



***HARRIS COUNTY  
APPRAISAL DISTRICT  
HARRIS COUNTY  
HOUSTON, TEXAS***

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**Division  
2017 Budget  
Summaries**

**June 2016**

***DIVISION BUDGET SUMMARIES***

***PROPOSED 2017 BUDGET***

for the

**HARRIS COUNTY APPRAISAL DISTRICT**

Board of Directors Budget Workshop  
June 15, 2016

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# Board of Directors & Appraisal Review Board - 1001

## 2017 Budget Briefing

### Divisions for budget items related to the Board of Directors and the Appraisal Review Board

#### Board of Directors

- Professional services for legal costs
- Post-ARB appeal costs
- Taxpayer Liaison Officer (.5 FTE)

#### Appraisal Review Board

- ARB per diem & associated taxes
- ARB Training



### 2017 Division Budget

Salaries, Wages & Related	\$2,730,000
Employee Benefits	\$257,445
Office & Field Operations	\$35,800
Computer Operations	\$0
Professional Services	\$11,193,967
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$14,217,212</b>

### Proposed Changes

None	\$0

2015 Performance measures	
Monthly board of directors' meetings	12
Post-ARB lawsuits	4,080
Post-ARB arbitrations	1,209
Total protests	359,704
ARB protest hearings	153,294
Cost per hearing	\$18.11
Cost per parcel	\$9.00

# Office of the Chief Appraiser - 5001

## 2017 Budget Briefing

Roland Altinger, Chief Appraiser  
 Jason Cunningham, Deputy Chief Appraiser

**Responsible for administration of the appraisal district and support of the board of directors**

- Direct the 2<sup>nd</sup> largest assessment entity in the United States
- 650 employees
- Responsibly oversee and manage \$81.4 million budget
- Annual reappraisal of 1.75 million parcels of property covering 1,778 square miles of land
- Annual caseload approximating 360,000 protests
- Produce timely and correct appraisal roll for over 500 taxing entities
- 6 total employees

**2017 Division Budget**

Salaries, Wages & Related	\$483,547
Employee Benefits	\$152,060
Office & Field Operations	\$60,000
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$695,607</b>

**Proposed Changes**

Share of salaries decrease	\$74,577
Increase office & field operations	\$10,400



<b>2015 Performance Measures</b>
Certify timely
Timely present budget to Board of Directors
Implement and continue development of management training program
Continue development on succession planning initiatives
Passed 2015 Property Value Study
Finalize implementation of bills from 84 <sup>th</sup> legislative session
Prepare for 85 <sup>th</sup> legislative session
Maintain relationships with over 500 jurisdictional representatives
Projected 2015 Population of Harris County: 4,538,028
Division cost per parcel: \$0.40

# Professional Education & Development Division - 5002

## 2017 Budget Briefing

Theresa Delbasto, Manager

**Responsible for education and professional development for all district employees.**

- Registration, certification, and renewal of appraisal licenses
- Registration, renewal, and certification for professional designations, licenses, certifications, and membership groups
- Managing and delivering top-class, in-house professional and technical education programs
- Prepare and coordinate HCAD annual education schedule and materials
- Enroll students in core appraisal courses – update in Halogen software
- Coordinate IAAO appraisal courses, workshops, and webinars
- Schedule Level III & IV exams
- Report TDLR core appraisal course results & continuing education credits
- Score exams and prepare certificates
- Manage career ladder program
- Coordinate CDP completion payments
- Update HCAD Appraiser Career Guidebook
- 4 total staff

**2017 Division Budget**

Salaries, Wages & Related	\$255,890
Employee Benefits	\$90,368
Office & Field Operations	\$16,725
Computer Operations	\$0
Professional Services	\$15,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Division Total</b>	<b>\$377,983</b>

**Proposed Changes**

<b>Increase Office &amp; Field Ops</b>	<b>\$1,500</b>
<b>Increase Professional Services</b>	<b>\$15,000</b>



2015 performance measures	
TDLR Registrations	300
PSI Online RPA Exam Registrations	45
Core Curriculum Appraisal Courses held	38
CTA Courses held	2
Students enrolled in Appraisal Courses	1,650
Appraisal Course exams scored	1,550
Course Certificates of Completion prepared & distributed	1,650
Instructor/Course Evaluations	1,520
IAAO Webinars scheduled	8
Prepared and processed PAF's for Career Ladder Promotions (24 for Appraiser III, 3 for Appraiser II and 12 for Appraiser I 3% Increase for meeting 1 year service and TDLR requirements)	50
Online reporting to TDLR of core course completions & CE reporting	1,650
Division cost per parcel	\$0.22

# Communications Division - 5003

## 2017 Budget Briefing

Jack Barnett, Chief Communications Officer

**Responsible for**

- Internal and external communications, including office of the assistant taxpayer liaison
- Community relations outreach and Speakers Bureau
- Annual report
- Photography, newsletters, new releases, and media responses
- Receive, research, and respond to property owner calls and emails
- Script and produce videos for public education and employee training
- Revise forms and letters to comply with Tax Code changes
- Update web site
- Respond to media questions and interview requests
  
- 7 total staff

**2017 Division Budget**

Salaries, Wages & Related	\$493,829
Employee Benefits	\$165,779
Office & Field Operations	\$13,100
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$672,708</b>

**Proposed Changes**

<b>None</b>	<b>\$0</b>



**2015 Performance Measures**

Property owner email responses	22,156
Property owner letter responses	217
Property owner phone call responses	493
Videos updated and produced	12
Total video loads	34,800
Form updates	108
Community Relations/Presentations	50
News media interviews	21
Newsletters	4
News releases	12
Web site updates	56
Division cost per parcel	\$0.38



# Legal Services Division - 5004

## 2017 Budget Briefing

L. Susan Herrera, Chief Legal Officer

### Responsible for legal services

- Represent the district at trials, hearings, mediations, appeals, depositions, settlement conferences, ARB hearings, and SOAH
- Defend between 2,000 and 3,500 lawsuits annually
- Work directly with review appraisal division to resolve lawsuits
- Provide in-house legal services to the district
- Respond to open records requests
  
- **14 Total Positions**
  - 9 Lawyers
  - 5 Support Staff

### 2017 Division Budget

Salaries, Wages & Related	\$1,002,643
Employee Benefits	\$321,708
Office & Field Operations	\$33,165
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,357,516</b>

### Proposed Changes:

Share of wages decrease	\$61,794
Decrease office & field operations	\$3,635



### 2015 Performance Measures

#### Lawsuits Pending as of 1/1/2015

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
3,199	12,884	\$10,706,762,645

#### Added During 2015

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
2,611	3,879	\$8,819,984,162

#### Pending as of 12/31/2015

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
3,699	5,610	\$11,400,399,198

#### Total Resolved During 2015

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
1,893	2,801	\$5,916,178,613

#### Non-Suits/Dismissals in 2015

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
131	3,794	\$800,232,952

#### Trials:

<u>Cases</u>	<u>Accounts</u>	<u>Reduction</u>
3	7	\$2,668,682

Average reduction 10.47%

Division cost per parcel \$.77

# Human Resources Division - 5005

## 2017 Budget Briefing

Sally Vardy, Chief Human Relations Officer

**Responsible for strategic and functional responsibilities for all HR disciplines, including, but not limited to:**

- Recruitment and Selection
- Onboarding
- Performance Management
- Employee Engagement
- Legal Compliance
- Policy Development & Governance
- Leadership Development
- Management and Support Staff Training
- Career Management
- Intra-Organizational Communication
- Risk Management
- Organizational Assessment
- Total Rewards
- Dispute Resolution
- Employee Relations
- Human Resources Information Systems
- Data Analytics
- 650 - Staff-district wide
- 8 HR Staff

### 2017 Division Budget

Salaries, Wages & Related	\$612,029
Employee Benefits	\$197,341
Office & Field Operations	\$44,142
Computer Operations	\$0
Professional Services	\$22,665
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$876,177</b>

### Proposed Changes

Share of Professional Services increase	\$15,165
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2015 Performance Measures	
Criminal & Work History Verifications	1,467
Applications Processed	3,448
ID Badges	1,617
Halogen Evaluations Reviewed	637
Interviews Conducted	893
Kronos Changes	916
Applicant Skills Assessment	322
Unemployment Claims, Workers' Comp., TWC Appeals, FMLA	103
New Job Postings	235
ARB Applications Processed	196
New Hire Orientation	89
ARB onboarding	63
HR Training Sessions	54
Cost per parcel	\$0.50

# Appraisal Operations Division - 5006

## 2017 Budget Briefing

April Holcomb, Associate Chief Appraiser

### Responsible for

- Using appraisal expertise to deliver credible certified estimates
- Statistical analysis of valuation processes
- Ad hoc queries to provide data and predictive analysis in support of information requests
- Act as liaison between Appraisal and Information Technology to support efficient and effective process enhancements
- Utilize appraisal expertise to evaluate CAMA technologies that promote credible reappraisals
- Conduct ratio studies to validate valuation performance and test cost schedules
- **7 Total Staff:**
  - 7 Appraisers

### 2017 Division Budget

Salaries, Wages & Related	\$578,147
Employee Benefits	\$179,719
Office & Field Operations	\$231,074
Computer Operations	\$0
Professional Services	\$32,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,020,940</b>

### Proposed Changes

Increase office & field operations	\$28,724

**SQL JOINS**

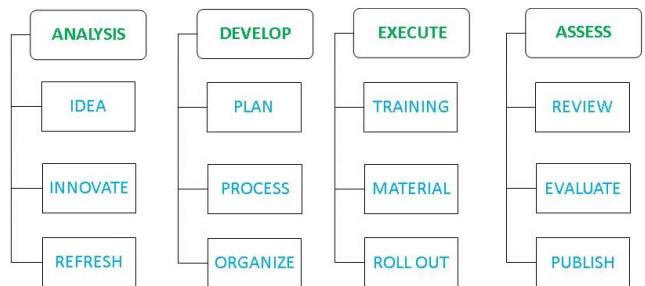
SELECT \* FROM Table A LEFT JOIN Table B ON A.Key = B.Key

SELECT \* FROM Table A RIGHT JOIN Table B ON A.Key = B.Key

SELECT \* FROM Table A INNER JOIN Table B ON A.Key = B.Key

SELECT \* FROM Table A FULL OUTER JOIN Table B ON A.Key = B.Key

### STRATEGY & PLANNING



2015 Performance Measures	
Assist in timely delivery of certified estimates	63
Develop ISD ratio studies: <ul style="list-style-type: none"> <li>○ commercial</li> <li>○ residential</li> </ul>	52 78
Develop and submit specifications for appraisal system change requests	33
Monitor and reply to iSettle emails	1,262
Division cost per parcel	\$0.58

# Business & Industrial Property Division - 5007

## 2017 Budget Briefing

Charles Stone, Associate Chief Appraiser

**Responsible for appraisal of personal property, industrial property, minerals, utilities, and inventory.**

Appraisal of 389,670 total parcels

- 6,071 industrial real property accounts
- 15,243 industrial personal property accounts
- 9,509 mineral and utility accounts
- 169,961 commercial personal property accounts
- 185,661 multi-location parcels
- 3,225 special inventory accounts

**Processing**

- 124,884 renditions
- 1,066,898 multi-location items
- 309,662 document scanning
- 124,618 document indexing
- 15,216 transportation pool items
- 5,786 exemptions

**• 88 Total Employees:**

- 62 Appraisers
- 26 Non-appraisal staff

**2017 Division Budget**

Salaries, Wages & Related	\$4,471,469
Employee Benefits	\$1,790,517
Office & Field Operations	\$129,280
Computer Operations	\$0
Professional Services	\$1,506,295
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$7,897,561</b>

**Proposed Changes**

Increase in office & field operations	\$21,700
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Total market value of property valued by this division in 2015: \$103,589,009,196

Market value change from 2014: \$2,888,552,859 (an increase of 2.87%)

2015 Performance Measures	
Properties inspected	55,349
Protests resolved	20,025
Penalty waiver requests reviewed	16,206
New tangible accounts created	13,946
Corrections processed	9,871
Dealer inventory declarations	2,790
Parcels per appraiser	6,285
Cost per parcel	\$4.49

## Commercial Valuation Division - 5008

### 2017 Budget Briefing

<p>Erika Nettles, Associate Chief Appraiser</p> <p><b>Responsible for appraisal of commercial property, land valuation, and agricultural valuation.</b></p> <ul style="list-style-type: none"> <li>• 106,218 total parcels</li> <li>• 259,034 acres of unimproved commercial land</li> <li>• 42,256 acres of agricultural and specially appraised land</li> <li>• 66,905 improved commercial properties</li> <li>• 39,313 vacant land parcels</li>   <li>• <b>78 Total Staff</b> <ul style="list-style-type: none"> <li>○ 62 Appraisers</li> <li>○ 16 Non-appraisal staff</li> </ul> </li> </ul>	 <p>Total market value of property both at noticed date and unnoticed date in 2016: \$165,831,674,445</p> <p>Total market value as of certification in 2015: \$137,408,746,897</p> <p>Market value change from 2015: Increase of \$28,422,927,548 or +20.68%</p>																																						
<p><b>2017 Division Budget</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Salaries, Wages &amp; Related</td> <td style="text-align: right;">\$4,149,274</td> </tr> <tr> <td>Employee Benefits</td> <td style="text-align: right;">\$1,623,497</td> </tr> <tr> <td>Office &amp; Field Operations</td> <td style="text-align: right;">\$211,481</td> </tr> <tr> <td>Computer Operations</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Professional Services</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Rent, Utilities &amp; Maintenance</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Capital Expenditures</td> <td style="text-align: right;">0</td> </tr> <tr> <td><b>Total</b></td> <td style="text-align: right;"><b>\$5,984,252</b></td> </tr> </table>	Salaries, Wages & Related	\$4,149,274	Employee Benefits	\$1,623,497	Office & Field Operations	\$211,481	Computer Operations	0	Professional Services	0	Rent, Utilities & Maintenance	0	Capital Expenditures	0	<b>Total</b>	<b>\$5,984,252</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: left;">2015 Performance Measures</th> </tr> </thead> <tbody> <tr> <td>Total properties inspected</td> <td style="text-align: right;">12,484</td> </tr> <tr> <td>Properties revalued</td> <td style="text-align: right;">82,675</td> </tr> <tr> <td>New construction added</td> <td style="text-align: right;">1,828</td> </tr> <tr> <td>Miles driven</td> <td style="text-align: right;">28,075</td> </tr> <tr> <td>Protests resolved</td> <td style="text-align: right;">55,550</td> </tr> <tr> <td>Sales processing &amp; verification</td> <td style="text-align: right;">5,869</td> </tr> <tr> <td>New subdivision files</td> <td style="text-align: right;">1,520</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Parcels per appraiser</td> <td style="text-align: right;">1,712</td> </tr> <tr> <td>Cost per parcel</td> <td style="text-align: right;">\$3.40</td> </tr> </tbody> </table>	2015 Performance Measures		Total properties inspected	12,484	Properties revalued	82,675	New construction added	1,828	Miles driven	28,075	Protests resolved	55,550	Sales processing & verification	5,869	New subdivision files	1,520			Parcels per appraiser	1,712	Cost per parcel	\$3.40
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<p><b>Proposed Changes</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Increase office &amp; field operations</td> <td style="text-align: right;">\$14,308</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </table>	Increase office & field operations	\$14,308																																					
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# Residential Property Division - 5009

## 2017 Budget Briefing

Steve Atchison, Associate Chief Appraiser

**Responsible for appraisal of all single-family residential properties in Harris County.**

- 1,102,721 improved residential properties
- 108,052 vacant residential properties
- Area of responsibility includes 233,599 improved acres and 39,868 vacant acres
  
- 149 Total Employees
  - 137 Appraisers
  - 12 Non-appraisal staff

### 2017 Division Budget

Salaries, Wages & Related	\$7,482,320
Employee Benefits	\$3,027,914
Office & Field Operations	\$717,512
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$11,227,746</b>

### Proposed Changes

Increase in office and field operation	\$6,404
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Total market value of property both noticed and unnoticed date in 2016:

\$255,000,649,621

Total market value of property as of certification in 2015:

\$237,649,484,225

Market value change for 2015:

\$17,351,165,396 (an increase of 7.3%)

2015 Performance Measures	
Total properties inspected	176,839
New construction inspected	48,792
Sales verified	4,453
Properties updated	1,042,399
New subdivisions	855
Jurisdiction estimates	176
Protests resolved	296,852
Splits & combos	7,648
Parcels per appraiser	8,650
Cost per parcel	\$6.39

## Audit Support Services Division - 5010

### 2017 Budget Briefing

Robert Brown, Director

#### Responsible for

- Conducting investigations into possible fraud, criminal, civil, and administrative matters
- Internal auditing
- Discovery and detection of omitted properties
- Facilitate the biennial State Comptroller's Methods and Assistance Program (MAP) Review of the CAD
- Evaluate CAD compliance of Property Tax Code, particularly the implementation of legislative updates
- Analyze and review appraisal data, reports, evidentiary data and procedures for accuracy, efficiency, deficiencies, duplication and fraud
- Emergency response team assistance, out of business permits, & review of major special projects (OCA)
  
- 10 Total Staff

#### 2017 Division Budget

Salaries, Wages & Related	\$761,590
Employee Benefits	\$246,106
Office & Field Operations	\$61,590
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,069,286</b>

#### Proposed Changes

Share of wages increase	\$159,584
Increase in office & field operations	\$420



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2015 performance measures	
Internal controls review and disaster recovery plan review	3
Special audit (includes processing 21-day property owner request letters for additional information, reviewing Freeport exemptions, and discovering omitted property)	3,059
Dealer inventory administration (motor vehicle, heavy equipment & manufactured housing); and assistance with litigation, petitions, and audits	397
Hearings review	1,000
Employee disclosure forms research	619
Investigations and administration	29
Hearings held	210
Cost per parcel	\$0.61

# Review Appraisal Division - 5011

## 2017 Budget Briefing

Grady Graham, Associate Chief Appraiser

**Responsible for overseeing post ARB property appeals and associated litigation.**

- Work directly with litigation counsel to resolve appeals.
- Appeals resolved through litigation, mediation, arbitration, SOAH, and in-house settlement conferences.
- Staff responsible for reviewing CAMA valuation, analyzing recent sales and contracts, developing reports, court appearances, testifying, and making settlement recommendations.
- Expert knowledge of appraisal methodology, tax code, and reports.
- Values considered are Market Value and Equal & Uniform.
  
- **37 Total Staff**
  - 23 Appraisers
  - 7 Research Staff
  - 7 Support Staff

**2017 Division Budget**

Salaries, Wages & Related	\$ 2,296,894
Employee Benefits	\$824,456
Office & Field Operations	\$56,500
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$3,177,850</b>

**Proposed Changes:**

None	\$0



2015 Performance Measures	
Number of lawsuits filed in 2015	4,116
Number of properties	9,442
Number of lawsuits resolved in 2015	4,048
Number of properties resolved	13,476
Total value in litigation (2015)	\$59 billion
Total value active (all years)	\$37 billion
Number of trials in 2015	11
Number of arbitrations filed in 2015	1,237
Number of arbitrations resolved	938
Number of SOAH cases filed in 2015	7
Number of SOAH cases resolved	7
Division cost per parcel	\$1.81



# Geographic Information System (GIS) Division - 8001

## 2017 Budget Briefing

David Dignum, Manager

### Responsible for

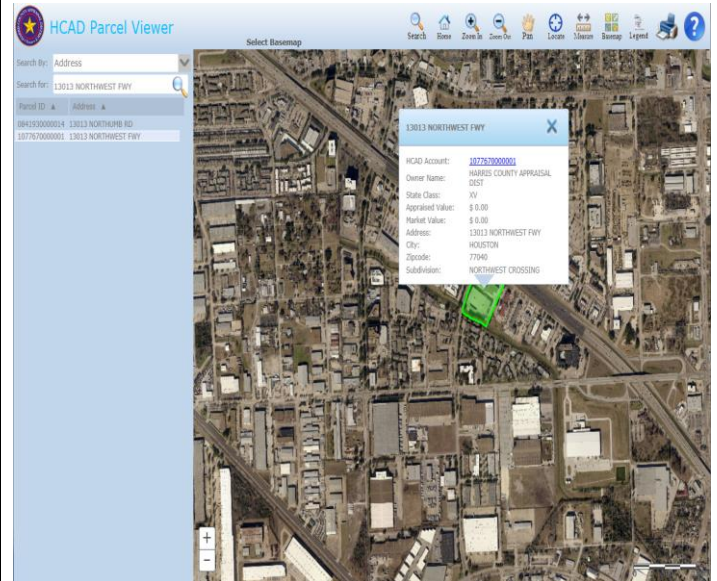
- The administration of the ArcGIS software suite to manage spatial data, create district base maps, generate maps for commercial & residential sales analysis, and mapping special land analysis.
- Use ArcGIS Desktop software for spatial data analysis to support HCAD divisions. Use of ArcGIS server software to house the GIS database and provide interactive maps via the intranet to HCAD divisions, and via the internet to the public and jurisdictions.
- Providing other county governments maps and spatial data to assist in various projects.
- Maintaining authoritative records about the status and change of parcels.
- Provide a strong framework for managing these types of records with full transaction support.
- Creating GIS-based maps and visualizations to assist in understanding situations and in storytelling.
- Maintaining maps by split outs, combinations, subdivisions, annexations and de-annexations.
- Acquire annual aerial ortho and oblique imagery for district use.
- 17 total Staff

### 2017 Division Budget

Salaries, Wages & Related	\$1,320,975
Employee Benefits	\$445,162
Office & Field Operations	\$39,580
Computer Operations	\$0
Professional Services	\$1,331,100
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$3,136,817</b>

### Proposed Changes

<b>Decrease in Salaries, Wages &amp; Related</b>	<b>\$&lt;86,684&gt;</b>
<b>Increase Office &amp; Field Operations</b>	<b>\$17,480</b>
<b>Increase in Professional Services</b>	<b>\$10,378</b>



### 2015 Performance Measures

Maintenance files	11,901
Create new subdivisions	1,418
Facet maps	800
Division cost per parcel	\$1.78

## ARB Operations Division - 8002

### 2017 Budget Briefing

Jeff Morrison, Chief of Hearings

**Responsible for coordination and planning of activities for the informal meetings, formal hearings, and related functions.**

- Manual and batch scheduling of current and prior year value, exemption, and correction hearings
- Staff front hearings counter for receiving hearings
- Staff kiosk stations for informal and formal hearing workflow management
- Staff and support the ARB Executive office
- Monitor queues for wait times and assist with workflow management
- Provide escorts for formal hearings
- Hearing Evidence processing (preparing, scanning, & sorting)
- Staff reschedule call center for property owners and agents
- Sorting and processing of return mail
- Affidavit processing
- Process jurisdiction corrections
  
- 30 total staff

#### 2017 Division Budget

Salaries, Wages & Related	\$1,362,598
Employee Benefits	\$580,081
Office & Field Operations	\$19,600
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,962,559</b>

#### Proposed Changes

Increase in office & field operations	\$130
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#### 2015 Performance Measures

2015 protest volume	362,272
Formal hearings scheduled	228,475
Informal meetings scheduled	372,496
Number of panels used	4,404
Hearing evidence: number of boxes scanned, prepped, & quality-controlled	819
Prior year, correction, and exemption hearings scheduled	9,758
Owner reschedules processed	17,671
Prior year correction processing	2,092
Division cost per parcel	\$1.12

## Jurisdiction Communications Division - 8003

### 2017 Budget Briefing

Celeste Kelly, Senior Director

#### Responsible for

- Providing technical and clerical support for over 687 active and inactive jurisdictions which contain over 1.6 million accounts
- Provide roll reports to inactive districts and provide information to various member of the tax community
- Schedule assessor meetings during the year to provide information concerning tax office and appraisal district issues
- Providing information relating to questions concerning exemptions, value, corrections, roll layout and other tax assessor issues to the tax offices, members of the tax community and the public
- Provide necessary reports for ISD Appeal of Property Value and non –ISD property value to assessors and auditors and review completed Appeal Reports of Property Value for discrepancies
  
- **6 Total Staff**

#### 2017 Division Budget

Salaries, Wages & Related	\$361,585
Employee Benefits	\$131,896
Office & Field Operations	\$13,320
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$506,801</b>

#### Proposed Changes

Share of office & field operations increase	\$370
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#### 2015 Performance Measures

Appraisal rolls	341,200
Mail	10,000
Telephone calls	9,000
Research	11,400
Name and address changes	6,600
Certified summary of appraisal roll	225
Estimates of appraised value	147
Division cost per parcel	\$0.29

## Information & Assistance Division - 8004

### 2017 Budget Briefing

Bonnie Hebert, Senior Director

#### Responsible for

- Maintaining up-to-date ownership records for parcels of real property
- Telephone bank, service counter, and agent services
- Scanning and entry of all protests
- Administration of exemption programs
- Maintaining files of split outs, combinations, subdivisions, annexations and de-annexations
- Receive and process all PIA and HB 201 request
  
- **119 Total Staff:**
  - 6 Appraisers
  - 13 Administration
  - 100 Support staff



#### 2017 Division Budget

Salaries, Wages & Related	\$5,237,011
Employee Benefits	\$2,292,368
Office & Field Operations	\$93,070
Computer Operations	\$0
Professional Services	\$369,260
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$7,991,709</b>

#### Proposed Changes

Increase in office & field operations	\$10,095

#### 2015 performance measures

Changes to property records- CAMA system	11,258
Receive, prepare & scan mail	254,786
Research returned mail	20,432
Key name changes	214,524
Key confirmation cards	13,367
Telephone contacts	300,199
Walk-in contacts	52,781
Process HB201	241,413
Process open records	4,134
Key & verify protests	359,639
○ Property owner	109,983
○ Agent	249,656
Exemption applications	156,616
Exemption field checks	4,102
Exemption hearings	976
Key appointment of agents	93,219
Key agent removals	15,195
Process annexations and de-annexations	16,381
Setup & key new subdivisions	1,501
Division Cost per parcel	\$4.55

# Information Technology Division - 8005

## 2017 Budget Briefing

### Responsible for

- Full service information technology support to internal HCAD colleagues, property owners & their agents, tax assessors / collectors, as well as interfacing with state, county and city agencies
- Support over 800 desktop & laptop/tablet computers, 700 phones, internal networks, printers/fax devices & network security
- Provide Computer Aided Mass Appraisal (CAMA) technology support
- Administer hcad.org web presence
- Manage \$2m in annual hardware & software related service/maintenance contracts
- Manage HCAD's data center facility
- 46 total staff



### 2017 Division Budget

Salaries, Wages & Related	\$3,701,601
Employee Benefits	\$1,164,868
Office & Field Operations	\$1,103,931
Computer Operations	\$1,379,334
Professional Services	\$130,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$150,000
<b>Total</b>	<b>\$ 7,629,734</b>

### Proposed Changes

None for 2017	\$0
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### 2015 Performance Measures

Processed & prepared annual certified & supplementary rolls	Monthly
iFile submissions & renditions facilitated via hcad.org	138,199
Technology support for formal hearings	45 Hearing Rooms 395 Help Desk calls
CAMA records maintained for 1988-2015	1.5m account records per year
Hearing Evidence, CAMA upgrades, owners & agents website projects completed	11
Help Desk issues resolved	2,863
Value & Scheduling notices and ARB orders printed & processed	1.77m
Division cost per parcel	\$4.34

## Budget & Finance Division - 8006

### 2017 Budget Briefing

Theresa Paul, Chief Financial Officer

**Responsible for budget, finance, payroll, benefits, purchasing, postal services, facilities and security**

- Manage and account for \$81.4 million budget
- Produce \$40.5 million payroll for EEs and ARB
- Contract for \$14.3 million employee benefit program
- Purchase \$26.6 million goods & services
- Manage 285,000sf facility
- Provide 24-hour security
- Manage \$24 million in investments
  
- 25 support staff



**2017 Division Budget**

Salaries, Wages & Related	\$1,685,837
Employee Benefits	\$579,201
Office & Field Operations	\$2,268,441
Computer Operations	\$0
Professional Services	\$60,300
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$4,593,779</b>

**Proposed Changes**

Share of salaries, wages & related increase-transferred of position	\$192,679
Share of benefits & taxes increase	\$43,875

2015 performance measures	
Taxing unit billing & receipts	5,152
Vendor payments processed	4,658
Employee & ARB payments processed	28,392
Fixed asset records maintained	4,881
Construction projects completed	14
Building repair & HVAC issues	77
Purchase orders processed	4,121
Internal mail processed	103,596
Emergency responses incl. 911	35
Security incidents	146
Cost per parcel	\$2.61

## Office Services Division - 8007

### 2017 Budget Briefing

Theresa Paul, Chief Financial Officer

**Responsible for funding overhead accounts and activities not assigned to the operating divisions:**

- Career development, career ladder & merit programs
- Workers' compensation insurance
- General liability and, property insurance
- Office equipment & maintenance
- 339,825 SF building & records center
- Utilities, operation & maintenance of facilities
- 24-hour security for building compound and records center



#### 2017 Division Budget

Salaries, Wages & Related	\$1,520,000
Employee Benefits	\$346,303
Office & Field Operations	\$499,620
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$4,666,554
Capital Expenditures	\$0
<b>Total</b>	<b>\$7,032,477</b>

#### Proposed Changes

Increase Overtime	\$350,000
Increase Career Ladder funding	\$50,000
Increase merit funding	\$200,000
Share of benefits increase	\$196,885
Increase in office & field operations	\$2,750

2015 performance measures	
Manage, operate & maintain facilities	339,825 SF
Cost PSF for note & leasing	\$7.13
Cost PSF for facility maintenance & construction	\$4.49
Cost PSF for utilities	\$1.74
Cost PSF for insurance	\$0.66
Division cost per parcel	\$4.00

2017 BUDGET WITH COMPARISONS  
2016 BUDGET & 2015 ACTUAL

Account Number	Account Name	2015 ACTUAL	2016 BUDGET	2,017 BUDGET
	Number of Positions	649	650	650
	Part-time & Seasonal FTEs	8	9	6
<u>SALARIES, WAGES &amp; RELATED</u>				
	Salaries & Wages	\$ 32,327,617	\$34,987,972	35,748,177
	Allowance for Career Development	0	95,000	95,000
	Less Salary Lapse	0	(1,121,333)	(1,415,629)
	Allowance for Merit	0	700,000	900,000
	Reserve for Longevity	0	389,350	389,350
	Allowance for Career Ladder	0	125,000	175,000
3010	Net Salaries & Wages	\$ 32,327,617	\$ 35,175,989	\$ 36,949,353
3011	ARB Board Members	2,776,734	2,700,000	2,700,000
3015	Contract & Seasonal Labor	0	0	0
3020	Shift Differential	292,074	32,000	32,000
3030	Overtime	236,335	229,483	612,666
3040	Part-time & Seasonal Wages	310,794	302,500	213,220
TOTAL SALARIES, WAGES & RELATED		\$ 35,943,555	\$ 38,439,972	\$ 40,507,239
<u>EMPLOYEE BENEFITS &amp; RELATED</u>				
3501	Group Health Insurance	6,659,374	6,895,202	7,410,000
3503	Workers' Compensation Insurance	112,906	95,000	95,000
3504	Group Life & LTD Insurance	90,843	93,200	98,860
3505	Group Dental Insurance	226,669	226,980	226,981
3507	Unemployment Insurance	17,189	224,100	224,100
3520	Retirement	6,317,656	4,638,767	5,571,435
3526	FICA Medicare	513,550	557,378	587,355
3527	Social Security	191,427	186,155	180,620
TOTAL EMPLOYEE BENEFITS & RELATED		\$ 14,129,613	\$ 12,916,782	\$ 14,394,351
<u>OFFICE &amp; FIELD OPERATIONS</u>				
4001	Office Supplies	115,839	155,586	165,244
4003	Office Equipment Maintenance	371,233	455,450	455,450
4011	Telephone & Communication Service	194,816	289,843	289,843
4020	Copier Leases	84,799	94,000	94,000
4021	Copier Supplies & Maintenance	95,213	145,390	145,390
4030	Mapping Reproduction & Supplies	265	5,000	2,500
4040	Public Notice Advertising	7,986	18,000	18,000
4050	Security Services	144,317	159,750	159,750
4060	Field Travel, Vanpool & Other Exp	946,000	1,080,868	1,114,168
4070	Appraisal Supplies	6,411	13,140	13,370
4080	Vehicle Gasoline & Maintenance	19,491	34,000	34,000
4090	Records Storage & Supplies	625	1,500	1,500
4092	Records Conversion Services	0	0	0
4097	Employee Recognition Activities	7,574	12,000	12,000
4100	Postage, Mailing, & Handling Svcs.	1,905,890	2,172,000	2,172,000
4200	Professional Registration & Dues	67,385	75,375	75,795
4202	Seminars & Other Tuition	160,466	227,027	234,279
4212	Education Travel & Expenses	129,685	126,500	161,373
4213	Books, Manuals & Publications	263,417	252,632	283,916
4501	Printing, Forms, & Stationery	83,954	80,150	80,150
4530	Paper, Copier & Printer	113,438	135,483	135,483
TOTAL OFFICE & FIELD OPERATIONS		\$ 4,718,803	\$ 5,533,694	\$ 5,648,211



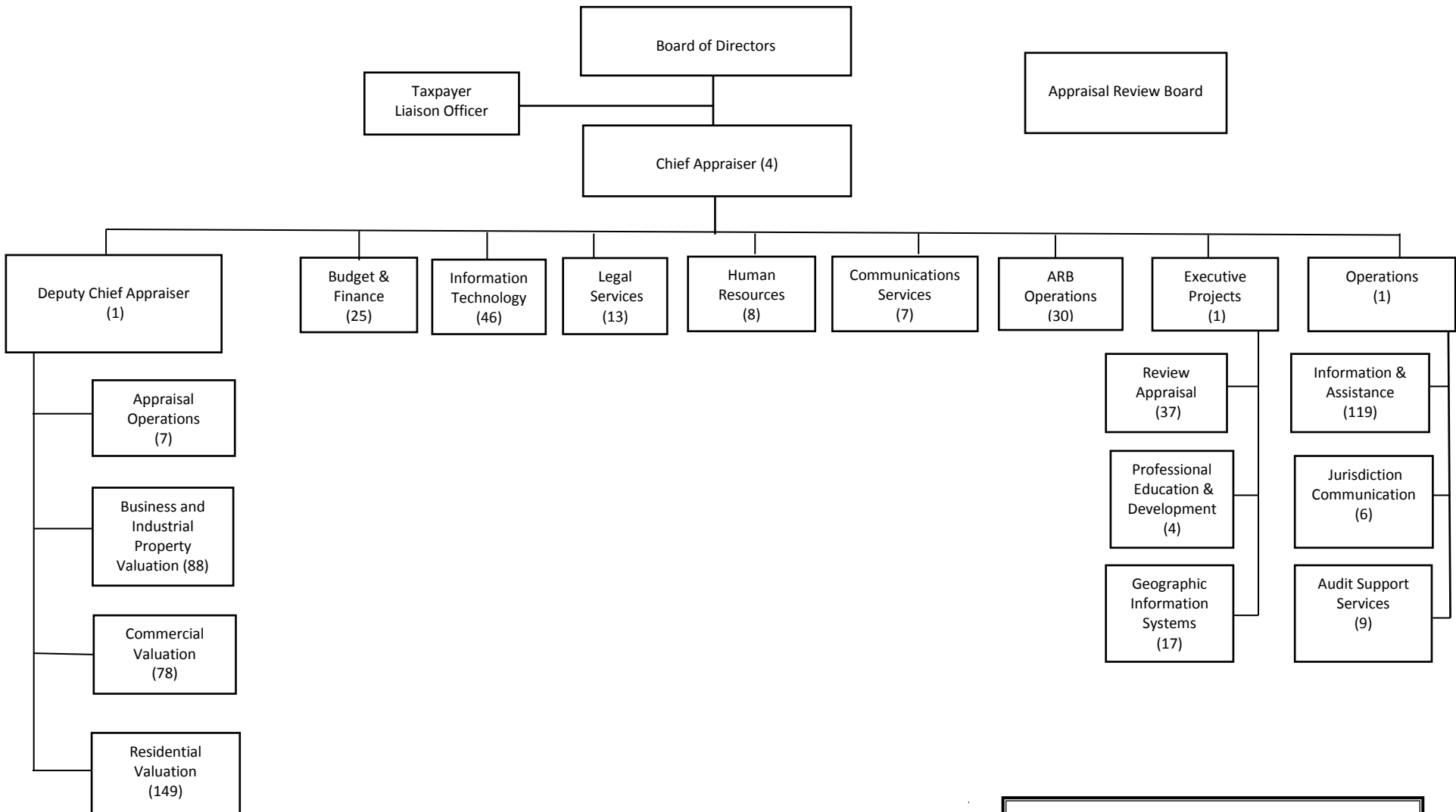
2017 BUDGET WITH COMPARISONS  
2016 BUDGET & 2015 ACTUAL

Account Number	Account Name	2015 ACTUAL	2016 BUDGET	2,017 BUDGET
<u>COMPUTER OPERATIONS</u>				
5010	Computer Leasing	0	0	0
5020	CPU & Related Maintenance	121,822	104,000	104,000
5030	Other Computer Maintenance	33,738	11,000	11,000
5040	Computer Supplies	17,600	33,850	33,850
5050	Software Lease & Maintenance	1,446,042	1,212,984	1,212,984
5060	Teleprocessing Lines & Installation	4,212	17,500	17,500
TOTAL COMPUTER OPERATIONS		\$ 1,623,413	\$ 1,379,334	\$ 1,379,334
<u>PROFESSIONAL SERVICES</u>				
5510	Financial Auditing	55,750	60,300	60,300
5520	Legal Services	9,435,515	10,983,967	10,983,967
5525	Arbitration Fees & Services	161,050	200,000	200,000
5526	State Office of Admin Hearings	0	5,000	5,000
5530	Appraisal Services	1,477,839	1,506,295	1,506,295
5550	Other Professional Services	602,163	543,760	573,925
5551	Mapping & Records Maintenance	1,064,951	1,320,722	1,331,100
TOTAL PROFESSIONAL SERVICES		\$ 12,797,268	\$ 14,620,044	\$ 14,660,587
<u>OFFICE SPACE, UTILITIES &amp; RELATED</u>				
6100	Office Space	2,420,208	2,421,904	2,421,904
6150	Utilities	433,190	590,000	590,000
6200	Building & Fixture Maintenance	1,299,232	1,524,650	1,524,650
6400	Casualty & Liability Insurance	131,088	130,000	130,000
TOTAL OFFICE SPACE, UTILITIES & RELATED		\$ 4,283,718	\$ 4,666,554	\$ 4,666,554
<u>FIXED ASSETS PURCHASES</u>				
6501	Capital Purchases	157,303	150,000	150,000
TOTAL FIXED ASSETS PURCHASES		\$ 157,303	\$ 150,000	\$ 150,000
TOTAL BUDGET		\$ 73,653,672	\$ 77,706,380	\$ 81,406,276

EXPENDITURE SUMMARY AND METHOD OF FINANCING  
2017 BUDGET

<u>BUDGETED EXPENDITURES</u>	2016 BUDGET	2017 BUDGET	Variance	% Change
<u>Account Groups</u>				
Number of Positions	650.0	650.0	0.0	0.00%
Part-time & Seasonal FTEs	8.7	5.9	(2.9)	-32.76%
Salaries, Wages & Related	38,439,972	40,507,239	2,067,267.0	5.38%
Employee Benefits	12,916,782	14,394,351	1,477,569.0	11.44%
Office & Field Operations	5,533,694	5,648,211	114,517.0	2.07%
Computer Operations	1,379,334	1,379,334	0.0	0.00%
Professional Services	14,620,044	14,660,587	40,543.0	0.28%
Office Space, Utilities & Maint.	4,666,554	4,666,554	0.0	0.00%
Capital Expenditures	150,000	150,000	0.0	0.00%
TOTAL BUDGET	77,706,380	81,406,276	3,699,896.0	4.76%
 <u>FINANCING METHOD</u>				
Jurisdiction Allocations	77,706,380	81,406,276	3,699,896.0	4.76%
Interest Income	0	0	0.0	0.00%
Other Income	0	0	0.0	0.00%
Application of Restricted Funds	0	0	0.0	0.00%
Application of Unrestricted Funds				
General Fund	0	0	0.0	0.00%
Internal Service Fund	0	0	0.0	0.00%
TOTAL FINANCING METHOD	77,706,380	81,406,276	3,699,896.0	4.76%

# PLAN OF ORGANIZATION - 2017



<u>Total Positions</u>	
Office of Chief Appraiser	327
Office of Deputy Chief Appraiser	<u>323</u>
Total	650