

2012-13 Preliminary Data Request List Tier 2

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. 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. Documentation verifying attendance of the chief appraiser or staff member at meetings of the taxing units
17. Most recent reappraisal plan approved by the board of directors
18. Instructions provided to appraisers for use in the field
19. Procedures for formal hearings before the ARB
20. Procedures for hiring new staff
21. Listing of TDLR numbers for all appraisers
22. Procedures for analyzing and updating cost schedules (if applicable)
23. Procedures for determining benchmark properties (if applicable)
24. Data collection manual or procedures for data collection
25. Copies of 5 calculations of motor vehicle inventory value for 2012
26. Procedures for conducting ratio studies
27. Procedures for identifying new property
28. Procedures for identifying new improvements or upgrades to existing property
29. Mapping procedures and schedule for updating maps
30. Procedures and schedule for updating land schedules
31. Procedures for analyzing and adjusting sales
32. Procedure for gathering sales data
33. Schedule of residential appraisal field dates (from Jan. 1 - April 1) for 2013
34. Procedure describing how data is collected and used for open-space land valuation
35. Most current calculation of net-to-land for all categories and subcategories of agricultural land
36. Schedule of per-acre productivity values
37. Procedure for inspecting wildlife management properties and reviewing annual reports from the owners

2012-13 Data to be Reviewed On-Site Tier 2

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. The CAD's website
5. The CAD's public feedback mechanism(s)
6. Phone and/or email logs (if applicable)
7. Appraisal records
8. Appraisal cards
9. Verification that the appraisal roll was certified by the required date
10. Verification that appraisal records were submitted to the ARB for review and determination
11. Exemption applications and supporting documentation
12. Transfer of tax ceiling certificates
13. Schedule of informal meetings with property owners (when available)
14. Schedule of ARB hearings (when available)
15. Cost schedules
16. Ratio studies
17. Benchmark property descriptions
18. Property classification guide
19. Mapping and CAMA systems
20. Five completed dealer heavy equipment declaration forms for 2012 or 2013 and calculations of market value of inventory for those companies
21. ARB records from the previous year
22. Supplemental notices of appraised value
23. Supplemental appraisal roll
24. Documentation showing more than one technique was used to locate new property
25. Documentation showing mapping updates
26. Documents used to support land schedule changes
27. Land sales verification documents
28. Documentation for properties appraised using the income approach
29. Income data that was collected for the appraisal of commercial properties
30. Expense data collected for income producing properties
31. Documentation showing that income data was collected or reviewed and that the income approach was considered
32. Sales documentation and proof of analysis and adjustment
33. Resource materials used in determining productivity values
34. Returned surveys used to determine productivity values
35. Spreadsheets or other documents used to compile the survey results
36. Appraisal applications for open-space land appraisal
37. Data from the natural resource conservation service soil surveys or other sources of information used to develop subcategories of agricultural lands

38. Annual reports that the CAD has received from owners of lands receiving open-space value based on wildlife management