the Texas Code, on or before April 1<sup>st</sup> of each respective year in order to allow all notices of appraised value to be sent timely by the deadline set forth in the Texas Property Tax Code.
- e. That it will make available to the Appraisal District in the form and manner required by the Texas Property Tax Code, copies of the appraisals of the properties covered by this contract, together with supporting data of such appraisals.
- f. That it will meet with taxpayers who respond to the Notices of Appraised Value and review with them the appraisal of their property, and will appear before the Appraisal Review Board in response to any protest or motion resulting from the appraisal of the property described in Article 1 of this contract to present testimony and evidence as to the value of any property being protested, and will assist the Appraisal District in the equalization of values of property subject to this contract as the Appraisal District determines until final action is taken fixing and equalizing the values for taxation for tax years comprising the Term.
- g. That it will follow all deadlines set forth in the Property Tax Code for preparation of the Notices of Appraised Value and Appraisal Rolls in connection with the appraisal of property identified in Article 1 of this contract.
- h. That it will follow Section 23.01 of the Texas Property Tax Code requiring property to be appraised using generally accepted appraisal methods and techniques, such appraisals complying with the Uniform Standards of Professional Appraisal Practice (USPAP) as it applies to the above-described properties located in the Appraisal District, for ad valorem tax purposes.



- i. That it will at all times during the period of this contract maintain general liability insurance, automobile liability insurance and workers' compensation insurance. A Certificate of Insurance with the Appraisal District as a named insured is hereby furnished by the Appraisal Firm, if requested. Should the Appraisal Firm fail to maintain the insurance coverage described above, the Appraisal District may, at its option, declare this contract null and void.
- j. That Appraisal Firm agrees to indemnify, hold harmless and defend the Appraisal District, its officers, employees, agents and representatives, from and against all claims, damages, losses, and expenses, including, but not limited to, attorney fees, arising out of or resulting from bodily injury or death of a person or property damages, including the loss of use of property, arising or alleged to arise out of or in any way related to this agreement or the performance of work or services of the Appraisal Firm, and its subcontractors under this agreement, or the result of any negligent act or omission or any intentional act or omission in violation of any applicable standard of care by the Appraisal Firm, its subcontractor or anyone directly or indirectly employed by the Appraisal Firm or anyone for whose acts the Appraisal Firm may be liable or due to the violation of any ordinance, regulation, statute, or other legal requirement by the Appraisal Firm, its subcontractors, or any of their agents, employees, but only to the extent the claims, damages, losses or expenses are caused in whole or in part by any intentional or negligent act or omission of the Appraisal Firm, its subcontractors or anyone directly or indirectly employed by the Appraisal Firm, its subcontractors or anyone for whose acts the company or its subcontractors may be liable, and Appraisal Firm shall carry at its own expense, insurance in a company satisfactory to Appraisal District to cover the above mentioned liabilities.
- k. That Appraisal Firm specifically agrees that it will not at any time, in any fashion, form, or manner, either directly or indirectly, divulge, disclose, or communicate to any person, firm, or corporation in any manner whatsoever any information of any kind, nature, or description concerning any confidential matters related to the Appraisal District. This obligation however does not extend to any matters which are deemed matters of public information or record under Texas law.
- l. That Appraisal Firm will follow any open records ruling issued by the Attorney General of Texas or judgement of a court having jurisdiction over requests made under the Texas Public Information Act for any information in the possession of the Appraisal Firm. Appraisal Firm shall have the right under this contract to bring its own action against the Attorney General of Texas in response to an open records ruling affecting the Appraisal Firm.

**2.02 Real Estate Appraisal Software.** The Appraisal Firm shall not be responsible for providing or maintaining real estate appraisal software under the terms of this Agreement. The Appraisal Firm shall not be responsible for data entry of appraisal information utilizing the Appraisal District's real estate appraisal software under the terms of this Agreement.

## ARTICLE 3

### APPRAISAL DISTRICT'S COVENANTS

#### 3.01 **Appraisal District Responsibilities.** The Appraisal District agrees as follows:

- a. That it will employ the Appraisal Firm to perform the services as outlined herein for the Term, and in consideration for the performance of these services the Appraisal District agrees and obligates itself to pay the Appraisal firm out of the funds allocated to it by the taxing units in the Appraisal District, as provided in the Texas Property Tax Code, a sum of money equal to TWENTY TWO THOUSAND AND NO/100 DOLLARS (\$22,000.00) per year, payable in quarterly installments of FIFTY FIVE HUNDRED AND NO/100 DOLLARS (\$5,500.00) due on the first (1<sup>st</sup>) day of January, April, July, and October of 2021, beginning on January 1, 2021. And a sum of money equal to TWENTY FOUR THOUSAND AND NO/100 DOLLARS (\$24,000.00) per year, payable in quarterly installments of SIX THOUSAND AND NO/100 DOLLARS (\$6000.00) due on the first (1<sup>st</sup>) day of January, April, July, and October of 2022 and 2023, beginning on January 1, 2022, payable to the order of the Appraisal Firm at the Appraisal Firm's address.
- b. If any new or additional property is added to this Agreement, resulting in the addition of properties comprising one percent more than the number of properties identified in Article 1 on January 1, 2021, the fee will be adjusted to the satisfaction of both parties.
- c. That it will at any time same may become necessary, pass and enter of record such orders as may be proper and necessary to legalize and facilitate the payment of all sums due the Appraisal Firm.
- d. The parties do not intend for this agreement to obligate future Boards of Directors. Accordingly, in the event the District budget for any year beyond 2022 does not have funds sufficient to enable the District to make payments under this agreement, then this contract is terminated on the effective date of such budget. The Appraisal District agrees to notify the Appraisal Firm, in writing, within fifteen (15) days after the approval of the budget which will cause the termination of the agreement under this section. However, any failure to so notify shall not affect termination under this section.

**3.02 Real Estate Appraisal Software.** The Appraisal District shall be solely responsible for providing and/or maintaining its real estate appraisal software. The Appraisal District shall be solely responsible for data entry of appraisal information utilizing the Appraisal District's real estate appraisal software.

## ARTICLE 4

### MUTUAL COVENANTS

**4.01 Mutual Responsibilities.** All parties to this Agreement distinctly understand and agree as follows:

- a. That each will lend every assistance to the other in the effective performance of this Agreement.
- b. That payments made hereunder by the Appraisal District to the Appraisal Firm are in no way contingent upon the amount of or increase in the appraised, assessed, or taxable value of property appraised by Appraisal Firm.
- c. It is understood and agreed that all programs, and/or other software of any kind or nature used by the Appraisal Firm in performance of its services herein is and shall remain the property of the Appraisal Firm and will not be delivered to Appraisal District at any time during the term of this Agreement or at the termination thereof. The data stored on behalf of the Appraisal District is and shall remain the property of the Appraisal District.
- d. Notwithstanding anything herein to the contrary, the Appraisal District may terminate this Agreement without it being necessary to establish cause upon service of written notice of cancellation, personally or by certified or registered mail, return receipt requested, thirty (30) days after the date of service of the notice. If a party defaults under the terms and conditions of this Agreement, this Agreement may be terminated by the non-defaulting party upon service of written notice of cancellation, personally or by certified or registered mail, return receipt requested, thirty (30) days after the date of service of the notice. The unpaid balance due and owing to the Appraisal Firm by the Appraisal District will be based on work completed by Appraisal Firm up to the date of termination of the Agreement and shall be mutually agreed upon by both parties, if possible. Further, this unpaid balance shall be paid by Appraisal District to Appraisal Firm within thirty (30) days after the Termination Date. If the parties hereto are unable to agree on the unpaid balance owed then either party may commence mediation procedures to resolve the dispute in accordance with this Agreement and, if mediation is unsuccessful, then Appraisal Firm may file suit to have the balance determined by a Court of proper jurisdiction.
- e. If appraisal districts within the State of Texas either cease to exist, lose their appraisal function, or lose their ability to contract for outside appraisal services, this Agreement may be terminated by either party upon service of written notice of cancellation, personally or by certified or registered mail, return receipt requested, thirty (30) days after the date of service of the notice.

## ARTICLE 5

### GENERAL AND ADMINISTRATIVE PROVISIONS

**5.01 Parties Bound.** This Agreement shall be binding upon and inure to the benefit of the parties and their respective heirs, executors, administrators, legal representatives, successors and assigns.

**5.02 Assignment.** Neither party shall have the right to transfer or assign that party's interest in this Agreement without the prior written consent of the other party.

**5.03 Corporate Authority.** Each party represents to the other that this Agreement, the transaction contemplated in this Agreement, and its execution and delivery, have been duly authorized by all necessary proceedings and actions.

**5.04 Time Limits.** Time is of the essence in this Agreement, therefore all of the time limits shall be strictly construed and rigidly enforced.

**5.05 No Waiver.** A failure or delay of the enforcement of the rights detailed in this Agreement by either party shall not constitute a waiver of those rights or be considered as a basis for estoppel. Either party may exercise its rights under this Agreement despite any delay or failure to enforce those rights.

**5.06 Paragraph Headings.** The paragraph headings used in this Agreement are descriptive only and shall have no legal force or effect whatsoever.

**5.07 Use of Pronouns.** The use of the neuter, masculine or singular to refer to a party described in this Agreement shall be deemed a proper reference whether the party is a governmental entity, an individual, a partnership, a corporation, or a group of two or more governmental entities, individuals, partnerships or corporations. The grammatical changes required to make the provisions of this Agreement applicable to governmental entities, corporations, partnerships, individuals or groups of individuals, or to females as well as males, shall in all instances be assumed as though in each case fully expressed.

**5.08 Understanding, Fair Construction.** By execution of this Agreement, the parties acknowledge that they have read and understood each provision, term and obligation contained in this Agreement. This Agreement, although possibly drawn by one party, shall be construed fairly and reasonably and not more strictly against the drafting party than the non-drafting party.

**5.09 Independent Contractor Relationship.** It is agreed and understood that any work requested by the parties to this Agreement shall be performed under the terms of the Agreement and that all parties are considered independent contractors. Each party is interested only in the results obtained under this Agreement and has the general right of inspection and supervision in order to secure the satisfactory completion of the work. Neither party shall have control over the other party with respect to its hours, times, employment or the like. Under no circumstances shall either party be deemed an employee of the other, nor shall either party act as an agent of the other party. Furthermore, the parties to this Agreement warrant that all obligations imposed on them by

this Agreement shall be performed with due diligence in a safe, competent, workmanlike manner and in compliance with any and all applicable statutes, rules and regulations. Any and all joint venture or partnership status is hereby expressly denied and the parties expressly state that they have not formed, either expressly or impliedly, a joint venture or partnership.

**5.10 Venue.** Venue for any forum hearing any dispute under this contract shall be Caldwell County, Texas.

**5.11 Notices.** All notices or other communications required or permitted to be given pursuant to this Agreement shall be in writing and shall be considered as properly given if mailed from within the United States by first class mail, postage prepaid, and addressed as follows:

If to the Appraisal District:

Caldwell County Appraisal District  
Chief Appraiser – Shanna Ramzinski  
211 Bufkin Ln.  
Lockhart, Texas 78644

If to the Appraisal Firm:

Eagle Property Tax Appraisal & Consulting, Inc.  
President - Gary L. Zeitler  
P. O. Box 866  
Jacksboro, Texas 76458-0866

A party may change the address for notice by giving notice of the change to the other party in writing.

**5.12 Texas Law.** This Agreement shall be subject to and governed by the laws of the State of Texas. Any and all obligations or payments are due and payable in Caldwell County, Texas.

**5.13. Alternative Dispute Resolution.** The parties agree to submit in good faith to mediation before filing a suit for damages.

**5.14 Severability.** If any provision of this Agreement shall, for any reason, be held violative of any applicable law, and so much of the Agreement is held to be unenforceable, then the invalidity of such a specific provision of this Agreement shall not be held to invalidate any

other provisions of this Agreement, which other provisions shall remain in full force and effect unless removal of the invalid provisions destroy the legitimate purposes of this Agreement, in which event this Agreement shall be canceled.

**5.15 Entire Agreement.** This Agreement represents the entire agreement by and between the parties, except as otherwise provided in this Agreement, and it may not be changed except by written amendment duly executed by all parties.

SIGNED, ACCEPTED AND AGREED TO on this Tuesday July 28, 2020, by the undersigned parties who hereby acknowledge that they have read and understood this Agreement, and any attachments thereto, and that they execute this legal document voluntarily and of their own free will.

Appraisal District:

Caldwell County Appraisal District

By: \_\_\_\_\_  
Board of Directors Chairman

By: \_\_\_\_\_  
Chief Appraiser – Shanna Ramzinski

Appraisal Firm:

Eagle Property Tax Appraisal & Consulting, Inc.

By: \_\_\_\_\_  
President - Gary L. Zeitler

REC'D AUG 12 2020

**Shanna**

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**From:** Bruce Wills <bruce@findalandman.com>  
**Sent:** Wednesday, August 12, 2020 1:59 PM  
**To:** Shanna  
**Cc:** FIND A LANDMAN  
**Subject:** Missing Tax Roll Tracts - Bid Proposal - Find A Landman, LLC  
**Attachments:** Caldwell Co CAD - Find A Landman - Bid Proposal - Missing Tax Roll Property Owner Identification.pdf

Ms. Ramzinski,

Attached please find our bid proposal for your consideration. Thank you for the opportunity to present our credentials, plan, and expected cost for your project.

If you or your staff, or the Caldwell County Appraisal District Board have any questions whatsoever, we are available any time.

Respectfully Submitted,



**Bruce M. Wills, RL**  
Client Project Director  
Find A Landman, LLC  
210-414-5517  
AAPL Mbr #88431

REC'D AUG 12 2020



**Proposal prepared for Caldwell County Appraisal District  
8/12/2020**

To: Shanna Ramzinski, Chief Appraiser, Caldwell County Appraisal District

Thank you for allowing us to evaluate and bid on your project to identify the owners of certain tracts of land in the county that are missing from the active tax rolls.

Find A Landman, LLC was established in 2014 as a network of land professionals that offers assistance for land and mineral rights research and acquisitions.

The Find a Landman network includes professionals with a wide array of experience in all areas of our industry throughout the country.

Find a Landman has served title companies, energy companies, land brokers, attorneys, real estate agents, real estate investors, land and mineral owners, and many more.

Find A Landman has completed hundreds of projects by closely working with clients through our in-house management team and partnering with in-the-field land professionals.

In preparation for this bid, we conducted a preliminary review of two tracts of land to get a sense of the feasibility of performing this project for the appraisal district. The preliminary results of this research is as follows:

- Tract adjacent to 121 Newton St., Luling, TX – 5 hours of research resulted in the likely owner being the Estate of Dovie Brantford, who is the owner of an adjacent property (Property Id: 25449)
- Tract adjacent to 1035 N. Hackberry Ave, Luling, TX – 2 hours of research resulted in a reference to a deed record containing 46.9 ac that likely included this tract. The deed was in Vol 329, Pg 394 into Charlie Hysaw. We also found an oil & gas unit plat from 1981 that appeared to include this tract, but we were unable to match the unit plat to the current CAD Map for the county. Additional research would be needed coming forward from the time of the Hysaw deed to determine current ownership. This would require in-person research in the clerk's office.

**Assumptions:**

- The appraisal district will identify (via CAD Map prints or other method of choice) and provide locations of approximately 128 tracts within the county needing owner identification. Our current understanding of the general locations of these tracts are:
  - o 18 tracts – Town of Lockhart
  - o 77 tracts – Town of Luling
  - o 33 tracts – In the county



- We expect there will be some tracts where the owners are unidentifiable in the maximum research time set for each tract. We believe there will be between 10-20% of the total number of tracts being reviewed where determining an owner will fall into this category.
- The project will not have a hard deadline, but we will endeavor to complete the project in an expeditious manner.

### **Planned Steps:**

- **Step 1:** Identify largest tracts, or tracts with improvements, that would likely most benefit the appraisal district if they were added to the tax rolls. We would give preference to the larger town tracts with improvements, as we would expect the county tracts to have ag exemptions, and as such, be of lesser tax value to the district. We have included the cost of this step separately in our bid, should the appraisal district prefer to perform this step and provide the results to us in their initial identification of the target tracts. If we perform this task, we will provide such list to the appraisal district for approval.
- **Step 2:** Search available public records and the use of additional tools to determine potential likely owners for the untaxed tracts. We believe there will likely be four groups of tracts, some that can be determined in approximately half a day of research, some requiring a full day, some taking longer than a full day, and then some that will be indeterminate regardless of the research time committed. We would basically limit our research to 1 1/2 days per tract maximum, but our bid is based on a mix of estimated time it would take. For any tracts where we reach our maximum research time, we would set those aside with whatever information has been found for later research by the appraisal district, or if budget time is available after identifying all of the other tracts, then to pick up and continue researching.
- **Step 3:** Make copies of the vesting deeds into who we think are the current owners, providing same to the appraisal district.
- **Step 4:** Where possible, provide contact information for the apparent owners.
- **Step 5:** If apparent owners appear to be deceased, look for probate records. We will not devote time to tracing heirs if there is no information in the probate records as that could be extremely time consuming.
- **Step 6:** If warranted, and time remaining in budget, review the district court records for the last identified owner of a tract to ensure that it wasn't lost in an unrecorded county deed relating to a tax sale, lawsuit, adverse possession suit, or other district court proceeding.

### **Deliverables:**

- For Identifiable tracts, provide a Surface Owner Report to a specific date, showing location, current presumed surface owner, approximate size, tract description if available, and then copies of any relevant vesting deeds, and prospective owner contact information if found.

## **Bid Price:**

- **Step 1:** \$2,000.00
- **Step 2 – 6:** \$64,000.00 for a maximum of 128 tracts (with an expectation of approximately 10-20% ultimately being unidentifiable). Alternatively, if the number of tracts is less than the expected 128, but greater than 50, Find A Landman can bid these steps on a per tract basis of \$500.00, at the discretion of the appraisal district. If the total number of tracts Find A Landman is asked to bid is below 50 in total, then the bid would be \$550.00 per tract for this step.
- These estimates include all costs for labor (in-house or sub-contractor), expenses (travel, per-diems, copy costs, and research service fees).
- Should the ultimate cost be less than estimated above, Find A Landman will reimburse the Caldwell County Appraisal District for any excess funds on deposit at the end of the project.
- Should the ultimate cost be more than estimated above, Find A Landman will assume any cost overruns up to 5% of the total, after which, and upon the approval of both parties, the scope will be adjusted, project stopped, or budget amended via a new workorder.

## **Payment Terms:**

- Should our bid be accepted by the Caldwell County Appraisal District, an \$8,400.00 initial deposit (\$2000 for Step 1 and 10% of Step 2-6) will be required to initiate the project.
- After completing Step 1 (using the initial deposit to offset the cost), Find A Landman will invoice the Appraisal District on a weekly basis for time and expenses incurred in Steps 2-6, with payment due within 10 days of invoice.
- The remainder of the initial deposit will be held until the end of the project and applied against the final invoice or refunded as appropriate.

## **Project Management & Staffing:**

- Find A Landman will sign a written contract either provided by the Appraisal District or Find A Landman (at the appraisal district's choosing), and prepare a Workorder spelling out the above steps, deliverables, schedule and costs for each phase of the project.
- Find A Landman will manage the project on a daily basis, and will provide weekly status reports in the media format preferred by the appraisal district (ie. email, phone or video conference).
- Find A Landman will use internal and membership sub-contract resources to accomplish the project objectives. Find A Landman will be solely responsible for managing and paying those resources for their time and materials.
- Find A Landman will provide completed ownership reports and source documents to the appraisal district at least on a weekly basis.
- If the total number of tracts desired to be researched equals the expected 128, we expect the project to take approximately 65 total work-days, or 97 elapsed days to

complete. The project would commence within 1 week of bid acceptance and payment of initial deposit, whichever occurs later.

**Privacy:**

- All documents and work products will be held in strict confidentiality and provided exclusively to the appraisal district for their use. No information retrieved, whether public or private, will be used by Find A Landman, LLC or any of our member sub-contractors for any purpose whatsoever.

**Disclaimer:** *Our research will be based on a review of the available public records in the target county, or other publicly available records, including those provided by the client, and covering the stated date period. We do not assume any responsibility for matters legal in character, nor do we render any opinion as to the legal title to the property in question or interest therein. This research will be prepared with the utmost care and diligence and in accordance with good industry practices and procedures for, delivered to, and accepted by the recipient upon the express stipulation that Find A Landman, LLC, and any sub-contractors, do not assume any liability or responsibility for errors and omissions in the records and information contained herein. Any results and conclusions are the professional opinion of Find A Landman, LLC, and any liability, foreseeable, or unforeseeable, shall be limited to the total amount paid by the client to the contractor under any agreement between the parties.*

We look forward to your consideration of our bid proposal for your project and are available any time to answer any questions or provide additional information as needed.

Respectfully submitted,



**David A. Willingham**

Founder & Managing Director  
Find A Landman, LLC  
830-377-5517  
david@findalandman.com

**Bruce M. Wills, RL**

Client Project Director  
Find A Landman, LLC  
210-414-5517  
AAPL Mbr #88431  
bruce@findalandman.com

## **Exhibit A**

David Willingham is the Co-Founder and Managing Director of Find A Landman, LLC. Mr. Willingham has over 13 years of land experience with private and public exploration and production companies, land brokerage services, title companies, and as an independent landman. His specialties are in mineral and land title, leasing, title curative, due diligence, right-of-way/easement negotiations, and land management services providing successful solutions for land and mineral clients.

Bruce Wills is the Client Project Director and a Managing Member of Find A Landman, LLC. Mr. Wills has 25+ years in managing mineral properties for family partnerships, trusts, and other individuals. He has a background in project management, finance, information technology and has been a practicing independent landman for 8 years, specializing in mineral and land title ownership, mineral valuation, production decline curve analysis, heirship and family lineage, deed plotting, title curative and is a notary public in the state of Texas.

Our 500+ member land professionals all possess significant experience in either law, land title, mineral title, title curative, leasing, acquisitions, and more. We draw on their experience as required by the project, and match them to clients based on the skills and expertise needed. Of the 500+ members, we have over 200 who are based in Texas.

**Shanna**

---

**From:** John Epley <jeepley@yahoo.com>  
**Sent:** Wednesday, August 12, 2020 11:14 AM  
**To:** Shanna  
**Subject:** Land Ownership

Ms. Shanna;

I am hereby tendering my bid for the position of Landman for the County of Caldwell.

We spoke on the phone several days ago. Below you will find the bid proposal.

Day Work: \$500.00 per day for a 5 day work week.

Expenses: Any and all copies of instruments needed to prove ownership  
Possibly a motel room for 3 of the 5 work days

My personal experience pertaining to the position:

50 years experience in landwork

Owned and operated Epley Abstract in Martin County, Texas

12 years experience as a Broker for Exxon, Shell, Texaco, etc.

3 years Team lead on Floresville, Texas to Gonzales, Texas

Please let me know if and when a decision is made either way.

Respectfully submitted

John E. Epley  
512-217-8864  
jeepley@yahoo.com

**PYLES★WHATLEY**

---

August 12, 2020

Caldwell County Appraisal District  
Attn: Shanna Ramzinski, R.P.A., C.T.A., R.T.A.  
211 Bufkin Lane  
Lockhart, TX 78644  
Phone: 512-398-5550 Fac: 512-398-5551  
Email: [shannar@caldwellcad.org](mailto:shannar@caldwellcad.org)

Re: Landman Services

Dear Ms. Shanna Ramzinski,

Pursuant to your recent request for Landman Services, Pyles Whatley would like to provide our Real Estate Consultant Services. Our firm provides a full range of appraisal, appraisal review, real estate consultant services for both financial and public/governmental organizations, including but not limited to single family residences, retail, office and industrial developments, both existing and proposed, as well as hospitality and multi-family developments, and subdivision analyses. An equal focus of the firm is right-of-way appraisals and eminent domain proceedings.

Pyles Whatley pledges 100% firsthand involvement and intimate knowledge of all aspects of every property we are assigned. Our comprehensive appraisals reflect all pertinent aspects of each property. Personal attention and accountability allow us a degree of responsiveness to our clients that is unmatched in the industry.

Based upon the information provided by Caldwell County Appraisal District, our firm estimates your Landman Assignment can be completed within 20 business days or 4 weeks from engagement. Our fee for the assignment is \$350 per day including all expenses, yet exclusive of any lodging expenses, if necessary. If obstacles occur, Pyles Whatley will address the concern/issue with the client as soon as it is discovered, thus reducing any further delay to the project.

If we can be of further assistance, or if you have any questions, please do not hesitate to contact our office.

Sincerely,

**PYLES WHATLEY**



**Kreg Hodge**  
**President and Senior Appraiser**

**Shanna**

---

**From:** Admin Assistant <AdminAssist@pyleswhatley.com>  
**Sent:** Wednesday, August 12, 2020 3:28 PM  
**To:** Shanna  
**Subject:** Landman Proposal  
**Attachments:** Caldwell Landman RFQ.pdf

See attached our proposal for the requested Landman Services. Please confirm receipt.  
Thank you for your consideration,

*Jo Gandolfi*

Administrative Assistant  
Pyles Whatley Corporation  
16910 Dallas Parkway #100  
Dallas, Texas 75248

REC'D AUG 12 2020

**Eagle Property Tax Appraisal  
& Consulting, Inc.**

**Property Ownership Research**

**For**

**Caldwell County Appraisal District**

**2020**



To: Caldwell County Appraisal District  
Board of Directors  
P O Box 900  
Lockhart, Texas 78644-0900

From: Eagle Property Tax Appraisal & Consulting, Inc.  
P O Box 866  
Jacksboro, Texas 76458-0866

Date: August 12, 2020

Re: Property Ownership Research Services

Dear Board,

The purpose of this document is to define the agreement between Eagle Property Tax Appraisal & Consulting, Inc. (Eagle) and Caldwell County Appraisal District (District) regarding Property Ownership Research Services for the 2020 tax year.

Eagle will supply two qualified staff members with extensive experience in deed and title research. The District will employ Eagle to supply research for current ownership of real property parcels located in Caldwell County. Each targeted parcel will be researched for one eight hour day, at which time it will be determined whether or not to continue with this parcel to conclusion or end it as a non-economical conclusion. If a parcel is terminated at the end of one day there will be no charge for that time. If the parcel is researched to a defensible ownership conclusion the District will be billed six hundred dollars per day per person with a maximum of twenty-four hundred dollars per parcel. Eagle ensures the following support to the District under this agreement:

**Representation**

- A. Eagle will supply two qualified staff member to represent the District's interests in this research project.
- B. Eagle's work will be directed solely by the Chief Appraiser.

C. Eagle staff will report directly to the Chief Appraiser on a weekly basis with data and work papers on all completed parcels.

D. All services will be performed in accordance with the most recent rules established by the

***Special Provisions***

A. This contract shall be for the 2020 tax year, however it can be terminated with a thirty-day written notice by either party to the other.

B. Eagle will bill the District at the beginning of each month for services rendered in the previous month.

For: Eagle Property Tax Appraisal & Consulting, Inc.

By \_\_\_\_\_  
President  
Gary L. Zeitler, RPA, RTA, CCA

Date \_\_\_\_\_

For: Caldwell CAD

By \_\_\_\_\_  
Board President

Date \_\_\_\_\_

By \_\_\_\_\_  
Board Member

By \_\_\_\_\_  
Board Member

By \_\_\_\_\_  
Board Member

By \_\_\_\_\_  
Board Member

REC'D AUG 11 2020

REC'D AUG 12 2020 *SR*



## Carter Land and Title Services LLC

2684 FM 86  
Luling, Texas 78648  
210-884-1363  
rosinecarter@yahoo.com

### Land Research Proposal Prepared for

Caldwell County Appraisal District

211 Bufkin

Lockhart, TX 78644

# CARTER LAND AND TITLE SERVICES, LLC

Land Research Proposal for Caldwell County Appraisal District

## SCOPE OF WORK

Review and identify properties currently listed as “unknown” on the Caldwell County Appraisal District roles. Identify the current owner of the property and review and examination of the chain of title.

## Introduction

My name is Rosine S. Carter, I am the owner of Carter Land and Title Services, LLC. I have worked as a Petroleum Landman/Right of Way agent for the more than 20 years. I am a TREC licensed Right of Way Agent and I have been involved with all aspects of the “Landman Business”. I am very familiar with Caldwell County as I have lived here and worked projects in this county since 2005. My husband and our family have owned property in Caldwell County since 1875 and we currently live on a ranch where we are the fourth generation to own and operate it. Currently, I am working towards my Real Estate Sales License and plan to become a licensed real estate agent in the near future.

While I have been in a Petroleum Landman for 20+ years, I have developed a close working relationship with several attorneys who specialize in real estate and Oil/Gas matters. Any one of these attorneys can draft deeds and affidavits needed to cure title.

I have attached a copy of my resume for your review.

## PROPOSED WORK

- Identify properties listed as “unknown” on Appraisal District Roles
- Examine Chain of Title for subject properties

264 FM 86 Luling, Texas 78648

- Identify title issues and steps necessary to cure title
- Take Steps to Cure Title
  - This step may involve services of an attorney to prepare documents (*ie , deeds, affidavits*)
- File appropriate documents at the Caldwell County Clerk's Office.
- Report finding to CCAD to update Appraisal District Roles.

## Proposed rate

- \$50.00 per hour for title research, acquisition and filing documents\*
  - \*This rate is a flat rate, Myself and my assistant.
- Notary services (no extra cost)

### *Costs not included above rate (Pass thru costs)*

- Copies of documents from various sources
- Filing fees at Caldwell County Clerk's office
- Attorney fees for drafting documents

## References

Lembo Allen, Attorney, 830-305-5081 [lembo@lazeightranches.com](mailto:lembo@lazeightranches.com)

Donna Emenhiser, Attorney 979-220-3422, [donnae@waltman.com](mailto:donnae@waltman.com)

Craig New, Attorney, 210-710-7565, [cnew@kalerenergy.com](mailto:cnew@kalerenergy.com)

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**Petroleum Landman**

*Seasoned Landman professional seeking opportunity to help company grow.*

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Versatile, exceptionally dedicated leader with expertise in title analysis, research, and organization. Over 20 years of experience in Oil & Gas. Proven ability to track complex chains of title and cure title issues. Excels in contract negotiation. Personable and engaging with the communication skills needed to lead high-performance teams.

**Areas of Expertise**

- Acquisitions
- Coaching & Mentoring
- Technical Communication
- Due Diligence
- Documentation & Reports
- Legal Analysis
- Easements
- Surface & Underground
- Capacity Building

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**Professional Experience**

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Carter Land & Title Services LLC

**Owner / Field Team Lead, 2000 - Present**

Direct field teams in the execution of concurrent projects: HBP, Curative, and Delaware Basin. Analyze chain of ownership and deliver title and mineral ownership reports for drilling operations. Determine mineral and surface ownership through performance of Title abstracting through county records.

**Key Achievements:**

- ♦ Research Chain of title, compile Title runsheets,
- ♦ Negotiated acquisition of right-of-way, easements, and other pipeline interests as Licensed Right of Way agent for key clients.
- ♦ Cured titles on 40,000+ acres of HBP leases in South Texas and the Permian Basins.
- ♦ Manage 2 crews of six petroleum landmen in title research for major oil companies.
- ♦ Performed due diligence on leaseholds and other Oil & Gas properties.
- ♦ Leased over 15,000 acres in East Texas / Hayneville Play.

Bowman Consulting Group

**Right of Way Agent III, August 2019 - Present**

Manage analysis and acquisition of underground and surface property for Utility Clients. Research and assess title documents to ensure property chain of title for utility easements. Develop comprehensive documentation of all activities to ensure effective management and reporting. Coach, manage, and inspire crew of five analysts.

**Key Achievements:**

- ♦ Obtained right of ways and easements from 300+ utility customers within less than four months.
- ♦ Review and Identify Title defects and cure all defects.

Waltman & Grisham Law Firm

*continued...*

**Independent Contractor, 2013 – Present**

Plan and execute extensive title research for Probate inventories, to include oil and gas minerals. Determine exact mineral interest in each property.

**Key Achievements:**

- ◆ Discovered and organized large mineral holding for extensive probate cases.
- ◆ Worked on several Curative title projects.

Robert J. Carter Sr. Trust

**Independent Landman, 2005 - Present**

Research all mineral interest for the Trust across Texas. Contribute to all lease and contract negotiations. Maintain accurate and complete files for mineral interest statewide.

**Key Achievements:**

- ◆ Discovered and organized over 20,000 acres of mineral held by trust and recovered back payments.

Carter Cattle and Crude Company

**Landman, 2005 - 2017**

Managed busy schedule of production projects and ensured all permits were filed on time. Delivered regulatory filings and commitments and negotiated all right of ways and deed requirements.

**Key Achievements:**

- ◆ Created and led Land and Regulatory Department for the company.

**Education**

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**Marketing**

*University of North Texas*

**General Studies**

*Texas State University*

**Training & Development**

- TREC ROW Agent #32936

**Professional & Community Involvement**

Active Member of AAPL, American Association of Petroleum Landmen

Active member IRWA

Past President Seton Associates, Edgar B. Davis Hospital, which raises money for operation of the Car A Van.

Sustaining Member of the Junior League of San Antonio.

Past Community Vice President Junior League of Corpus Christi, Past chair of several major Junior League Fundraisers.

Notary Public Commission Texas and Florida

To : The Board of Directors of the  
Caldwell County Appraisal District

REC'D AUG 12 2020

ATTN: Shanna Ramzinski

RE: Bid with Summary of Qualifications for research on property in Caldwell Co., TX

BY: Tony Miller  
Land Title Research  
P O Box 1088  
Lockhart, TX 78644

\$35.00 per hour to be funded out of a retainer of \$5000.00 (retainer amount is negotiable)

**Qualifications:**

40 years Title Research 35 years in Caldwell County and have lived in Lockhart 40 years

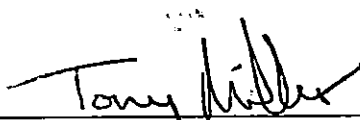
Contacts in Caldwell County with the local Abstract offices using their records & data base. Use is subject to added fees from their office.

Contacts with the Hinkle Surveyors sharing information dealing with land ownership issues and old maps.

Contacts with Oil & Gas Operators allowing access to their information on division owner research allowing cross references on surface and mineral ownership.

The ability to drive to the properties in question and visit with the offset land owners to acquire information dealing with the adjacent property in question. Also to find missing heirs if needed.

Run Sheets will be provided showing Volume and Page with Date of instruments including Grantor and Grantee with a brief document summary. Copies can be provided if needed, there would be an added fee assessed for them which is charged by the County Clerk.

  
\_\_\_\_\_  
Tony Miller                      8-12-20



REC'D AUG 12 2020

*Bid enclosed*

## Shanna

---

**From:** Phelps, Bill <BPhelps@trccompanies.com>  
**Sent:** Wednesday, August 12, 2020 3:49 PM  
**To:** Shanna  
**Cc:** LaSusa, Tyler; Rasmussen, Julie  
**Subject:** TRC - Land Research Response  
**Attachments:** Caldwell County Land Research RFP TRC Response 12Aug2020.pdf

Dear Ms. Ramzinski,

TRC Field Services, Inc. (TRC) is pleased to submit the attached brief summary of qualifications in response to the Caldwell County Appraisal District's (CCAD) request for qualifications pertaining to services needed for land research on property throughout the county which is omitted from the appraisal rolls.

TRC Field Services is a full-service Land and Right of Way services company with over 350 dedicated Land Professionals within the overall TRC company of 5,000+ professionals. We stand ready to mobilize on Day 1 of the project to assist CCAD with the needs of this project. We are confident you will find our qualifications as a fit for this project. Please do not hesitate to reach out to me directly should you have any questions or require anything further in regard to this request.

All the Best,

**William R. Phelps A.F.M., R.W.P**

Market Director  
Director, Land and ROW



16350 Park Ten Place, Suite 101, Houston, TX 77084  
T 314.210.9117    bphelps@trccompanies.com

[LinkedIn](#) | [Twitter](#) | [Blog](#) | [TRCcompanies.com](#)

**Please note that our domain name and email addresses have changed !**



505 East Huntland Dr.  
Suite 250  
Austin, TX 78752

T 512.329.6080  
TRCcompanies.com

August 12, 2020

Caldwell County Appraisal District  
PO Box 900  
Lockhart, TX 78644

Attn: Shanna Ramzinski  
Caldwell County Appraisal District

Re: Land Research on Property Throughout the County Which is Omitted from the Appraisal Rolls

Dear Ms. Ramzinski,

In response to the Board of Directors of the Caldwell County Appraisal District's (CCAD) request for proposals to perform land research on property throughout the County which is omitted from the appraisal rolls, TRC Companies (TRC) is pleased to submit this summary of our qualifications and attached rate sheets under which we will provide the described necessary services.

TRC is a recognized leader in industry and provides a complete platform for all services related to land and project development. TRC provides all land and right-of-way, engineering, consulting, and construction management services to municipal, environmental, energy, and infrastructure clients, including land and right-of-way services. TRC is a national industry leader, and we are capable of addressing all of CCAD's project life cycle, with resources in over 100 office locations throughout the United States, including two Austin, TX office locations. TRC's field of land professionals, engineers, project managers, and support staff are well equipped to fulfill CCAD's needs and requirements for the subject services. Our professionals consistently exceed our customers' expectations, offering a level of problem-solving capabilities that provide creative solutions to the most complex issues.

After a thorough review and understanding of the situation at hand for CCAD, TRC believes that the use of a full-service land company is in the best interest of the County. TRC will self-perform all necessary and potentially necessary work within the scope of this project, including Title and Research, Surveying, GIS and Mapping, together with any and all other Land-Related services needed. TRC will be able to deliver a higher value of services at a lower end-cost to CCAD by integrating all needed services into one unified Project Team without using any subcontractors.

We are confident that our response to this RFP will sufficiently show TRC's capabilities to perform the requested services beyond the County's expectations. I extend to the County my personal commitment to the project and the commitment of the TRC team as CCAD's one-stop Land Services partner.

Sincerely,

TRC Field Services, Inc.

William R. Phelps, R.W.P., A.F.M  
Director of Land, Market Director

Attachments: Rate Sheet

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# 1. TRC Overview & Capabilities

TRC Companies, Inc., ranked #19 on ENR's list of Top 500 Design Firms in United States, is a privately owned, full-service engineering and environmental firm with more than 40 years of experience in providing strategic and effective engineering and environmental consulting services for transportation, the energy sector, and other utility and industry clients through our nearly 5,000 staff working out of our 136 offices nationwide.

Our corporate structure allows TRC to assemble project teams with the best possible mix of technical expertise and geographic proximity to our clients' locations. Our project approach includes high levels of client collaboration, intense strategy development, goal setting, and agent tracking, all aimed at understanding our clients' needs and providing smart, innovative, integrated solutions to help reduce business risks, in order to satisfy project objectives and achieve our clients' goals.

TRC's Field Services group is comprised of 350 field services professionals spanning multiple industries and expertise producing a dynamic and diverse project delivery team.

As a full-service provider of Land / Right-of-Way services, we understand the importance of producing a complete work product that is a real solution and recognize this as a key value to project success. Our professionals solve even the most difficult problems with proven processes, committed agents, and state of the art technologies.

## Right-of-Way Services

- Title Searches
- Site Assessments and Acquisition
- Payment/Just Compensation
- ROW and Workspace Acquisition
- Records Research
- Line List Development
- Relocation
- Feasibility & Conceptual Studies
- Due Diligence
- Public Outreach and Stakeholder Engagement
- Survey Permission and Permit Crossings
- Database Management
- Damage Settlement
- Negotiation

In addition to the above services, TRC Field Services also has an in-house full-service Land Surveying team with licensed Professional Land Surveyors in Texas, as well as most U.S. states. These survey professionals utilize industry best practices and technologies to provide Land Surveying services to countless clients throughout the United States and are fully supported by Survey Managers and Engineers who are experts in survey, mapping, and the associated Federal, State, and Local regulations.

TRC stands ready to mobilize the above services and any other service-needs that may arise during the course of the project. The TRC difference is our ability to engage all of our services on Day 1 saving money compared to other companies needing weeks to stand up services.



## 2. Project Plan

### 2.1. Project Overview

CCAD, like many counties and municipalities across the country has Parcels and properties that are undefined and not on the tax-rolls due to a variety of reasons. Typically, TRC finds properties not listed on the tax rolls due a variety of reasons. Often, deeds and other legal documents are not recorded properly. Simple errors in surveys and mapping add to the list and often eliminate, create or blur parcel boundaries creating unsolved and unexplainable abnormalities. CCAD desires to determine the root cause of the issue with each parcel, identify the ownership and evaluate the legal curative for each tract.

CCAD has 30 to 40 properties in the Luling and Lockhart (county seat) areas which are not on the current tax rolls. Most are reported as vacant lots, have no or insufficient legal descriptions and no record title holder is identifiable. CCAD is requesting services from a knowledgeable firm that can identify the boundary of each parcel as used, identify the legal boundary, and identify the current owners by running title back to patent (if necessary). Finally, CCAD is requesting owner information sufficient to provide proper legal notice from the County on issues related to legal proceedings and taxation issues associated with the property.

TRC has completed this type work for many years in most states. When working for a municipality or building an infrastructure project, TRC has a process in place to determine the root cause of the problem and cure the issues for the tract.

### 2.2. TRC Project Approach

1. TRC will review each property and plot the boundary.
2. The boundary, as known, will be overlaid into existing Town/County plats and any subdivision plans that exist.
3. A highly trained title professional will research the County record going back to patten before bringing the title forward to determine the last land-owner of record.
4. TRC will then use one of several platforms (at no cost to CCAD) to locate relatives or remaindermen that have an interest in this property.
5. In instances where surveys disagree or parcel boundaries are in error, TRC will provide CCAD with the suggested correct boundary information and justification for this boundary. TRC will provide this information to CCAD in a shapefile or other desired format.

### 2.3. Project Details

This project has several unknowns which will affect pricing. TRC recognizes each parcel and area will have common but uncertain issues that must be identified. To provide the most comprehensive and complete pricing model possible, TRC proposes the following:

1. Jointly, the parties will select a single parcel and complete all task listed above for a price not to exceed of \$2,500.
2. Upon delivery of the parcel report, TRC and CCAD will meet to determine the cost-value relationship of the work delivered. This will allow CCAD to establish thresholds for the balance of properties. These thresholds would not only include pricing but identification of value-added items for each property.
3. After this meeting and CCAD identifying the level of effort expected for each site, TRC will provide a per parcel quote on a defined scope or work off the attached rates on a time and material basis. TRC will be willing provide CCAD with a not to exceed quote on a per tract basis.



TRC believes this approach provides CCAD with C with maximum flexibility add offer an opportunity to refine all value-added activities associated with each parcel.

### 3. Appendix

#### 3.1. Attachment A: Rate Sheet

Job Category	Hourly Rate	Day Rate
ROW/Title Supervisor		\$550
Sr. Title Agent		\$480
Title Agent		\$451
RPLS	\$110	
Survey/Data Tech	\$75	



**CALDWELL COUNTY APPRAISAL DISTRICT  
2021 APPRAISAL BUDGET (PROPOSED )**

	<b>PERSONNEL</b>	<b>2020</b>	<b>2021</b>
70101	Chief Appraiser	78,485.00	82,411.00
70102	Deputy Chief Appraiser	45,175.00	47,435.00
70103	GIS Mapper/System Mgr/IT	63,507.00	66,685.00
70105	Field Appraiser II	33,885.00	33,280.00
70106	Senior Appraiser I	43,832.00	46,025.00
70107	Senior Appraiser II	41,597.00	35,580.00
70108	Field Appraiser I	34,568.00	33,280.00
70109	Field Appraiser III	32,493.00	34,119.00
70111	Administrative Asst.	50,030.00	52,533.00
70112	Data entry technician	30,115.00	31,622.00
70113	Support data entry	36,766.00	38,605.00
70114	Appraisal Clerk	0.00	25,000.00
70120	Field Appraiser IV	39,734.00	41,721.00
70130	Part time	0.00	3,000.00
70135	Payroll contingency	2,000.00	2,000.00
70136	Annual Longevity Compensation	0.00	6,000.00
	<b>SUBTOTAL</b>	<b>532,187.00</b>	<b>579,296.00</b>
	<b>DEDUCTIONS/BENEFITS</b>		
71000	Payroll Tax	\$45,000.00	\$50,500.00
71002	Retirement/ employer	\$51,000.00	\$55,000.00
71004	Health benefits	\$107,400.00	\$116,500.00
71005	Worker comp	\$2,750.00	\$3,100.00
71006	Unemployment	\$4,000.00	\$4,000.00
	<b>SUBTOTAL</b>	<b>210,150.00</b>	<b>229,100.00</b>
	<b>SERVICES</b>		
72000	Appr Engineers	\$42,000.00	\$64,000.00
72001	Appr Review Bd	\$24,000.00	\$37,500.00
72002	Audit	\$6,200.00	\$6,300.00
72003	Board of Directors	\$1,790.00	\$1,790.00
72004	Data Processing Services	\$51,400.00	\$56,050.00
72007	Janitorial service	\$6,200.00	\$6,200.00
72008	Legal	\$27,000.00	\$27,000.00
	<b>SUBTOTAL</b>	<b>158,590.00</b>	<b>198,840.00</b>

	<b>GENERAL EXPENSES</b>	<b>2020</b>	<b>2021</b>
72500	Bond- Chief - Notary	\$250.00	\$250.00
72501	Membership / Dues	\$3,800.00	\$3,800.00
72502	Computer supplies	\$7,000.00	\$7,000.00
72504	Education & fees	\$8,000.00	\$9,700.00
72505	Insurance - liability	\$1,750.00	\$1,900.00
72506	Insurance Building/ Equip - contents	\$4,100.00	\$4,500.00
72507	Legal notices/printing	\$15,200.00	\$17,100.00
72508	Maint - hardware/equip	\$8,700.00	\$8,700.00
72509	Maint -office equip	\$1,000.00	\$1,000.00
72510	Mileage & travel	\$5,000.00	\$5,500.00
72511	Office supplies	\$7,800.00	\$8,500.00
72512	Postage	\$26,200.00	\$27,200.00
72513	Postage meter/Box rental	\$4,425.00	\$4,425.00
72514	Publications Subcrip & books	\$6,860.00	\$6,860.00
72515	Rental - copier	\$2,650.00	\$2,650.00
72516	Electricity	\$9,000.00	\$9,000.00
72517	Telephone	\$13,400.00	\$14,000.00
72518	Water & sewer	\$3,500.00	\$3,500.00
72519	Mortgage	\$54,520.00	\$57,300.00
72520	Building Maint	\$5,000.00	\$5,000.00
72523	Fuel - Vehicle	\$7,200.00	\$7,200.00
72524	Maint - Vehicle	\$6,200.00	\$12,500.00
72525	Ins - vehicle	\$2,400.00	\$2,600.00
	<b>SUBTOTAL</b>	<b>203,955.00</b>	<b>220,185.00</b>
	<b>CAPITAL INVESTMENTS</b>		
79000	Office equipment	\$5,000.00	\$5,000.00
79001	Computer Equipment	\$28,500.00	\$29,000.00
79003	Vehicle	\$25,000.00	\$0.00
	<b>SUBTOTAL</b>	<b>58,500.00</b>	<b>34,000.00</b>
	<b>CONTINGENCY</b>		
79002	Building Expense	\$5,000.00	\$5,000.00
79990	Contingency	\$10,000.00	\$10,000.00
	<b>SUBTOTAL</b>	<b>15,000.00</b>	<b>15,000.00</b>
	<b>TOTAL EXPENSES</b>	<b>1,178,382.00</b>	<b>1,276,421.00</b>
<b>GCA</b>	<b>911 EXPENSES PAID BY COUNTY</b>	<b>27,800.00</b>	<b>0.00</b>
		<b>1,150,582.00</b>	<b>1,276,421.00</b>

**CALDWELL COUNTY APPRAISAL DISTRICT  
2021 COLLECTION BUDGET (PROPOSED )**

	<b>PERSONNEL</b>	<b>2020</b>	<b>2021</b>
90-70120	Deputy Tax Collector	53,021.00	55,672.00
90-70121	Collections Specialist	35,200.00	36,960.00
90-70126	Public Assist	27,316.00	28,681.00
90-70130	Part time	0.00	0.00
90-70135	Payroll contingency	0.00	1,500.00
90-70136	Annual Longevity Compensation	0.00	2,000.00
	<b>SUBTOTAL</b>	<b>115,537.00</b>	<b>124,813.00</b>
	<b>DEDUCTIONS/BENEFITS</b>		
90-71000	Payroll Tax	9,250.00	9,800.00
90-71002	Retirement/ employer	11,500.00	12,000.00
90-71004	Health benefits	27,700.00	27,700.00
90-71005	Worker comp	875.00	950.00
90-71006	Unemployment	3,375.00	3,375.00
	<b>SUBTOTAL</b>	<b>52,700.00</b>	<b>53,825.00</b>
	<b>SERVICES</b>		
90-72002	Audit	1,800.00	1,900.00
90-72004	Data Processing Services	19,450.00	20,500.00
90-72005	County employee contract	17,500.00	18,000.00
90-72007	Janitorial service	2,500.00	2,500.00
90-72008	Legal	2,500.00	2,500.00
	<b>SUBTOTAL</b>	<b>43,750.00</b>	<b>45,400.00</b>
	<b>GENERAL EXPENSES</b>		
90-72500	Bond- Chief - Notary	200.00	200.00
90-72501	Membership / Dues	700.00	700.00
90-72502	Computer supplies	2,300.00	2,300.00
90-72504	Education & fees	3,400.00	4,100.00
90-72505	Insurance - liability	850.00	1,000.00
90-72506	Insurance Building/ Equip - contents	1,300.00	1,700.00
90-72507	Legal notices/printing	10,300.00	11,500.00
90-72508	Maint - hardware/equip	2,600.00	2,600.00
90-72509	Maint -office equip	1,500.00	1,500.00
90-72510	Mileage & travel	2,800.00	3,100.00
90-72511	Office supplies	3,200.00	3,500.00
90-72512	Postage	15,000.00	15,300.00
90-72513	Postage meter/Box rental	1,400.00	1,400.00
90-72515	Rental - copier	1,800.00	1,800.00
90-72516	Electricity	3,000.00	3,000.00
90-72517	Telephone	3,400.00	3,600.00
90-72518	Water & sewer	1,200.00	1,200.00
90-72519	Mortgage	16,500.00	17,200.00
90-72520	Building Maint	2,100.00	2,300.00
	<b>SUBTOTAL</b>	<b>73,550.00</b>	<b>78,000.00</b>
	<b>CAPITAL INVESTMENTS</b>		
90-79000	Office equipment	2,000.00	2,000.00
90-79001	Computer Equipment	9,200.00	11,300.00
	<b>SUBTOTAL</b>	<b>11,200.00</b>	<b>13,300.00</b>
	<b>CONTINGENCY</b>		
90-79002	Building Expense	2,200.00	2,200.00
90-79990	Contingency	3,000.00	3,000.00
	<b>SUBTOTAL</b>	<b>5,200.00</b>	<b>5,200.00</b>
	<b>TOTAL EXPENSES</b>	<b>301,937.00</b>	<b>320,538.00</b>

**PROPOSED SALARY ADJUSTMENTS BY PERCENTAGE**

	<b>PERSONNEL</b>	<b>2020</b>	<b>2021</b>	
70101	Chief Appraiser	78,485.00	82,411.00	5.00%
70102	Deputy Chief Appraiser	45,175.00	47,435.00	5.00%
70103	GIS Mapper/System Mgr/IT	63,507.00	66,685.00	5.00%
70105	Field Appraiser II	33,885.00	33,280.00	-1.79%
70106	Senior Appraiser I	43,832.00	46,025.00	5.00%
70107	Senior Appraiser II	41,597.00	35,580.00	-14.46%
70108	Field Appraiser I	34,568.00	33,280.00	-3.73%
70109	Field Appraiser III	32,493.00	34,119.00	5.00%
70111	Administrative Asst.	50,030.00	52,533.00	5.00%
70112	Data entry technician	30,115.00	31,622.00	5.00%
70113	Support data entry	36,766.00	38,605.00	5.00%
70114	Appraisal Clerk	0.00	25,000.00	100.00%
70120	Field Appraiser IV	39,734.00	41,721.00	5.00%
70130	Part time	0.00	3,000.00	100.00%
70135	Payroll contingency	2,000.00	2,000.00	0.00%
70136	Annual Longevity Compensation	0.00	6,000.00	100.00%
	<b>SUBTOTAL</b>	<b>532,187.00</b>	<b>579,296.00</b>	<b>8.85%</b>

	<b>PERSONNEL</b>	<b>2020</b>	<b>2021</b>	
70101	Chief Appraiser	78,485.00	81,624.40	4.00%
70102	Deputy Chief Appraiser	45,175.00	46,982.00	4.00%
70103	GIS Mapper/System Mgr/IT	63,507.00	66,047.28	4.00%
70105	Field Appraiser II	33,885.00	32,970.00	-2.70%
70106	Senior Appraiser I	43,832.00	45,585.28	4.00%
70107	Senior Appraiser II	41,597.00	35,240.00	-15.28%
70108	Field Appraiser I	34,568.00	32,970.00	-4.62%
70109	Field Appraiser III	32,493.00	33,792.72	4.00%
70111	Administrative Asst.	50,030.00	52,031.20	4.00%
70112	Data entry technician	30,115.00	31,319.60	4.00%
70113	Support data entry	36,766.00	38,236.64	4.00%
70114	Appraisal Clerk	0.00	25,000.00	100.00%
70120	Field Appraiser IV	39,734.00	41,323.36	4.00%
70130	Part time	0.00	3,000.00	100.00%
70135	Payroll contingency	2,000.00	2,000.00	0.00%
70136	Annual Longevity Compensation	0.00	6,000.00	100.00%
	<b>SUBTOTAL</b>	<b>532,187.00</b>	<b>574,122.48</b>	<b>7.88%</b>

	<b>PERSONNEL</b>	<b>2020</b>	<b>2021</b>	
70101	Chief Appraiser	78,485.00	80,839.55	3.00%
70102	Deputy Chief Appraiser	45,175.00	46,530.25	3.00%
70103	GIS Mapper/System Mgr/IT	63,507.00	65,412.21	3.00%
70105	Field Appraiser II	33,885.00	32,651.00	-3.64%
70106	Senior Appraiser I	43,832.00	45,146.96	3.00%
70107	Senior Appraiser II	41,597.00	34,902.00	-16.09%
70108	Field Appraiser I	34,568.00	32,651.00	-5.55%
70109	Field Appraiser III	32,493.00	33,467.79	3.00%
70111	Administrative Asst.	50,030.00	51,530.90	3.00%
70112	Data entry technician	30,115.00	31,018.45	3.00%
70113	Support data entry	36,766.00	37,868.98	3.00%
70114	Appraisal Clerk	0.00	25,000.00	100.00%
70120	Field Appraiser IV	39,734.00	40,926.02	3.00%
70130	Part time	0.00	3,000.00	100.00%
70135	Payroll contingency	2,000.00	2,000.00	0.00%
70136	Annual Longevity Compensation	0.00	6,000.00	100.00%
	<b>SUBTOTAL</b>	<b>532,187.00</b>	<b>568,945.11</b>	<b>6.91%</b>

## PROPOSED SALARY ADJUSTMENTS BY PERCENTAGE

	PERSONNEL	2020	2021		
90-70120	Deputy Tax Collector	53,021.00	55,672.00	2,651.00	5.00%
90-70121	Collections Specialist	35,200.00	36,960.00	1,760.00	5.00%
90-70126	Public Assist	27,316.00	28,681.00	1,365.00	5.00%
90-70130	Part time	0.00	0.00	0.00	0.00%
90-70135	Payroll contingency	0.00	2,000.00	2,000.00	100.00%
90-70136	Annual Longevity Compensation	0.00	1,500.00	1,500.00	100.00%
	<b>SUBTOTAL</b>	<b>115,537.00</b>	<b>124,813.00</b>	<b>9,276.00</b>	<b>8.03%</b>

	PERSONNEL	2020	2021		
90-70120	Deputy Tax Collector	53,021.00	55,141.84	2,120.84	4.00%
90-70121	Collections Specialist	35,200.00	36,608.00	1,408.00	4.00%
90-70126	Public Assist	27,316.00	28,408.64	1,092.64	4.00%
90-70130	Part time	0.00	0.00	0.00	0.00%
90-70135	Payroll contingency	0.00	2,000.00	2,000.00	100.00%
90-70136	Annual Longevity Compensation	0.00	1,500.00	1,500.00	100.00%
	<b>SUBTOTAL</b>	<b>115,537.00</b>	<b>122,158.48</b>	<b>6,621.48</b>	<b>5.73%</b>

	PERSONNEL	2020	2021		
90-70120	Deputy Tax Collector	53,021.00	54,611.63	1,590.63	3.00%
90-70121	Collections Specialist	35,200.00	36,256.00	1,056.00	3.00%
90-70126	Public Assist	27,316.00	28,135.48	819.48	3.00%
90-70130	Part time	0.00	0.00	0.00	0.00%
90-70135	Payroll contingency	0.00	2,000.00	2,000.00	100.00%
90-70136	Annual Longevity Compensation	0.00	1,500.00	1,500.00	100.00%
	<b>SUBTOTAL</b>	<b>115,537.00</b>	<b>121,003.11</b>	<b>5,466.11</b>	<b>4.73%</b>

# MISSION STATEMENT

**The mission of the Caldwell County Appraisal District is to discover, list and appraise all property located within the boundaries of the district in an accurate, ethical and impartial manner in an effort to estimate the market value of each property and achieve uniformity and equity between classes of properties. This will be accomplished by maintaining the highest standards in appraisal practices and law, guided by the goals of providing quality service to the taxpayers and taxing entities and by developing personnel who are professional and knowledgeable.**