

2012-13 Preliminary Data Request List Tier 3

Copies of the following:

1. Most recent proposed budget
2. Notice of budget hearing
3. Proposed budget amendments (if applicable)
4. Board resolution granting the authority to the chief appraiser to sign checks, drafts, or orders, or equivalent documentation (Tax Code Section 6.06(f))
5. Contracts for appraisal services
6. Proof of current appraiser certification(s) for the appraisers employed by the appraisal services contractor
7. Copy of board of directors' meeting minutes and agendas for the previous two years
8. Documentation showing credit was given or refunds made to entities for unobligated fund balances at the end of the year (if applicable)
9. Two most recent financial audits
10. Depository bids received for the last two cycles
11. Letters granting an extension of the depository contract (if applicable)
12. Two most recent depository contracts
13. RFPs for goods or services over \$50,000 for the previous two years (not including legal or appraisal services)
14. Procedures for responding to the public (if applicable)
15. Written documents explaining how property is appraised (if completed)
16. Most recent reappraisal plan approved by the board of directors
17. Instructions provided to appraisers for use in the field
18. Listing of TDLR numbers for all appraisers
19. Procedures for analyzing and updating cost schedules (if applicable)
20. Procedures for determining benchmark properties (if applicable)
21. Procedures for identifying new property
22. Mapping procedures and schedule for updating maps
23. Procedures and schedule for updating land schedules
24. Data collection manual or procedures for data collection
25. Procedures for analyzing and adjusting sales
26. Procedure for gathering sales data
27. Procedure describing how data is collected and used for open-space land valuation
28. Most current calculation of net-to-land for all categories and subcategories of agricultural land
29. Schedule of per-acre productivity values
30. Procedure for inspecting wildlife management properties and reviewing annual reports from the owners

2012-13 Data to be Reviewed On-Site Tier 3

The appraisal district does not need to make a copy of the following, but provide access to them while the reviewer is onsite:

1. Documentation showing that the CAD uses available media to communicate with property owners
2. Reports and publications that the CAD provides to the public
3. Training materials for customer service/public relations classes offered by the CAD
4. Phone and/or email logs (if applicable)
5. Appraisal records
6. Appraisal cards
7. Verification that the appraisal roll was certified by the required date
8. Verification that appraisal records were submitted to the ARB for review and determination
9. Exemption applications and supporting documentation
10. Transfer of tax ceiling certificates
11. Schedule of informal meetings with property owners (when available)
12. Schedule of ARB hearings (when available)
13. Cost schedules
14. Ratio studies
15. Benchmark property descriptions
16. Appraisal manuals
17. Property classification guide
18. Five completed dealer heavy equipment declaration forms for 2012 or 2013 and calculations of market value of inventory for those companies
19. Supplemental notices of appraised value
20. Supplemental appraisal roll
21. Documentation showing more than one technique was used to locate new property
22. Mapping system
23. Documentation showing mapping updates
24. Documents used to support land schedule changes
25. Land sales verification documents
26. Documentation showing that income data was collected or reviewed and that the income approach was considered
27. Sales documentation and proof of analysis and adjustment
28. Resource materials used in determining productivity values
29. Returned surveys used to determine productivity values
30. Spreadsheets or other documents used to compile the survey results
31. Appraisal applications for open-space land appraisal
32. Data from the natural resource conservation service soil surveys or other sources of information used to develop subcategories of agricultural lands
33. Annual reports that the CAD has received from owners of lands receiving open-space value based on wildlife management