



BOARD OF DIRECTORS

SPECIAL MEETING

November 13, 2025

NOTICE OF SPECIAL MEETING

FILED

11/4/2025 4:05:29 PM

BOARD OF DIRECTORS

of the

COLLIN CENTRAL APPRAISAL DISTRICT

CENTRAL APPRAISAL DISTRICT OFFICE

250 ELDORADO PARKWAY, DR. LEO FITZGERALD BOARD ROOM
MCKINNEY, TEXAS 75069

STACEY KEMP
COUNTY CLERK
COLLIN COUNTY, TEXAS
BY : LJ DEPUTY

Notice is hereby given that on the 13th day of November, at 6:00 p.m., the Board of Directors of the Collin Central Appraisal District will hold a meeting at the Central Appraisal District Office, 250 Eldorado Parkway, McKinney, Texas 75069. The Board Chairman will direct the meeting from the District's office, in the Dr. Leo Fitzgerald board room. Board members and the public may attend in person or connect via the telephone number and conference ID below. The chief appraiser and selected staff will attend in person, with other members of the District's staff connecting from their individual offices or from a remote location. Board members, staff and the public will have telephone access by dialing 1-833-304-4846, at which time they will be prompted to enter the Phone Conference ID: 917 676 372#. Telephonic access will be available at 6:00 p.m. until the meeting is adjourned by the Board Chairman. The subjects discussed are listed on the agenda which is attached to and made a part of this notice. The Board's agenda packet is available on the District's public website: <https://collincad.org/boards/bod>. On this 4th day of November 2025, this notice was filed with the County Clerk of Collin County, Texas.



Marty Wright
Chief Appraiser
Phone: (469) 742-9200



AGENDA

BOARD OF DIRECTORS SPECIAL MEETING

**CENTRAL APPRAISAL DISTRICT OFFICE
250 ELDORADO PARKWAY, DR. LEO FITZGERALD BOARD ROOM
MCKINNEY, TEXAS 75069**

A. CALL TO ORDER

1. Announcement by presiding officer whether the meeting has been posted in the manner required by law.
2. Roll Call: Announcement by presiding officer whether a quorum is present.

B. AUDIENCE

Receive public comments. Five minute limit per speaker, unless extended by Board vote.

C. WORK SESSION

1. Discuss Policy #101 Agenda Items

D. EXECUTIVE SESSION

1. Consultation with an attorney regarding pending or contemplated litigation, and/or a matter in which the duty of the attorney to the governmental body under the Texas Disciplinary Rules of Professional Conduct of the State of Texas clearly conflicts with the [Texas Open Meetings Act]. Pursuant to Texas Open Meetings Act, Section 551.071.
2. Deliberation regarding real property. Pursuant to Texas Open Meetings Act, Section 551.072.
3. Personnel matters. Pursuant to Texas Open Meetings Act, Section 551.074. Discuss Chief Appraiser's employment performance.

E. ACTION ON ITEMS DISCUSSED IN EXECUTIVE SESSION

1. Action on items pertaining to litigation, if any.
2. Action on items pertaining to real property, if any.

3. Action on items pertaining to personnel, if any.

F. CONSENT AGENDA

The Consent Agenda will be acted upon in one motion and contains items which are routine and typically noncontroversial. Items may be removed from this agenda for individual discussion by a Board Member, the Chief Appraiser or any citizen.

1. Approval of minutes from the August 21, 2025 special meeting.
2. Review of August, September and October 2025 bills.
3. Review of August, September and October 2025 financial reports.
4. Review and sign checks for approved purchases requiring Board signature.
5. Review report of August, September and October 2025 checks and electronic transfers greater than \$25,000.

G. REGULAR AGENDA

1. Receive recommendation and vote on the 2026 Printing & Mailing Services.
2. Receive recommendation and vote on Aerial Photography.
3. Receive recommendation and vote on off-site data backup and disaster recovery.
4. Receive recommendation and vote on server cluster replacement.
5. Receive recommendation and vote on District's 2026 health insurance carriers, including option for employees to select from either a High Deductible Health Plan (HDHP), with a Health Saving Account (HSA) or traditional PPO medical plan, with medical reimbursement.
6. Review and discuss changes on Medical Reimbursement, Policy #1001 for 2026, for employees selecting traditional PPO medical plan.
7. Review and discuss changes on District's HSA Contribution, Policy #1005 for 2026, for employees selecting HDHP with Health Savings Account.
8. Receive recommendation and vote on Resolution # 2025-95, group insurance carriers.
9. Receive recommendation and vote on Resolution # 2025-1149, Board Policy #1001.
10. Receive recommendation and vote on Resolution # 2025-1150, Board Policy #1005.
11. Receive recommendation and vote on appointing the 2026 Appraisal Review Board Officers.
12. Receive recommendation and vote on appointing the 2026 Appraisal Review Board Membership.
13. Receive recommendation and vote on appointing the District's 2026 Taxpayer Liaison Officer (TLO).

14. Receive a report regarding Policy #1008 Spending Appraisal Review Board Funds.
15. Receive recommendation and vote on allocating 2026 budget funds for the Appraisal Review Board's independent legal counsel.
16. Recieve recommendation and discuss line-item transfers within the 2025 Budget.
17. Receive recommendation and vote on Resolution # 2025-1151, line-item transfers.

H. REPORTS

1. Taxpayer Liaison Officer Report
2. 2025 ARB Chairman Report.
3. 2025 Protest Report
4. 3rd Qtr 2025 Binding Arbitration Report.
5. 3rd Qtr 2025 Investment/Collateral Report
6. 3rd Qtr 2025 Vendor Report.
7. 3rd Qtr 2025 Litigation Report.
8. Litigation Cost Report.
9. CCAD Representation by Saunders, Walsh & Beard

I. CHIEF APPRAISER'S REPORT

1. General Comments

J. ANNOUNCEMENT OF NEXT SPECIAL SCHEDULED MEETING

K. ADJOURNMENT

1. Decision to Adjourn



POLICY NUMBER: 101

POLICY NAME: BOARD OF DIRECTORS MONTHLY MEETINGS

It is the policy of the Board of Directors of the Collin Central Appraisal District that the Board will meet in regular session at least eight (8) times per year in a public meeting. In accordance with Section 6.04(b) of the Property Tax Code, the Board will schedule meetings in such a manner to meet at least once per calendar quarter. The meetings shall be designated at the beginning of each calendar year and so posted as scheduled Board meetings. The Board of Directors may hold additional regular, or special, Board meetings at the call of the Chairman of the Board of Directors as needed by properly posting the regular or special meeting in accordance with the Open Meetings Act. The Board of Directors shall suspend regular Board meetings for the months of July and November each year.

Open Meetings and Public Hearing Notices

The administrative duty of posting open meeting notices, including the agenda for Board meetings and public hearings and the delivery of written notices to the presiding officer of the governing body of each taxing entity participating in the district of the date, time, and place for the public hearings and Board meetings, has been delegated by the Board, with consent of the Board Secretary to relinquish such duty, to the Chief Appraiser.

Property Tax Code Section: 6.04

Date Adopted: September 24, 2009

Resolution #: 2009-2



Collin Central Appraisal District

POLICY NUMBER: 101

POLICY NAME: BOARD OF DIRECTORS MONTHLY MEETINGS

It is the policy of the Board of Directors of the Collin Central Appraisal District that the Board will meet in regular session at least eight (8) times per year in a public meeting. In accordance with Section 6.04(b) of the Property Tax Code, the Board will schedule meetings in such a manner to meet at least once per calendar quarter. The meetings shall be designated at the beginning of each calendar year and so posted as scheduled Board meetings. The Board of Directors may hold additional regular, or special, Board meetings at the call of the Chairman of the Board of Directors as needed by properly posting the regular or special meeting in accordance with the Open Meetings Act. The Board of Directors shall suspend regular Board meetings for the months of July and November each year.

Open Meetings and Public Hearing Notices

The administrative duty of posting open meeting notices, including the agenda for Board meetings and public hearings and the delivery of written notices to the presiding officer of the governing body of each taxing entity participating in the district of the date, time, and place for the public hearings and Board meetings, has been delegated by the Board, with consent of the Board Secretary to relinquish such duty, to the Chief Appraiser.

Agenda Items Added at Board Member Request

Board of Directors Members can request an agenda item be added to an upcoming meeting agenda by recommending the item in open session of a meeting for consideration by the full Board. After discussion, the Board will vote and require a majority in favor of the item for it to be added to an upcoming meeting. The Board hereby delegates to the Chief Appraiser the task of researching the item and determining when the item will be added to a future agenda based on the complexity of the agenda item.

Property Tax Code Section: 6.04

Date Adopted: September 24, 2009
Resolution #: 2009-2

Date Amended: May 22, 2025
Resolution #: 2025-93

Collin Central Appraisal District

POLICY NUMBER: 101

POLICY NAME: BOARD OF DIRECTORS MONTHLY MEETINGS

It is the policy of the Board of Directors of the Collin Central Appraisal District that the Board will meet in regular session at least eight (8) times per year in a public meeting. In accordance with Section 6.04(b) of the Property Tax Code, the Board will schedule meetings in such a manner to meet at least once per calendar quarter. The meetings shall be designated at the beginning of each calendar year and so posted as scheduled Board meetings. The Board of Directors may hold additional regular, or special, Board meetings at the call of the Chairman of the Board of Directors as needed by properly posting the regular or special meeting in accordance with the Open Meetings Act. The Board of Directors shall suspend regular Board meetings for the months of July and November each year.

Open Meetings and Public Hearing Notices

The administrative duty of posting open meeting notices, including the agenda for Board meetings and public hearings and the delivery of written notices to the presiding officer of the governing body of each taxing entity participating in the district of the date, time, and place for the public hearings and Board meetings, has been delegated by the Board, with consent of the Board Secretary to relinquish such duty, to the Chief Appraiser.

Creating an Agenda for Board of Directors Meetings

Preparation of the Agenda

1. In consultation with the Board Chair, the Chief Appraiser shall prepare the agenda; however, final approval for the agenda is the sole authority of the Chair.
2. A Board Member may request that a subject be included on a future agenda for a Board Meeting or Work Session by email or during the discussion of upcoming agenda items. The Board Chair shall ensure topics that at least two Board members, jointly or individually, have requested be addressed are scheduled for deliberation at an appropriate time in the near future.
3. No item can be placed on the Board Meeting agenda by a Board Member if submitted less than the eleventh calendar day in advance of the meeting unless delaying the item could seriously affect the operation of the District.

Meeting Preparation

1. The agenda packet is posted and notice emailed to Board Members minimum of five days before meetings. The Chief Appraiser will ensure that documents and data for an agenda item, including presentations, are provided to all Board Members at least 72 hours prior to the meeting.
2. The Chief Appraiser will ensure that adequate backup materials and necessary information for each agenda item are provided to Board Members. Backup materials and information not available when the agenda is posted will be provided immediately upon completion.
3. Once the Board agenda packet is posted, the Chief Appraiser or designee will inform the Board of any agenda item supporting documentation revisions or updates.
4. For contracts placed on the agenda for approval, the Chief Appraiser will ensure that the contract is available to Board Members upon request.

Agenda Questions

1. Board Members will direct agenda-related questions to the Chief Appraiser, the Board Chair, and the appropriate staff member (if known) as soon as possible before a meeting. This does not limit a Board Member's ability to ask questions during the Board Meeting. If requested information is not available, the Chief Appraiser will inform the Board Member before the beginning of the Board Meeting or as soon as possible.
2. If an answer is not readily available, requires a special report, or requires a significant investment of time that will divert staff from established priorities, the Chief Appraiser will notify the Board Member and the Board Chair prior to the start of the meeting. The Board Member has the option of pulling the item from the agenda or making a motion to postpone the agenda item for further consideration.
3. Any Board Member may remove an item from the Consent Agenda for separate consideration, making every effort to inform the Chief Appraiser, Board Chair, and appropriate staff member prior to the meeting of their intent to remove the item to allow staff to prepare as needed. This does not limit a Board Member's right to remove an item from the Consent Agenda during a meeting.
4. The Chief Appraiser or designee will ensure that answers provided to one Board Member are provided to all Board Members.

Further information

1. All Board Members are expected to conduct themselves professionally and ethically during meetings and public forums and in accordance with Robert's Rules of Order, Newly Revised.
2. Differences of opinion, if respectfully submitted, are not to be construed as unacceptable behavior but rather as alternate views on a subject.
3. Debate and discussion must continue until such time as each Board Member feels that they have had adequate time to ask clarifying questions or make comments, unless the question has been moved and adopted.
4. No Board Member will coerce another Board Member to vote in a particular manner and no member may solicit votes in any manner.
5. No Board Member will criticize any Board Member's questions, discussion or vote.
6. Although it is the duty of every Board Member who has an opinion on a question to express it by their vote, they cannot be compelled to vote and can abstain. Board Members abstaining from voting may briefly state their reason for the abstention.

Closed Session

1. All matters discussed in Closed Session are strictly confidential by law. If Board Members are asked for information regarding Closed Sessions, Board Members will state that they can give no information other than what is posted on the agenda.
2. Only members of the Board have a right to attend Closed Session, except that the District's attorney must be present when it meets under Section 551.071. A governmental body has discretion to include any of its officers and employees whose participation is necessary to the matter under consideration; therefore, the Board could require the Chief Appraiser to attend all Closed Sessions.
3. When it is apparent to and agreed upon by a consensus of the Board that it would be in the best interest of the staff, community or Board to make a statement regarding a Closed Session agenda item, the Board Chair will compose an official statement in compliance with the Texas Open Meetings Act.

Property Tax Code Section: 6.04

Date Adopted: September 24, 2009
Resolution #: 2009-2

Date Amended: June 26, 2025
Resolution #: 2025-93

Director Tardog /ino

Adding agenda items by Members of the board or directors.

In order to promote initiative by individual board members , The Chief Appraiser will, three days before the agenda is posted, by email put out a call for any Agenda items.

Any board of director may add an agenda item to the Agenda, with the understanding that this privilege may be modified or suspended by a majority vote of the board if the agenda items do not adhere to the goals and needs of the Board.

Modifications may include requiring the support of two directors, or any other modification a majority of the board may deem appropriate.

Any board member submitting an agenda item is encouraged to carefully consider input and advice from both the Chairman and Chief Appraiser as to timing and appropriateness of the Agenda item .

2. Further, the chief appraiser as part of their agenda duties , will not add to any agenda, modifications to any board of director polices without first, at a regularly scheduled meeting, obtaining consent of the board.

*Are
these items to be
placed on future agendas*

Adding to Agenda policy 101 Rev 2. June 24, 2025

Author Jerry Tartaglino

Adding agenda items by Members of the Board or Directors.

In order to promote initiative by individual board members, *a Board member may submit a proposed agenda item at any time prior to 10 days prior to the meeting.*

Any board of director may add an agenda item to the Agenda, with the understanding that this privilege may be modified or suspended by a majority vote of the board if the agenda items do not adhere to the goals and needs of the Board.

Modifications may include requiring the support of two directors, or any other modification a majority of the board may deem appropriate.

Any board member submitting an agenda item is encouraged to carefully consider input and advice from both the Chairman and Chief Appraiser as to timing and appropriateness of the Agenda item .

BOARD MEETINGS

BE
(LOCAL)

Meeting Place and Time	The notice for a Board meeting shall reflect the date, time, and location of the meeting.
Regular Meetings	Regular meetings of the Board shall normally be held on the fourth Monday of each month at 6:30 p.m. When determined necessary and for the convenience of Board members, the Board President may change the date, time, or location of a regular meeting with proper notice.
Special or Emergency Meetings	<p>The Board President shall call special meetings at the Board President's discretion or on request by two members of the Board.</p> <p>The Board President shall call an emergency meeting when it is determined by the Board President or two members of the Board that an emergency or urgent public necessity, as defined by law, warrants the meeting.</p>
Agenda	<p>The deadline for submitting items for inclusion on the agenda is the fifth calendar day before regular meetings and the third calendar day before special meetings.</p> <p>Preparation</p> <p>In consultation with the Board President, the Superintendent shall prepare the agenda for all Board meetings. The Superintendent shall include on the preliminary agenda of the meeting all topics that have been timely submitted by the Board President and at least two Board members.</p> <p>Before the official agenda is finalized for any meeting, the Superintendent shall consult the Board President to ensure that the agenda and the topics included meet with the Board President's approval. In reviewing the preliminary agenda, the Board President shall ensure that any topics the Board or at least two Board members have requested to be addressed are either on that agenda or scheduled for deliberation at an appropriate time in the near future. The Board President shall not have authority to remove from the agenda a subject requested by at least two Board members without specific authorization from those Board members.</p>
Notice to Members	Members of the Board shall be given notice of regular and special meetings at least 72 hours prior to the scheduled time of the meeting and at least one hour prior to the time of an emergency meeting.
Closed Meeting	<p>Notice of all meetings shall provide for the possibility of a closed meeting during an open meeting, in accordance with law.</p> <p>The Board may conduct a closed meeting when the agenda subject is one that may properly be discussed in closed meeting. [See BEC]</p>

BOARD MEETINGS

BE
(LOCAL)

Order of Business	The order of business for regular Board meetings shall be as set out in the agenda accompanying the notice of the meeting. At the meeting, the order in which posted agenda items are taken may be changed by consensus of Board members.
Rules of Order	The Board shall observe the parliamentary procedures as found in <i>Robert's Rules of Order, Newly Revised</i> , except as otherwise provided in Board procedural rules or by law. Procedural rules may be suspended at any Board meeting by majority vote of the members present.
Voting	Voting shall be by voice vote or show of hands, as directed by the Board President. Any member may abstain from voting, and a member's vote or failure to vote shall be recorded upon that member's request. [See BDAA(LOCAL) for the Board President's voting rights]
Consent Agenda	When the agenda is prepared, the Board President shall determine items, if any, that qualify to be placed on the consent agenda. A consent agenda shall include items of a routine and/or recurring nature grouped together under one action item. For each item listed as part of a consent agenda, the Board shall be furnished with background material. All such items shall be acted upon by one vote without separate discussion, unless a Board member requests that an item be withdrawn for individual consideration. The remaining items shall be adopted under a single motion and vote.
Minutes	<p>Board action shall be carefully recorded by the Board Secretary or clerk; when approved, these minutes shall serve as the legal record of official Board actions. The written minutes of all meetings shall be approved by vote of the Board and signed by the Board President and the Board Secretary.</p> <p>The official minutes of the Board shall be retained on file in the office of the Superintendent and shall be available for examination during regular office hours.</p>
Discussions and Limitation	<p>Discussions shall be addressed to the Board President and then the entire membership. Discussion shall be directed solely to the business currently under deliberation, and the Board President shall halt discussion that does not apply to the business before the Board.</p> <p>The Board President shall also halt discussion if the Board has agreed to a time limitation for discussion of an item, and that time limit has expired. Aside from these limitations, the Board President shall not interfere with debate so long as members wish to address themselves to an item under consideration.</p>

6. A retreat is a planning meeting between Board Members and staff which could include a training session for Board Members. A retreat must be held within the boundaries of the District.
7. Board Members are encouraged to make every effort to attend all meetings. If a Board Member is unable to attend, they will notify the Board President and the Superintendent as soon as possible.

Preparation of the Agenda

Further information: BE(LEGAL) BE(LOCAL) BED(LEGAL) BED(LOCAL)

1. In consultation with the Board President, the Superintendent shall prepare the agenda; however, final approval for the agenda is the sole authority of the Board President.
2. Any two Board Members may request that an item be included on a future agenda pursuant to Board policy BE(LOCAL). Upon the request of the Board President or the Superintendent, requesting Board Members will meet with the Board President and Superintendent to discuss the requested topic, the scope of any presentation required to address such topic and an estimate on the timing required to prepare such presentation. The Superintendent and Board President shall determine the placement and timing of the requested item.

Meeting Preparation

Further information: BE(LEGAL) BE(LOCAL) BEC(LEGAL) BED(LEGAL) BED(LOCAL)

1. The agenda packet is posted and notice is emailed to Board Members no less than four days before meetings. The Superintendent will ensure that documents and data for an agenda item, including presentations, are provided to all Board Members as soon as possible prior to the meeting. The Superintendent is encouraged to make available all such materials no later than twenty-four hours prior to such meeting.
2. Although backup materials are not required by the Open Meetings Act for posting the agenda, the Superintendent will ensure that adequate backup materials and necessary information for each agenda item are provided to Board Members. Any materials or information not ready when the agenda is posted will be shared with the Board as soon as they become available.
3. Once the Board agenda packet is posted, the Superintendent or designee will inform the Board of any agenda item supporting documentation revisions or updates.

Agenda Questions

Further information: BBE(LEGAL) BBE(LOCAL) BE(LEGAL) BE(LOCAL)

1. Board Members will direct agenda-related questions to the Superintendent, the Board President, and the appropriate staff member (if known) as soon as possible before a meeting and are encouraged to submit all such questions no later than twenty-four hours prior to such meeting. This does not limit a Board Member's ability to ask questions during a Board meeting. Board Members are encouraged to ask questions which may require additional preparation by the Superintendent or appropriate staff member as soon as possible before a meeting. If requested information is not available, the Superintendent will inform the Board Member before the beginning of the Board meeting or as soon as possible.
2. If an answer requires a special report, or requires a significant investment of time that will divert staff from established priorities, the Superintendent will notify the Board Member and the Board President prior to the start of the meeting. A board member may request an item be pulled from the agenda, subject to the discretion of the Board President or Superintendent. They may also motion to postpone an item during an open meeting or request a follow-up presentation as described under "Preparation of the Agenda."
3. The Consent Agenda contains routine items grouped together for approval by the Board with no discussion. Any Board Member may remove an item from the Consent Agenda for separate consideration, making every effort to inform the Superintendent, Board President, and appropriate staff member prior to the meeting of their intent to remove the item to allow staff to prepare as needed. This does not limit a Board Member's right to remove an item from the Consent Agenda during a meeting. If a Board Member does not support an item on the Consent Agenda, they are encouraged to remove such item from the Consent Agenda for separate consideration to avoid jeopardizing passage of the remainder of the Consent Agenda.

4. The Superintendent or designee will ensure that questions and answers provided to one Board Member are provided to all Board Members.
5. To ensure efficient meetings and equal participation, each Board Member may have the opportunity to speak or ask questions for up to five minutes per agenda item. The total discussion time for each agenda item is stated in the agenda and set prior to the meeting during the agenda review process. Once a Board Member has spent their allotted time, the presiding officer will ensure all Trustees have an opportunity to speak, if desired, before anyone speaks again. The presiding officer enforces time limits and manages the order of speakers and may use a timer to keep track.

Meeting Participation

Further information: BBF(LOCAL) BE(LEGAL) BE(LOCAL) BEC(LEGAL) BED(LEGAL) BED(LOCAL)

1. All Board Members are expected to conduct themselves professionally and ethically during meetings and public forums and in accordance with Roberts Rules of Order - Newly Revised, and applicable Board policy, including but not limited to BBF(LOCAL).
2. Differences of opinion, if respectfully submitted, are not to be construed as unacceptable behavior but rather respected as alternate views on a subject.
3. Discussion shall allow time for each Board Member to ask clarifying questions or make comments. No Board Member will coerce another Board Member to vote in a particular manner and no member may solicit votes in any manner.
4. No Board Member will criticize any Board Member's questions, discussion or vote.
5. Although it is the duty of every Board Member who has an opinion on a question to express it by their vote, they cannot be compelled to vote and can abstain. Board Members abstaining from voting shall briefly state their reason for the abstention.

Closed Session

Further information: BBF(LOCAL) BE(LEGAL) BE(LOCAL) BEC(LEGAL)

1. All matters discussed in Closed Session are strictly confidential by law. If Board Members are asked for information regarding Closed Sessions, Board Members will state that they can give no information other than what is posted on the agenda.
2. Only members of the Board have a right to attend Closed Session, except that the District's attorney must be present when it meets under Section 551.071. A governmental body has discretion to include any of its officers, employees, representatives and agents whose participation is necessary to the matter under consideration.
3. When it is apparent to and agreed upon by a consensus of the Board that it would be in the best interest of the students, staff, community or Board to make a statement regarding a Closed Session agenda item, the Board President will compose an official statement in compliance with the Texas Open Meetings Act.
4. Board members should be cognizant of the allocated time prescribed in the agenda for the meeting and will follow meeting participation procedures stated above. The Administrative Assistant to the Board will create a certified agenda of Closed Sessions in cooperation with the Board Secretary.

Response to Complaints

Further information: BBE(LEGAL) BBE(LOCAL) BBF (LOCAL) DGBA(LEGAL) DGBA(LOCAL) DGBA(EXHIBIT)
FNG(LEGAL) FNG(LOCAL) FNG(EXHIBIT) GF(LEGAL) GF(LOCAL) GF(EXHIBIT)

1. When a Board Member receives a complaint from a community member or an employee, the Board Member should:
 - listen respectfully;
 - remain impartial; and
 - ask if the District's procedures and chain of command have been followed.

- B. In making the determination, the Board shall consult with legal counsel to determine whether any additions, changes, or deletions need occur.
- C. Upon completion of any requested changes, the Board President shall provide a copy of the contract to all Trustees for review prior to approval.

ARTICLE VI: BOARD MEETINGS

Section 1: General Provisions

- A. Unless otherwise indicated in the notice of the meeting, Board meetings shall be held at the Frisco ISD Central Administration Building.
- B. All public portions of regular scheduled meetings at which the Board may take action or hear public comment are either recorded and/or minutes are taken and either the recording and/or minutes posted on the District website as soon as practicable after the date of the meeting. Any other meeting may be recorded at the discretion of the Board President.
- C. Trustees are expected to attend no less than 90% of scheduled board meetings.
- D. Trustees are expected to review the material sent to them regarding items on the agenda prior to the meeting and resolve questions prior to the meeting, when possible, by contacting the Superintendent or relevant District staff.

Section 2: Board Agenda

- A. The Superintendent, in consultation with the Board President, shall draft proposed agendas for all Board meetings.
- B. Trustees may request that the following items be placed on a regular meeting agenda in accordance with this section:
 - 1. Action items, other than proposed policy additions, deletions, or revisions which must be placed on an agenda in accordance with applicable provisions of these Board Operating Procedures.
 - 2. Staff reports on specific topics. The Superintendent, in his or her sole discretion, may select the appropriate staff members, or third parties if applicable, to provide such reports.
 - 3. Items for Trustee discussion only.
 - 4. Trustees may not request that an Action Item voted on by the full Board be added to a future Board Agenda until at least two regular Board Meetings have passed since the full Board previously voted on that or a materially equivalent item.
- C. Trustees may not request that members of the public participate in a Board meeting, except in accordance with the procedures for public participation described in these procedures.

- D. In making a request, a Trustee must provide sufficient information to describe the item such that it can be appropriately listed on an agenda in compliance with the Texas Open Meetings Act.
- E. The Board President, in consultation with the Superintendent, shall develop procedures for Trustees to request that applicable items be added to a Board meeting agenda.
- F. If two (2) or more Trustees, using the applicable procedures developed by the Board President, separately request that an item, as described above, be included on the agenda, the Board President shall determine whether the requests comply with these procedures and any procedures for submission developed by the Board President. If the Board President determines that both requests comply with applicable procedures, the Superintendent shall add the item to an agenda for a Board meeting at an appropriate time in the future. The item shall be added to a regular or special meeting agenda no later than the second regular Board meeting scheduled to occur after receipt of the second Trustee request that complies with the procedures established for submission of a request, as such compliance is determined by the Board President. If the Board President determines that the requests do not comply with the applicable procedures, the Board President shall inform the requesting Trustee(s) of the defect in the request. The timeline for adding an item to the agenda shall not begin until two compliant requests have been received in accordance with applicable procedures.
- G. The Board President, in his or her sole discretion, shall have the authority to adjust the language of a requested item to ensure it is posted in compliance with the Texas Open Meetings Act, but shall ensure that the language of the item is such that the purpose of the item is not materially changed. If the Board President utilizes his or her discretion to adjust the language of a requested item, the Board President shall provide notice of the language change to the requested Board members prior to or simultaneous with public posting of the agenda.
- H. The Board President shall not have the authority to remove an item placed on an agenda upon request of two (2) or more Trustees, except by consent of a sufficient number of the requesting Trustees such that only one requesting Trustee has not consented.
- I. Consent Agenda.
 - 1. Each agenda may include a portion of the agenda designated as the Consent Agenda.
 - 2. Items placed on the Consent Agenda may be approved in a single vote.
 - 3. The Superintendent, in consultation with the Board President, shall determine which items will be placed on the Consent Agenda.
 - 4. Any Trustee may request that a particular item be removed from the Consent Agenda and voted on separately.
 - 5. A Trustee may make such a request at any time prior to the presiding officer of a meeting calling for a vote on the Consent Agenda on which the item appears.

6. However, Trustees shall make the request as soon as possible and before the meeting begins if possible.
7. Such requests shall be made to the Board President and the Superintendent.
8. When a Trustee has made such a request, the presiding officer of the meeting shall indicate that the item has been removed from the Consent Agenda and call the item separately for discussion and possible action.

Section 3: Procedures for Board Participation

Trustees are expected to conduct themselves professionally, ethically, and with decorum at all Board meetings.

1. Trustees shall conduct themselves professionally and ethically during meetings in accordance with Board Operating Procedures and policy.
2. Trustees shall not engage in external communications during Board meetings.
3. Trustees shall not engage in any discussion or debate, except in relation to a properly posted agenda item, and only after the item has been introduced by the presiding officer.
4. All comments made by Trustees shall be directed to the Chair or the Board as a whole, not to individual Trustees.
5. In consideration of action items, no debate or discussion may occur prior to a proper motion being made and seconded.
6. To ensure productive deliberations and the orderly conduct of Board meetings, Trustees shall speak only when recognized by the presiding officer. Trustees shall not speak while another Trustee is speaking.
7. The presiding officer shall recognize the movant first on the motion and, if the movant has not used all of his or her time, to close on the motion prior to a vote.
8. The presiding officer shall prioritize recognizing Trustees who have not yet spoken.
9. Trustees must keep comments, questions, and discussion relevant to the particular item on the agenda being considered at the time.
10. In speaking on an agenda item, each Trustee shall have no more than twenty (20) minutes, cumulative of all comments, questions, answers to questions from staff, and discussion on a particular item, unless the time has been extended by the presiding officer prior to or during the introduction of an item, or unless two-thirds (2/3) of Trustees vote to extend the Trustee's time.
11. When it appears that no Trustees have a desire to be recognized further, the presiding officer shall ask the Board if it is ready to close debate. If after a reasonable time no Trustee indicates a desire to be recognized, the presiding officer shall announce the end of debate and, if applicable, call a vote on the item.

12. At any time during a debate, any Trustee may move that the question be called and such a motion must be immediately voted on without debate. If a majority of Trustees votes in favor of the motion, debate on the original question is ended immediately and the Board shall vote on the original question at that time.
13. The Board shall abide by rules related to the priority and effect of motions and rules related to points of order as laid out in the most recent available version of Robert's Rules of Order, as determined by the presiding officer.
14. Trustees may make any motion considered proper and applicable in accordance with Robert's Rules of Order.
15. Trustees shall not criticize any other Trustee for the questions, comments, discussion, or vote taken by the Trustee at the meeting. Differences of opinion, if respectfully submitted, are not to be construed as unacceptable behavior but rather as alternate views on a subject.
16. Trustees shall not disclose confidential legal advice provided to the Board during closed session during any discussion or debate regarding an Agenda Item or at any other time. Attorney-client privilege is held by the Board as a body and no individual Trustee may compromise such privilege.
17. Trustees may not coerce other Trustees to vote in a particular manner and no member may solicit votes in any manner.
18. Trustees may abstain from voting on items but shall briefly explain the reason for their abstention.

Section 4: Procedures for Public Participation

A. Definitions.

1. "Agenda Item" means any item listed on an agenda for a Board meeting.
2. "Public Comment Session" means any portion of the meeting during which the Board takes public comment.
3. "Public Comment Form" means the form created by the District which individuals must complete in order to speak during the Public Comment Session of a meeting.

B. Procedures for Regular Board Meetings.

1. Sign-Up Procedures.

- a. Individuals wishing to provide public comment during a Regular Board Meeting must complete and submit the required Public Comment Form prior to the designated start time for the open meeting in which the individual desires to speak.
- b. Public Comment Forms are not carried over from one meeting to the next, even if the Board defers action on an item to a later meeting.

Concerns about a Board Member

Approved: June 27, 2023

1. If a Board Member has a concern about the performance and/or actions of another Board Member, the recommended process for addressing such concerns shall be the following, in this order:
 - a. The concerned Board Member shall have a private conversation with the Board Member to resolve the issue;
 - b. If unresolved, the concerned Board Member will meet privately with the Board President and outline the specific issue. The Board President and the concerned Board Member will meet with the Board Member to resolve the issue. If the concern is with the performance of the Board President, the Vice President will meet with the concerned Board Member; and
 - c. If the issue is still not resolved, the concerned Board Member will hold a conference with the Board President (or Vice President with concerns regarding the President) and the Superintendent or designee to develop a plan of action to resolve the concerns.
2. If the issue remains unresolved, the concerned Board Member will, through the Board President, request that an item be placed on a regularly scheduled agenda as a Closed Session item.
3. Should the Board determine that reprimand or censorship is warranted, such action may only be taken in a duly posted public meeting. If a Board Member warrants censure as determined by the Board, the Board can take action as permitted by applicable laws and regulations.

Annual Board Planning Calendar

Approved: June 27, 2023

The Board's annual planning calendar provides a general planning guideline and at a minimum, can include the following items:

- a. Required Board actions, including items legally required;
- b. Items required by Board policy; and
- c. Desired Board reports.

Meetings

Approved: June 27, 2023

1. All meetings wherein the Board votes on any matter or allows public comment shall be videotaped and available on the McKinney ISD website.
2. Board Meetings are open to the public and held at the McKinney ISD Community Events Center, or other location designated in accordance with the Texas Open Meetings Act, to conduct the formal business of the District. Board Meetings typically are preceded by a Closed Session to discuss certain items as authorized under the Texas Open Meetings Act (Texas Government Code Chapter 551)

3. Work Sessions are open to the public and held at McKinney ISD Community Events Center Room, or other location designated in accordance with the Texas Open Meetings Act, to discuss items and to receive information. Work Sessions will primarily include review and dialogue about instructional programming.
4. A Special Meeting is a business meeting held on a date other than a regularly scheduled meeting on the published calendar.
5. Emergency Meetings are called to address a reasonably unforeseeable situation or an imminent threat to public health and safety which requires immediate action by the Board and may be scheduled with a one-hour notice. Unless hindered by the emergency, Emergency Meetings are videotaped and available on the McKinney ISD website.
6. The Board may hold a closed session at any time, in accordance with the Texas Open Meetings Act.
7. Board Members are encouraged to make every effort to attend all meetings. If a Board Member is unable to attend, they will notify the Board President and the Superintendent as soon as possible.

Preparation of the Agenda

Approved: June 27, 2023

1. In consultation with the Board President, the Superintendent shall prepare the agenda; however, final approval for the agenda is the sole authority of the President.
2. A Board Member may request that a subject be included on a future agenda for a Board Meeting or Work Session by email or during the discussion of upcoming agenda items. The Board President shall ensure topics that at least two Board Members, either jointly or individually, have requested be addressed are scheduled for deliberation at an appropriate time in the near future.
3. No item can be requested to be placed on the Board Meeting agenda by a Board Member if submitted later than noon of the eighth calendar day before regularly scheduled meetings and noon of the third calendar day before special meetings.

Meeting Preparation

Approved: June 27, 2023

1. The agenda packet is posted and notice emailed to Board Members a minimum of seventy-two hours (72) prior to the scheduled meeting. The Superintendent will ensure that documents and data for an agenda item, including presentations, are provided to all Board Members a minimum of seventy-two hours (72) prior to the scheduled meeting.
2. The Superintendent will ensure that adequate backup materials and necessary information for each agenda item are provided to Board Members. Backup materials and information not available when the agenda is posted will be provided immediately upon completion.
3. Once the Board agenda packet is posted, the Superintendent or designee will inform the Board of any agenda item supporting documentation revisions or updates.
4. For contracts placed on the agenda for approval, the Superintendent will ensure that the contract is available to Board Members upon request prior to, or during, the meeting.

Agenda Questions

Approved: June 27, 2023

1. Board Members will direct agenda-related questions to the Superintendent and the Board President, as soon as possible before a meeting. This does not limit a Board Member's ability to ask questions during the Board Meeting. If requested information is not available, the Superintendent will inform the Board Member before the beginning of the Board Meeting or as soon as possible. Questions not presented prior to a meeting may require additional time for response and may delay the Board's consideration of an item.
2. If an answer is not readily available, requires a special report, or requires a significant investment of time that will divert staff from established priorities, the Superintendent will notify the Board Member and the Board President prior to the start of the meeting. The Board Member has the option of making a motion to postpone the agenda item for further consideration.
3. Any Board Member may remove an item from the Consent Agenda for separate consideration, making every effort to inform the Superintendent, Board President, and appropriate staff member prior to the meeting of their intent to remove the item to allow staff to prepare as needed. This does not limit a Board Member's right to remove an item from the Consent Agenda during a meeting.
4. The Superintendent or designee will ensure that answers / communications provided to one Board Member are provided to all Board Members.

Meeting Participation

Approved: June 27, 2023

1. Anytime four (4) or more Board Members are gathered to discuss school district business, it is considered a meeting.
2. Failure to timely post such a meeting is considered a violation of the Texas Open Meetings Act.
3. All Board Members are expected to conduct themselves professionally and ethically during meetings and public forums and in accordance with Roberts Rules of Order, Newly Revised, unless suspended by majority vote of the members present.
4. Differences of opinion, if respectfully submitted, are not to be construed as unacceptable behavior but rather as alternate views on a subject.
5. Debate and discussion must continue until such time as each Board Member feels that they have had adequate time to ask clarifying questions or make comments unless the question has been moved and adopted.
6. No Board Member will coerce another Board Member to vote in a particular manner and no member may solicit votes in any manner.
7. No Board Member will criticize any Board Member's questions, discussion or vote.
8. Although it is the duty of every Board Member who has an opinion on a question to express it by their vote, they cannot be compelled to vote and can abstain. Board Members abstaining from voting may briefly state their reason for the abstention.

Address:
2860 Virginia Parkway
McKinney, Texas 75071



Fax: 214.491.1504
Phone: 214.491.1500
Email: info@imaginenorthtexas.org

IMAGINE INTERNATIONAL ACADEMY OF NORTH TEXAS

An International Baccalaureate World School

www.imaginenorthtexas.org

NOTICE & AGENDA – MEETING OF BOARD OF MANAGERS

JANUARY 15, 2025

Mission Statement: The mission of the Imagine International Academy of North Texas is to cultivate future leaders passionate about making a positive contribution to their local and global communities.

Date: January 15, 2025 Time: 4:30 PM
Location: 2860 Virginia Parkway, McKinney, TX 75071
School Library

Notice is hereby given that a meeting of the Board of Managers of the Imagine International Academy of North Texas will be held on the date, time, and location posted above. It is the intent of the Board to have a quorum physically present at this address. Board members not physically present may participate by live two-way video and audio feed in accordance with the Texas Open Meetings Act. If a quorum of the Board cannot be physically present at the above address, it is the intent to have the presiding officer physically present at the above address. Members of the public may submit comments on any agenda item(s) before or during consideration of the item to board@imaginenorthtexas.org. Items will not necessarily be discussed or considered in the order they are printed on the agenda below. If, during the course of the meeting, discussion of any item on the agenda should be held in an executive or closed session, the Board will convene in such executive or closed session as permitted by and in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

I. CALL TO ORDER/ROLL CALL/ESTABLISHMENT OF QUORUM

II. CITIZENS' PRESENTATIONS AND RECOGNITIONS (3-MINUTE LIMIT PER CITIZEN)

This is an opportunity for citizens to address the Board on any matter, whether or not it is posted on the agenda. The Board cannot by law take action nor have any discussion or deliberations on any presentation made to the Board at this time concerning an item not listed on the agenda. Any item presented may be noticed on a future agenda for deliberation or action.

III. CONSENT AGENDA

All items listed below are considered routine by the Board of Managers and will be enacted with one motion. There will be no separate discussion of items unless a Board member so requests, in which event the item will be removed from the general order of business and considered in its normal sequence.

- A. CONSIDER APPROVAL OF MINUTES FROM THE NOVEMBER 20, 2024 MEETING
- B. CONSIDER APPROVAL FOR CHARTER SCHOOL GOVERNANCE & ORGANIZATION (200.140, 200.160, 200.180, 200.200, 200.220)
- C. CONSIDER APPROVAL OF CAO MONITORING REPORT FOR EE-7, EE-8 & EE-9
- D. CONSIDER APPROVAL OF NEW SCHOOL VENDOR AGREEMENTS

IV. IIA-NT DISTRICT VULNERABILITY ASSESSMENT REPORT (E. Upton)

V. CENTRAL ADMINISTRATION OFFICER (CAO) REPORT (E. Upton)

VI. IB EVALUATION REVIEW (E. Upton)

VII. CHIEF FINANCIAL OFFICER (CFO) REPORT (M. Kennedy)

- A. GENERAL REPORTS
- B. FRIENDS OF IIA-NT DONATION REPORT

VIII. CONSIDER APPROVAL OF ADDITIONAL INVESTMENT OF FUNDS *(M. Kennedy/E. Upton)*

IX. CONSIDER APPROVAL OF SCHOOL LIBRARY BOOK ADDITIONS *(E. Upton)*

X. CONSIDER APPROVAL OF ALTERNATE TEA APPROVAL DESIGNEE *(E. Upton)*

XI. COMMUNITY LINKAGE MEETING PRESENTATION *(E. Upton/C. Haeckler)*

XII. BOARD MEMBER SUCCESSION PLANNING *(C. Haeckler)*

XIII. POLICY GOVERNANCE MONITORING *(C. Haeckler)*

- A. RESULTS MONITORING OF R-3
- B. BOARD MONITORING OF GP-6, GP-7 & BCR-3

XIV. BOARD CALENDAR / FUTURE AGENDA ITEMS

XV. CLOSED SESSION: The Board may adjourn to Closed Session on any item listed above as appropriate to that item pursuant to the Texas Open Meetings Act.

XVI. RECONVENE: Reconvene to Open Session and take action, if any, on items discussed in Closed Session.

XVII. ADJOURNMENT

In accordance with the Texas Open Meetings Act (Subchapters D and E of Ch. 551, Tex. Government Code), the Board may enter closed meeting to deliberate any subject authorized by Subchapter D that is listed on the Agenda for this meeting. Any final action, decision, or vote on a subject deliberated in closed meeting will be taken in an open meeting held in compliance with the Texas Open Meetings Act.

CERTIFICATION

Posted in accordance with Ch. 551 of the Texas Government Code on Sunday, January 12th, 2025 at or before 4:30 PM.



Michael Domingue, Board Secretary

If you plan to attend this public meeting and have a disability that requires special needs, please advise the Board Secretary 48 hours in advance by emailing board@imagenorthtexas.org and reasonable accommodations will be made to assist you.



AGENDA

CITY COUNCIL MEETING December 7, 2010 @ 5:00 P.M.

Notice is hereby given the City Council for the City of Parker will meet in a Regular Meeting on Tuesday, December 7, 2010 at 5:00 P.M. at the Parker City Hall, 5700 E. Parker Road, Parker, Texas 75002.

CALL TO ORDER – Roll Call and Determination of a Quorum

EXECUTIVE SESSION 5:00 P.M. – 6:00 P.M.

Pursuant to the provisions of Chapter 551, Texas Government Code, Vernon's Texas Codes Annotated the City Council may hold a closed meeting.

1. RECESS TO CLOSED EXECUTIVE SESSION IN ACCORDANCE WITH THE AUTHORITY CONTAINED IN TEXAS GOVERNMENT CODE SECTION 551.071 AND 551.072:
 - A. ACQUISITION OF REAL ESTATE EASEMENTS FOR WATER SYSTEM IMPROVEMENTS IN OR PARALLEL TO BOZEMAN ROAD, AND EXTENDING NORTH TO PARKER ROAD FROM BOZEMAN ROAD.
 - B. LEGAL ADVICE REGARDING MUNICIPAL BOUNDARY ADJUSTMENT AT CHAPARRAL ROAD AND THE PLANO/ ALLEN CITY LIMITS.
2. RECONVENE REGULAR MEETING.
3. (a) DELIBERATION AND APPROPRIATE ACTION ON ADOPTION OF RESOLUTION 2010-320, REGARDING THE NECESSITY OF EMINENT DOMAIN PROCEEDINGS TO ACQUIRE NEEDED EASEMENTS FOR THE CONSTRUCTION AND USE OF A WATERLINE DESIGNATED AS THE 2009 WATERLINE ADDITION, IN OR PARALLEL TO BOZEMAN ROAD, AND EXTENDING NORTH TO PARKER ROAD FROM BOZEMAN ROAD.

(b) ANY OTHER ACTION REQUIRED AS A RESULT OF THE EXECUTIVE SESSION.

PLEDGE OF ALLEGIANCE

American Pledge: I pledge allegiance to the flag of the United States of America; and to the republic for which it stands, one nation under God, indivisible with liberty and justice for all.

Texas Pledge: Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible.

THE CITY COUNCIL WILL HOLD ITS MEETING IN JOINT SESSION WITH THE PARKER PARKS AND RECREATION COMMISSION, COMMENCING AT 6:00 PM.

4. PRESENTATION TO THE PARKER CITY COUNCIL AND THE PARKER PARKS AND RECREATION COMMISSION BY AL JOHNSON, REGARDING THE DESIGN, FUNDING, GRANT REQUIREMENTS, AND SCHEDULING OF THE IMPROVEMENTS PROPOSED FOR THE PRESERVE, INCLUDING THE INSTALLATION OF A TRAIL, AND ANY APPROPRIATE ACTION BY THE CITY COUNCIL AS A RESULT OF THE PRESENTATION.

PUBLIC COMMENTS The City Council invites any person with business before the Council not scheduled on the agenda to speak to the Council. No formal action may be taken on these items at this meeting. Please keep comments to 3 minutes.

INDIVIDUAL CONSIDERATION ITEMS

5. CONSIDERATION AND/OR ANY APPROPRIATE ACTION ON MEETING MINUTES FOR NOVEMBER 16, 2010.
6. INTERVIEWS, CONSIDERATION AND/OR ANY APPROPRIATE ACTION ON RESOLUTION 2010-318 APPOINTING 2010-2011 COMMISSION MEMBERS TO THE PLANNING AND ZONING COMMISSION.

THE CITY COUNCIL WILL HOLD ITS MEETING IN JOINT SESSION WITH THE PARKER PLANNING AND ZONING COMMISSION, COMMENCING AT THE CONCLUSION OF ITEMS 1-6 ABOVE.

7. CONSIDERATION AND/OR ANY APPROPRIATE ACTION ON PLANNING AND ZONING COMMISSIONS PROPOSED AMENDMENTS ON WIND TURBINE ORDINANCE.

ROUTINE ITEMS

8. FUTURE AGENDA ITEM REQUESTS.

9. UPDATES

- a. Reminder - Council approved cancelling the December 21 and January 4 regular meetings due to the holidays.
- b. "History of the City of Parker Data Collection."

10. ADJOURN

In addition to any specifically identified Executive Sessions, Council may convene into Executive Session at any point during the open meeting to discuss any item posted on this Agenda. The Open Meetings Act provides specific exceptions that require that a meeting be open. Should Council elect to convene into Executive Session, those exceptions will be specifically identified and announced. Any subsequent action, as a result of this Executive Session, will be taken and recorded in open session.

I certify that this Notice of Meeting was posted on December 3, 2010 at 5:00 p.m. at the Parker City Hall, and as a courtesy, this Agenda is also posted to the City of Parker Website at www.parkertexas.us.

Date Notice Removed


Carrie L. Smith, TRMC, CMC
City Secretary

The Parker City Hall is Wheelchair accessible. Sign interpretations or other special assistance for disabled attendees must be requested 48 hours in advance by contacting the City Secretary's Office at 972 442 6811.



AGENDA
CITY COUNCIL MEETING
JULY 15, 2025 @ 5:00 PM

Notice is hereby given that the City Council for the City of Parker will meet on Tuesday, July 15, 2025 at 5:00 PM at the Parker City Hall, 5700 E. Parker Road, Parker, Texas, 75002. The City Council meeting will be open to the public and live streamed.

Pursuant to Texas Government Code § 551.127, notice is given that it is the intent of the City Council that a quorum of the Council will be physically present for the above-referenced meeting at Parker City Hall, 5700 E. Parker Road, Parker, Texas. Some council members or City employees may participate in this meeting remotely by means of video conference call in compliance with state law.

CALL TO ORDER – Roll Call and Determination of a Quorum

WORKSHOP (5:00PM – 6:30PM)

1. BUDGET PROCESS OVERVIEW

ADJOURN

CALL TO ORDER – Roll Call and Determination of a Quorum

PLEDGE OF ALLEGIANCE

AMERICAN PLEDGE: I pledge allegiance to the flag of the United States of America; and to the republic for which it stands, one nation under God, indivisible with liberty and justice for all.

TEXAS PLEDGE: Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible.

PUBLIC COMMENTS – The City Council invites any person with business before the council to speak to the council. No formal action may be taken on these items at this meeting. please keep comments to 3 minutes.

ITEMS OF COMMUNITY INTEREST

2. PARKS AND RECREATION COMMISSION (P&R) – WEDNESDAY, AUGUST 13, 2025, 5 PM

BUDGET/TAX RATE MEETINGS

CONSENT AGENDA - Routine Council business. Consent Agenda is approved by a single majority vote. Items may be removed for open discussion by a request from a Councilmember or member of staff.

- [3.](#) APPROVAL OF MEETING MINUTES FOR APRIL 22, 2025. [SPECIAL MEETING]
- [4.](#) APPROVAL OF MEETING MINUTES FOR APRIL 30, 2025. [SPECIAL MEETING]

INDIVIDUAL CONSIDERATION ITEMS

- [5.](#) CONSIDERATION AND/OR ANY APPROPRIATE ACTION ON RESOLUTION NO. 2025-853 SUSPENDING THE JULY 31, 2025 EFFECTIVE DATE OF ONCOR ELECTRIC DELIVERY COMPANY'S REQUESTED RATE CHANGE TO PERMIT THE CITY TIME TO STUDY THE REQUEST AND TO ESTABLISH REASONABLE RATES.
- [6.](#) CONSIDERATION AND/OR ANY APPROPRIATE ACTION ON RESOLUTION 2025-848 ESTABLISHING A PROCEDURE FOR COUNCIL NOMINATIONS.

ROUTINE ITEMS

[7.](#) UPDATE(S):

FM2551

TEXAS COMMISSION ON ENVIRONMENTAL QUALITY (TCEQ),
WASTEWATER TREATMENT PLANT (WWTP) AND MUNICIPAL UTILITY
DISTRICT (MUD)

LEWIS LANE

POST OFFICE/ZIP CODE

DUBLIN ROAD WATER LINES

NEWSLETTER

CAPITAL IMPROVEMENT PLAN (CIP)

PERSONNEL MANUAL

COMPREHENSIVE PLAN (COMP)

NOISE COMMITTEE

ANY ADDITIONAL UPDATES noise committee

MONTHLY/QUARTERLY REPORTS

[June 2025 - Building Permit/Code Report](#)

[June 2025 – Court Report](#)

[June 2025 - Finance \(monthly financials\) Report](#)

DONATION(S)

[8.](#) ACCEPTANCE OF DONATION(S) FOR POLICE, FIRE, AND CITY STAFF FOR THE RECORD (Each valued at between \$0 - \$1,000 [RES. NO. 2024-801])

Melissa Tierce donated a case of Body Armor drinks valued at \$25 to the Police Department.

Lea Ann Hall, Alyssa and Alex Finklea a donated \$500 cash to the Fire Department.

Debra Merlino donated a tray of pastries valued at \$25 to the Police Department.

Special Acknowledgement of Training at 3900 McCreary Road by Fire Department.

FUTURE AGENDA ITEMS

[9.](#) FUTURE AGENDA ITEMS

EXECUTIVE SESSION START TO FINISH – Pursuant to the provision of Chapter 551, Texas Government Code the City Council may hold a closed meeting.

RECESS TO CLOSED EXECUTIVE SESSION IN ACCORDANCE WITH THE AUTHORITY CONTAINED IN:

Government Code Section 551.074 Personnel – To deliberate the appointment, employment, or duties of a city administrator.

Government Code Section 551.074 Personnel—To deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee.

Government Code Section 551.071(1)—Consultation with City Attorney concerning Pending or Contemplated Litigation.

Government Code Section 551.071(2) – Consultation with Attorney on a matter in which the duty of the attorney to the governmental body under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with this chapter (Open Meetings Act).

RECONVENE REGULAR MEETING.

ANY APPROPRIATE DELIBERATION AND/OR ACTION ON ANY OF THE EXECUTIVE SESSION SUBJECTS LISTED ABOVE.

ADJOURN

In addition to any specifically identified Executive Sessions, Council may convene into Executive Session at any point during the open meeting to discuss any item posted on this Agenda. The Open Meetings Act provides specific exceptions to the requirement that a meeting be open. Should Council elect to convene into Executive Session, those exceptions will be specifically identified and announced. Any subsequent action, as a result of this Executive Session, will be taken and recorded in open session.

I certify that this Notice of Meeting was posted on or before July 11, 2025, by 5:00 p.m. at the Parker City Hall, and required by Texas Open Meetings Act (TOMA) is also posted to the City of Parker Website at www.parkertexas.us

The Parker City Hall is Wheelchair accessible. Sign interpretations or other special assistance for disabled attendees must be requested 48 hours in advance by contacting the City Secretary's Office at 972 442 6811.

Date Notice Removed

Patti Scott Grey
City Secretary

The Parker City Hall is Wheelchair accessible. Sign interpretations or other special assistance for disabled attendees must be requested 48 hours in advance by contacting the City Secretary's Office at 972 442 6811.

MINUTES

BOARD OF DIRECTORS COLLIN CENTRAL APPRAISAL DISTRICT

Thursday, August 21, 2025

MEETING LOCATION: CENTRAL APPRAISAL DISTRICT OFFICE
250 Eldorado Parkway, Dr. Leo Fitzgerald
Board Room
McKinney, Texas 75069

MEMBERS PRESENT: Brian Mantzey, Richard Grady, Veronica Yost,
Andrew Cook, Scott Grigg, Alvin Benton,
Randal Shinn

MEMBERS ABSENT: Sumbel Zeb, Jerry Tartaglino

APPROVAL OF MINUTES:

Chairman

Secretary

NATURE OF BUSINESS

A. CALL TO ORDER

Call to order 6:00 p.m.

1. Announcement by presiding officer whether the meeting has been posted in the manner required by law.

Discussion: Meeting was called to order by Chairman, Brian Mantzey, and he announced that the meeting had been posted in the time and manner required by law.

Motion: N/A

Motion By: None

Second By: None

2. Roll Call: Announcement by presiding officer whether a quorum is present.

Discussion: The Chairman announced that a quorum was present.

Motion: N/A

Motion By: None

Second By: None

B. AUDIENCE

Receive public comments. Five-minute limit per speaker, unless extended by Board vote.

Mark Walsh, Saunders, Walsh & Beard, District's Legal Counsel

George Chollar, ARB Chairman

Nancy Bittner, ARB Vice Chairman
Adam Ringgenberg, Valley View Consulting, LLC
Kendall Yorn, Allen, Tx.
Public comments received:
Kendall Yorn, Allen, Tx. property owner

C. WORK SESSION

Board Member E&O Insurance and CCAD Purchasing

- Board Member Errors & Omissions Liability Insurance coverage overview
- Policy #117 CCAD Purchasing overview

D. EXECUTIVE SESSION

Board adjourned to executive session at 6:18 p.m.

1. Consultation with attorney regarding pending or contemplated litigation, and/or a matter in which the duty of the attorney to the governmental body under the Texas Disciplinary Rules of Professional Conduct of the State of Texas clearly conflicts with the [Texas Open Meetings Act]. Pursuant to the Texas Open Meetings Act, Section 551.071.

Discussion: N/A

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

2. Deliberation regarding real property. Pursuant to Texas Open Meetings Act, Section 551.072.

Discussion: Regarding future building expansion with attorney Mark Walsh.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

3. Personnel matters. Pursuant to Texas Open Meetings Act, Section 551.074.

Discussion: N/A

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

E. ACTION ON ITEMS DISCUSSED IN EXECUTIVE SESSION

1. Action on items pertaining to litigation, if any.

Discussion: N/A

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

2. Action on items pertaining to real property, if any.

Discussion: No action taken regarding real property.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

3. Action on items pertaining to personnel, if any.

Discussion: N/A

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

F. CONSENT AGENDA

The Consent Agenda will be acted upon in one motion and contains items which are routine and typically noncontroversial. Items may be removed from this agenda for individual discussion by a Board Member, the Chief Appraiser or any citizen.

Motion by Richard Grady to accept reports and approve action items contained in consent agenda. Seconded by Scott Grigg. Motion carried.

Board reconvened to open session at 7:06 p.m.

1. Approval of minutes from the June 26, 2025 regular meeting.

Discussion: Action taken: Board approved minutes from June 26, 2025, regular meeting, with the change and correction on Item F1 to reflect Scott Grigg abstained from that vote.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Scott Grigg

2. Review of June 2025 and July 2025 bills.

Discussion: Action taken: Board reviewed the June and July 2025 bills.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Scott Grigg

3. Review of June 2025 and July 2025 financial reports.

Discussion: Action taken: Board reviewed and accepted the June and July 2025 financial reports.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Scott Grigg

4. Review and sign checks for approved purchases requiring Board signature.

Discussion: Action taken: There were no checks at this meeting needing to be signed by Chairman, Brian Mantzey.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Scott Grigg

5. Review reports of June 2025 and July 2025 checks and electronic transfers greater than \$25,000.

Discussion: Action taken: Board reviewed and accepted the June and July 2025 report of checks and electronic transfers greater than \$25,000.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Scott Grigg

G. REGULAR AGENDA

"No actionable items"

H. REPORTS

1. Taxpayer Liaison Officer Report

Discussion: Chris Nickell, Taxpayer Liaison Officer, presented the Monthly Status Report. There were 13 new complaints received from June 16th through July, 8 were settled for various reasons and 5 are ongoing for rehearings. There were 128 Customer Service Surveys received during this period. One new TDLR complaint received in late June involving Solar Exemptions, which was responded to July 10th. There has been no response from the new owner who filed a TDLR complaint for disaster relief following Mr. Swanson's reply with evidence on 3/19/2025.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

2. Report of Activities and Events for ARB Officer Selection and ARB Member Applications

Discussion: George Chollar, ARB Chairman, addressed the Board regarding matters pertaining to ARB Officer selection and ARB member applications.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

3. 2025 Protest & Inquiry Report

Discussion: Tina Castillo, Director of ARB and Agent Services, presented the 2025 Protest & Inquiry Report.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

4. 2nd Quarter Arbitration Report

Discussion: The 2nd Quarter Arbitration Report was presented by Teresa Justus, ARB & Agent Services Manager.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

5. 2nd Quarter Investment & Collateral Report

Discussion: Adam Ringgenberg, Valley View Consulting, LLC presented the 2nd Quarter Investment & Collateral Report.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

6. Vendor Report

Discussion: Mr. Swanson presented the Vendor Report.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

7. Litigation Report & Expense Summary

Discussion: Mr. Swanson also presented the Litigation Report & Expense Summary.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

I. CHIEF APPRAISER'S REPORT

1. General Comments

Discussion: On behalf of Marty Wright, Chief Appraiser, Mr. Swanson extended his thanks to CCAD staff on certifying timely for the entities.

Motion: N/A

Yes 0, No 0, Abstained 0

Motion By: None

Second By: None

J. ANNOUNCEMENT OF NEXT REGULAR SCHEDULED MEETING

The next meeting is to be held on the date and at the time listed below. The meeting will be held at 250 Eldorado Pkwy., Dr. Leo Fitzgerald Board Room, McKinney, Texas.

Thursday, September 25, 2025, 6:00 p.m.

K. ADJOURNMENT

1. Decision to Adjourn

Discussion: Chairman, Brian Mantzey, announced that the Board had concluded its business and the meeting was adjourned. The meeting adjourned at 7:45 p.m.

Motion: Carried

Yes 6, No 0, Abstained 0

Motion By: Richard Grady

Second By: Veronica Yost

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
August 2025

Date	Num	Name	Amount	Description
8/5/2025	6871	COLORIT GRAPHICS SERVICES	\$30.00	PRINTING AND/OR POSTAGE & DELIVERY
8/5/2025	6872	DSS	\$698.02	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/5/2025	6873	PERDUE, BRANDON, FIELDER, COLLINS	\$250.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/5/2025	6874	SHI GOVERNMENT SOLUTIONS	\$2,009.60	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/5/2025	888718	BUNDICK, FRANK	\$412.50	DEPUTY SHERIFF
8/5/2025	888719	DECK, RANDALL	\$425.00	DEPUTY SHERIFF
8/5/2025	888720	PENSON, OLIVIA K	\$950.00	DEPUTY SHERIFF
8/5/2025	888721	THIGPEN, LESLIE MICHAEL	\$400.00	DEPUTY SHERIFF
8/5/2025	888722	MASSEY SERVICE, INC	\$400.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/5/2025	888723	NICKELL, CHRISTOPHER	\$4,512.00	TAXPAYER LIASON OFFICER (TLO)
8/5/2025	888724	QUALITY PERSONNEL SERVICE	\$838.20	EMPLOYMENT AGENCY (SEASONAL TEMPS)
8/5/2025	888725	RING CENTRAL, INC.	\$3,742.55	UTILITIES
8/5/2025	888726	SAUNDERS & WALSH, PLLC	\$193,830.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/5/2025	888727	UBISTOR, INC.	\$4,942.40	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/5/2025	888728	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/5/2025	888729	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/6/2025	ACH-P	CINTAS FIRST AID	\$276.90	SUPPLIES OR MISC G&A SERVICES
8/7/2025	ACH-P	NCR CC MERCHANT	\$50.00	CREDIT CARD MERCHANT
8/8/2025	3389	ADP INC	\$424,656.54	PAYROLL, TAXES, OR FEES
8/8/2025	3390	ADP INC	\$59,297.73	PAYROLL, TAXES, OR FEES
8/8/2025	3394	NATIONWIDE RETIREMENT SOLUTIONS	\$3,010.00	EMPLOYEE BENEFITS
8/8/2025	3394	NATIONWIDE RETIREMENT SOLUTIONS	\$6,010.00	EMPLOYEE BENEFITS
8/8/2025	6875	BRENNAN, KEVIN	\$102.90	EMPLOYEE REIMBURSEMENT
8/8/2025	6876	CASTILLO, TINA	\$247.00	EMPLOYEE REIMBURSEMENT
8/8/2025	6877	CYPRESS VALLEY LANDSCAPING	\$1,379.92	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/8/2025	6878	DEX IMAGING	\$5,105.11	EQUIPMENT LEASE OR MAINTENANCE
8/8/2025	6879	GREAT AMERICA FINANCIAL SERVICES	\$1,963.00	EQUIPMENT LEASE OR MAINTENANCE
8/8/2025	6880	NELSON, LAURA	\$2.03	EMPLOYEE REIMBURSEMENT
8/8/2025	6881	PAPERTONE ENTERPRISES LLC	\$327.92	SUPPLIES OR MISC G&A SERVICES
8/8/2025	6882	SERVICE FIRST	\$210.00	EQUIPMENT LEASE OR MAINTENANCE
8/8/2025	6883	TAAD	\$243.50	MEMBERSHIP, DUES, LICENSES, ETC.
8/8/2025	6884	TARRANT APPRAISAL DISTRICT	\$230.00	EDUCATION, TRAVEL, OR TRAINER
8/8/2025	6885	YOURMEMBERSHIP.COM, INC.	\$459.00	NEW HIRE AND/OR TESTING RELATED
8/8/2025	6886	VOID	\$0.00	VOID
8/8/2025	6887	VOID	\$0.00	VOID
8/8/2025	6888	VOID	\$0.00	VOID
8/8/2025	6889	VOID	\$0.00	VOID
8/8/2025	ACH	ADP INC	\$4,613.89	PAYROLL, TAXES, OR FEES
8/8/2025	ACH	TEXAS WORKFORCE COMMISSION	\$8,589.00	UNEMPLOYMENT TAXES
8/11/2025	6890	CDW-G	\$1,204.70	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/11/2025	6891	IN BLOOM	\$93.00	SUPPLIES OR MISC G&A SERVICES
8/11/2025	6892	PLANO OFFICE SUPPLY	\$2,129.02	SUPPLIES OR MISC G&A SERVICES
8/11/2025	6893	REED, DANIELLE	\$71.00	EMPLOYEE REIMBURSEMENT
8/11/2025	ACH-P	AT&T - MAIN LOCAL	\$248.82	UTILITIES
8/11/2025	ACH-P	SAM'S CLUB	\$1,478.24	SUPPLIES OR MISC G&A SERVICES
8/12/2025	888730	DAVIS, MARISA	\$975.00	DEPUTY SHERIFF
8/12/2025	888731	DIAZ, STEPHEN ERIK	\$495.00	DEPUTY SHERIFF
8/12/2025	888732	VALDEZ, CHRISTIAN	\$510.00	DEPUTY SHERIFF
8/12/2025	888733	ZEGADLO, MARC	\$495.00	DEPUTY SHERIFF
8/12/2025	888734	INTEX ELECTRICAL CONTRACTORS, INC	\$450.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/12/2025	888735	MC PURE CLEANING, LLC	\$7,200.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/12/2025	888736	QUALITY PERSONNEL SERVICE	\$1,065.57	EMPLOYMENT AGENCY (SEASONAL TEMPS)
8/12/2025	888737	VALLEY VIEW CONSULTING, LLC	\$5,175.99	PROFESSIONAL SERVICES (INVESTMENT ADVISORS)
8/12/2025	888738	VARIVERGE LLC	\$285.40	PRINTING AND/OR POSTAGE & DELIVERY
8/15/2025	ACH	TCDRS	\$184,237.34	EMPLOYEE BENEFITS
8/18/2025	6894	BATTERIES PLUS	\$23.52	SUPPLIES OR MISC G&A SERVICES
8/18/2025	6895	BLUECROSS BLUESHIELD (LIFE&STLT)	\$11,743.54	EMPLOYEE BENEFITS
8/18/2025	6896	VOID	\$0.00	VOID
8/18/2025	6897	JOPLIN'S	\$3,417.40	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/18/2025	6898	LEGAL SHIELD / ID SHIELD	\$1,692.25	EMPLOYEE BENEFITS
8/18/2025	6899	SHI GOVERNMENT SOLUTIONS	\$4,320.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/18/2025	6900	CYPRESS VALLEY LANDSCAPING	\$573.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/18/2025	6901	SHI GOVERNMENT SOLUTIONS	\$3,784.32	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/18/2025	6902	SUPERIOR VISION OF TEXAS	\$1,720.91	EMPLOYEE BENEFITS
8/18/2025	6903	TARRANT APPRAISAL DISTRICT	\$230.00	EDUCATION, TRAVEL, OR TRAINER

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
August 2025

Date	Num	Name	Amount	Description
8/18/2025	6904	TDLR	\$100.00	MEMBERSHIP, DUES, LICENSES, ETC.
8/18/2025	6905	TILLEY, SHAWN	\$635.00	EMPLOYEE REIMBURSEMENT
8/19/2025	6906	COLORIT GRAPHICS SERVICES	\$141.50	PRINTING AND/OR POSTAGE & DELIVERY
8/19/2025	6907	COSTAR REALTY INFORMATION INC	\$6,735.87	PUBLICATIONS AND/OR RESEARCH
8/19/2025	6908	FRONTIER WASTE - MCKINNEY	\$534.87	UTILITIES
8/19/2025	888739	BORTON, BRIAN K	\$975.00	DEPUTY SHERIFF
8/19/2025	888740	BUNDICK, FRANK	\$495.00	DEPUTY SHERIFF
8/19/2025	888741	ORDONEZ, GORGE	\$495.00	DEPUTY SHERIFF
8/19/2025	888742	THIGPEN, LESLIE MICHAEL	\$480.00	DEPUTY SHERIFF
8/19/2025	888743	CUSHMAN & WAKEFIELD	\$10,500.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/19/2025	888744	MASSEY SERVICE, INC	\$336.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/19/2025	888745	QUALITY PERSONNEL SERVICE	\$1,785.85	EMPLOYMENT AGENCY (SEASONAL TEMPS)
8/19/2025	888746	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/19/2025	888747	VARIVERGE LLC	\$1,534.37	PRINTING AND/OR POSTAGE & DELIVERY
8/19/2025	888748	WEX HEALTH INC	\$170.50	EMPLOYEE BENEFITS
8/19/2025	888749	VAIL & PARK, P.C.	\$1,500.00	PROFESSIONAL SERVICES (CPA)
8/19/2025	ACH-P	AT&T - FIBER	\$52.78	UTILITIES
8/19/2025	ACH-P	UNUM LIFE INSURANCE CO OF AMERICA	\$994.10	EMPLOYEE BENEFITS
8/19/2025	ACH-P	AT&T - MOBILITY	\$5,081.44	UTILITIES
8/20/2025	888750	SWANSON, BRIAN	\$438.50	EMPLOYEE REIMBURSEMENT
8/22/2025	3407	ADP INC	\$378,232.13	PAYROLL, TAXES, OR FEES
8/22/2025	3408	ADP INC	\$58,932.14	PAYROLL, TAXES, OR FEES
8/22/2025	3411	NATIONWIDE RETIREMENT SOLUTIONS	\$3,228.18	EMPLOYEE BENEFITS
8/22/2025	3411	NATIONWIDE RETIREMENT SOLUTIONS	\$6,010.00	EMPLOYEE BENEFITS
8/25/2025	6909	AFLAC	\$6,658.11	EMPLOYEE BENEFITS
8/25/2025	6910	CITY OF MCKINNEY	\$1,615.25	UTILITIES
8/25/2025	6911	FIRST STOP HEALTH	\$1,426.00	EMPLOYEE BENEFITS
8/25/2025	6912	FRONTIER WASTE - MCKINNEY	\$534.87	UTILITIES
8/25/2025	6913	MYPRINTCHOICE	\$70.00	PRINTING AND/OR POSTAGE & DELIVERY
8/25/2025	6914	SHELL ENERGY SOLUTIONS	\$7,080.71	UTILITIES
8/25/2025	6915	SHI GOVERNMENT SOLUTIONS	\$10,100.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/25/2025	6916	SPECTRUM ENTERPRISE	\$1,356.12	UTILITIES
8/25/2025	ACH	PITNEY BOWES RESERVE ACCOUNT	\$20,000.00	PRINTING AND/OR POSTAGE & DELIVERY
8/26/2025	888751	BUNDICK, FRANK	\$720.00	DEPUTY SHERIFF
8/26/2025	888752	DIAZ, STEPHEN ERIK	\$1,020.00	DEPUTY SHERIFF
8/26/2025	888753	JEFFCOAT, JARROD	\$540.00	DEPUTY SHERIFF
8/26/2025	888754	POLK, MATTHEW	\$555.00	DEPUTY SHERIFF
8/26/2025	888755	GSO ARCHITECTS	\$30,000.00	PROFESSIONAL SERVICES (ARCHITECH)
8/26/2025	888756	HARRIS GOVERN	\$58,300.25	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
8/26/2025	888758	QUALITY PERSONNEL SERVICE	\$13,141.55	EMPLOYMENT AGENCY (SEASONAL TEMPS)
8/26/2025	888759	VARIVERGE LLC	\$1,245.00	PRINTING AND/OR POSTAGE & DELIVERY
8/26/2025	ACH-P	CINTAS FIRST AID	\$93.04	SUPPLIES OR MISC G&A SERVICES
8/26/2025	ACH-P	CINTAS FIRST AID	\$240.00	SUPPLIES OR MISC G&A SERVICES
8/26/2025	ACH-P	PITNEY BOWES SUPPLIES	\$690.30	SUPPLIES OR MISC G&A SERVICES
8/26/2025	ACH-P	CINTAS SANI CLEAN #163	\$3,532.36	FACILITIES MAINTENANCE, REPAIRS, REMODEL
8/26/2025	TRANSFER	CCAD	\$53,833.00	FUNDS TO COVER ARB PAYROLL
8/28/2025	ACH-P	AT&T - FIBER	\$1,606.89	UTILITIES
8/29/2025	3414	ADP INC	\$1,154.55	PAYROLL, TAXES, OR FEES
8/29/2025	3419	ADP INC	\$110.00	PAYROLL, TAXES, OR FEES
8/29/2025	6917	CARD SERVICE CENTER	\$6,292.87	CREDIT CARD MERCHANT
8/29/2025	6918	STAPLES BUSINESS CREDIT	\$2,171.89	SUPPLIES OR MISC G&A SERVICES
8/29/2025	6919	ARMSTRONG & ARMSTRONG, P.C.	\$587.50	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/29/2025	6920	VOID	\$0.00	VOID
8/29/2025	6921	COLORIT GRAPHICS SERVICES	\$140.00	PRINTING AND/OR POSTAGE & DELIVERY
8/29/2025	6922	DEX IMAGING	\$2,764.85	EQUIPMENT LEASE OR MAINTENANCE
8/29/2025	6923	MYPRINTCHOICE	\$140.00	PRINTING AND/OR POSTAGE & DELIVERY
8/29/2025	6924	PERDUE, BRANDON, FIELDER, COLLINS	\$250.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
8/29/2025	6925	PLANO OFFICE SUPPLY	\$2,894.53	SUPPLIES OR MISC G&A SERVICES
			<u>\$1,698,086.60</u>	

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
September 2025

Date	Num	Name	Amount	Description
9/3/2025	888760	QUALITY PERSONNEL SERVICE	\$10,199.68	EMPLOYMENT AGENCY (SEASONAL TEMPS)
9/3/2025	888761	HENRY, JAMES	\$1,050.00	DEPUTY SHERIFF
9/3/2025	888762	NEVAREZ, ALEJANDRO	\$1,140.00	DEPUTY SHERIFF
9/3/2025	888763	THIGPEN, LESLIE MICHAEL	\$555.00	DEPUTY SHERIFF
9/3/2025	888764	HERITAGE BROKERAGE SERVICES	\$3,250.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/3/2025	888765	INTEX ELECTRICAL CONTRACTORS, INC	\$650.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/3/2025	888766	MC PURE CLEANING, LLC	\$7,800.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/3/2025	888767	VOID	\$0.00	VOID
9/3/2025	888768	RING CENTRAL, INC.	\$3,742.55	UTILITIES
9/3/2025	TRANSFER	CCAD	\$51,116.00	FUNDS TO COVER ARB PAYROLL
9/5/2025	3430	ADP INC	\$433,307.23	PAYROLL, TAXES, OR FEES
9/5/2025	3431	ADP INC	\$59,634.65	PAYROLL, TAXES, OR FEES
9/5/2025	3434	NATIONWIDE RETIREMENT SOLUTIONS	\$3,228.18	EMPLOYEE BENEFITS
9/5/2025	3434	NATIONWIDE RETIREMENT SOLUTIONS	\$6,060.00	EMPLOYEE BENEFITS
9/8/2025	6926	BLUECROSS BLUESHIELD OF TEXAS	\$157,281.40	EMPLOYEE BENEFITS
9/8/2025	6927	CYPRESS VALLEY LANDSCAPING	\$1,379.92	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/8/2025	6928	FIRST STOP HEALTH	\$2,975.00	EMPLOYEE BENEFITS
9/8/2025	6929	JOPLIN'S	\$375.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/8/2025	6930	SHI GOVERNMENT SOLUTIONS	\$46.44	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/8/2025	6931	SHRED-IT USA LLC	\$171.82	SUPPLIES OR MISC G&A SERVICES
9/9/2025	888769	BORTON, BRIAN K	\$495.00	DEPUTY SHERIFF
9/9/2025	888770	DIAZ, STEPHEN ERIK	\$495.00	DEPUTY SHERIFF
9/9/2025	888771	SARTOR, LIAM D.	\$495.00	DEPUTY SHERIFF
9/9/2025	888772	THIGPEN, LESLIE MICHAEL	\$495.00	DEPUTY SHERIFF
9/9/2025	888773	AMERICAN SERVICES	\$4,200.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/9/2025	888774	FALTYS, DIANNE	\$101.94	SUPPLIES OR MISC G&A SERVICES
9/9/2025	888775	NICKELL, CHRISTOPHER	\$2,592.00	TAXPAYER LIASON OFFICER (TLO)
9/9/2025	888776	SAUNDERS & WALSH, PLLC	\$340,575.50	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/9/2025	888777	UBISTOR, INC.	\$4,942.40	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/9/2025	888778	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/9/2025	888779	VAIL & PARK, P.C.	\$11,250.00	PROFESSIONAL SERVICES (CPA)
9/9/2025	888780	LAW OFFICE OF ERNIE J HERNANDEZ, PLLC	\$450.00	ARBITRATION
9/9/2025	888781	GREAU, IVY	\$119.00	EMPLOYEE REIMBURSEMENT
9/9/2025	888782	GRUSENDORF, ERIC	\$494.00	EMPLOYEE REIMBURSEMENT
9/9/2025	ACH-P	AT&T - MAIN LOCAL	\$254.94	UTILITIES
9/9/2025	ACH-P	HOME DEPOT	\$143.93	SUPPLIES OR MISC G&A SERVICES
9/9/2025	ACH-P	SAM'S CLUB	\$181.42	SUPPLIES OR MISC G&A SERVICES
9/12/2025	ACH	ADP INC	\$5,562.66	PAYROLL, TAXES, OR FEES
9/15/2025	ACH	TCDRS	\$182,106.11	EMPLOYEE BENEFITS
9/16/2025	6932	BRENNAN, KEVIN	\$73.50	EMPLOYEE REIMBURSEMENT
9/16/2025	6933	COLLIN COUNTY CHAPTER TAAO	\$180.00	MEMBERSHIP, DUES, LICENSES, ETC.
9/16/2025	6934	FRONTIER WASTE - MCKINNEY	\$534.87	UTILITIES
9/16/2025	6935	PROSTAR SERVICES, INC	\$1,577.05	SUPPLIES OR MISC G&A SERVICES
9/16/2025	6936	SUPERIOR VISION OF TEXAS	\$1,706.14	EMPLOYEE BENEFITS
9/16/2025	6937	TDLR	\$400.00	MEMBERSHIP, DUES, LICENSES, ETC.
9/16/2025	888783	DAVIS, MARISA	\$540.00	DEPUTY SHERIFF
9/16/2025	888784	DIAZ, STEPHEN ERIK	\$1,080.00	DEPUTY SHERIFF
9/16/2025	888785	ORDONEZ, GORGE	\$540.00	DEPUTY SHERIFF
9/16/2025	888786	PENSON, OLIVIA K	\$525.00	DEPUTY SHERIFF
9/16/2025	888787	CUSHMAN & WAKEFIELD	\$7,500.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/16/2025	888788	GONZALES, CHRIS	\$1,084.40	EMPLOYEE REIMBURSEMENT
9/16/2025	888789	QUALITY PERSONNEL SERVICE	\$10,570.36	EMPLOYMENT AGENCY (SEASONAL TEMPS)
9/16/2025	888790	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/16/2025	888791	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/16/2025	TRANSFER	CCAD	\$50,313.00	FUNDS TO COVER ARB PAYROLL
9/18/2025	6938	BLUECROSS BLUESHIELD (LIFE&STLT)	\$11,719.29	EMPLOYEE BENEFITS
9/18/2025	6939	CARENOW CORPORATE	\$480.00	NEW HIRE AND/OR TESTING RELATED
9/18/2025	6940	COSTAR REALTY INFORMATION INC	\$6,735.87	PUBLICATIONS AND/OR RESEARCH
9/18/2025	6941	FIRST STOP HEALTH	\$1,380.00	EMPLOYEE BENEFITS
9/18/2025	6942	FISH WINDOW CLEANING	\$211.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/18/2025	6943	GREAT AMERICA FINANCIAL SERVICES	\$1,963.00	EQUIPMENT LEASE OR MAINTENANCE
9/18/2025	6944	INSIGHTS PUBLIC SECTOR	\$4,830.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/18/2025	6945	KLEIMAN, MELVYN (formerly Humetrics)	\$650.00	NEW HIRE AND/OR TESTING RELATED
9/18/2025	6946	LEGAL SHIELD / ID SHIELD	\$1,781.80	EMPLOYEE BENEFITS
9/18/2025	6947	PROSTAR SERVICES, INC	\$534.80	SUPPLIES OR MISC G&A SERVICES
9/18/2025	6948	DELL MARKETING	\$14,910.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/18/2025	888792	CUSHMAN & WAKEFIELD	\$10,500.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/18/2025	888793	CUSHMAN & WAKEFIELD	\$8,500.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/18/2025	888794	MASSEY SERVICE, INC	\$336.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/18/2025	888795	TRUE PRODIGY TECH SOLUTIONS LLC	\$6,772.69	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/18/2025	888796	MASSEY SERVICE, INC	\$400.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/18/2025	ACH-P	NCR CC MERCHANT	\$50.00	CREDIT CARD MERCHANT

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
September 2025

Date	Num	Name	Amount	Description
9/18/2025	ACH-P	IRON MOUNTAIN	\$157.86	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/18/2025	ACH-P	IRON MOUNTAIN	\$164.19	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/19/2025	3448	ADP INC	\$390,061.75	PAYROLL, TAXES, OR FEES
9/19/2025	3449	ADP INC	\$60,594.95	PAYROLL, TAXES, OR FEES
9/19/2025	3450	NATIONWIDE RETIREMENT SOLUTIONS	\$3,228.18	EMPLOYEE BENEFITS
9/19/2025	3450	NATIONWIDE RETIREMENT SOLUTIONS	\$6,060.00	EMPLOYEE BENEFITS
9/23/2025	6949	BLUECROSS BLUESHIELD OF TEXAS	\$159,817.08	EMPLOYEE BENEFITS
9/23/2025	6950	CASTILLO, TINA	\$634.20	EMPLOYEE REIMBURSEMENT
9/23/2025	6951	CITY OF MCKINNEY	\$1,309.60	UTILITIES
9/23/2025	6952	CROWE, ROBERT	\$1,329.00	EMPLOYEE REIMBURSEMENT
9/23/2025	6953	CYPRESS VALLEY LANDSCAPING	\$491.50	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/23/2025	6954	ESRI INC	\$32,486.84	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/23/2025	6955	INSURICA EXPRESS	\$50.00	SUPPLIES OR MISC G&A SERVICES
9/23/2025	6956	SHI GOVERNMENT SOLUTIONS	\$1,457.80	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/23/2025	6957	SPECTRUM ENTERPRISE	\$1,356.12	UTILITIES
9/23/2025	6958	TRANE US INC	\$5,929.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/23/2025	888797	ACOSTA, RAMIRO	\$1,080.00	DEPUTY SHERIFF
9/23/2025	888798	BORTON, BRIAN K	\$495.00	DEPUTY SHERIFF
9/23/2025	888799	HENRY, JAMES	\$555.00	DEPUTY SHERIFF
9/23/2025	888800	SARTOR, LIAM D.	\$555.00	DEPUTY SHERIFF
9/23/2025	888801	HUMPHREY & ASSOCIATES, INC.	\$12,545.25	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/23/2025	888802	QUALITY PERSONNEL SERVICE	\$10,472.57	EMPLOYMENT AGENCY (SEASONAL TEMPS)
9/23/2025	888803	RICHARDS, BRAD	\$1,207.96	EMPLOYEE REIMBURSEMENT
9/23/2025	888804	SWINGLE COLLINS & ASSOCIATES	\$3,250.00	EMPLOYEE BENEFITS
9/23/2025	TRANSFER	CCAD	\$43,478.00	FUNDS TO COVER ARB PAYROLL
9/24/2025	6959	ARMSTRONG & ARMSTRONG, P.C.	\$12,768.75	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
9/24/2025	6960	TAO	\$7,690.00	MEMBERSHIP, DUES, LICENSES, ETC.
9/24/2025	6961	TDLR	\$25.00	MEMBERSHIP, DUES, LICENSES, ETC.
9/24/2025	888805	CAPITOL APPRAISAL GROUP, LLC	\$5,747.75	PROFESSIONAL SERVICES (UTILITIES APPRAISAL SRVS)
9/24/2025	888806	GONZALES, CHRIS	\$102.56	EMPLOYEE REIMBURSEMENT
9/24/2025	888807	VAIL & PARK, P.C.	\$1,500.00	PROFESSIONAL SERVICES (CPA)
9/26/2025	ACH-P	PITNEY BOWES LEASE	\$326.82	EQUIPMENT LEASE OR MAINTENANCE
9/30/2025	6962	DSS	\$98.88	UTILITIES
9/30/2025	6963	DSS FIRE INC	\$198.00	UTILITIES
9/30/2025	6964	IN BLOOM	\$84.00	SUPPLIES OR MISC G&A SERVICES
9/30/2025	6965	INSIGHTS PUBLIC SECTOR	\$6,105.96	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/30/2025	6966	SHELL ENERGY SOLUTIONS	\$7,603.78	UTILITIES
9/30/2025	6967	SHI GOVERNMENT SOLUTIONS	\$6,622.56	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/30/2025	6968	STAPLES BUSINESS CREDIT	\$2,240.76	SUPPLIES OR MISC G&A SERVICES
9/30/2025	6969	TILLEY, SHAWN	\$149.00	EMPLOYEE REIMBURSEMENT
9/30/2025	6970	MEDIUM GIANT COMPANY, INC	\$21,652.40	PUBLICATIONS AND/OR RESEARCH
9/30/2025	6971	CARD SERVICE CENTER	\$15,214.76	CREDIT CARD MERCHANT
9/30/2025	6972	AFLAC	\$6,658.11	EMPLOYEE BENEFITS
9/30/2025	6973	DALLAS MORNING NEWS	\$530.02	PUBLICATIONS AND/OR RESEARCH
9/30/2025	6974	DELL MARKETING	\$17,233.90	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/30/2025	6975	JOPLIN'S	\$600.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/30/2025	6976	PLANO OFFICE SUPPLY	\$2,658.48	SUPPLIES OR MISC G&A SERVICES
9/30/2025	6977	DEX IMAGING	\$5,877.47	EQUIPMENT LEASE OR MAINTENANCE
9/30/2025	888808	HENRY, JAMES	\$510.00	DEPUTY SHERIFF
9/30/2025	888809	NEVAREZ, ALEJANDRO	\$1,080.00	DEPUTY SHERIFF
9/30/2025	888810	POLK, MATTHEW	\$525.00	DEPUTY SHERIFF
9/30/2025	888811	ZEGADLO, MARC	\$555.00	DEPUTY SHERIFF
9/30/2025	888812	ABACUS COMPUTERS INC	\$4,596.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
9/30/2025	888813	GREAU, IVY	\$149.00	EMPLOYEE REIMBURSEMENT
9/30/2025	888814	MURLEY PLUMBING	\$396.50	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/30/2025	888815	QUALITY PERSONNEL SERVICE	\$10,142.15	EMPLOYMENT AGENCY (SEASONAL TEMPS)
9/30/2025	ACH-P	HOME DEPOT	\$41.44	SUPPLIES OR MISC G&A SERVICES
9/30/2025	ACH-P	AT&T - FIBER	\$52.78	UTILITIES
9/30/2025	ACH-P	PITNEY BOWES SUPPLIES	\$225.00	SUPPLIES OR MISC G&A SERVICES
9/30/2025	ACH-P	CINTAS FIRST AID	\$579.68	SUPPLIES OR MISC G&A SERVICES
9/30/2025	ACH-P	UNUM LIFE INSURANCE CO OF AMERICA	\$1,007.10	EMPLOYEE BENEFITS
9/30/2025	ACH-P	SAM'S CLUB	\$1,222.01	SUPPLIES OR MISC G&A SERVICES
9/30/2025	ACH-P	AT&T - FIBER	\$1,606.89	UTILITIES
9/30/2025	ACH-P	CINTAS SANI CLEAN #163	\$3,254.04	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/30/2025	ACH-P	CINTAS SANI CLEAN #163	\$3,484.39	FACILITIES MAINTENANCE, REPAIRS, REMODEL
9/30/2025	ACH-P	AT&T - MOBILITY	\$5,122.24	UTILITIES
9/30/2025	ACH-P	PITNEY BOWES LEASE	\$7,796.01	EQUIPMENT LEASE OR MAINTENANCE
9/30/2025	ACH-P	PITNEY BOWES LEASE	\$7,796.01	EQUIPMENT LEASE OR MAINTENANCE
9/30/2025	TRANSFER	CCAD	\$46,066.00	FUNDS TO COVER ARB PAYROLL
			<u>\$2,427,958.59</u>	

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
October 2025

Date	Num	Name	Amount	Description
10/3/2025	3470	ADP INC	\$61,135.61	PAYROLL, TAXES, OR FEES
10/3/2025	3471	ADP INC	\$445,707.25	PAYROLL, TAXES, OR FEES
10/3/2025	3477	NATIONWIDE RETIREMENT SOLUTIONS	\$3,228.18	EMPLOYEE BENEFITS
10/3/2025	3477	NATIONWIDE RETIREMENT SOLUTIONS	\$6,060.00	EMPLOYEE BENEFITS
10/6/2025	ACH	TCDRS	\$400,000.00	UAAL BUY DOWN
10/7/2025	6979	BETSY ROSS FLAG GIRLS INC	\$1,457.04	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/7/2025	6980	CASH	\$200.00	SUPPLIES OR MISC G&A SERVICES
10/7/2025	6981	COLORIT GRAPHICS SERVICES	\$60.00	PRINTING AND/OR POSTAGE & DELIVERY
10/7/2025	6982	CYPRESS VALLEY LANDSCAPING	\$1,379.92	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/7/2025	6983	MEDIUM GIANT COMPANY, INC	\$1,611.60	PUBLICATIONS AND/OR RESEARCH
10/7/2025	6984	SHI GOVERNMENT SOLUTIONS	\$1,509.12	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/7/2025	6985	TML-IRP	\$110,624.36	INSURANCE (GENERAL LIAB AND W/C)
10/7/2025	6986	SHI GOVERNMENT SOLUTIONS	\$2,451.20	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/7/2025	888816	NEVAREZ, ALEJANDRO	\$1,500.00	DEPUTY SHERIFF
10/7/2025	888817	PENSON, OLIVIA K	\$480.00	DEPUTY SHERIFF
10/7/2025	888818	SARTOR, LIAM D.	\$540.00	DEPUTY SHERIFF
10/7/2025	888819	CUSHMAN & WAKEFIELD	\$7,500.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/7/2025	888820	QUALITY PERSONNEL SERVICE	\$3,280.15	EMPLOYMENT AGENCY (SEASONAL TEMPS)
10/7/2025	888821	RING CENTRAL, INC.	\$3,907.58	UTILITIES
10/7/2025	888822	SAUNDERS & WALSH, PLLC	\$412,561.79	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/7/2025	888823	THE EXEMPTION PROJECT, INC.	\$42,375.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/7/2025	888824	UBISTOR, INC.	\$4,942.40	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/7/2025	888825	MC PURE CLEANING, LLC	\$7,200.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/7/2025	TRANSFER	CCAD	\$25,703.00	FUNDS TO COVER ARB PAYROLL
10/8/2025	888826	NICKELL, CHRISTOPHER	\$3,024.00	TAXPAYER LIASON OFFICER (TLO)
10/8/2025	888827	VALBRIDGE PROPERTY ADVISORS	\$14,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/8/2025	888828	VALBRIDGE PROPERTY ADVISORS	\$16,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/8/2025	888829	VALBRIDGE PROPERTY ADVISORS	\$16,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/8/2025	888830	WEX HEALTH INC	\$168.75	EMPLOYEE BENEFITS
10/10/2025	ACH	ADP INC	\$4,671.28	PAYROLL, TAXES, OR FEES
10/14/2025	888831	BORTON, BRIAN K	\$480.00	DEPUTY SHERIFF
10/14/2025	888832	DAVIS, MARISA	\$540.00	DEPUTY SHERIFF
10/14/2025	888833	GILLESPIE, DANIEL	\$480.00	DEPUTY SHERIFF
10/14/2025	888834	ORDONEZ, GORGE	\$585.00	DEPUTY SHERIFF
10/14/2025	888835	SARTOR, LIAM D.	\$555.00	DEPUTY SHERIFF
10/14/2025	888836	GLASS, TAMERA	\$422.20	EMPLOYEE REIMBURSEMENT
10/14/2025	888837	QUALITY PERSONNEL SERVICE	\$11,292.41	EMPLOYMENT AGENCY (SEASONAL TEMPS)
10/14/2025	888838	VALBRIDGE PROPERTY ADVISORS	\$8,000.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/14/2025	TRANSFER	CCAD	\$50,963.00	FUNDS TO COVER ARB PAYROLL
10/15/2025	6987	BRENNAN, KEVIN	\$88.20	EMPLOYEE REIMBURSEMENT
10/15/2025	6988	CITY OF MCKINNEY POLICE DEPARTMENT	\$100.00	UTILITIES
10/15/2025	6989	COSTAR REALTY INFORMATION INC	\$6,735.87	PUBLICATIONS AND/OR RESEARCH
10/15/2025	6990	DSS FIRE INC	\$1,464.00	UTILITIES
10/15/2025	6991	GREAT AMERICA FINANCIAL SERVICES	\$1,963.00	EQUIPMENT LEASE OR MAINTENANCE
10/15/2025	6992	GRIFFITH JR, BOBBY	\$450.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/15/2025	6993	PERDUE, BRANDON, FIELDER, COLLINS, MOTT	\$250.00	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
10/15/2025	6994	TILLEY, SHAWN	\$645.00	EMPLOYEE REIMBURSEMENT
10/15/2025	6995	TDLR	\$100.00	MEMBERSHIP, DUES, LICENSES, ETC.
10/15/2025	6996	JOPLIN'S	\$15,050.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/15/2025	6997	GILLILAND, WENDY	\$307.40	EMPLOYEE REIMBURSEMENT
10/15/2025	ACH	TCDRS	\$186,747.06	EMPLOYEE BENEFITS
10/15/2025	ACH-P	NCR CC MERCHANT	\$50.00	CREDIT CARD MERCHANT
10/15/2025	ACH-P	AT&T - MAIN LOCAL	\$256.65	UTILITIES
10/15/2025	ACH-P	WEX HEALTH INC	\$10,000.00	EMPLOYEE BENEFITS
10/17/2025	3526	ADP INC	\$392,830.92	PAYROLL, TAXES, OR FEES
10/17/2025	3527	ADP INC	\$60,834.23	PAYROLL, TAXES, OR FEES
10/17/2025	3531	NATIONWIDE RETIREMENT SOLUTIONS	\$3,060.00	EMPLOYEE BENEFITS
10/17/2025	3531	NATIONWIDE RETIREMENT SOLUTIONS	\$7,060.00	EMPLOYEE BENEFITS
10/17/2025	ACH-P	NCR CC MERCHANT	\$50.00	CREDIT CARD MERCHANT
10/21/2025	6998	BATTERIES PLUS	\$23.52	SUPPLIES OR MISC G&A SERVICES
10/21/2025	6999	BLUECROSS BLUESHIELD (LIFE&STLT)	\$12,108.66	EMPLOYEE BENEFITS
10/21/2025	7000	CARENOW CORPORATE	\$300.00	NEW HIRE AND/OR TESTING RELATED
10/21/2025	7001	FIRST STOP HEALTH	\$1,508.80	EMPLOYEE BENEFITS
10/21/2025	7002	FRONTIER WASTE - MCKINNEY	\$561.61	UTILITIES
10/21/2025	7003	LEGAL SHIELD / ID SHIELD	\$1,791.75	EMPLOYEE BENEFITS
10/21/2025	7004	MYPRINTCHOICE	\$150.00	PRINTING AND/OR POSTAGE & DELIVERY

COLLIN CENTRAL APPRAISAL DISTRICT
Board of Directors Check Detail Report (Operating Account)
October 2025

Date	Num	Name	Amount	Description
10/21/2025	7005	PROPERTY TAX EDUCATION COALITION, INC	\$60.00	EDUCATION, TRAVEL, OR TRAINER
10/21/2025	7006	SUPERIOR VISION OF TEXAS	\$1,785.31	EMPLOYEE BENEFITS
10/21/2025	7007	TAAD	\$117.50	MEMBERSHIP, DUES, LICENSES, ETC.
10/21/2025	888839	NEVAREZ, ALEJANDRO	\$990.00	DEPUTY SHERIFF
10/21/2025	888840	PENSON, OLIVIA K	\$510.00	DEPUTY SHERIFF
10/21/2025	888841	SARTOR, LIAM D.	\$495.00	DEPUTY SHERIFF
10/21/2025	888842	EVERBRIDGE, INC	\$4,500.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/21/2025	888843	QUALITY PERSONNEL SERVICE	\$678.15	EMPLOYMENT AGENCY (SEASONAL TEMPS)
10/21/2025	888844	SWINGLE COLLINS & ASSOCIATES	\$3,250.00	EMPLOYEE BENEFITS
10/21/2025	888845	VAIL & PARK, P.C.	\$1,500.00	PROFESSIONAL SERVICES (CPA)
10/21/2025	888846	VALLEY VIEW CONSULTING, LLC	\$5,219.15	PROFESSIONAL SERVICES (INVESTMENT ADVISORS)
10/21/2025	888847	MASSEY SERVICE, INC	\$336.00	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/24/2025	ACH	TEXAS WORKFORCE COMMISSION	\$5,360.00	UNEMPLOYMENT TAXES
10/28/2025	7008	AFLAC	\$6,658.11	EMPLOYEE BENEFITS
10/28/2025	7009	CITY OF MCKINNEY	\$1,551.35	UTILITIES
10/28/2025	7010	FEDEX OFFICE	\$42.70	PRINTING AND/OR POSTAGE & DELIVERY
10/28/2025	7011	INSIGHTS PUBLIC SECTOR	\$90.51	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/28/2025	7012	M&M FENCING AND WELDING, INC.	\$570.78	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/28/2025	7013	PROSTAR SERVICES, INC	\$1,235.25	SUPPLIES OR MISC G&A SERVICES
10/28/2025	7014	SALAZAR, ISABEL	\$71.00	EMPLOYEE REIMBURSEMENT
10/28/2025	7015	SHELL ENERGY SOLUTIONS	\$6,779.52	UTILITIES
10/28/2025	7016	SPECTRUM ENTERPRISE	\$1,356.12	UTILITIES
10/28/2025	7017	STAPLES BUSINESS CREDIT	\$4,871.14	SUPPLIES OR MISC G&A SERVICES
10/28/2025	7018	SPECTRUM ENTERPRISE	\$1,356.12	UTILITIES
10/28/2025	888848	HENRY, JAMES	\$990.00	DEPUTY SHERIFF
10/28/2025	888849	ORDONEZ, GORGE	\$525.00	DEPUTY SHERIFF
10/28/2025	888850	POLK, MATTHEW	\$495.00	DEPUTY SHERIFF
10/28/2025	888851	SARTOR, LIAM D.	\$495.00	DEPUTY SHERIFF
10/28/2025	888852	HARRIS GOVERN	\$1,060.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/28/2025	888853	QUALITY PERSONNEL SERVICE	\$9,767.29	EMPLOYMENT AGENCY (SEASONAL TEMPS)
10/28/2025	888854	VARIVERGE LLC	\$1,261.30	PRINTING AND/OR POSTAGE & DELIVERY
10/28/2025	TRANSFER	CCAD	\$53,543.00	FUNDS TO COVER ARB PAYROLL
10/30/2025	ACH-P	AT&T MOBILITY	\$5,247.23	UTILITIES
10/30/2025	7019	BLUECROSS BLUESHIELD	\$167,718.63	EMPLOYEE BENEFITS
10/30/2025	7020	DELL MARKETING	\$509.11	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/30/2025	7021	JOPLIN'S	\$562.50	FACILITIES MAINTENANCE, REPAIRS, REMODEL
10/30/2025	7022	MYPRINTCHOICE	\$350.00	PRINTING AND/OR POSTAGE & DELIVERY
10/30/2025	888855	TONI BRYAN	\$336.42	EMPLOYEE REIMBURSEMENT
10/30/2025	888856	USER SCAPE	\$6,199.00	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
10/31/2025	3538	ADP INC	\$410,970.18	PAYROLL, TAXES, OR FEES
10/31/2025	3539	ADP INC	\$62,958.87	PAYROLL, TAXES, OR FEES
10/31/2025	3540	NATIONWIDE RETIREMENT SOLUTIONS	\$7,390.00	EMPLOYEE BENEFITS
10/31/2025	3540	NATIONWIDE RETIREMENT SOLUTIONS	\$3,360.00	EMPLOYEE BENEFITS
10/31/2025	7023	CARD SERVICE CENTER	\$8,508.86	CREDIT CARD MERCHANT
			<u>\$3,168,713.61</u>	

COMPILED FINANCIAL STATEMENTS

Collin Central Appraisal District

For the One and Eight Months Ended August 31, 2025

Collin Central Appraisal District

Compiled Financial Statements

For the One and Eight Months Ended August 31, 2025

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Board of Directors

Collin Central Appraisal District
250 Eldorado Parkway
McKinney, Texas 75069

Management is responsible for the accompanying financial statements of the business-type activities of the Collin Central Appraisal District (the “District”) as of August 31, 2025 and for the one and eight months ended August 31, 2025, which collectively comprise the District’s basic financial statements as listed in the table of contents, in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. We do not express an opinion, a conclusion, nor provide any assurance on these financial statements.

Management has elected to omit the government-wide financial statements, substantially all the disclosures, and the statements of cash flows required by accounting principles generally accepted in the United States of America. If the omitted government-wide financial statements, disclosures, and the statement of cash flows were included in the financial statements, they might influence the user’s conclusions about the District’s financial position, results of operations, and cash flows. Accordingly, the financial statements are not designed for those who are not informed about such matters.

Management has omitted the discussion and analysis, schedule of changes in net pension liability and related ratios, and schedule of contributions that the Governmental Accounting Standards Board requires to be presented to supplement the basic financial statements. Such missing information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context.

Vail + Park, P.C.

Frisco, Texas

September 15, 2025

COLLIN CENTRAL APPRAISAL DISTRICT
Statement of Net Position - Proprietary Fund
August 31, 2025

Assets

Current Assets:

Cash & Cash Equivalents	\$ 17,285,782
Certificates of Deposit	18,600,171
Prepaid Items	373,489
Total Current Assets	<u>36,259,442</u>

Noncurrent Assets:

Land	1,387,232
Building	8,799,372
Computer Equipment	992,278
Furniture & Equipment	538,420
Software	797,859
Right-to-Use Assets	201,660
SBITA Assets	626,457
Less Accumulated Depreciation and Amortization	(5,543,366)
Net Pension Asset	4,485,314
Total Noncurrent Assets	<u>12,285,226</u>
Total Assets	<u>48,544,668</u>

Deferred Outflows of Resources

Deferred Outflow Related to TCDRS	3,599,827
Total Deferred Outflows of Resources	<u>3,599,827</u>

Liabilities

Current Liabilities:

Accounts Payable	361,428
Accrued Liability	150,000
Accrued Wages Payable	365,515
Unearned Revenue - Entities	5,428,273
Compensated Absences Payable, Current	176,801
Operating Lease Liabilities, Current	50,404
SBITA Liabilities, Current	177,365
Total Current Liabilities	<u>6,709,786</u>

Noncurrent Liabilities:

Operating Lease Liabilities, Net of Current Portion	63,710
SBITA Liabilities, Net of Current Portion	190,757
Compensated Absences Payable, Net of Current Portion	530,403
Total Noncurrent Liabilities	<u>784,870</u>
Total Liabilities	<u>7,494,656</u>

Deferred Inflow of Resources

Deferred Inflow Related to TCDRS	286,783
Total Deferred Inflows of Resources	<u>286,783</u>

Net Position

Net Investment in Capital Assets	7,317,676
Unrestricted - Designated	34,340,000
Unrestricted - Undesignated	2,705,380
Total Net Position	<u>\$ 44,363,056</u>

COLLIN CENTRAL APPRAISAL DISTRICT
Statements of Revenues, Expenses and Changes in Fund Net Position and Budgetary Comparison - Proprietary Fund
For the One and Eight Months Ended August 31, 2025

	One Month Ended August 31, 2025	Eight Months Ended August 31, 2025	Budget Fiscal Year 2025	Percentage of Budget	Remaining Budget
Operating Revenues					
Local Support	\$ 2,307,508	\$ 18,460,064	\$ 27,690,100	66.67%	\$ 9,230,036
Business Personal Property					
Rendition Penalty Revenue	50	70,546	-		(70,546)
Miscellaneous Revenue	176	3,491	-		(3,491)
Total Revenues	2,307,734	18,534,101	27,690,100	66.93%	9,155,999
Operating Expenses					
Salaries - Full Time	899,692	7,799,129	14,608,200	53.39%	6,809,071
Salaries - Part Time and Temp	10,031	351,531	600,000	58.59%	248,469
Overtime	844	77,697	140,000	55.50%	62,303
Payroll Taxes	13,779	120,922	214,800	56.30%	93,878
Auto Allowance	61,153	534,495	887,800	60.20%	353,305
Workers' Compensation	3,592	33,246	70,000	47.49%	36,754
Group Insurance	209,806	1,701,667	2,978,000	57.14%	1,276,333
Employee Retirement	119,156	1,035,270	2,032,900	50.93%	997,630
Unemployment Compensation	8,589	10,319	50,000	20.64%	39,681
Aerial Photography	383,460	383,460	445,000	86.17%	61,540
Appraisal Review Board	53,935	612,069	1,000,000	61.21%	387,931
Audit & Accounting	1,500	35,869	42,500	84.40%	6,631
Board of Directors Meeting	-	-	7,500	0.00%	7,500
Building Maintenance & Repairs	52,503	335,968	760,000	44.21%	424,032
Computer Maintenance	47,616	238,357	375,000	63.56%	136,643
Contract Services	8,425	60,395	150,000	40.26%	89,605
Equipment Repair & Maintenance	7,499	28,463	52,000	54.74%	23,537
General Insurance	5,112	41,312	80,000	51.64%	38,688
Legal Notices & Advertising	10,588	10,588	37,000	28.62%	26,412
Legal Services	216,304	1,706,601	2,500,000	68.26%	793,399
Postage	22,189	458,551	520,000	88.18%	61,449
Professional Services	20,274	236,247	500,000	47.25%	263,753
Registration & Dues	960	9,159	45,000	20.35%	35,841
Rent-Equipment	2,443	18,278	115,000	15.89%	96,722
Security	9,942	93,505	165,000	56.67%	71,495
Supplies & Materials	19,210	266,902	570,000	46.82%	303,098
Telephone, Internet, Data Cloud	12,343	109,714	300,000	36.57%	190,286
Travel & Education	2,480	34,294	125,000	27.44%	90,706
Utilities	10,129	77,625	141,900	54.70%	64,275
Equipment & Software - Non-Capital	32,827	410,335	1,195,000	34.34%	784,665
Depreciation and Amortization	21,681	173,445	-		(173,445)
Contingency	-	-	282,500	0.00%	282,500
Buy Down of Pension	-	-	400,000	0.00%	400,000
Total Operating Expenses	2,268,062	17,005,413	31,390,100	54.17%	14,384,687
Operating Income (Loss)	39,672	1,528,688	(3,700,000)	-41.32%	(5,228,688)
Nonoperating Income (Expenses)					
Interest Income	97,527	987,010	-		(987,010)
Total Nonoperating Revenues & Expenses	97,527	987,010	-		(987,010)
Change in Net Position	137,199	2,515,698	\$ (3,700,000)	-67.99%	\$ (6,215,698)
Net Position, Beginning of Period	44,225,857	41,847,358			
Net Position, End of Period	\$ 44,363,056	\$ 44,363,056			

See Independent Accountants' Compilation Report.

COMPILED FINANCIAL STATEMENTS

Collin Central Appraisal District

For the One and Nine Months Ended September 30, 2025

Collin Central Appraisal District

Compiled Financial Statements

For the One and Nine Months Ended September 30, 2025

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Board of Directors

Collin Central Appraisal District
250 Eldorado Parkway
McKinney, Texas 75069

Management is responsible for the accompanying financial statements of the business-type activities of the Collin Central Appraisal District (the "District") as of September 30, 2025 and for the one and nine months ended September 30, 2025, which collectively comprise the District's basic financial statements as listed in the table of contents, in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. We do not express an opinion, a conclusion, nor provide any assurance on these financial statements.

Management has elected to omit the government-wide financial statements, substantially all the disclosures, and the statements of cash flows required by accounting principles generally accepted in the United States of America. If the omitted government-wide financial statements, disclosures, and the statement of cash flows were included in the financial statements, they might influence the user's conclusions about the District's financial position, results of operations, and cash flows. Accordingly, the financial statements are not designed for those who are not informed about such matters.

Management has omitted the discussion and analysis, schedule of changes in net pension liability and related ratios, and schedule of contributions that the Governmental Accounting Standards Board requires to be presented to supplement the basic financial statements. Such missing information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context.

Vail + Park, P.C.

Frisco, Texas

October 14, 2025

COLLIN CENTRAL APPRAISAL DISTRICT
Statement of Net Position - Proprietary Fund
September 30, 2025

Assets

Current Assets:

Cash & Cash Equivalents	\$ 18,736,406
Certificates of Deposit	18,714,902
Prepaid Items	339,593
Total Current Assets	<u>37,790,901</u>

Noncurrent Assets:

Land	1,387,232
Building	8,799,372
Computer Equipment	992,278
Furniture & Equipment	538,420
Software	797,859
Right-to-Use Assets	201,660
SBITA Assets	626,457
Less Accumulated Depreciation and Amortization	(5,592,190)
Net Pension Asset	4,485,314
Total Noncurrent Assets	<u>12,236,402</u>

Total Assets	<u>50,027,303</u>
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Deferred Outflows of Resources

Deferred Outflow Related to TCDRS	3,599,827
Total Deferred Outflows of Resources	<u>3,599,827</u>

Liabilities

Current Liabilities:

Accounts Payable	226,800
Accrued Liability	150,000
Accrued Wages Payable	365,515
Unearned Revenue - Entities	6,922,363
Compensated Absences Payable, Current	176,801
Operating Lease Liabilities, Current	48,630
SBITA Liabilities, Current	176,619
Total Current Liabilities	<u>8,066,728</u>

Noncurrent Liabilities:

Operating Lease Liabilities, Net of Current Portion	60,782
SBITA Liabilities, Net of Current Portion	169,296
Compensated Absences Payable, Net of Current Portion	530,403
Total Noncurrent Liabilities	<u>760,481</u>
Total Liabilities	<u>8,827,209</u>

Deferred Inflow of Resources

Deferred Inflow Related to TCDRS	286,783
Total Deferred Inflows of Resources	<u>286,783</u>

Net Position

Net Investment in Capital Assets	7,295,761
Unrestricted - Designated	34,340,000
Unrestricted - Undesignated	2,877,377
Total Net Position	<u>\$ 44,513,138</u>

COLLIN CENTRAL APPRAISAL DISTRICT
Statements of Revenues, Expenses and Changes in Fund Net Position and Budgetary Comparison - Proprietary Fund
For the One and Nine Months Ended September 30, 2025

	One Month Ended September 30, 2025	Nine Months Ended September 30, 2025	Budget Fiscal Year 2025	Percentage of Budget	Remaining Budget
Operating Revenues					
Local Support	\$ 2,307,508	\$ 20,767,572	\$ 27,690,100	75.00%	\$ 6,922,528
Business Personal Property					
Rendition Penalty Revenue	27	70,573	-		(70,573)
Miscellaneous Revenue	415	3,906	-		(3,906)
Total Revenues	<u>2,307,950</u>	<u>20,842,051</u>	<u>27,690,100</u>	<u>75.27%</u>	<u>6,848,049</u>
Operating Expenses					
Salaries - Full Time	918,826	8,717,955	14,608,200	59.68%	5,890,245
Salaries - Part Time and Temp	27,589	379,120	600,000	63.19%	220,880
Overtime	3,647	81,344	140,000	58.10%	58,656
Payroll Taxes	14,113	135,035	214,800	62.87%	79,765
Auto Allowance	62,399	596,894	887,800	67.23%	290,906
Workers' Compensation	3,591	36,837	70,000	52.62%	33,163
Group Insurance	210,973	1,912,640	2,978,000	64.23%	1,065,360
Employee Retirement	122,193	1,157,463	2,032,900	56.94%	875,437
Unemployment Compensation	10,319	10,319	50,000	20.64%	39,681
Aerial Photography	383,460	383,460	445,000	86.17%	61,540
Appraisal Review Board	191,058	803,127	1,000,000	80.31%	196,873
Audit & Accounting	1,500	37,369	42,500	87.93%	5,131
Board of Directors Meeting	-	-	7,500	0.00%	7,500
Building Maintenance & Repairs	36,936	372,904	760,000	49.07%	387,096
Computer Maintenance	28,182	266,539	375,000	71.08%	108,461
Contract Services	9,423	69,818	150,000	46.55%	80,182
Equipment Repair & Maintenance	3,095	31,558	52,000	60.69%	20,442
General Insurance	5,113	46,425	80,000	58.03%	33,575
Legal Notices & Advertising	23,264	33,852	37,000	91.49%	3,148
Legal Services	422,794	2,129,395	2,500,000	85.18%	370,605
Postage	458,551	458,551	520,000	88.18%	61,449
Professional Services	22,134	258,381	500,000	51.68%	241,619
Registration & Dues	7,353	16,512	45,000	36.69%	28,488
Rent-Equipment	17,881	36,159	115,000	31.44%	78,841
Security	10,290	103,795	165,000	62.91%	61,205
Supplies & Materials	21,075	287,977	570,000	50.52%	282,023
Telephone, Internet, Data Cloud	8,138	117,852	300,000	39.28%	182,148
Travel & Education	19,462	53,756	125,000	43.00%	71,244
Utilities	9,640	87,265	141,900	61.50%	54,635
Equipment & Software - Non-Capital	111,069	521,404	1,195,000	43.63%	673,596
Depreciation and Amortization	21,680	195,125	-		(195,125)
Contingency	-	-	282,500	0.00%	282,500
Buy Down of Pension	-	-	400,000	0.00%	400,000
Total Operating Expenses	<u>3,185,748</u>	<u>19,338,831</u>	<u>31,390,100</u>	<u>61.61%</u>	<u>12,051,269</u>
Operating Income (Loss)	<u>(877,798)</u>	<u>1,503,220</u>	<u>(3,700,000)</u>	<u>-40.63%</u>	<u>(5,203,220)</u>
Nonoperating Income (Expenses)					
Interest Income	175,550	1,162,560	-		(1,162,560)
Total Nonoperating Revenues & Expenses	<u>175,550</u>	<u>1,162,560</u>	<u>-</u>		<u>(1,162,560)</u>
Change in Net Position	<u>(702,248)</u>	<u>2,665,780</u>	<u>\$ (3,700,000)</u>	<u>-72.05%</u>	<u>\$ (6,365,780)</u>
Net Position, Beginning of Period	<u>45,215,386</u>	<u>41,847,358</u>			
Net Position, End of Period	<u>\$ 44,513,138</u>	<u>\$ 44,513,138</u>			

See Independent Accountants' Compilation Report.

COMPILED FINANCIAL STATEMENTS

Collin Central Appraisal District

For the One and Ten Months Ended October 31, 2025

Collin Central Appraisal District

Compiled Financial Statements

For the One and Ten Months Ended October 31, 2025

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Board of Directors

Collin Central Appraisal District
250 Eldorado Parkway
McKinney, Texas 75069

Management is responsible for the accompanying financial statements of the business-type activities of the Collin Central Appraisal District (the “District”) as of October 31, 2025 and for the one and ten months ended October 31, 2025, which collectively comprise the District’s basic financial statements as listed in the table of contents, in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. We do not express an opinion, a conclusion, nor provide any assurance on these financial statements.

Management has elected to omit the government-wide financial statements, substantially all the disclosures, and the statements of cash flows required by accounting principles generally accepted in the United States of America. If the omitted government-wide financial statements, disclosures, and the statement of cash flows were included in the financial statements, they might influence the user’s conclusions about the District’s financial position, results of operations, and cash flows. Accordingly, the financial statements are not designed for those who are not informed about such matters.

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Vail + Park, P.C.

Frisco, Texas

November 4, 2025

COLLIN CENTRAL APPRAISAL DISTRICT
Statement of Net Position - Proprietary Fund
October 31, 2025

Assets

Current Assets:

Cash & Cash Equivalents	\$ 17,706,637
Certificates of Deposit	16,690,392
Prepaid Items	423,492
Total Current Assets	<u>34,820,521</u>

Noncurrent Assets:

Land	1,387,232
Building	8,799,372
Computer Equipment	992,278
Furniture & Equipment	538,420
Software	797,859
Right-to-Use Assets	201,660
SBITA Assets	626,457
Less Accumulated Depreciation and Amortization	(5,641,014)
Net Pension Asset	<u>4,485,314</u>
Total Noncurrent Assets	<u>12,187,578</u>
Total Assets	<u>47,008,099</u>

Deferred Outflows of Resources

Deferred Outflow Related to TCDRS	<u>3,599,827</u>
Total Deferred Outflows of Resources	<u>3,599,827</u>

Liabilities

Current Liabilities:

Accounts Payable	319,576
Accrued Liability	150,005
Accrued Wages Payable	365,515
Unearned Revenue - Entities	4,615,020
Compensated Absences Payable, Current	176,801
Operating Lease Liabilities, Current	46,849
SBITA Liabilities, Current	172,338
Total Current Liabilities	<u>5,846,104</u>

Noncurrent Liabilities:

Operating Lease Liabilities, Net of Current Portion	57,861
SBITA Liabilities, Net of Current Portion	151,371
Compensated Absences Payable, Net of Current Portion	530,403
Total Noncurrent Liabilities	<u>739,635</u>
Total Liabilities	<u>6,585,739</u>

Deferred Inflow of Resources

Deferred Inflow Related to TCDRS	<u>286,783</u>
Total Deferred Inflows of Resources	<u>286,783</u>

Net Position

Net Investment in Capital Assets	7,273,845
Unrestricted - Designated	34,340,000
Unrestricted - Undesignated	2,121,559
Total Net Position	<u>\$ 43,735,404</u>

COLLIN CENTRAL APPRAISAL DISTRICT
Statements of Revenues, Expenses and Changes in Fund Net Position and Budgetary Comparison - Proprietary Fund
For the One and Ten Months Ended October 31, 2025

	One Month Ended October 31, 2025	Ten Months Ended October 31, 2025	Budget Fiscal Year 2025	Percentage of Budget	Remaining Budget
Operating Revenues					
Local Support	\$ 2,307,508	\$ 23,075,080	\$ 27,690,100	83.33%	\$ 4,615,020
Business Personal Property					
Rendition Penalty Revenue	6,972	77,545	-		(77,545)
Miscellaneous Revenue	39	3,945	-		(3,945)
Total Revenues	2,314,519	23,156,570	27,690,100	83.63%	4,533,530
Operating Expenses					
Salaries - Full Time	1,411,748	10,129,703	14,608,200	69.34%	4,478,497
Salaries - Part Time and Temp	16,679	395,799	600,000	65.97%	204,201
Overtime	5,049	86,393	140,000	61.71%	53,607
Payroll Taxes	21,822	156,857	214,800	73.02%	57,943
Auto Allowance	96,299	693,193	887,800	78.08%	194,607
Workers' Compensation	3,795	40,632	70,000	58.05%	29,368
Group Insurance	231,466	2,144,106	2,978,000	72.00%	833,894
Employee Retirement	187,630	1,345,093	2,032,900	66.17%	687,807
Unemployment Compensation	5,360	15,679	50,000	31.36%	34,321
Aerial Photography	383,460	383,460	445,000	86.17%	61,540
Appraisal Review Board	133,318	936,445	1,000,000	93.64%	63,555
Audit & Accounting	1,500	38,869	42,500	91.46%	3,631
Board of Directors Meeting	-	-	7,500	0.00%	7,500
Building Maintenance & Repairs	27,062	399,966	760,000	52.63%	360,034
Computer Maintenance	45,925	312,464	375,000	83.32%	62,536
Contract Services	6,935	76,753	150,000	51.17%	73,247
Equipment Repair & Maintenance	2,802	34,360	52,000	66.08%	17,640
General Insurance	5,423	51,848	80,000	64.81%	28,152
Legal Notices & Advertising	33,852	33,852	37,000	91.49%	3,148
Legal Services	448,312	2,577,707	2,500,000	103.11%	(77,707)
Postage	1,120	459,671	520,000	88.40%	60,329
Professional Services	23,390	281,771	500,000	56.35%	218,229
Registration & Dues	8,940	25,452	45,000	56.56%	19,548
Rent-Equipment	1,963	38,122	115,000	33.15%	76,878
Security	12,135	115,930	165,000	70.26%	49,070
Supplies & Materials	27,057	315,034	570,000	55.27%	254,966
Telephone, Internet, Data Cloud	11,458	129,310	300,000	43.10%	170,690
Travel & Education	4,535	58,291	125,000	46.63%	66,709
Utilities	8,893	96,158	141,900	67.76%	45,742
Equipment & Software - Non-Capital	20,256	541,660	1,195,000	45.33%	653,340
Depreciation and Amortization	21,681	216,806	-		(216,806)
Contingency	-	-	282,500	0.00%	282,500
Buy Down of Pension	400,000	400,000	400,000	100.00%	-
Total Operating Expenses	3,609,865	22,531,384	31,390,100	71.78%	8,858,716
Operating Income (Loss)	(1,295,346)	625,186	(3,700,000)	-16.90%	(4,325,186)
Nonoperating Income (Expenses)					
Interest Income	100,300	1,262,860	-		(1,262,860)
Total Nonoperating Revenues & Expenses	100,300	1,262,860	-		(1,262,860)
Change in Net Position	(1,195,046)	1,888,046	\$ (3,700,000)	-51.03%	\$ (5,588,046)
Net Position, Beginning of Period	44,930,450	41,847,358			
Net Position, End of Period	\$ 43,735,404	\$ 43,735,404			

See Independent Accountants' Compilation Report.



Collin Central Appraisal District

Date: 11/04/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

Subject: Budgeted expenditures requiring signature of Board Officer

ITEM	DESCRIPTION	\$ AMOUNT
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As of this date, there are no budgeted expenditures that require the signature of a Board Officer.



Collin Central Appraisal District

Date: 09/08/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright", is written over the "From:" line.

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser

For: AUGUST 2025

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	8/05/25	Saunders & Walsh	\$193,830.00
ACH	8/08/25	ADP (payroll and taxes)	\$482,954.27
ACH	8/15/25	TCDRS	\$184,237.34
ACH	8/22/25	ADP (payroll and taxes)	\$437,164.27
ACH	8/26/25	GSO Architects	\$30,000.00
ACH	8/26/25	Harris Govern	\$58,300.25
Transfer	8/26/25	Funds to cover ARB payroll	\$58,833.00



Collin Central Appraisal District

Date: 10/06/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright", is written over the "From:" line.

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser

For: SEPTEMBER 2025 (page 1 of 2)

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	9/03/25	Funds to cover ARB payroll	\$51,116.00
ACH	9/05/25	ADP (payroll and taxes)	\$492,941.88
Ck #6926	9/08/25	Blue Cross and Blue Shield	\$157,281.40
ACH	9/09/25	Saunders & Walsh	\$340,575.50
ACH	9/15/25	TCDRS	\$182,106.11
Transfer	9/16/25	Funds to cover ARB payroll	\$50,313.00
ACH	9/19/25	ADP (payroll and taxes)	\$450,656.70
Ck #6949	9/23/25	Blue Cross and Blue Shield	\$159,817.08
Ck #6954	9/23/25	ESRI, Inc. (software license renewal)	\$32,486.84
Transfer	9/23/25	Funds to cover ARB payroll	\$43,478.00



Collin Central Appraisal District

Date: 10/06/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser

For: SEPTEMBER 2025 (page 2 of 2)

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	9/30/25	Funds to cover ARB payroll	\$46,066.00



Collin Central Appraisal District

Date: 11/03/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright", is written over the "From:" line.

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser

For: OCTOBER 2025 (page 1 of 2)

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	10/03/25	ADP (payroll and taxes)	\$506,842.86
ACH	10/06/25	TCDRS (UAAL Buy Down)	\$400,000.00
ACH	10/07/25	Saunders & Walsh	\$412,561.79
ACH	10/07/25	The Exemption Project	\$42,375.00
Transfer	10/07/25	Funds to cover ARB payroll	\$25,703.00
Transfer	10/14/25	Funds to cover ARB payroll	\$50,963.00
ACH	10/15/25	TCDRS	\$186,747.06
ACH	10/17/25	ADP (payroll and taxes)	\$453,665.15
Transfer	10/25/25	Funds to cover ARB payroll	\$53,543.00
Ck #7019	10/30/25	Blue Cross and Blue Shield	\$167,718.63



Collin Central Appraisal District

Date: 11/03/2025

To: Board of Directors

From: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

Subject: Budgeted expenditures over \$25,000 approved by Chief Appraiser

For: OCTOBER 2025 (page 2 of 2)

ITEM	DATE	DESCRIPTION	\$ AMOUNT
ACH	10/31/25	ADP (payroll and taxes)	\$473,929.05

G.1.
Receive recommendation and vote on the
2026 Printing & Mailing Services.

November 13, 2025



Collin Central Appraisal District

November 4th, 2025

2026 Printing & Mailing Services Award of Contract Recommendation Executive Summary

The District solicited sealed bids for the annual printing and mailing of appraisal notices and other statutorily required mailings (bid packet example attached). The Information Services department issued the 2026 Printing & Mailing Services RFB (IST-2026-PM) on September 30th. The bid packet was broadcast on the DemandStar government bids service on September 30th. The public notice was published in the Dallas Morning News on September 30th and again on October 7th. The deadline to submit completed bids was on October 20th, 2025. Two sealed bids were received by the deadline and opened on October 20th at 3:00 pm:

Vendor	Location	Bid Amount
VariVerge, LLC	Dallas, TX	\$146,595
Wolverine Services, Inc	Detroit, MI	\$95,470

VariVerge has served as the District's printing and mailing vendor for approximately nineteen of the past 24 years. From 2014 through 2018, the District contracted with three other lower-bid vendors. However, due to repeated performance issues, including delayed mailings and quality control failures, the District awarded the 2019 contract back to VariVerge and has continued with them each year since then.

The RFB specified that bidders must:

1. Have prior experience providing printing and mailing services for a Texas appraisal district, and
2. Demonstrate the ability to process PACS print/export files (the District's property appraisal system).

VariVerge meets both qualifications and currently provides these services for over 125 appraisal districts across Texas, offering unmatched experience and reliability within the Texas property tax system (RFB submission attached).

Wolverine Services does not meet either requirement, lacking experience with both Texas appraisal districts and PACS data formats. This represents significant compliance and operational risk. Another concern is their distance from North Texas; their plan would be to print & insert at their Detroit facility and then drop-ship the mail to Texas where Pitney Bowes would then take possession and enter it into the mail-stream as a third-party service.

VariVerge offers:

- Proven on-time performance and accuracy across high-volume mailings.
- Extensive experience integrating PACS export files with automated processing systems.
- Convenient proximity, with operations located in Dallas, ensuring responsive local support.

Awarding the contract to Wolverine would introduce risks associated with inexperience in Texas property tax processes, potential data handling errors, and potential delays affecting statutory mailing deadlines.

Staff recommend awarding the 2026 Printing and Mailing Services contract to **VariVerge, LLC**, as the lowest responsible and responsive bidder meeting all specifications and qualification requirements of the RFB, for a total estimated annual cost of **\$146,345**. Funding for this contract is included in the 2026 approved budget under Printing and Postage Services.

Ryan Matthews
Deputy Chief Appraiser - Technology

REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES

BID PACKET



Bids Request issued on
September 30, 2025

Completed Bids to be received no later than
October 20, 2025 at 3:00 PM (CDT)

Submit Sealed Bids to
Attn: Shane Cheek
COLLIN CENTRAL APPRAISAL DISTRICT
250 Eldorado Pkwy
McKinney, Texas 75069

Any questions should be emailed to
purchasing@cadcollin.org

Bidder / Company Name: _____

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

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**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

SECTION 1: GENERAL INFORMATION

1.1 Summary

The Collin Central Appraisal District (hereafter "CCAD" or "the District"), a political subdivision of the State of Texas, is soliciting competitive bids from qualified vendors for the printing and mailing of various notices and forms as required by the Texas Property Tax Code. The contract will encompass three primary projects: Business Personal Property Renditions, Homestead Qualification Notices, and Notices of Appraised Value.

1.2 Issuing Office & Contact Information

All correspondence and inquiries related to this RFB shall be directed to: purchasing@cadcollin.org

Sealed bids must be delivered to: Attn: Shane Cheek
Collin Central Appraisal District
250 Eldorado Pkwy, McKinney TX 75072

1.3 Timeline of Events

Event	Date	Time (CDT)
RFB Released	September 30, 2025	
Newspaper Publication #1	September 30, 2025	
Newspaper Publication #2	October 7, 2025	
Deadline for Bidder Questions	October 13, 2025	5:00 PM
CCAD Response to Questions	October 15, 2025	5:00 PM
Bid Submission Deadline	October 20, 2025	3:00 PM
Bid Opening	October 20, 2025	3:01 PM
Bid Evaluation Period	October 21 - November 4, 2025	
Anticipated Award Notification	November 17, 2025	
Contract Start Date	January 1, 2026	

CCAD reserves the right to amend this timeline at its sole discretion.

NOTE - There will be no pre-bid vendors meeting.

1.4 Contract Term

The initial term of the contract shall be for one (1) year, commencing on or about January 1, 2026. CCAD reserves the right (at CCAD's sole option) to renew the contract for four (4) additional one-year periods on the same terms and conditions of the original contract.

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

SECTION 2: INSTRUCTIONS TO BIDDERS

2.1 Bid Submission Requirements

Bids must be submitted in a sealed envelope or package, clearly marked on the exterior with: "SEALED BID – DO NOT OPEN" "RFB# IST-2026-PM". Bids must be received at the address specified in Section 1 no later than the Bid Submission Deadline. Bids received after this deadline will be rejected.

Each bid packet must include:

1. Completed and signed Section 5: Bid Form / Cost Proposal
2. Completed Attachment A: References Form
3. Completed and signed Attachment B: Financial Interest Disclosure
4. Completed and signed Attachment C: Conflict of Interest Questionnaire (Form CIQ)
5. Completed and signed Attachment D: Certificate of Interested Parties (Form 1295)
6. Completed and signed Attachment E: Other Certifications
7. Completed and signed Attachment F: Form W-9
8. A narrative describing the bidder's specific experience with Texas Appraisal Districts and the Harris Govern PACS software exports.
9. Provide information on other "print on demand" services offered, such as daily/weekly mail.

2.2 Questions and Clarifications

All questions regarding this RFB must be submitted in writing via email to the contact person listed in Section 1 by the deadline specified in the timeline. All questions and their official answers will be compiled and distributed as an addendum to all known prospective bidders.

2.3 Evaluation Criteria

The contract will be awarded to the bidder who provides the goods and services at the best value for the District. In determining the best value to the District, it will consider:

- Cost (as detailed in the Bid Form).
- Bidder's demonstrated successful experience with Texas Appraisal Districts.
- Bidder's demonstrated successful experience with CCAD in prior years, if any.
- Ability to meet all technical requirements, including data handling, turnaround times, and tracking.
- Qualifications and experience of the firm and assigned staff (e.g., forms designer).
- References from other Texas Appraisal Districts.

2.4 Award of Contract

CCAD reserves the right to accept or reject any or all bids, to waive any informalities in the bidding process, and to award the contract in a manner that is in the best interest of the District. The successful bidder will be notified by the District after the contract has been awarded by the Board of Directors. An Agreement will be sent for signature. It along with the RFB packet and the submitted/accepted bid proposal will then become the Contract. The price and terms of the bid must remain open through January 15, 2026.

2.5 Taxation

The District is exempt under the Sales and Use Tax Laws, and the bid shall not include such taxes.

2.6 Pricing Exclusions

- All bids must be for complete services, including but not limited to labor, ink, paper, & envelopes.
- The completed "Bid/Price Quote" must include any/and all expenses to meet the enclosed specifications with the exception of postage. Postage will be billed as a direct pass-through cost to the District.

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

SECTION 3: SCOPE OF WORK

3.1 General Requirements & Vendor Qualifications

The successful bidder (hereafter "Vendor") must meet the following qualifications:

- **Experience:** Vendor must demonstrate significant prior experience providing printing and mailing services for Texas County Appraisal Districts. References are required.
- **Forms Designer:** Vendor must have a staffed, in-house forms designer to assist with layout, compliance with postal regulations, and any necessary form updates.
- **Turnaround Time:** For all projects, the Vendor must guarantee a maximum five (5) business day turnaround. This period is measured from the time CCAD successfully uploads the data files to the Vendor's system until the mailpieces are delivered to and accepted by the United States Postal Service (USPS).
- **Samples:** Prior to production, the Vendor must generate samples from final data provided by the District. The Vendor must provide printed samples from each printer intended to be used during production. These samples must be presented for review, verification, and approval by the District.
- **Trial Run:** After the Award of Contract, the selected Vendor will be required to process a trial/test job, at no charge, of the District's choosing using sample data supplied by the District. The Vendor must produce samples, both PDF and printed copies, of no more than fifty (50) mail pieces as selected by the District for review. This "Trial Run" must be performed and pass the District's review process before any work relating to this proposal/contract is to be performed.
- **Mailpiece Tracking:** Vendor must provide a secure, web-based portal for CCAD staff to track the status of each mailing. The portal must provide visibility from data receipt through production and include USPS Intelligent Mail® barcode (IMpb) tracking for each mailpiece by Prop ID and Send-To Address.
- **PDF Archiving:** Vendor must provide CCAD with a digital PDF copy of each individual mailpiece generated, on or before the mail date. The filename for each PDF must correspond with the Property ID (Prop ID) associated with that mailpiece.
- **Security:** Vendor must describe its data security protocols for handling confidential taxpayer information.

3.2 Data and File Requirements

- **Data Source:** CCAD will provide all necessary data via a file export from its Harris Govern Property Appraisal and Collection System (PACS).
- **File Compatibility:** The Vendor **must** be able to process and utilize the standard Harris Govern PACS file exports without requiring any modification, re-formatting, or data manipulation by CCAD staff. The ability to work with these native files is a mandatory requirement.

3.3 Printing and Mailing Requirements

- **Printing Method:** All letters, notices, and forms must be inline laser printed (simplex or duplex as required). Any pre-printed inserts, such as static informational flyers, may be offset printed.
- **Barcode Printing:** Vendor must have the ability to create & print '3 of 9' and QR barcodes.
- **Mail Processing:** All mailings must be processed using USPS-certified software for household merging (where applicable and allowed by statute), and presorting to achieve the lowest possible postage rates.
- **Postmark Date:** Each mail piece **must** be postmarked using a date-meter method. Due to extreme date sensitive requirements by the Texas Property Tax Code, a postmark date must appear on all envelopes.
- **Postage:** Postage will be billed as a direct pass-through cost. The Vendor must provide detailed postage statements from the USPS for each mailing.
- **Proof of Mailing:** Vendor must provide an audit of proof of printing & mailing within two (2) business days of each mailing. This report must show the mail date and quantities of each mailing.
- **Envelopes:** Vendor will provide all necessary envelopes (e.g., #10 window, 6x9 booklet) as specified and as needed for each project.
- **Mail Origination:** All projects must be mailed from within the State of Texas.

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

3.4 Project 1: Business Personal Property (BPP) Renditions

- **Description:** Printing and mailing of the annual BPP Rendition form to all known business property owners in Collin County. (Texas Property Tax Code § 22.01)
- **Anticipated Mailing Date:** On or about January 15th annually.
- **Estimated Quantity:** ~35,000 pieces.
- **Components:**
 1. "BPP Rendition Form", 8.5" x 11", laser printed duplex, 4 pages.
 2. "CCAD Informational Insert", 8.5" x 11", laser printed duplex, 2 pages
 3. #10 Window Envelope, 6" x 9" or 9" x 12" Window Booklet Envelope

3.5 Project 2: Homestead Qualification Letters

- **Description:** Printing and mailing of a notification letter and a homestead application to property owners who may qualify for a homestead exemption. (Texas Property Tax Code § 25.192)
- **Anticipated Mailing Date:** On or about February 1st annually.
- **Estimated Quantity:** ~40,000 pieces.
- **Components:**
 1. "Qualification Letter", 8.5" x 11", laser printed duplex, 2 pages.
 2. "Residence Homestead Application", 8.5" x 11", laser printed duplex, 2 pages.
 3. #10 Window Envelope for mailing to property owner.

3.6 Project 3: Notices of Appraised Value

- **Description:** Printing and mailing of the annual Notice of Appraised Value to all property owners in Collin County. This is the largest and most time-sensitive mailing. (Texas Property Tax Code §25.19)
- **Anticipated Mailing Dates:** Staggered mailings throughout April and May. The largest mail drops occur mid-April, on or before April 15th.
- **Estimated Quantity:** ~475,000 pieces.
- **Components:**
 1. "Notice of Appraised Value" on front & "Notice of Protest Form" on back, 8.5" x 11", laser printed duplex, 2 pages.
 2. "CCAD Informational Insert", 8.5" x 11", may be offset printed duplex, 2 pages.
 3. "Taxpayer Remedies Insert", 8.5" x 11", may be offset printed duplex, 2 pages.
 4. #10 Window Envelope, 6" x 9" or 9" x 12" Window Booklet Envelope

SECTION 4: LEGAL AND REGULATORY COMPLIANCE

The Vendor must agree to comply with all applicable federal, state, and local laws, rules, and regulations. As a political subdivision of the State of Texas, CCAD and its contractors are subject to specific statutes.

4.1 Texas Property Tax Code

The Vendor must be familiar with and operate in compliance with all relevant sections of the Texas Property Tax Code, including but not limited to:

- **§25.19 - Notice of Appraised Value:** The Vendor must produce and mail notices that meet all content and delivery requirements of this statute.

4.2 Texas Government Code

- **Chapter 552 (Public Information Act):** All information, documentation, and other material in connection with this RFB or any resulting contract may be subject to public disclosure under the Texas Public Information Act.

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

4.3 Data Security & Confidentiality

Vendor acknowledges that it will have access to confidential taxpayer information and agrees to: use such information solely for the purpose of fulfilling this Contract; implement and maintain appropriate safeguards (including encryption in transit and at rest); prohibit disclosure to any unauthorized third party or subcontractor without prior written approval of the District; promptly notify the District (within 48 hours) of any actual or suspected security incident, breach, or unauthorized disclosure; and return or destroy all District-provided data at the end of the Contract, certifying destruction in writing.

4.4 Indemnification and Insurance

The Vendor shall agree to indemnify and hold harmless CCAD, its officials, agents, and employees from any and all claims, damages, losses, and expenses arising out of the performance of the contract. The Vendor will be required to maintain sufficient insurance coverage (e.g., General Liability, Errors & Omissions) as deemed necessary by the District. The successful bidder shall not commence work under this Contract until they have obtained all the insurance required hereunder.

Within five (5) business days after notification of acceptance of bid and prior to commencement of services, Vendor must submit to the District proof of the following requirements:

- Workers Compensation and Texas Employer's Liability (Statutory)
- General Liability: Bodily Injury = \$500,000 per person - Property Damage = \$500,000 per occurrence
- Automobile Liability = \$1,000,000 policy limit

4.5 Termination

The District may terminate the work to be performed herein under in whole or in part at any time without cause and without penalty or liability. Upon receipt of such notice, the vendor shall immediately discontinue all services and actions.

4.6 Conflict of Interest Disclosures (Local Gov't Code Ch. 176)

In accordance with Chapter 176 of the Texas Local Government Code, any bidder or person wishing to do business with CCAD must file a completed Conflict of Interest Questionnaire (Form CIQ). This form must be submitted with the bid proposal.

4.7 Certificate of Interested Parties (Gov't Code §2252.908)

This Contract is subject to the disclosure requirements of Section 2252.908, Texas Government Code. Vendor must complete Form 1295 electronically via the Texas Ethics Commission's website, print the form, have it executed and notarized, and provide it to the District prior to contract execution, if: (a) the contract requires Board of Directors approval before it may be signed; or (b) the contract has a value of at least \$1,000,000.

4.8 No Boycott of Israel (Gov't Code, Ch. 2271)

Pursuant to Chapter 2271, Texas Government Code, vendor verifies that it does not boycott Israel and will not boycott Israel during the term of this Contract. This verification applies only if: (a) Contractor is a company (not a sole proprietor); (b) Contractor has ten (10) or more full-time employees; and (c) this Contract has a value of \$100,000 or more.

4.9 Debarment / Suspension Certification

By entering into this Contract, Vendor certifies that it is not debarred, suspended, or otherwise excluded from participation in federal or state procurement programs. Vendor must notify the District immediately if its status changes during the Contract term.

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

SECTION 5: BID FORM / COST PROPOSAL

5.1 Bidder Information

Bidder / Company Name: _____

Address: _____

City, State, Zip: _____

Phone#: _____ Email: _____

Printed Name: _____ Title: _____

5.2 Bid Amount

The Bidder agrees to provide the Services for the District as described in these bid documents, for the sum of:

Project Description	Volume	Project Cost
BPP Renditions	35,000	
Homestead Qualification Letters	45,000	
Appraisal Notices	475,000	
Job & Mail Tracking "Web Portal"		
Other:		
Other:		
Other:		
Grand Total Cost >>>		

The Bid Amount includes all costs in connection with the Services to be performed by Bidder, including, but not limited to supplies and materials, equipment, insurance, labor, supervision, overhead and profit. Postage will be billed to the District as a direct pass-through cost.

**REQUEST FOR BID
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PRINTING & MAILING SERVICES**

5.3 Project 1 Bid Sheets (BPP Renditions)

Estimated Volume: 35,000 Renditions – 105,000 Sheets – 210,000 Pages

Project Item#	Description	(S)heet or (P)age	Quantity	Unit Price	Total Price
1.1	Laser Printed BPP Rendition 4-pages, duplex				
1.2	Information & Affidavit Insert 2-pages, duplex				
1.4	Envelopes				
	Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS				
	Data Programming Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Forms Design Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Other Costs				
	Project Total →				

5.4 Project 2 Bid Sheets (Homestead Qualification Letters)

Estimated Volume: 45,000 Letters – 90,000 Sheets – 180,000 Pages

Project Item#	Description	(S)heet or (P)age	Quantity	Unit Price	Total Price
2.1	Laser Printed HS Qualification Letter, 2-pages, duplex.				
2.2	Laser Printed HS Application form, 2-pages, duplex.				
2.3	Envelopes				
	Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS				
	Data Programming Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Forms Design Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Other Costs				
	Project Total →				

**REQUEST FOR BID
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PRINTING & MAILING SERVICES**

5.5 Project 3 Bid Sheets (Appraisal Notices)

Estimated Volume: 475,000 Notices – 1,425,000 Sheets – 2,850,000 Pages

Project Item#	Description	(S)heet or (P)age	Quantity	Unit Price	Total Price
3.1	Laser Printed Appraisal Notice 2-pages, duplex				
3.2	Informal Procedures Insert 2-pages, duplex				
3.3	Taxpayer Remedies Insert 2-pages, duplex				
3.4	Envelopes				
	Fold, Insert, Sort, Seal, Meter, Tray & Deliver to USPS				
	PDF Archive File (Notice Only)				
	Data Programming Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Forms Design Cost	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	
	Other Costs				
	Project Total →				

5.6 Acknowledgement & Signature

By signing below, the bidder acknowledges and agrees to all terms and conditions set forth in this Invitation for Bid. The bidder certifies that they are an authorized representative of the company and that the information provided is true and correct.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES

ATTACHMENT A: REFERENCES

Ref-1

Company Name: _____

Address: _____

Contact Name: _____ Email: _____

Contract Calendar Years or Date Ranges: _____

Contract Description (including size & type of service, and estimated total dollar amount if available):


~~~~~

**Ref-2**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_

Contract Calendar Years or Date Ranges: \_\_\_\_\_

Contract Description (including size & type of service, and estimated total dollar amount if available):

\_\_\_\_\_  
\_\_\_\_\_  
~~~~~

Ref-3

Company Name: _____

Address: _____

Contact Name: _____ Email: _____

Contract Calendar Years or Date Ranges: _____

Contract Description (including size & type of service, and estimated total dollar amount if available):

(attach additional sheets if needed)

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

ATTACHMENT B: FINANCIAL INTEREST DISCLOSURE

Bidder affirms that no officer, director, owner, or key employee of the company has a financial, business, or family relationship with any member of the Collin Central Appraisal District Board of Directors or with District management listed below, except as disclosed below, if applicable.

Marty Wright
Chief Appraiser

Brian Swanson
Deputy Chief – Business Operations

Phil Greaux
Deputy Chief – Appraisal

Stephanie Cave-Bernal
Deputy Chief – ARB, Research, & Customer Service

Ryan Matthews
Deputy Chief – Technology

Toni Bryan
Director – Business Operations & Finance

Tina Castillo
Director - ARB/Agent Services

Shane Cheek
Director – Information Services

Wendy Gilliland
Director – Research Services

Eric Grusendorf
Director – Residential Appraisal

Taylor Hamilton
Director – Customer Service

Jason Harris
Director – Information Technology

Sara McAfee
Director – GIS/Mapping

Brad Richards
Director – BPP Appraisal

Cindy Smith
Director – Appraisal Support

Shawn Tilley
Director – Commercial Appraisal

Dana Wilson
Director – Land Appraisal

- ☐ No relationships or financial interests to disclose
☐ The attached relationships/financial interests exist (*attach explanation*)

Company Name: _____

Authorized Representative Name: _____

Signature: _____

Date: _____

**REQUEST FOR BID
RFB No. IST-2026-PM
PRINTING & MAILING SERVICES**

ATTACHMENT C: CONFLICT OF INTEREST QUESTIONNAIRE

This form is required by Chapter 176 of the Local Government Code. It must be completed and submitted by vendors who have a business relationship with a local government officer or a family member of the officer, as defined in the statute.

Vendors must complete the official CIQ form provided by the Texas Ethics Commission. The most recent version of the form and instructions are available at:

<https://www.ethics.state.tx.us/forms/conflict/>

- Attach the completed CIQ form to your bid submission, if applicable.
- Or sign below if there is no conflict of interest to disclose.

~~~~~

Pursuant to Chapter 176, Texas Local Government Code, the undersign certifies that no conflict of interest exists and no disclosure is required.

**Company Name:** \_\_\_\_\_

**Authorized Representative Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



**REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES**

**ATTACHMENT D: CERTIFICATE OF INTERESTED PARTIES**

Pursuant to Section 2252.908, Texas Government Code, certain contracts require the completion of Form 1295 (Certificate of Interested Parties).

To comply:

- 1 Visit the Texas Ethics Commission website at <https://www.ethics.state.tx.us/filinginfo/1295/>.
- 2 Complete Form 1295 electronically and obtain a certificate number.
- 3 Print the completed form.
- 4 Have the form executed by an authorized company official and notarized.
- 5 Provide the notarized form to the District.

*The Contract will not be effective until the District receives the completed Form 1295.*



**REQUEST FOR BID  
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PRINTING & MAILING SERVICES**

**ATTACHMENT E: OTHER CERTIFICATIONS**

In submitting this bid, I certify as follows:

**Certification of No Boycott of Israel (Gov't Code Ch. 2271)**

The Vendor certifies that it does not boycott Israel and will not boycott Israel during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is  $\geq$  \$100,000).*

**Certification of No Boycott of Energy Companies (Gov't Code Ch. 2274, Subch. A)**

The Vendor certifies that it does not boycott energy companies and will not boycott energy companies during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is  $\geq$  \$100,000).*

**Certification of Non-Discrimination Against Firearm or Ammunition Companies (Gov't Code Ch. 2274)**

The Vendor certifies that it does not discriminate against a firearm entity or firearm trade association and will not discriminate during the term of this Contract.

**Non-Collusion Certification**

The Vendor certifies that this bid is genuine and not collusive.

**Certification Regarding Debarment / Suspension**

The Vendor certifies that the company is not debarred, suspended, or excluded from participation in Federal or State programs.

**Data Security & Confidentiality Certification**

The Vendor certifies that all District data will be safeguarded, used solely for contract purposes, encrypted in transit and at rest, and destroyed/returned at the end of the contract term.

The undersigned hereby further certifies that they have read and understands all of the above.

**Company Name:** \_\_\_\_\_

**Authorized Representative Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



REQUEST FOR BID  
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PRINTING & MAILING SERVICES

**ATTACHMENT F: W-9 FORM**

The W-9 form can be found on the IRS website here: <https://www.irs.gov/forms-instructions>



# PROJECT SAMPLES







**AFFIRMATION OF PRIOR YEAR RENDITION (check only if applicable and your assets were exactly the same as last year's rendition form):**

☐ By checking this box, I affirm that the information contained in the most recent rendition statement filed for a prior tax year (the \_\_\_\_\_ tax year) continues to be complete and accurate for the current tax year.

**MARKET VALUE:**

Check the total market value of your business personal property:

☐ Under \$20,000☐ \$20,000 or over

If you checked "Under \$20,000", please complete only Schedule A below and if applicable, Schedule F. Otherwise complete Schedules B thru F, whichever are applicable.

**REPRESENTATION:**

Please indicate if you are filling out this form as:

☐ Owner, employee, or employee of an affiliated entity of the owner☐ Authorized Agent☐ Fiduciary☐ Secured PartyName & Title of Owner, Authorized Agent,  
Fiduciary or Secured Party:

Phone (area code + number):

Present Mailing Address:

City, State, ZIP Code:

Are you a secured party with a security interest in the property subject to this rendition and with a historical cost new of more than \$50,000, per Tax Code Section 22.01(c-1) and (c-2)?

☐ NO☐ YES - If yes, attach a document signed by the property owner indicating consent to file the rendition. Without the authorization, the rendition is not valid and cannot be processed

Property Tax Agent's Name (if not shown above)

Agent's Mailing Address (number and street)

City, State, ZIP code

Phone (area code &amp; number)

**THIS FORM MUST BE SIGNED AND DATED - By signing this document, you attest that the information contained on it and any attachments submitted with it are true and correct to the best of your knowledge and belief.**

If you ARE a secured party, property owner, an employee of the property owner, or an employee of a property owner on behalf of an affiliated entity of the property owner, print, sign &amp; date on the line below: (notarization NOT required)

Print Name:

Signature:

Date:

If you are NOT a secured party, property owner, an employee of the property owner, or an employee of a property owner on behalf of an affiliated entity of the property owner, print, sign &amp; date on the line below: (notarization IS required)

I swear that the information provided on this form and any attachments is true and correct to the best of my knowledge and belief.

Print Name:

Signature:

Date:

Subscribed and sworn before me, this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

\_\_\_\_\_  
Notary Public, State of Texas**IF YOU MAKE A FALSE STATEMENT ON THIS FORM, YOU COULD BE FOUND GUILTY OF A CLASS A MISDEMEANOR OR A STATE JAIL FELONY UNDER PENAL CODE SEC. 37.10.**Did you timely apply for a September 1st inventory date? (optional) ..... ☐ Yes☐ NoDoes your inventory involve interstate/foreign commerce issues? (optional) ..... ☐ Yes☐ NoDoes your inventory involve freeport goods? (optional) ..... ☐ Yes☐ No**SCHEDULE A: PERSONAL PROPERTY VALUED LESS THAN \$20,000**

List all taxable personal property by type/category of property (See "Definitions"). If needed, you may attach additional sheets OR a computer-generated copy listing the information below. If you manage or control property as a fiduciary on Jan 1, also list the names and addresses of each property owner. "Good Faith Estimate of Market Value" or "Historical Cost When New" is optional for Schedule A only.

| General Property Description<br>by Type / Category | Estimate of<br>Quantity of<br>Each Type | Good Faith Estimate<br>of Market Value* | Historical Cost<br>When New* | Year<br>Acquired* | Property Owner Name / Address<br>(if you manage or control property as a fiduciary) |
|----------------------------------------------------|-----------------------------------------|-----------------------------------------|------------------------------|-------------------|-------------------------------------------------------------------------------------|
|                                                    |                                         |                                         |                              |                   |                                                                                     |
|                                                    |                                         | (OR)                                    | (AND)                        |                   |                                                                                     |
|                                                    |                                         |                                         |                              |                   |                                                                                     |
|                                                    |                                         |                                         |                              |                   |                                                                                     |
|                                                    |                                         |                                         |                              |                   |                                                                                     |
|                                                    |                                         |                                         |                              |                   |                                                                                     |
|                                                    |                                         |                                         |                              |                   |                                                                                     |

\*Provide an amount for either the "Good Faith Estimate of Market Value", or a "Historical Cost When New" and "Year Acquired". If you provide an historical cost when new and year acquired, you need not provide a good faith estimate of market value.

**Please retain a copy of this completed form for your files!****P1-Pg2**





PERSONAL PROPERTY VALUED AT \$20,000 OR MORE

| SCHEDULE B: INVENTORY, RAW MATERIALS, AND WORK-IN-PROGRESS                                                                                                                                                                                                                                                                                                  |                                              |                                         |                                            |                                      |                            |                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|-----------------------------------------|--------------------------------------------|--------------------------------------|----------------------------|-----------------------------------------------------------------------------------|
| List all taxable inventory by type of property. If needed, attach additional sheets or a computer-generated copy listing the information below. If you manage or control property as a fiduciary on January 1, also list the names and addresses of each property owner. If you carry consigned goods, also list the names and addresses of each consignor. |                                              |                                         |                                            |                                      |                            |                                                                                   |
| Property Description<br>by Type / Category                                                                                                                                                                                                                                                                                                                  | Property Address<br>or Address Where Taxable | Estimate of<br>Quantity of<br>Each Type | Good Faith<br>Estimate of<br>Market Value* | Historical Cost<br>(OR)<br>When New* | Year<br>Acquired*<br>(AND) | Property Owner Name/Address<br>(if you manage or control property as a fiduciary) |
|                                                                                                                                                                                                                                                                                                                                                             |                                              |                                         |                                            |                                      |                            |                                                                                   |
|                                                                                                                                                                                                                                                                                                                                                             |                                              |                                         |                                            |                                      |                            |                                                                                   |
|                                                                                                                                                                                                                                                                                                                                                             |                                              |                                         |                                            |                                      |                            |                                                                                   |
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|                                                                                                                                                                                                                                                                                                                                                             |                                              |                                         |                                            |                                      |                            |                                                                                   |

| SCHEDULE C: SUPPLIES                                                                                                                                                                                                                                                    |                                              |                                         |                                            |                                      |                            |                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|-----------------------------------------|--------------------------------------------|--------------------------------------|----------------------------|-----------------------------------------------------------------------------------|
| List all taxable supplies by type of property. If needed, attach additional sheets or a computer-generated copy listing the information below. If you manage or control property as a fiduciary on January 1, also list the names and addresses of each property owner. |                                              |                                         |                                            |                                      |                            |                                                                                   |
| Property Description<br>by Type / Category                                                                                                                                                                                                                              | Property Address<br>or Address Where Taxable | Estimate of<br>Quantity of<br>Each Type | Good Faith<br>Estimate of<br>Market Value* | Historical Cost<br>(OR)<br>When New* | Year<br>Acquired*<br>(AND) | Property Owner Name/Address<br>(if you manage or control property as a fiduciary) |
|                                                                                                                                                                                                                                                                         |                                              |                                         |                                            |                                      |                            |                                                                                   |
|                                                                                                                                                                                                                                                                         |                                              |                                         |                                            |                                      |                            |                                                                                   |
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|                                                                                                                                                                                                                                                                         |                                              |                                         |                                            |                                      |                            |                                                                                   |

| SCHEDULE D: VEHICLES, TRAILERS, AND SPECIAL EQUIPMENT                                                                                                                                                                                                                                                                                                                                             |                    |                     |                                                   |                                            |                                               |                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|---------------------|---------------------------------------------------|--------------------------------------------|-----------------------------------------------|-------------------|
| List only vehicles that are licensed in the name of the business as shown on Page 1. Vehicles disposed of after January 1 are taxable for the year and must be listed below. If needed, attach additional sheets or a computer-generated copy listing the information below. Report leased vehicles under Schedule F. Leased vehicles must be reported showing the name and address of the owner. |                    |                     |                                                   |                                            |                                               |                   |
| Year<br>(optional)                                                                                                                                                                                                                                                                                                                                                                                | Make<br>(optional) | Model<br>(optional) | Vehicle Identification Number (VIN)<br>(optional) | Good Faith<br>Estimate of<br>Market Value* | Historical Cost<br>(OR)<br>When New*<br>(AND) | Year<br>Acquired* |
|                                                                                                                                                                                                                                                                                                                                                                                                   |                    |                     |                                                   |                                            |                                               |                   |
|                                                                                                                                                                                                                                                                                                                                                                                                   |                    |                     |                                                   |                                            |                                               |                   |
|                                                                                                                                                                                                                                                                                                                                                                                                   |                    |                     |                                                   |                                            |                                               |                   |
|                                                                                                                                                                                                                                                                                                                                                                                                   |                    |                     |                                                   |                                            |                                               |                   |
|                                                                                                                                                                                                                                                                                                                                                                                                   |                    |                     |                                                   |                                            |                                               |                   |

\*Provide an amount for either the "Good Faith Estimate of Market Value", or a "Historical Cost When New" and "Year Acquired". If you provide an historical cost when new and year acquired, you need not provide a good faith estimate of market value.



**SCHEDULE E: FURNITURE, FIXTURES, MACHINERY, EQUIPMENT, COMPUTERS**

Total (by year acquired) all furniture, fixtures, machinery, equipment, and computers (new or used) still in possession on January 1. Items received as gifts are to be listed in the same manner. If needed, attach additional sheets or a computer-generated listing of the information below.

| Furniture & Fixtures |                                           | Machinery & Equipment                     |                                           | Office Equipment                          |                                           |                                           |
|----------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| Year Acquired        | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value* | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value* | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value* |
| 2023                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2022                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2021                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2020                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2019                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2018                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2017                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2016                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2015                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2014                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2013                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2012                 |                                           |                                           |                                           |                                           |                                           |                                           |
| 2011 & prior         |                                           |                                           |                                           |                                           |                                           |                                           |
| TOTAL:               |                                           |                                           |                                           |                                           |                                           |                                           |

| Computer Equipment |                                           | POS / Servers / Mainframes                |                                           | Other (any other items not listed in other schedules) |             |                                           |                                           |
|--------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------------------|-------------|-------------------------------------------|-------------------------------------------|
| Year Acquired      | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value* | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value*             | Description | Historical Cost When New*<br>(omit cents) | (OR) Good Faith Estimate of Market Value* |
| 2023               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2022               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2021               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2020               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2019               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2018               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2017               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2016               |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| 2015 & prior       |                                           |                                           |                                           |                                                       |             |                                           |                                           |
| TOTAL:             |                                           |                                           |                                           |                                                       |             |                                           |                                           |

**SCHEDULE F: PROPERTY UNDER BAILMENT, LEASE, CONSIGNMENT OR OTHER ARRANGEMENT**

List the name and address of each owner of taxable property that is in your possession or under your management on January 1 by bailment, lease, consignment, or other arrangement. If needed, attach additional sheets or a computer-generated copy listing the information below.

| Property Owner's Name | Property Owner's Address | General Property Description |
|-----------------------|--------------------------|------------------------------|
|                       |                          |                              |
|                       |                          |                              |
|                       |                          |                              |
|                       |                          |                              |
|                       |                          |                              |

\*Provide an amount for either the "Good Faith Estimate of Market Value", or a "Historical Cost When New" and "Year Acquired". If you provide an historical cost when new and year acquired, you need not provide a good faith estimate of market value.









## IMPORTANT INFORMATION

**GENERAL INFORMATION:** This form is for use in rendering, pursuant to Tax Code Section 22.01, tangible personal property used for the production of income that you own or manage and control as a fiduciary on Jan. 1 of this year. This report is confidential and not open to public inspection; disclosure is permitted pursuant to the terms of Tax Code Section 22.27.

**FILING INSTRUCTIONS:** This document and all supporting documentation must be filed with the appraisal district office in the county in which the property is taxable. Do not file this document with the Texas Comptroller of Public Accounts. Contact information for appraisal district offices may be found on the Comptroller's website.

**DEADLINES:** Rendition statements and property report deadlines depend on property type. The statements and reports must be delivered to the chief appraiser after Jan. 1 and no later than the deadline indicated below. On written request by the property owner, the chief appraiser shall extend a deadline for filing a rendition statement or property report to May 15. The chief appraiser may further extend the deadline an additional 15 days upon good cause shown in writing by the property owner.

| Rendition Statements & Reports                                                                                                                                                           | Deadlines | Allowed Extension(s)                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------------------------------------------------------------------------------------------------------------------------|
| Property generally                                                                                                                                                                       | April 15  |                                                                                                                                 |
| Property regulated by the Texas Public Utility Commission, Texas Railroad Commissions, Federal Surface Transportation Board, or Federal Energy Regulatory Commission. Tax Code §22.23(d) | April 30  | <ul style="list-style-type: none"><li>• May 15 upon written request</li><li>• Additional 15 days for good cause shown</li></ul> |

**EXEMPTION:** A person is entitled to an exemption from taxation of the tangible personal property that is held or used for the production of income if it has less than \$2,500 of taxable value. (Tax Code Section 11.145)

If an exemption is denied or terminated on a property, the owner must render it for taxation within 30 days from the denial or termination. (Tax Code Sections 21.01(a) and 22.02)

**PENALTIES:** The chief appraiser must impose a penalty on a person who fails to timely file a required rendition statement or property report in an amount equal to 10 percent of the total amount of taxes imposed on the property for that year by taxing units participating in the appraisal district. The chief appraiser must impose an additional penalty on the person equal to 50 percent of the total amount of taxes imposed on the property for the tax year of the statement or report by the taxing units participating in the appraisal district if it is finally determined by a court that:

- (1) the person filed a false statement or report with the intent to commit fraud or to evade the tax; or
- (2) the person alters, destroys, or conceals any record, document, or thing, or presents to the chief appraiser any altered or fraudulent record, document, or thing, or otherwise engages in fraudulent conduct, for the purpose of affecting the course or outcome of an inspection, investigation, determination, or other proceeding before the appraisal district.

## Business Personal Property Rendition

### DEFINITIONS

**Address Where Taxable:** In some instances, personal property that is only temporarily at its current address may be taxable at another location (taxable situs). If you know that this is the case, please list the address where taxable.

**Consigned Goods:** Personal property owned by another person that you are selling by arrangement with that person. If you have consigned goods, report the name and address of the owner in the appropriate blank.

**Estimate of Quantity:** For each type or category listed, the number of items, or other relevant measure of quantity (e.g., gallons, bushels, tons, pounds, board feet).

**Fiduciary:** A person or institution who manages property for another and who must exercise a standard of care in such management activity imposed by law or contract.

**Good Faith Estimate of Market Value:** Your best estimate of what the property would have sold for in U.S. dollars on January 1 of the current tax year if it had been on the market for a reasonable length of time and neither you nor the purchaser was forced to buy or sell. For inventory, it is the price for which the property would have sold as a unit to a purchaser who would continue the business.

**Historical Cost When New:** What you paid for the property when it was new, or if you bought the property used, what the original buyer paid when it was new. If you bought the property used and do not know what the original buyer paid, state what you paid with a note that you purchased it used.

**Inventory:** Personal property that is held for sale in the ordinary course of a trade or business.

**Personal Property:** Every kind of property that is not real property; generally, property that is movable without damage to itself or the associated real property.

**Property Address:** The physical address of the personal property on January 1 of the current tax year. Normally, the property is taxable by the taxing unit where the property is located.

**Secured Party:** A person in whose favor a security interest is created or provided for under a security agreement; see Business and Commerce Code Section 1.201 for further details.

**Type/Category:** Functionally similar personal property groups. Examples are: furniture, fixtures, machinery, equipment, vehicles and supplies. Narrower groupings such as personal computers, milling equipment, freezer cases and forklifts should be used, if possible. A person is not required to render for taxation personal property appraised under Tax Code Section 23.24.

**Year Acquired:** The year that you purchased the property, or otherwise acquired.

For more information, visit: [www.CollinCAD.org](http://www.CollinCAD.org)



2807709

## Notice of Residential Homestead Exemption Qualification

Collin Central Appraisal District  
250 Eldorado Pkwy  
McKinney TX 75069-8023

Date of Notice: 02/01/2024

Property ID: 2807709

Geo ID: R-12006-00D-0180-1

Legal: LAVON FARMS (CLA), BLK D, LOT 18

9 1 AV 0.507\*\*\*\*\*AUTO\*\*5-DIGIT 75189 5DGS 2 FT 1

|||||

AHMED ZEINAB MOHAMED  
257 HAWTHORN DR  
LAVON TX 75166-1208

**NOTICE: A residence homestead exemption from ad valorem taxation is NOT currently being allowed on the property listed below. However, our records show that this property may qualify for a residence homestead exemption, which will reduce your taxes.**

According to the records of the appraisal district, the property described in this notice may be your primary residence and may qualify for a residence homestead exemption from ad valorem taxation. If the property is your home and you occupy it as your primary residence, the property likely qualifies for one or more residence homestead exemptions, which will reduce the amount of taxes imposed on the property. The form needed to apply for a residence homestead exemption is enclosed. Although the form may state that the deadline for filing an application for a residence homestead exemption is April 30, a late application for a residence homestead exemption will be accepted if filed before February 1, 2027. A copy of your Texas Driver's License or Texas Identification Card with the address of the property is required. There is no fee or charge for filing an application or a late application for a residence homestead exemption.

Property Address: 257 HAWTHORN LAVON TX 75166

To file your application online, use our Online eFile Portal website by visiting the URL below or by scanning the QR code with your mobile device. Filing online reduces the processing time of your application and gives you confirmation and status alert emails once your application is submitted.

Submit your application online at : [efile.collinCAD.org](https://efile.collinCAD.org)

Owner ID: 1193426

PIN: XXXXXXXX



\*If you are unable to submit your application online or would rather file by paper form:

- Please be aware that filing by paper can increase the processing time by up to 30 days
- You can download a copy of the application form on our website – [collincad.org/hsapp](https://collincad.org/hsapp)
- You can call our offices and request an application form be mailed to you - 469.742.9200



# APPLICATION FOR RESIDENCE HOMESTEAD EXEMPTION

## Important Information

### GENERAL INSTRUCTIONS

This Residence Homestead Exemption Application is for claiming exemptions pursuant to Tax Code Sections 11.13, 11.131, 11.132, 11.133, 11.134, and 11.432. The exemptions apply only to property that you own and occupy as your principal place of residence.

### REQUIRED DOCUMENTATION

Attach a copy of property owner's driver's license or state-issued personal identification certificate. The address listed on the driver's license or state-issued personal identification certificate must correspond to the property address for which the exemption is requested. Property owners who reside in certain facilities or participate in a certain address confidentiality program may be exempt from this requirement. The chief appraiser may waive the requirements for certain active-duty U.S. armed services members or their spouses or holders of certain driver's licenses.

#### Manufactured Home owners must provide:

- a copy of the Texas Department of Housing and Community Affairs statement of ownership showing that the applicant is the owner of the manufactured home;
- a copy of the sales purchase agreement, other applicable contract or agreement or payment receipt showing that the applicant is the purchaser of the manufactured home; or
- a sworn affidavit by the applicant indicating that:
  - the applicant is the owner of the manufactured home;
  - the seller of the manufactured home did not provide the applicant with the applicable contract or agreement; and
  - the applicant could not locate the seller after making a good faith effort.

### EXEMPTION QUALIFICATIONS

#### General Residence Homestead Exemption (Tax Code Section 11.13(a) and (b)):

A property owner who acquires property after January 1st may receive the residence homestead exemption for the applicable portion of that tax year immediately on qualification of the exemption, if the previous owner did not receive the same exemption for the tax year. The property owner must occupy the property as the owner's primary residence and the residence homestead exemption cannot be claimed by the property owner on any other property.

#### Disabled Person Exemption (Tax Code Section 11.13(c) and (d)):

Persons under a disability for purposes of payment of disability insurance benefits under Federal Old-Age, Survivors, and Disability Insurance. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit\* or other compelling evidence establishing the applicant's ownership interest in the homestead. An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

#### Age 65 or Older Exemption (Tax Code Section 11.13(c) and (d)):

This exemption is effective January 1st of the tax year in which the property owner becomes age 65. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit\* or other compelling evidence establishing the applicant's ownership interest in the homestead. An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

#### Surviving Spouse of an Individual Who Qualified for Age 65 or Older Exemption

(Tax Code Section 11.13(q)):

Surviving spouse of person who qualified for the age 65 or older exemption may receive this exemption if the surviving spouse was 55 years of age or older when the qualifying spouse died. The property must have been the surviving spouse's residence homestead at the time of death and remain the surviving spouse's residence homestead. This exemption cannot be combined with an exemption under 11.13(d).

#### 100 Percent Disabled Veterans Exemption (Tax Code Section 11.131(b)):

Property owner who receives a 100 percent disability compensation due to a service-connected disability and a rating of 100 percent disabled or individual unemployability from the U.S. Department of Veterans Affairs or its successor. Documentation must be provided to support this exemption request.

#### Surviving Spouse of a Disabled Veteran Who Qualified or Would Have Qualified for the 100 Percent Disabled Veteran's Exemption

(Tax Code Section 11.131(c) and (d)):

Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.131(b) at the time of his or her death or would have qualified for the exemption if the exemption had been in effect on the date the disabled veteran died) who has not remarried since the death of the veteran. The property must have been the surviving spouse's residence homestead at the time of the veteran's death and remain the surviving spouse's residence homestead.

#### Donated Residence Homestead of Partially Disabled Veteran (Tax Code Section 11.132(b)):

A disabled veteran with a disability rating of less than 100 percent with a residence homestead donated by a charitable organization at no cost or at some cost that is not more than 50 percent of the good faith estimate of the market value of the residence homestead as of the date the donation is made. Documentation must be provided to support this exemption request.

#### Surviving Spouse of a Disabled Veteran Who Qualified for the Donated Residence Homestead Exemption

(Tax Code Section 11.132(c) and (d)):

Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.132(b) at the time of his or her death) who has not remarried since the death of the disabled veteran and maintains the property as his or her residence homestead.

#### Surviving Spouse of a Member of Armed Services Killed in Line of Duty

(Tax Code Section 11.133(b) and (c)):

Surviving spouse of a U.S. armed services member who is killed or fatally injured in the line of duty who has not remarried since the death of the service member. Documentation must be provided to support this exemption request.

#### Surviving Spouse of a First Responder Killed in the Line of Duty (Tax Code Section 11.134):

Surviving spouse of a first responder who is killed or fatally injured in the line of duty who has not remarried since the death of the first responder. Documentation must be provided to support this exemption request.

For more information or questions regarding homestead exemptions:  
call 469.742.9200 or visit [CollinCAD.org/faqs](http://CollinCAD.org/faqs)





Return application to: \*\*\*PLEASE DO NOT FAX\*\*\*  
Collin Central Appraisal District Metro: 469.742.9200  
250 Eldorado Pkwy Toll-Free: 866.467.1110  
McKinney, TX 75069-8023 www.CollinCAD.org

| For Appraisal District Use Only                           |  | Initials: _____ |
|-----------------------------------------------------------|--|-----------------|
| G: _____ HS _____ OV65 _____ DP _____ DVHS _____ SS _____ |  |                 |
| D: _____ HS _____ OV65 _____ DP _____ DVHS _____ SS _____ |  |                 |

## RESIDENCE HOMESTEAD EXEMPTION APPLICATION

This application is for use in claiming residence homestead exemptions pursuant to Tax Code Sections 11.13, 11.131, 11.132, 11.133, 11.134, and 11.432.  
The exemptions apply only to property that you own and occupy as your principal place of residence. See filing deadline info on page 2.

Situs Address: 257 HAWTHORN DR , LAVON (Real - A1)  
Legal Description: LAVON FARMS (CLA), BLK D, LOT 18

**AHMED ZEINAB MOHAMED**  
**257 HAWTHORN DR**  
**LAVON, TX 75166-1208**

| Tax Year & Prop ID                                                                                                                |                           |
|-----------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| Tax Year:                                                                                                                         | <b>2024</b>               |
| Property ID:                                                                                                                      | <b>2807709</b>            |
| Geo ID:                                                                                                                           | <b>R-12006-00D-0180-1</b> |
| <input type="checkbox"/> Late Filing for Prior Year(s): _____<br>(must met qualifications for homestead exemption in prior years) |                           |



### SECTION 1: Exemptions Requested (check all that apply to you)

- |                                                                                          |                                                                                                                         |
|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> GENERAL RESIDENCE HOMESTEAD                                     | <input type="checkbox"/> DISABLED PERSON                                                                                |
| <input type="checkbox"/> PERSON AGE 65 OR OLDER                                          | <input type="checkbox"/> AGE 55 OR OLDER SURVIVING SPOUSE* OF PERSON<br>Who Qualified for the Age 65 or Older Exemption |
| <input type="checkbox"/> 100% DISABLED VETERAN**                                         | <input type="checkbox"/> SURVIVING SPOUSE* OF DISABLED VETERAN**<br>Who Qualified for the 100% DV Exemption             |
| <input type="checkbox"/> DONATED RESIDENCE OF PARTIALLY DISABLED VETERAN**               | <input type="checkbox"/> SURVIVING SPOUSE* OF DISABLED VETERAN**<br>Who Qualified for the Donated Residence Exemption   |
| <input type="checkbox"/> SURVIVING SPOUSE* OF MEMBER OF ARMED FORCES<br>Killed In Action | <input type="checkbox"/> SURVIVING SPOUSE* OF FIRST RESPONDER<br>Killed In The Line of Duty                             |

#### \*SURVIVING SPOUSE

Deceased Spouse's Name: \_\_\_\_\_ Date of Death: \_\_\_\_\_

#### \*\*DISABLED VETERAN

Percent Disability Rating: \_\_\_\_\_ % Is the disability a permanent total disability as determined by the U.S. Department of Veterans Affairs under 38 C.F.R Section 4.15? Yes ☐ No ☐

Were you receiving a homestead exemption on your previous residence? Yes ☐ No ☐

Are you transferring an exemption from a previous residence? Yes ☐ No ☐

Are you transferring a tax (ceiling) limitation from a previous address? Yes ☐ No ☐

Previous Residence Street Address, City, State, Zip Code

Previous County

NOTE: The exemptions will be removed from the previous address. If the previous address was not in Collin County, you must notify the previous County's appraisal district to remove the exemptions.

### SECTION 2: Owner/Applicant Information (must attach a copy of your TX Driver License or state issued ID - see Section 4)

Do you own the property for which you are seeking an exemption? ☐ Yes ☐ No

SELECT ONE: ☐ Single Adult ☐ Married Couple ☐ Married Living Separately ☐ Other (e.g., individual who own property with others)

NOTE: Each individual owner, excluding married couples, residing on the property must complete a separate application to qualify for their exemption.

| Name of Property Owner<br>(print full name) | Birth Date*<br>(mm/dd/yyyy) | TX Driver License / State ID<br>or Social Security Number** | Percent Ownership<br>Interest |
|---------------------------------------------|-----------------------------|-------------------------------------------------------------|-------------------------------|
| Owner 1                                     |                             |                                                             | %                             |
| Owner 2 (spouse)                            |                             |                                                             | %                             |

Primary Phone Number (area code & number)

Mailing Address (including city, state & zip)

Is your mailing address different from  
the property address? If yes, explain why:



**SECTION 3: Property Information**

Date you acquired this property: \_\_\_\_/\_\_\_\_/\_\_\_\_

Date you began occupying the property as your principal residence: \_\_\_\_/\_\_\_\_/\_\_\_\_

Physical Street Address, City, Zip Code (if different from the situs address printed on page 1)

Legal Description (if known)

Number of acres (or fraction of an acre, not to exceed 20) you own and occupy as your principal residence: \_\_\_\_\_ acres

Note: the structure and the land must have identical ownership

Do you have an exclusive right to occupy this property because you own stock in a co-op housing corp?..... ☐ Yes ☐ NoIs any portion of this property income producing?..... ☐ Yes ☐ No If yes, what percentage? \_\_\_\_\_%**MANUFACTURED HOMES:** You must also complete page 4, Residential Homestead for a Manufactured Home Information form.**SECTION 4: Application Documents****ATTACH A COPY OF YOUR DRIVER LICENSE OR STATE ISSUED PERSONAL IDENTIFICATION CERTIFICATE. THE ADDRESS LISTED ON YOUR DRIVER LICENSE OR STATE ID MUST CORRESPOND TO THE ADDRESS OF THE PROPERTY FOR WHICH AN EXEMPTION IS CLAIMED IN THIS APPLICATION.****In certain cases, you are exempt from these requirements or the chief appraiser may waive the requirements.**

Please indicate if you are exempt from the requirement to provide a copy of your driver license or state issued personal identification certificate:

☐ I am a resident of a facility that provides services related to health, infirmity, or aging.☐ Facility Name & Address: \_\_\_\_\_☐ I am certified for participation in the address confidentiality program administered by the Office of the Texas Attorney General under Code of Criminal Procedure, Chapter 58, Subchapter B.

Please indicate if you request that the chief appraiser waive the requirement that the address of the property for which the exemption is claimed correspond to the address listed on your driver license or state issued personal identification certificate:

☐ I am an active duty member of the armed services of the United States or the spouse of an active duty member.  
(You must attach a copy of your, or your spouses, military identification card AND a copy of a utility bill for the subject property in yours, or your spouses, name.)☐ I hold a driver license issued under Section 521.121(c) or 521.1211, Texas Transportation Code.  
(You must attach a copy of the application for that license from the Texas Department of Transportation.)Is the applicant identified on the deed or other recorded instrument? ☐ No - Documentation required. (see Important Information on page 3)  
☐ Yes - Court record/filing number on recorded deed or other instrument: \_\_\_\_\_Is the property an heir property (see Important Information on page 3)?..... ☐ No ☐ YesIf yes, do other heir property owners occupy the property?..... ☐ No ☐ Yes (affidavits required)**SECTION 5: Affirmation and Signature**By signing this application, you state that: (1) the facts in this application are true and correct; (2) you meet the qualifications under Texas law for the residence homestead exemption(s) for which you are applying; (3) you do not claim a residence homestead exemption on another residence homestead in Texas, and you do not claim a residence homestead exemption on a residence homestead outside of Texas.; and (4) you have read and understand the *Notice Regarding Penalties for Making or Filing an Application Containing a False Statement*, found below."I, \_\_\_\_\_, have not claimed another residence homestead exemption in  
Printed Name of Property Owner

Texas or another state, and all information provided in this application is true and correct."

**sign & date  
here >>>>**\_\_\_\_\_  
Signature of Property Owner or Person Authorized to Sign the Application\*\_\_\_\_\_  
Date**NOTICE REGARDING PENALTIES FOR MAKING OR FILING AN APPLICATION CONTAINING A FALSE STATEMENT: If you make a false statement on this form, you could be found guilty of a Class A misdemeanor or a state jail felony under Section 37.10, Penal Code.**Your signature on this application constitutes a sworn statement that you have read and understand the *Notice Regarding Penalties for Making or Filing an Application Containing a False Statement*.

\*Only a person with a valid power of attorney or other court-ordered designation is authorized to sign the application on behalf of the property owner. You must submit official documentation showing you have authorization.

• **Filing Deadlines:** For the Homestead Exemption, you must file the application between January 1 and April 30 of the tax year for which you are claiming the exemption. If you qualify for an Age 65 or Older / Disabled Person exemption, you must file the application no later than the first anniversary of the date you qualify. You may file a late application for a Residence Homestead Exemption, including a 100% Disabled Veteran Homestead Exemption, no later than two years after the tax delinquency date.• **Re-Filing:** If the chief appraiser grants the exemption(s), you do not need to reapply annually. You must reapply, however, if the chief appraiser requires you to do so by sending you a new application asking you to reapply. You must notify the chief appraiser in writing if and when your right to any exemption ends or your qualifications change. You must reapply if you qualify for additional exemptions based on age or disability in the future. To ensure the earliest possible qualification without reapplication, the older spouse should complete the application for a married couple.



## 2025 Notice of Appraised Value

**COLLIN CENTRAL APPRAISAL DISTRICT**  
**250 ELDORADO PKWY**  
**MCKINNEY, TX 75069-8023**

Phone: 469.742.9200 866.467.1110

DATE OF NOTICE: April 15, 2025

Property ID: 2692097

Ownership %: 100.00

Geo ID: R-10219-00D-0050-1

Legal: NORTHGLEN 1 ADDITION (CPL), BLK D, LOT 5

Legal Acres:

Situs: 3620 FUNSTON DR PLANO, TX 75025

Appraiser: CCE

Agent ID: 1102456

EFile PIN: XXXXXXXXXXXX

Property ID: 2692097 - R-10219-00D-0050-1

707 PROTEST

Agent for: DASGUPTA ABHIJIT &amp; GARGI A

PO BOX 1784

EULESS, TX 76039-1784

Dear Property Owner,

We have appraised the property listed above for the tax year 2025. As of January 1, our appraisal is outlined below.

| Appraisal Information                                                            |  | Last Year - 2024 | Proposed - 2025 |
|----------------------------------------------------------------------------------|--|------------------|-----------------|
| Market Value of Improvements (Structures / Buildings, etc.)                      |  | 765,264          | 727,128         |
| Market Value of Non Ag/Timber Land                                               |  | 168,000          | 168,000         |
| Market Value of Ag/Timber Land                                                   |  | 0                | 0               |
| Market Value of Personal Property/Minerals                                       |  | 0                | 0               |
| Total Market Value                                                               |  | 933,264          | 895,128         |
| Productivity Value of Ag/Timber Land                                             |  | 0                | 0               |
| Appraised Value** (possible limitations, see below)                              |  | 744,611          | 819,072         |
| Exemptions (DV - Disabled Vet; DP-Disabled Person; HS-Homestead; OV65 - Over 65) |  | HS               | HS              |

| 2024<br>Exemption Amount | 2024<br>Taxable Value | Taxing Unit    | 2025 Proposed<br>Appraised Value | 2025<br>Exemption Amount | 2025<br>Taxable Value |
|--------------------------|-----------------------|----------------|----------------------------------|--------------------------|-----------------------|
| 186,653                  | 557,958               | PLANO CITY     | 819,072                          | 179,026                  | 640,046               |
| 46,663                   | 697,948               | COLLIN COUNTY  | 819,072                          | 44,756                   | 774,316               |
| 186,653                  | 557,958               | COLLIN COLLEGE | 819,072                          | 179,026                  | 640,046               |
| 100,000                  | 644,611               | FRISCO ISD     | 819,072                          | 100,000                  | 719,072               |

Scan the QR code below to  
schedule an in-person informal  
review of your appraised value  
with the appraisal staff.

CollinCAD.org/informal

See the "Informal Appraisal Review"  
insert for more information.

The difference between the 2020 appraised value and the 2025 appraised value is 46.26%.

\*\* Your residence homestead is protected from future appraisal value increases in excess of 10% per year PLUS the value of any new improvements.

An (\*) next to the Taxing Unit name indicates a tax ceiling exists for that taxing unit. If you qualified your home for an age 65 and older or disabled person homestead exemption for school taxes, the school taxes on that home cannot increase as long as you own and live in that home. The tax ceiling is the amount that you pay in the year that you qualified for the 65 and older or disabled person exemption. The school taxes on your home may not go above the amount of the ceiling, unless you improve the home (other than normal repairs and maintenance).

You or your property may qualify for one of these residence homestead exemptions, if not already indicated above. Visit our website or contact our office for more information.

HS - General Residence Homestead

OV65 - Age 65 Or Older, or Surviving Spouse

DP - Disabled Person

DVHS - 100 Percent Disabled Veteran, or Surviving Spouse

MASSS - Surviving Spouse of Member of Armed Forces Killed In Action

FRSS - Surviving Spouse of First Responder Killed in the Line of Duty

## LOCAL PROPERTY TAX DATABASE

Visit Texas.gov/PropertyTaxes to find a link to your local property tax database on which you can easily access information regarding your property taxes, including information regarding the amount of taxes that each entity that taxes your property will impose if the entity adopts its proposed tax rate. Your local property tax database will be updated regularly during August and September as local elected officials propose and adopt the property tax rates that will determine how much you pay in property taxes.

A property owner may request from the county assessor-collector for the county in which the property is located or, if the county assessor-collector does not assess taxes for the county, the person who assesses taxes for the county under Section 6.24(b), contact information for the assessor for each taxing unit in which the property is located, who must provide the information described by this subsection to the owner on request.

County Tax Assessor-Collector: Collin County Tax Office PO Box 8046, McKinney TX 75070 972.547.5020

A property owner may register on the appraisal district's internet website, if the appraisal district maintains an internet website, to have notifications regarding updates to the property tax database delivered to the owner by e-mail.

\*\*You may qualify for the real property other than residence homestead circuit breaker limitation if your property's appraised value is not more than the amount determined under Tax Code Section 23.231 Subsection (j) for the tax year in which the property first qualified. Under Section 23.231, Tax Code, for the 2024, 2025, and 2026 tax years, the appraised value of real property other than a residence homestead for ad valorem tax purposes may not be increased by more than 20 percent each year, with certain exceptions. The circuit breaker limitation provided under Section 23.231, Tax Code, expires December 31, 2026. Unless this expiration date is extended by the Texas Legislature, beginning in the 2027 tax year, the circuit breaker limitation provided under Section 23.231, Tax Code, will no longer be in effect and may result in an increase in ad valorem taxes imposed on real property previously subject to the limitation.

The governing body of each unit decides whether or not property taxes will increase. The appraisal district only determines the value of your property. The Texas Legislature does not set the amount of your local taxes. Your property tax burden is decided by your locally elected officials, and all inquiries concerning your taxes should be directed to those officials.

Property owners who file a notice of protest with the Appraisal Review Board (ARB) may request an informal conference with the appraisal district to attempt to resolve a dispute prior to a formal ARB hearing. In counties with populations of 1 million or more, property owners may request an ARB special panel for certain property protests.

To file a protest, you must file a written protest with the ARB. To file a written protest, complete the Notice of Protest form by following the instructions included in the form and, no later than the deadline indicated below, mail or deliver the form to the ARB at the address indicated below. The ARB will notify you of the date &amp; time of your hearing.

Deadline for filing a protest:

May 15, 2025

Location of Hearings:

250 Eldorado Pkwy, McKinney TX 75069

ARB will begin hearings:

May 22, 2025

Enclosed are copies of the following documents published by the Texas Comptroller of Public Accounts: (1) Taxpayer Assistance Pamphlet; and (2) Notice of Protest form. If you have any questions or need more information, please contact the appraisal district office at the phone numbers or at the address shown above.

Marty Wright, Chief Appraiser

Prj3-Pg1

Self-Service Kiosk





## CCAD-132 [Rev 2025-v1]

\*\*\* Property owners must file a protest using the Online Appeals eFile website or submit a written protest by mail or in-person. \*\*\*



# INFORMAL APPRAISAL REVIEW PROCESS

## Important Taxpayer Information



**YOUR PROPERTY VALUE IS IMPORTANT TO US** - We welcome the opportunity to informally discuss any questions or concerns you have about your appraisal. Additional information on how to schedule an in-person informal review meeting with an appraiser can be found below. *NOTE – All owner protests filed online via our Taxpayer Portal will be reviewed by our appraisers, including your supporting documents & opinion-of-value submitted, as they prepare the case for a potential ARB hearing. Any actions taken by the appraiser will be communicated to you via the Taxpayer Portal eFile system.*

**About the Appraisal** - The appraiser is required to appraise property at market value as of January 1st. They have applied generally accepted mass appraisal methods and techniques based upon individual characteristics that affect the market value of your property.

**Informal Review (meeting with appraiser)** - If you want an in-person informal appraisal review with a member of the District's staff, those must be scheduled using the QR code located on your Appraisal Notice. For the most availability, please schedule your meeting as soon as possible. In-person informal reviews are typically finalized at the initial meeting, unless additional information or documents are pending delivery. If you have more than 10 properties that you wish to discuss in-person, please contact our office by phone at the number(s) listed below. Telephone inquiries are responded to typically within 15 business days. The following is provided to assist you in reviewing your appraisal informally with a District appraiser prior to the protest deadline.

**Providing Information** - Please provide the following items with your protest, based on the property type:

**Real Property:** closing disclosure, contracts, comparable sales, appraisals, loan documents, repair estimates, & photographs. In addition, for commercial property: rent rolls, leases, income & expense statements, and/or construction documents.

**Business Personal Property:** depreciation schedules, balance sheets, IRS returns, and letters from your CPA certifying the correct values of inventory, furniture, and/or equipment.

**After Informally Reviewing** - Whether in-person, by phone, or online, the appraiser will choose one of two actions:

1. Change the appraised value based on a review of the appraisal (including info & documents you provided); or
2. Make no change to the original appraised value.

**After Receiving the Appraiser's Action** - You may choose one of two options:

1. Agree with the change the appraiser made to the appraised value (and withdraw your protest, if already filed); or
2. Disagree with the appraiser's decision and decide whether to file a formal protest (before the deadline) for a formal hearing with the Appraisal Review Board (ARB), if not already filed, and proceed with the ARB hearing once scheduled.



**Hours:** Monday to Friday, 8am to 4pm

*Thursdays through May 15, open till 7pm*

**Informal Meetings:** By appointment only

*Scan QR code on Appraisal Notice to schedule appointment*

**Address:** 250 Eldorado Pkwy, McKinney 75069

*Drop-Box available 24/7 next to the main entrance doors*

**Phone:** 469.742.9200 (metro) / 866.467.1110 (toll-free)

**Filing Your Protest Online (eFile)** - We strongly encourage you to submit your protest using the Taxpayer Portal eFile website. If eligible, you will see your eFile PIN printed in the top-right section of the mailed copy of your appraisal notice. You will need your Property ID and eFile PIN to register for a new user account even if you had filed online in prior years as we have converted to a new eFile system for 2025. Filing through the eFile system is the fastest way to initiate & receive confirmation that your protest has been filed. Additionally, you have the opportunity to manage your protest, upload, review and receive documentation, receive, accept, or reject settlement offers, if made by the appraiser. **Please note, you will receive your Hearing Notification letter through the eFile system within 15 days of the scheduled hearing. You will not receive an additional hearing notice via USPS. If you file your protest through the eFile system, please do not also file a paper/duplicate protest on the same property account.** (eFile.CollinCAD.org)

**Protest Deadline** - THERE IS A PROTEST DEADLINE. THIS DEADLINE IS PRINTED ON YOUR APPRAISAL NOTICE. You must file your protest prior to the protest deadline to reserve your rights to a formal Appraisal Review Board (ARB) hearing. Please do not wait until after 5pm on the deadline day to eFile in case of technical issues that may prevent you from filing. If you cannot file online due to technical issues or simply chose not to use eFile, the ARB accept protests postmarked or hand-delivered to our office on or before the protest deadline. There is also a drop-box located just outside our main entrance doors. The ARB will notify you of the date and time of your scheduled hearing at least 15 days prior to the hearing via the eFile system, or by USPS mail for those who filed a paper protest. The ARB will NOT accept protests filed via fax, email, or helpdesk. **Please note, an informal review or in-person meeting does not reserve your rights to a formal ARB hearing; you must file a protest before the filing deadline.**



## PLEASE READ - IMPORTANT INFORMATION REGARDING FORMAL ARB HEARINGS

**Appraisal Review Board (ARB) Hearings** - A property owner may participate in their ARB protest hearing by appearing in-person, or by sworn affidavit or written declaration, accompanied by telephone or video conference if requested. If you intend to appear by telephone or video conference, you must notify the ARB of your request in writing no later than the 10<sup>th</sup> day before the date of the hearing and your request must include the Owner's Name, Address, and Property Account Number(s). Requests should be made using the comments section of your paper protest form, or via email to [CollinARB@CollinARB.org](mailto:CollinARB@CollinARB.org). An owner who appears by telephone or video conference must offer any evidence by affidavit or written declaration. To facilitate input into their records, the ARB requests these forms and evidence at least 3 days prior to the hearing. An owner who timely requests a telephone or video conference hearing will receive detailed information about the process. During a video conference, in addition to audio, the ARB panel hearing the protest will use screen sharing to allow all parties a live view of the evidence being reviewed by members of the ARB panel.

*For forms and more information about the Collin Appraisal Review Board, visit: [www.CollinARB.org](http://www.CollinARB.org)*

## THE FOLLOWING INFORMATION IS PROVIDED TO ASSIST YOU IN REVIEWING YOUR NOTICE OF APPRAISED VALUE

### **Why did I receive this Notice of Appraised Value?**

This appraisal notice was sent to inform you of the appraised value your School District, Collin County, Collin County Community College, City, and/or Special District (*if you live in a city or special district that levies taxes*) will use in calculating your property taxes this year in October.

### **Why does the notice not include the tax amounts?**

The Appraisal District does not impose a tax or set tax rates. Beginning August 7<sup>th</sup>, you may visit [CollinTaxes.org](http://CollinTaxes.org) to access your property tax information, including information regarding the amount of taxes that each entity will impose on your property along with their tax rates. That website is updated regularly during August and September as local elected officials propose and adopt the property tax rates that will determine how much you pay in property taxes.

### **What are the Appraisal District's duties?**

The Appraisal District's primary duties include placing all taxable property on the appraisal roll, appraising all property at market value, approval or denial of exemption applications, approval, or denial of agricultural use appraisal applications, and processing agricultural use rollbacks for change of use.

### **Who sets the property tax rates?**

The governing body of each taxing unit (city, school, county, etc. elected officials) determines their tax rate each year. The Appraisal District does not recommend, determine, or adopt tax rates. Please contact the appropriate taxing unit for questions or concerns related to their tax rate.

### **What is the appraised value based on?**

Section 1.04 of the Texas Property Tax Code requires the Appraisal District to appraise all property at 100% MARKET VALUE. The tax code defines "market value" as the price at which a property would transfer under prevailing market conditions on January 1st, considering the seller has a reasonable time to find a purchaser, and both are knowledgeable of the possible uses of the property, and neither are in a position to take advantage of the other.

### **What is a Cap/Limitation?**

**Homestead Cap:** This applies to residential homesteads only and goes into effect the second year after a homestead exemption has been granted in your name on your residence. This limit is the previous year's appraised value, plus 10%, plus the value of any new improvements made to the property. See our website FAQs for a detailed explanation and illustration of the calculation. (*Example: for homestead exemptions filed & qualified for on or before Dec 31st 2023, the cap is effective for the 2025 tax year*)

**Non-Homestead Cap (Circuit Breaker Limitation):** This applies to all other non-homesteaded real property (rental homes, secondary homes, commercial properties, etc.) valued at \$5,160,000 or less, and goes into effect the year after you own the property for a full calendar year. This limit is the previous year's appraised value, plus 20%, plus the market value of any new improvements. (*Example: for non-homestead real property purchased on or before Dec 31st 2023, the cap is effective for the 2025 tax year*)

NOTE: When appealing your value, you are disputing the MARKET VALUE. The assessed or taxable value can only be lowered if you are successful in lowering the market value below the assessed value or obtain approval of an exemption and/or ag use appraisal.

### **What must I do to qualify for a General Residential Homestead Exemption?**

You may qualify if you:

- ✓ Own & occupy the home as your principal residence;
- ✓ Do not claim a residential exemption on any other property; and
- ✓ File a Homestead Exemption Application with the Appraisal District

NOTE: School districts must allow the general homestead exemption. All other entities are optional.

*Visit our website or contact our office for more information regarding other exemptions that are available.*

*Exemption applications are available on our website, or you can call our office to request one by mail.*



# Taxpayer Assistance Pamphlet

January 1, 2025

**Y**ou are entitled to an explanation of the remedies available to you when you are not satisfied with your property's appraised value. The Texas Comptroller of Public Accounts is required to publish a pamphlet that explains the remedies available to taxpayers and procedures to be followed in seeking remedial action. The Comptroller's office must provide information related to the functions of the taxpayer liaison officer (TLO) appointed in appraisal districts with a population of more than 120,000 and include advice on preparing and presenting a protest.

The Tax Code further directs that copies of the pamphlet be made readily available to taxpayers at no cost. The chief appraiser of an appraisal district may include it with the notice of appraised value mailed to property owners to explain the deadlines and procedures used in protesting their property's value. The chief appraiser must provide another copy to property owners initiating a protest.

The first step in exercising your rights under the Tax Code is to protest your property's appraised value. The following remedies only address appraised values and related matters. Government spending and taxation are not the subjects of this publication and must be addressed by local taxing units.

## How to Protest Property Value

Appraisal districts must send required notices by May 1, or by April 1 if your property is a residence homestead, or as soon as practical thereafter. The notice must separate the appraised value of real and personal property.

The notice will also include the date and place the appraisal review board (ARB) will begin hearing protests and an explanation of the availability and purpose of an informal conference with the appraisal district to resolve your concerns before your ARB hearing. If you are dissatisfied with your appraised value or if errors exist in the appraisal records of your property, you should file a notice of protest with the ARB.

If an appraisal district has an internet website, it must permit electronic filing of a protest for incorrect appraised value and/or unequal appraisal of property for which a residence homestead exemption has been granted, with certain exceptions. Counties with populations of 500,000 or more are required to have a website. Contact your local appraisal district for more details on filing a protest electronically.

## What Can be Protested

The notice of protest may be filed using the model form on the Comptroller's website: [comptroller.texas.gov/forms/50-132.pdf](http://comptroller.texas.gov/forms/50-132.pdf). The notice need not be on this form. Your notice of protest is sufficient if it identifies (1) the

protesting person claiming an ownership interest in the property, (2) the property that is the subject of the protest and (3) dissatisfaction with an appraisal district determination.

You may request the ARB schedule hearings on protests to be held consecutively concerning up to 20 designated properties on the same day. You may use a special notice on the Comptroller's website: [comptroller.texas.gov/forms/50-131.pdf](http://comptroller.texas.gov/forms/50-131.pdf).

You may protest your property's value in the following situations:

- the value the appraisal district placed on your property is too high and/or your property is unequally appraised;
- the appraisal district denied a special appraisal, such as open-space land, or incorrectly denied or modified your exemption application;
- the appraisal district failed to provide you with required notices;
- the appraisal district denied the circuit breaker limitation on appraised value for non-homestead real property; or
- other matters prescribed by Tax Code Section 41.41(a).

## How to Complete the Protest Form

If using the protest form, these tips will help ensure that you can present your evidence and preserve your appeal rights.

- You should pay particular attention to the reason for protest section of the form.
- What you check as the reason for the protest influences the type of evidence you may present at your hearing.
- Your appeal options after the hearing are influenced by what you protest.

In the case of a typical residential property, checking incorrect appraised value and/or unequal appraisal will allow you to present the widest types of evidence and preserve your full appeal rights.

## How to Resolve Concerns Informally

Appraisal districts will informally meet with you and try to resolve your objections prior to your ARB hearing. You must request the informal conference with the appraisal district on either your notice of protest form or in writing before your scheduled hearing date. It is very important, however, that you preserve your right to a hearing with the ARB by filing your notice of protest before the deadline, even if you expect to resolve your concerns at the informal meeting with the appraisal district.

Ask one of the appraisal district's appraisers to explain how the district arrived at your property's value. Be sure the property description is correct and that the measurements for your home or business and lot are accurate. Many appraisal districts have this information online.

## What is an ARB?

The ARB is an independent, impartial group of citizens authorized to resolve disputes between taxpayers and the appraisal district. In counties with a population of less than 75,000, the local administrative district judge, or the judge's designee appoints ARB members. In counties with a population of 75,000 or more, the appraisal district board of directors appoints ARB members, including special panel ARB members to hear complex property cases where available.

The ARB must adopt and follow certain hearing procedures that may be unfamiliar to you. It must base its decisions on facts it hears from you and the appraisal district to decide whether the appraisal district has acted properly in determining your property's value.

ARB members cannot discuss your case with anyone outside of the hearing. Protest hearings, however, are open to the public and anyone can sit in and listen to the case. A closed hearing is allowed on the joint motion of the property owner and chief appraiser if either intends to disclose proprietary or confidential information at the hearing.

## When are Protests Filed?

You must file your notice of protest with the ARB no later than May 15 or 30 days after the appraisal district mailed the notice of appraised value, whichever is later. You may request an evening or Saturday hearing. The ARB will notify you at least 15 days in advance of the date, time and place of your hearing. Under certain circumstances, you may be entitled to a postponement of the hearing to a later date. The ARB begins hearings around May 15 and generally completes them by July 20. Start and end dates can vary by appraisal district.

At least 14 days before your protest hearing, the appraisal district will mail a copy of this pamphlet; a copy of the adopted ARB hearing procedures; and a statement that you may request a copy of the data, schedules, formulas and any other information the chief appraiser will introduce at your hearing.

You or your authorized representative may appear at the ARB hearing in person, by telephone conference call, videoconference or by filing a written affidavit. To appear by telephone conference call or videoconference, you must provide written notice at least 10 days before the hearing, and any evidence must be submitted by written affidavit delivered to the ARB before the hearing begins. ARBs in counties with populations less than 100,000 that also lack the technological capabilities for videoconferences are not required to provide them.



If you fail to appear, you may lose the right to be heard by the ARB on the protest and the right to appeal. If you or your authorized representative fails to appear at a hearing, you are entitled to a new hearing if you file with the ARB, not later than four days after your hearing date, a written statement showing good cause for failing to appear and request a new hearing. Good cause is defined as a reason that includes an error or mistake that was not intentional or was not the result of conscious indifference and will not cause undue delay or injury to the person authorized to extend the deadline or grant a rescheduling.

### What Steps to Take to Prepare for a Protest Hearing

You should consult with the appraisal district staff about your property's value. Ask questions about items you do not understand. The appraisal district is required to provide copies of documents that you request, at no charge via first class mail or electronically by filing a written request to exchange electronic communications on a form prescribed by the Comptroller for that purpose. Many appraisal districts provide a great deal of information on their websites at no charge.

If you are protesting the appraisal of your home or small business, you can view videos on the topic on the Comptroller's website at [comptroller.texas.gov/taxes/property-tax/protests/index.php](http://comptroller.texas.gov/taxes/property-tax/protests/index.php).

Observing the following tips can also help in achieving a successful appeal:

- *Be on time and prepared for your hearing.* The ARB may place time limits on hearings.
- *Stick to the facts and avoid emotional pleas.* The ARB has no control over the appraisal district's operations or budget, tax rates for local taxing units, inflation or local politics; addressing these topics in your presentation wastes time and will not help your case.
- *Review the ARB hearing procedures.* After you receive the ARB hearing procedures, take time to become thoroughly familiar with them and be prepared to follow them.
- *Present your information in a simple and well-organized manner.* You and the appraisal district staff are required to exchange evidence at or before the hearing. Photographs and other documents are useful. You should take an appropriate number of copies so that each ARB member and the appraisal district representative receives one.

The date of your appraisal is Jan. 1, so you should make sure that changes made before that date are included in the appraisal. Improvements or damage to your property after Jan. 1 should not be part of the appraisal or the protest.

If you are protesting business property value or other appraisal matters, you should have evidence to support your opinion of value. Sales data may not be available or relevant, but income and expense information may be useful.

Generally, the appraisal district has the burden of proof in value and unequal appraisal

disputes. An appraiser's job is to appraise property at its market value, equitably and uniformly.

### Limited Binding Arbitration

After you have filed a notice of protest and if you believe your ARB or chief appraiser failed to comply with a procedural requirement relating to your protest, you may file a request for limited binding arbitration (LBA) to compel the ARB or chief appraiser to comply with certain procedural requirements.

To request LBA, you must file a Request for Limited Binding Arbitration. Additional information about filing an LBA request, including filing deadlines and fees, can be found at [texas.gov/propertytaxarbitration](http://texas.gov/propertytaxarbitration).

### What if you are Dissatisfied with the ARB's Decision

After the ARB rules on your protest, it will send a written order by certified mail. If you are dissatisfied with the order of determination, there are three options to appeal. Any ARB decision can be appealed to the state district court in the county in which the property is located. Depending on the facts and property type, you may be able to appeal to the State Office of Administrative Hearings (SOAH) or to regular binding arbitration.

Additional information about appealing an ARB decision, including filing deadlines and fees, can be found on the Comptroller's website at [comptroller.texas.gov/taxes/property-tax/protests/index.php](http://comptroller.texas.gov/taxes/property-tax/protests/index.php).

In all types of appeals you are required to pay a specified portion of your taxes before the delinquency date.

### TLOs

Appraisal district boards of directors in counties with populations of more than 120,000 must appoint a TLO whose primary responsibility is assisting taxpayers, property owners and members of the public with understanding the appraisal process, the protest process, the procedures for filing complaints, comments, and suggestions with the appraisal district, and filing an LBA request.

A property owner may file a written complaint with the TLO to request resolution of a dispute on a matter that does not relate to property appraisal. The TLO may resolve a complaint by directing the property owner to the appropriate resources or referring the issue to the appropriate employee or officer of the appraisal district or ARB. Additionally, the TLO may facilitate an informal meeting with the parties of the dispute to resolve the issue and notify a property owner of the resolution of a complaint not later than the 90th day after the date the complaint is filed. The resolution of a complaint filed is not an action that a property owner is entitled to protest, request LBA or appeal under Tax Code Chapter 42.

TLOs also assist property owners, agents, and members of the public with understanding the Comptroller's ARB Survey process

for submitting comments, complaints and suggestions related to the ARB's fairness and efficiency.

### What is the Comptroller's role in the protest process?

The Comptroller's office provides a survey for property owners to offer feedback on the ARB experience that may be submitted by mail or electronically. The online survey is available in English at [surveymonkey.com/r/surveyarb](http://surveymonkey.com/r/surveyarb) and in Spanish at [surveymonkey.com/r/Spanishsurveyarb](http://surveymonkey.com/r/Spanishsurveyarb). Survey results are published in an annual report. The Comptroller's office does not, however, have oversight responsibility over the ARB and has no authority to investigate complaints about the ARB. Any complaints about the ARB or its members should be directed to the ARB itself, the TLO or the applicable appointing authority. The Comptroller's office has no direct involvement in the protest process.

Further, this pamphlet is intended to provide customer assistance to taxpayers. It does not address all aspects of property tax law or the appraisal process. The Comptroller's office is not offering legal advice, and this information neither constitutes nor serves as a substitute for legal advice. Questions regarding the meaning or interpretation of statutes, notice requirements and other matters should be directed to an attorney or other appropriate counsel.

### Where can you get more information?

This publication does not cover all aspects of the ARB protest process or property taxes. For more information, please see the following web resources:

- *Appraisal Protests and Appeals;*
- *Appraisal Review Board Manual;*
- *Paying Your Taxes;*
- *Property Tax System Basics;*
- *Taxpayer Bill of Rights;*
- *Texas Property Tax Code;* and
- *Valuing Property.*

This information is found on the Comptroller's Property Tax Assistance website. It provides property owners a wealth of information on the appraisal and protest process at [comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/). For specific inquiries, you must contact the appraisal district in which your property is located.

**Property Tax Assistance Division**  
**Texas Comptroller of Public Accounts**  
**Publication #96-295, Revised January 2025.**

For additional copies visit our website:

**[comptroller.texas.gov/taxes/property-tax/](http://comptroller.texas.gov/taxes/property-tax/)**

 Sign up to receive email updates on the Comptroller topics of your choice at **[comptroller.texas.gov/subscribe/](http://comptroller.texas.gov/subscribe/)**.

In compliance with the Americans with Disabilities Act, this document may be requested in alternative formats by calling:

**800-252-5555.**



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

**BID PACKET**



Bids Request issued on  
**September 30, 2025**

Completed Bids to be received no later than  
**October 20, 2025 at 3:00 PM (CDT)**

Submit Sealed Bids to  
Attn: Shane Cheek  
**COLLIN CENTRAL APPRAISAL DISTRICT**  
250 Eldorado Pkwy  
McKinney, Texas 75069

Any questions should be emailed to  
**[purchasing@cadcollin.org](mailto:purchasing@cadcollin.org)**

Bidder / Company Name: \_\_\_\_\_

*Variverge, LLC*



# RFB No. IST-2026-PM

PRINTING AND MAILING SERVICES – DUE OCTOBER 20, 2025

MCKENZIE PARKER – VARIVERGE, LLC





## Cover Letter

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**Including our company name, contact information, and a brief summary of our proposal.**

VariVerge, LLC  
8949 Diplomacy Row  
Dallas, TX 75247

McKenzie Parker  
Director of Sales  
432-203-6935 (D)  
888-288-6693 (O)  
806-223-5584 (M)  
[mckenziep@variverge.com](mailto:mckenziep@variverge.com)

### EXECUTIVE SUMMARY

VariVerge is a private, well-established print and mail company with a proven track record in the industry since its inception in 1992. We specialize in, and focus our business on, the production and distribution of variable data statements and notices for a wide range of clients, including 125 counties in Texas. With decades of experience and a commitment to excellence, we are well-equipped to provide comprehensive solutions for your appraisal notice needs. The rapid growth we've experienced as an organization uniquely qualifies us in that we've encountered numerous different software systems, file types, customer types and demands over the years. With over 200 customers in various states, we've been down this road before and have a demonstrated history of success. Each encounter with a new customer has allowed us the opportunity to learn and grow, making VariVerge a better, faster, and more secure solution for your printing and mailing needs.

VariVerge is committed to delivering exceptional service and exceeding client expectations. Our dedicated customer support team is available to address any inquiries or concerns, ensuring a smooth and hassle-free experience. We use a help desk ticketing system for 24/7 support, as well as cell phone contact information provided for all key employees involved in the project. VariVerge has built a reputation for reliability, quality, and security in the print and mail industry. We are well-prepared to meet your appraisal notice needs with our experience, technology, and commitment to excellence. We look forward to the opportunity to partner with you and provide tailored solutions to support your organization's success.





## Company Background

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**Overview of VariVerge's company history, services offered, and relevant experience.**

**Key Strengths and Differentiators:**

1. **Expertise:** With over three decades of experience and a core team that's been together since the beginning, VariVerge has developed extensive knowledge and expertise in the print and mail industry. Our team understands the unique requirements and challenges associated with Appraisal Notices because of the numerous projects we've worked with our customers on.
2. **State-of-the-Art Facilities:** Our state-of-the-art production facilities are equipped with the latest technology in digital printing, ensuring high-quality and accurate notices every time. Both the Amarillo facility and the Dallas facility are equipped with numerous printing equipment options as well as inserters and ancillary equipment used in completing the print and mail process.
3. **Data Security:** We prioritize the security of sensitive customer data. Our robust security measures, including encryption and physical security protocols, ensuring that your data remains confidential and protected throughout the printing and mailing process.
4. **Scalability:** VariVerge has the capacity to handle projects of all sizes, from small counties to the largest populated counties in Texas. Our scalable solutions can adapt to your growing needs.
5. **Compliance and Regulations:** We stay up to date with industry regulations and compliance standards, including USPS regulations, to ensure that your appraisal notices meet all legal requirements, we are also SSAE 18 SOC I, II, & III Compliant.

**Services Offered: Our comprehensive services include:**

- **Data Processing:** We can efficiently process and format your appraisal notice data to ensure accuracy and consistency in your notices through the use of our 2D barcoding system.
- **Printing:** Our advanced printing technology allows us to produce high-quality, full-color notices with precision on our in-house high-speed printer.
- **Mailing:** We handle the entire mailing process, from printing addresses to presorting and applying postage, ensuring prompt delivery to your taxpayers. We offer NCOA and ACS updates to ensure you have the most accurate mailing information in your database.
- **Inserting and Fulfillment:** We offer a range of inserting options, including single or multiple inserts. We currently have 3 pockets for preprinted inserts on our equipment, anything over 3 inserts in a job would require inserts to be printed "in stream" and built into the data file itself.
- **Reporting and VariTrack™:** We offer real-time tracking and reporting to keep you informed about the status of your mailings through our VariTrack™ portal and automated email notification system. Piece Search visibility available for proof of delivery for ARB Hearings for individual mail pieces.





## Company Background Continued

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Please see organization chart and resumes of our Key Personnel.

- Luke Austin-CEO – Luke has been the CEO of VariVerge since 2010. Luke received his BBA in Finance from Baylor University and his master's in accounting from the University of Virginia. Luke will oversee the project from a high level from start to finish, beginning at implementation.
- Gary Tibbets-VP – Gary was the Owner of West Texas Micrographics, which became VariVerge in 2010. Gary has been the VP and Data Processing Manager since 2010 and before at VariVerge. Gary handles a large segment of the data processing for VariVerge. Once the data file is received through the VariTrack portal, Gary processes and organizes the data to create proofs that ultimately become the printed document. Gary brings 35 years of experience in data processing.
- Trent Morgan/Mason Fleming- Data Processing and Graphic Design – With VariVerge for a over a year and a half, but already crucial members of the team, Trent and Mason are part of the data processing team responsible for custom programming and graphic design. Mason handles form redesigns and setting up customer data to run and provides final proofs for approval while Trent programs data files and turns them into printed pieces. Mason and Trent work closely alongside Gary Tibbets in the Data Processing department.
- McKenzie Parker-Director of Sales – McKenzie has been the sole Sales and Marketing representative and with VariVerge since 2013. McKenzie received her Bachelor of Arts in Public Relations from Pepperdine University. McKenzie will coordinate and be the initial point of contact and the liaison between VariVerge and the customer throughout the onboarding process. She will coordinate with both teams to initiate setup and complete required checklists surrounding the project to ensure everyone is on the same page.
- Jeff Taylor-General Manager – Jeff has been with VariVerge since 2016 and prior to that was our production manager for our sister company for over 20 years. Jeff is the general manager of the Dallas location and will oversee the day-to-day printing of the documents when the files are transmitted to VariVerge. His Managerial sign-off is required at the start of each production job on the production floor after checking setup and that all materials are correct and quality controls are in place.

□ Certifications:

1. Epic technical operator certification
2. Epic remove/replace certification
3. Epic global controls certification.

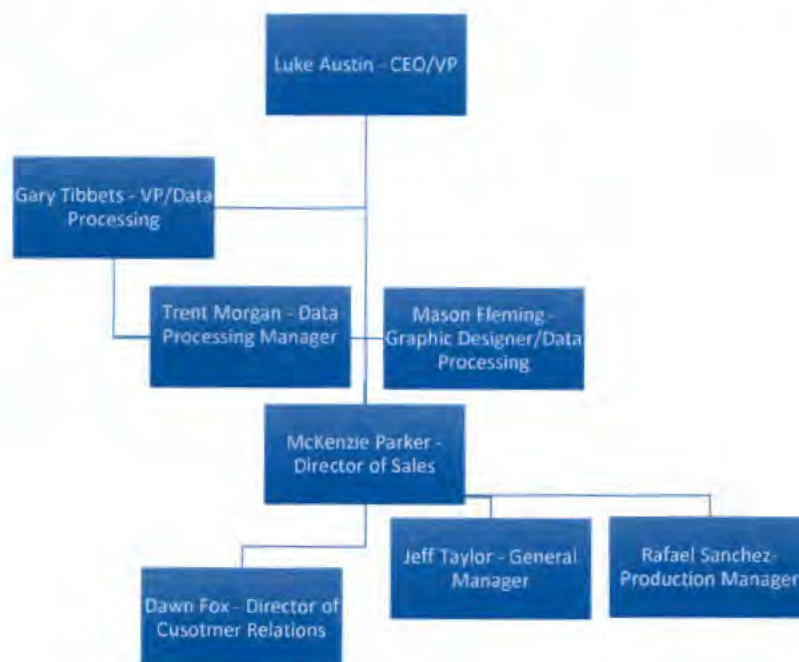




- Rafael Sanchez-Production Manager – Rafael has worked for VariVerge for over 5 years but has been in the mailing industry since 2007. He was previously a supervisor at a large presort mail facility and has extensive experience in mail production. Rafael will manage the materials and the scheduling of jobs to be placed on our job board. He's part of the print production management team that will ensure that the documents are delivered to the post office within the agreed upon turnaround time while also monitoring the job for quality and signing off as a part of the Management staff. All jobs require a dual manager sign off before production begins.

□ Certifications:

1. Epic technical operator certification
  2. Epic remove/replace certification
  3. Epic global controls certification.
- Dawn Fox-Director of Customer Relations – Dawn has been in the print and mail industry for 20 years and with VariVerge for 3 years. Dawn's assigned role is solely to assist the customer in whatever they may need. She will be the liaison between the customer and our internal teams for issues related to the job. She's key in expediting unexcepted issues that arise to the appropriate team member in order to handle any issues promptly and efficiently. Dawn sits on the board for the Postal Customer Council and keeps us up to date on industry standards, practices and upcoming changes. With the numerous years in the industry, Dawn has numerous contacts that assist us in times of need.





### 3.1 General Requirements & Vendor Qualifications

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- **Experience:** Vendor must demonstrate significant prior experience providing printing and mailing services for Texas County Appraisal Districts. References are required.
  - ❖ Please see included Bid Reference List, additional references, and the Texas County Map showing all current customers in Texas. With over 35 years of experience working almost exclusively for Texas Appraisal Districts, we have the extensive knowledge required to provide the printing and mailing services for CCAD.
- **Forms Designer:** Vendor must have a staffed, in-house forms designer to assist with layout, compliance with postal regulations, and any necessary form updates.
  - ❖ VariVerge employs full time, on-site graphic designers, custom programmers, data processing team members, as well as postal experts to ensure all mailings qualify with current postal regulations and requirements.
- **Turnaround Time:** For all projects, the Vendor must guarantee a maximum of (5) business day turnaround. This period is measured from the time CCAD successfully uploads the data files to the Vendor's system until the mailpieces are delivered to and accepted by the United States Postal Service (USPS).
  - ❖ VariVerge can guarantee our appraisal schedule based on a first come, first serve basis. The general timeline is 5-7 business days, but this is after proof approval to mail date.
- **Samples:** Prior to production, the Vendor must generate samples from final data provided by the District. The vendor must provide printed samples from each printer intended to be used during production. These samples must be presented for review, verification, and approval by the District.
  - ❖ VariVerge utilizes a Screen Truepress Jet 520 NX Printer capable of printing 500,000 duplex sheets per day. All CCAD notices will be printed on this machine. Physical printed samples are available for delivery to Collin CAD or CCAD is welcome to the facility anytime for review because of our proximity to the appraisal district. Live proofs must be approved prior to the print production phase of our process.
- **Trial Run:** After the Award of the Contract, the selected Vendor will be required to process a trial/test job, at no charge, of the District's choosing using sample data supplied by the District. The Vendor must produce samples, both PDF and printed copies, of no more than fifty (50) mail pieces as selected by the District for review. This "Trial Run" must be performed and pass the District's review process before any work relating to this proposal/contract is to be performed.
  - ❖ VariVerge can utilize current test data from last year's data and/or have the selected 50 mail pieces uploaded to run as test data for the Trial Run. VariVerge encourages the staff of CCAD to be present during the testing phase, for physical samples and testing, if desired.
- **Mailpiece Tracking:** Vendor must provide a secure, web-based portal for CCAD staff to track the status of each mailing. The portal must provide visibility from data receipt





through production and include USPS Intelligent Mail Barcode (IMB) tracking for each mailpiece by Prop ID and Send-To Address.

- ❖ Through our proprietary VariTrack portal, CCAD can login in to a secure, web based portal for a variety of functions. Specific details regarding VariTrack and it's functions are available later in this report. However, through the use of the IMB barcode on the mailpiece, that information is being transmitted back to VariVerge and our custom on-staff programmers developed VariTrack to display that information in a digestible manner. CCAD can login and view actual USPS scans as the mail pieces travel through the USPS equipment, ultimately until a delivery scan is completed. Through the use of this barcoding system, we have also developed a Piece Search Function, where CCAD can login and search by either property ID or by name and address to pull up a delivery report. This information can be helpful in ARB hearings for proof of delivery to a resident protesting. Additionally, production tracking from file upload to delivery to USPS is available in real time to the CCAD staff.
- **PDF Archiving:** Vendor must provide CCAD with a digital PDF copy of each individual mailpiece generated, on or before the mail date. The filename for each PDF must correspond with the Property ID associated with that mailpiece.
  - ❖ The current process for PDF archiving is to create a searchable PDF document of each individual mailpiece generated after proof approval. The files are named by Property ID and all confidential information is removed from the images. The files are then available to CCAD through the VariTrack portal.
- **Security:** Vendor must describe its data security protocols for handling confidential taxpayer information.
  - ❖ VariVerge undergoes a stringent, third-party audit every other annual year that tests controls we have in place for both physical and digital security. As part of this audit, we also have a tested Disaster Recovery Plan in place in the event of disaster to avoid downtime to our customers and their sensitive mailing dates. All doors remain locked 24/7 and are only accessible by key personnel. Cameras monitor facilities both on the production floor and externally for security. Additionally, all channels for transmitting data are secure FTP transfers with tested controls. VariVerge is SSAE 18 SOC I Type 2, SOC II, Type 2 and SOC III compliant. A copy of the report is available upon request.





### 3.2 Data and File Requirements

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- **Data Source:** CCAD will provide all necessary data via a file export from its Harris Govern Property Appraisal and Collection System (PACS).
  - ❖ Of VariVerge's 125 counties served, approximately 90% of them utilize the PACS software export. VariVerge has worked closely with Harris Govern for over 30 years and we have a streamlined process for receiving exports out of PACS, processing and providing samples quickly and efficiently. In addition, CCAD is already set up in our systems and processes, resulting in proofs available same-day of data upload.
- **File Compatibility:** The Vendor **must** be able to process and utilize the standard Harris Govern PACS file exports without requiring any modification, re-formatting, or data manipulation by CCAD staff. The ability to work with these native files is a mandatory requirement.
  - ❖ VariVerge is already setup to run CCAD exports out of PACS after serving the appraisal district for over 15 years. There will be no manipulation or re-formatting required from CCAD staff. In addition, we work closely with Harris Govern when new legislation passes in order to reduce the number of pages/inserts required when new verbiage is introduced. VariVerge formats behind the scenes without intervention from CCAD staff, while still abiding by the legislative requirements.





### 3.3 Printing and Mailing Requirements

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- **Printing Method:** All letters, notices, and forms must be inline laser printed (simplex or duplex as required). Any preprinted inserts, such as static informational flyers, may be offset printed.
  - ❖ Pricing is proposed that anything with variable data information printed on it will be printed inline on our Screen Truepress. Rights and Remedies, Information and Affidavits, and Informal Procedures inserts will be preprinted for insertion.
- **Barcode Printing:** Vendor must have the ability to create & print '3 of 9' and QR barcodes.
  - ❖ Currently already using the '3 of 9' font to create barcodes readable by CCAD scanners and as long as we are provided the data to include in the QR code, we can create dynamic QR codes for statements or for printing on the outside of the mailing envelope itself.
- **Mail Processing:** All mailings must be processed using USPS-certified software for household merging (where applicable and allowed by statute) and presorting to achieve the lowest possible postage rates.
  - ❖ VariVerge will automatically combine multiple property owners using either match names and addresses or just mailing addresses. We can also combine based on owner ID, as directed by CCAD. VariVerge is a full-service statement processing provider. We are required to CASS and presort all mail submitted electronically to the USPS and pass along the lowest presort rate to CCAD. Multiple property owners will be sorted to the end of the file during processing along with foreign addresses. Those pieces are then printed and inserted into either 6x9 envelopes or larger, as required.
- **Postmark Date:** Each mail piece **must** be postmarked using a date-meter method. Due to the extreme date sensitive requirements by the Texas Property Tax Code, a postmark date must appear on all envelopes.
  - ❖ Currently we apply a meter strip of postage that contains a postmark date of the mail date. Moving forward, the USPS is no longer supporting the meter strip technology in 2026 and VariVerge will move to applying a permit imprint. A mail date can be imprint on the envelope at run time to satisfy this requirement when we move to permit imprint.
- **Postage:** Postage will be billed as a direct pass-through cost. The Vendor must provide detailed postage statements from the USPS for each mailing.
  - ❖ VariVerge will submit a postage deposit invoice in March to CCAD to cover a portion of the postage required. After running live data, services and any additional postage will be billed at actual cost. VariVerge never marks up postage.
- **Proof of Mailing:** Vendor must provide an audit of proof of printing and mailing within two (2) business days of each mailing. This report must show the mail date and quantities of each mailing.





- ❖ CCAD can log into VariTrack in real time and pull reports showing mail dates and quantities of each mailing. Postal reports are also available upon request for additional auditing purposes.
- **Envelopes:** Vendor will provide all necessary envelopes (e.g., #10 window, 6x9 booklet) as specified and as needed for each project.
  - ❖ VariVerge orders in combination with our other 125 clients in order to get the best price possible for our customers. VariVerge will supply all #10 envelopes, 6x9 envelopes and 9x12 envelopes, and even boxes as required for mailing.
- **Mail Origination:** All projects must be mailed from within the State of Texas.
  - ❖ VariVerge has two locations. Our Dallas location where the CCAD mail will originate from is located at:

VariVerge, LLC  
8949 Diplomacy Row  
Dallas, TX 75247





## Technical Approach

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**Describe your approach to fulfilling the scope of work, including equipment and technology to be used onsite.**

- RFP awarded to VariVerge, a New Customer Checklist and New Job Checklist is sent out internally to VariVerge staff to notify the team of the new (or existing) customer and details surrounding it.
- An instruction sheet on how to set up a login on our VariTrack Portal will be provided to the Collin Central Appraisal District Representative(s).
- Because CCAD is a current customer of VariVerge, we are setup to receive their file types already, but samples from test data will be provided from the customer and proofs of test data will be approved prior to receiving live data files.
- Materials will be ordered per CCAD envelope and insert specifications. Prior to envelope ordering, proofs must be approved by Collin Central Appraisal District.
- A mutually agreeable schedule for each Job will be created and distributed to CCAD defining deadlines for test and live data transmittal and approvals to hit required mail dates.
- At run time, live data will be transmitted to VariVerge from CCAD to the VariVerge VariTrack™ Portal and processing will begin by the pre-approved date determined by the signed off schedule.
- A set of 5 automated emails will be sent to the pre-appointed CCAD personnel throughout the process. One when we receive your file, one when we process it, print, insert and deliver to the post office. This will keep CCAD updated on a real-time basis of where their job(s) are at in our system. Additionally, our VariTrack™ Portal allows CCAD staff to create login ID's and view in real time the percentage of pieces inserted, as well as piece counts for a more granular level of transparency.
- Proof approval will be required before printing can begin to ensure that all information is correct as displayed.
- 2D barcodes will be placed on the notices that cameras on our inserters read as the notices pass through our equipment. This process is in place to track the documents throughout the printing and inserting phase. The inserters are checking back against the original data file to verify that all pieces are printed and inserted correctly, 100%. If any pieces were damaged or not inserted, a reprint file is created and placed back on the inserter until we reach 100% completion. This process also prevents the possibility of "double stuffing" a document.
- Appropriate inserts will either be printed or provided to VariVerge to include with the notices if necessary or as requested by CCAD.
  - Inserts can either be preprinted or built into the data file itself to print behind the notices, depending on what's appropriate for the particular job.





## Technical Approach Continued

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- Notices will then be folded and inserted into the #10 envelopes, along with State required forms and inserted to show the IMB barcode and mailing addresses through the windowed envelope.
- #10 envelopes will have a permit imprint of postage applied moving forward that will deduct postage funds. Postage is invoiced as a deposit prior to mailing of notices. Appraisal notices are placed in trays in presort order and sleeved and palletized. The USPS stops for pickup at our warehouse 3 times a day for submittal to the Dallas BMEU for distribution.
- Upon delivery, staff at CCAD will be able to login to their account on our VariTrack™ Portal. Within the VariTrack™ Portal, users will have access to delivery scans throughout the USPS mailing process to delivery destination. There is also a Piece Search function that CAD staff can search by identifying factors on the notice to pinpoint where a notice is at within the mail stream and verify delivery for ARB purposes. Address Change Reports (ACS) are available within the Portal for download to update your mailing database in real time to reduce or eliminate your return mail.
- Please note that while not a requirement of the RFP, we can deliver your notices electronically as PDF files emailed to recipients as long as we are provided with a list of email addresses for those who have "opted in" to receive their notice electronically.



**REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES**

**SECTION 5: BID FORM / COST PROPOSAL**

**5.1 Bidder Information**

Bidder / Company Name: Variverge, LLC

Address: 8949 Diplomacy Row

City, State, Zip: Dallas, TX 75247

Phone#: 432-203-6935 Email: mckenziep@variverge.com

Printed Name: McKenzie Parker Title: Director of Sales

**5.2 Bid Amount**

The Bidder agrees to provide the Services for the District as described in these bid documents, for the sum of:

| Project Description              | Volume     | Project Cost  |
|----------------------------------|------------|---------------|
| BPP Renditions                   | 35,000     | 10,465.00     |
| Homestead Qualification Letters  | 45,000     | 11,430.00     |
| Appraisal Notices                | 475,000    | 124,450.00    |
| Job & Mail Tracking "Web Portal" | Annual Fee | \$250 - basic |
| Other:                           |            |               |
| Other:                           |            |               |
| Other:                           |            |               |
| Grand Total Cost >>>             |            | \$146,595.00  |

The Bid Amount includes all costs in connection with the Services to be performed by Bidder, including, but not limited to supplies and materials, equipment, insurance, labor, supervision, overhead and profit. Postage will be billed to the District as a direct pass-through cost.



**REQUEST FOR BID**  
**RFB No. IST-2026-PM**  
**PRINTING & MAILING SERVICES**

**5.3 Project 1 Bid Sheets (BPP Renditions)**

Estimated Volume: 35,000 Renditions – 105,000 Sheets – 210,000 Pages

| Project Item# | Description                                                | (S)heet or (P)age    | Quantity                 | Unit Price              | Total Price      |
|---------------|------------------------------------------------------------|----------------------|--------------------------|-------------------------|------------------|
| 1.1           | Laser Printed BPP Rendition<br>4-pages, duplex             | 2 sheets<br>4 images | 140,000                  | 0.035                   | 4,900.00         |
| 1.2           | Information & Affidavit Insert<br>2-pages, duplex          | 1 sheet<br>2 images  | 35,000                   | 0.045                   | 1,575.00         |
| 1.4           | Envelopes                                                  | n/a                  | 35,000                   | 0.035                   | 1,225.00         |
|               | Fold, Insert, Sort, Seal, Meter,<br>Tray & Deliver to USPS | n/a                  | 35,000                   | 0.04                    | 1,400.00         |
|               | Data Programming Cost                                      | n/a                  | 35,000<br><del>n/a</del> | 0.005<br><del>n/a</del> | 175.00           |
|               | Forms Design Cost                                          | n/a                  | n/a                      | n/a                     | Ø                |
|               | Other Costs (paper)                                        | 70,000               | 70,000                   | 0.017                   | 1,190.00         |
|               | <b>Project Total →</b>                                     |                      |                          |                         | <b>10,465.00</b> |

**5.4 Project 2 Bid Sheets (Homestead Qualification Letters)**

Estimated Volume: 45,000 Letters – 90,000 Sheets – 180,000 Pages

| Project Item# | Description                                                | (S)heet or (P)age   | Quantity                 | Unit Price              | Total Price      |
|---------------|------------------------------------------------------------|---------------------|--------------------------|-------------------------|------------------|
| 2.1           | Laser Printed HS Qualification<br>Letter, 2-pages, duplex. | 1 sheet<br>2 images | 90,000                   | 0.035                   | 3,150.00         |
| 2.2           | Laser Printed HS Application<br>form, 2-pages, duplex.     | 1 sheet<br>2 images | 90,000                   | 0.035                   | 3,150.00         |
| 2.3           | Envelopes                                                  | n/a                 | 45,000                   | 0.035                   | 1,575.00         |
|               | Fold, Insert, Sort, Seal, Meter,<br>Tray & Deliver to USPS | n/a                 | 45,000                   | 0.04                    | 1,800.00         |
|               | Data Programming Cost                                      | n/a                 | 45,000<br><del>n/a</del> | 0.005<br><del>n/a</del> | 225.00           |
|               | Forms Design Cost                                          | n/a                 | n/a                      | n/a                     | Ø                |
|               | Other Costs (paper)                                        | 90,000              | 90,000                   | 0.017                   | 1,530.00         |
|               | <b>Project Total →</b>                                     |                     |                          |                         | <b>11,430.00</b> |



**REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES**

**5.5 Project 3 Bid Sheets (Appraisal Notices)**

Estimated Volume: 475,000 Notices – 1,425,000 Sheets – 2,850,000 Pages

| Project Item# | Description                                                | (S)heet or (P)age   | Quantity                  | Unit Price   | Total Price       |
|---------------|------------------------------------------------------------|---------------------|---------------------------|--------------|-------------------|
| 3.1           | Laser Printed Appraisal Notice<br>2-pages, duplex          | 1 sheet<br>2 images | 950,000                   | 0.035        | 33,250.00         |
| 3.2           | Informal Procedures Insert<br>2-pages, duplex              | 1 sheet<br>2 images | 475,000                   | 0.045        | 21,375.00         |
| 3.3           | Taxpayer Remedies Insert<br>2-pages, duplex                | 1 sheet<br>2 images | 475,000                   | 0.045        | 21,375.00         |
| 3.4           | Envelopes                                                  | n/a                 | 475,000                   | 0.035        | 16,625.00         |
|               | Fold, Insert, Sort, Seal, Meter,<br>Tray & Deliver to USPS | n/a                 | 475,000                   | 0.04         | 19,000.00         |
|               | PDF Archive File (Notice Only)                             | n/a                 | 475,000                   | 0.005        | 2,375.00          |
|               | Data Programming Cost                                      | n/a                 | 475,000<br><del>n/a</del> | 0.005<br>n/a | 2,375.00          |
|               | Forms Design Cost                                          | n/a                 | n/a                       | n/a          | Ø                 |
|               | Other Costs (paper)                                        | 475,000             | 475,000                   | 0.017        | 8,075.00          |
|               | <b>Project Total →</b>                                     |                     |                           |              | <b>124,450.00</b> |

**5.6 Acknowledgement & Signature**

By signing below, the bidder acknowledges and agrees to all terms and conditions set forth in this Invitation for Bid. The bidder certifies that they are an authorized representative of the company and that the information provided is true and correct.

Printed Name: Mckenzie Parker Title: Director of Sales

Signature: Mckenzie Parker Date: 10/1/25





# VARITRACK PORTAL OVERVIEW

A smarter, faster, and more accurate way to manage your mailing operations—designed for industries where communication, precision and security is non-negotiable. Whether reducing postage costs or improving address hygiene, VariTrack is designed to enhance every aspect of your mailing process.

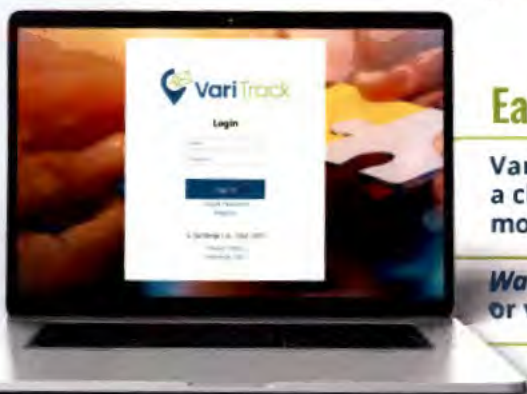
## Key Features



- **Real-Time, Enhanced Mail Accuracy:** VariTrack ensures your mail reaches its intended recipients through cutting-edge tools, including address correction and USPS Intelligent Mail Barcode (IMB) tracking.
- **Dashboard-Based Job Review:** The centralized dashboard provides instant access to the latest updates, enabling you to identify and address potential issues before they become costly problems. Track every job from data upload to final delivery with complete transparency.
- **Advanced Address Hygiene Tools:** VariTrack integrates advanced address hygiene tools, including National Change of Address (NCOA) checks and Address Change Service (ACS) updates, to reduce undeliverables and postage waste.
- **Secure Data Upload:** Upload files directly through the portal, eliminating the need for outdated FTP processes. VariTrack adheres to SSAE 18 SOC standards, providing two-factor authentication and robust data encryption to protect your information.
- **Advanced Reporting Tools:** VariTrack provides real-time insights into job performance, address hygiene, and mailing accuracy. Maintain access to all historical data and delivery metrics.

## Why VariTrack Matters

- **Saves Time:** Replaces manual tracking and address updates with automated reporting and integrated tools.
- **Saves Money:** Reduces return mail, optimizes postage costs, and eliminates unnecessary reprints.
- **Increases Accuracy:** Tracks every piece, every step, with job-level accountability and alerts.
- **Builds Confidence:** Full audit trails and compliance-ready documentation provide peace of mind.



## Easy to Use. Easy to Trust.

VariTrack was built with simplicity and security in mind. You'll get a clean, user-friendly interface that makes it easy to upload data, monitor job progress, download reports, and fix issues fast.

**Want to see it in action?** Contact McKenzie Parker at (888) 288-6693 or visit [www.variverge.com](http://www.variverge.com) to request a demo.



variverge  
data + print + mail






# VariTrack

## ANNUAL PLANS

### BASIC

# \$250.00













Billed annually

|                                                                                     |                                      |
|-------------------------------------------------------------------------------------|--------------------------------------|
|    | Unlimited Users                      |
|    | Customer Support                     |
|    | Communication Settings               |
|    | Company Contact Management           |
|    | Job Review                           |
|    | User Management                      |
|    | Secure FTP File Upload               |
|    | Mail Quality Reports                 |
|    | Proofing and Approval                |
|    | Live Production Tracking             |
|  | Mail Piece Tracking                  |
|  | Individual Piece Search Verification |

### STANDARD

# \$500.00

Billed annually

|                                                                                     |                                      |
|-------------------------------------------------------------------------------------|--------------------------------------|
|    | Unlimited Users                      |
|    | Customer Support                     |
|    | Communication Settings               |
|    | Company Contact Management           |
|    | Job Review                           |
|    | User Management                      |
|    | Secure FTP File Upload               |
|    | Mail Quality Reports                 |
|    | Proofing and Approval                |
|    | Live Production Tracking             |
|  | Mail Piece Tracking                  |
|  | Individual Piece Search Verification |

BEST  
VALUE

### PREMIUM

# \$750.00

Billed annually

|                                                                                       |                                      |
|---------------------------------------------------------------------------------------|--------------------------------------|
|    | Unlimited Users                      |
|    | Customer Support                     |
|    | Communication Settings               |
|    | Company Contact Management           |
|    | Job Review                           |
|    | User Management                      |
|    | Secure FTP File Upload               |
|    | Mail Quality Reports                 |
|    | Proofing and Approval                |
|    | Live Production Tracking             |
|  | Mail Piece Tracking                  |
|  | Individual Piece Search Verification |

## ADD ON SERVICES



### ACS Mail Quality

Download USPS Address Correction Service "ACS" notices to help minimize your return mail.

### Volume Based Pricing

### Secure Destruction

Tired of managing return mail? Secure Destruction is an efficient, secure, and eco-friendly solution for handling mail containing personally protected information. This opt-in service ensures that Undeliverable-As-Addressed (UAA) First-Class mail containing sensitive data is securely shredded and recycled, instead of being returned to the sender.

**\$500.00 Setup Fee**

### Appraisal Property Search

Appraisal Districts can use this service to search by Property ID, helping them better prepare for taxpayer ARB hearings.

**\$500.00 Setup Fee**

**\$500.00 Annual Fee**

## SERVICES EXPLAINED



### Unlimited Users

VariTrack offers unlimited user access, enabling seamless and continuous interaction for all users with the same email domain. Multiple users can access the platform in a web-based browser to view real-time status updates.



### Customer Support

Our helpful customer support team is always available to assist you with VariTrack and guide you through getting the best value from its powerful features.



### Communication Settings

VariTrack allows users to choose their preferred communication methods from VariVerge, providing flexibility in how they receive updates and information.



### Company Contact Management

The company admin can update contact information within VariTrack to manage staff contact changes and ensure accurate communication details.



### Job Review

Job Review allows customers to view all jobs sent to VariVerge over the life of the contract.



### User Management

The company admin can invite users and assign specific roles and permissions to ensure appropriate access within the portal across your organization.



### Secure FTP File Upload

Securely upload data files to be processed by VariVerge, and easily download results and reports.



### Mail Quality Reports

Export NCOA (National Change of Address) and non-mailable piece reports to help improve your mail quality.



### Proofing and Approval

Securely log into VariTrack to download samples, review them, and provide approval for printing.



### Live Production Tracking

A customer can log into VariTrack at any time to view real-time status updates, providing insights into the current stage of their job in our production pipeline for mail delivery.



### Mail Piece Tracking

By leveraging the USPS Intelligent Mail Barcode, you can log in to VariTrack to monitor the near real-time delivery status of your mail pieces.



### Individual Piece Search Verification

Easily search for and view individual mail pieces by name, account number, or delivery address. Generate comprehensive summary reports detailing all operational and delivery information—perfect for delivery audit scenarios.



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

ATTACHMENT A: REFERENCES

**Ref-1**

Company Name: Dallas Central Appraisal District

Address: 2949 N Stemmons Fwy., Dallas, TX 75247

Contact Name: Doug Colby Email: colbyd@dcad.org

Contract Calendar Years or Date Ranges: January 2017 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, appraisal notices, efile notices, homestead applications & exemptions w/ mail tracking - 530,000 (+) accounts

**Ref-2**

Company Name: Travis Central Appraisal District

Address: 850 E Anderson Lane, Austin, TX 78714

Contact Name: Leana Mann Email: lmann@tcadcentral.org

Contract Calendar Years or Date Ranges: 1999 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, appraisal notices, efile notices, homestead exemptions & applications, and SB2 postcards - 1,050,000 accounts

**Ref-3**

Company Name: Bexar Appraisal District

Address: 411 N Frio, San Antonio, TX 78201

Contact Name: Sarah Durnell Email: sdurnell@bcad.org

Contract Calendar Years or Date Ranges: 2010 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, appraisal notices, efile notices, homestead postcards & homestead apps. Roughly 600,000 (+) accounts annually

(attach additional sheets if needed)



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

ATTACHMENT A: REFERENCES

**Ref-1**

Company Name: Tarrant Appraisal District

Address: 2500 Handley Edenville Rd., Fort Worth, TX 76118

Contact Name: Brian Lipka Email: blipka@tad.org

Contract Calendar Years or Date Ranges: 2004 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, appraisal & efile notices, postcards,  
mineral & industrial notices - 750,000 accounts

**Ref-2**

Company Name: Montgomery Central Appraisal District

Address: 109 Gladstell St., Conroe, TX 77301

Contact Name: Jared Smith Email: jaredsmith@mcad-tx.org

Contract Calendar Years or Date Ranges: 2020 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, APB packets, appraisal & efile notices,  
homestead applications & exemptions - 250,000 accounts

**Ref-3**

Company Name: Denton Central Appraisal District

Address: 3911 Morse Street, Denton, TX 76202

Contact Name: Don Spencer Email: don.spencer@dentoncad.com

Contract Calendar Years or Date Ranges: 2016 - current contract

Contract Description (including size & type of service, and estimated total dollar amount if available):

Print & mail BPP renditions, appraisal & efile notices, homestead apps  
& exemptions - 375,000 accounts

(attach additional sheets if needed)





**variverge**  
data + print + mail

920 West 9th + Amarillo, Texas 79101  
1.888.288.6693 + [variverge.com](http://variverge.com)

| Customer                              | Contact           | Phone Number   |
|---------------------------------------|-------------------|----------------|
| Bexar Appraisal District              | Sarah Durnell     | (210) 242-2444 |
| Brazoria County Appraisal District    | Marcel Pierel     | (979) 849-7792 |
| Collin Central Appraisal District     | Shane Cheek       | (469) 742-9200 |
| Dallas Central Appraisal District     | Doug Colby        | (214) 819-2324 |
| Denton Central Appraisal District     | Don Spencer       | (940) 349-3978 |
| El Paso Central Appraisal District    | Octavius Sweeney  | (915) 780-2131 |
| Ellis Appraisal District              | Tonya Detavernier | (972) 937-3552 |
| Galveston Central Appraisal District  | Michelle Gilliand | (409) 935-1980 |
| Hays Central Appraisal District       | Laura Raven       | (512) 268-2522 |
| Hidalgo County Appraisal District     | George Gandara    | (956) 381-8466 |
| Hill County Appraisal District        | Julia Scott       | (254) 582-2508 |
| Kaufman County Appraisal District     | Sarah Curtis      | (972) 932-6081 |
| Lubbock Central Appraisal District    | Monica Buescher   | (806) 776-2208 |
| Mongtomery Central Appraisal District | Jared Smith       | (936) 539-8635 |
| Potter-Randall Appraisal District     | Jeffrey Dagley    | (806) 358-1601 |
| Smith County Appraisal District       | Carol Dixon       | (903) 590-2920 |



Travis Central Appraisal District

Leana Mann

(512) 834-9317

Webb County Appraisal District

Bobby Peregoy

(956) 718-3741

Wise County Appraisal District

Deidra Deaton

(940) 627-3081



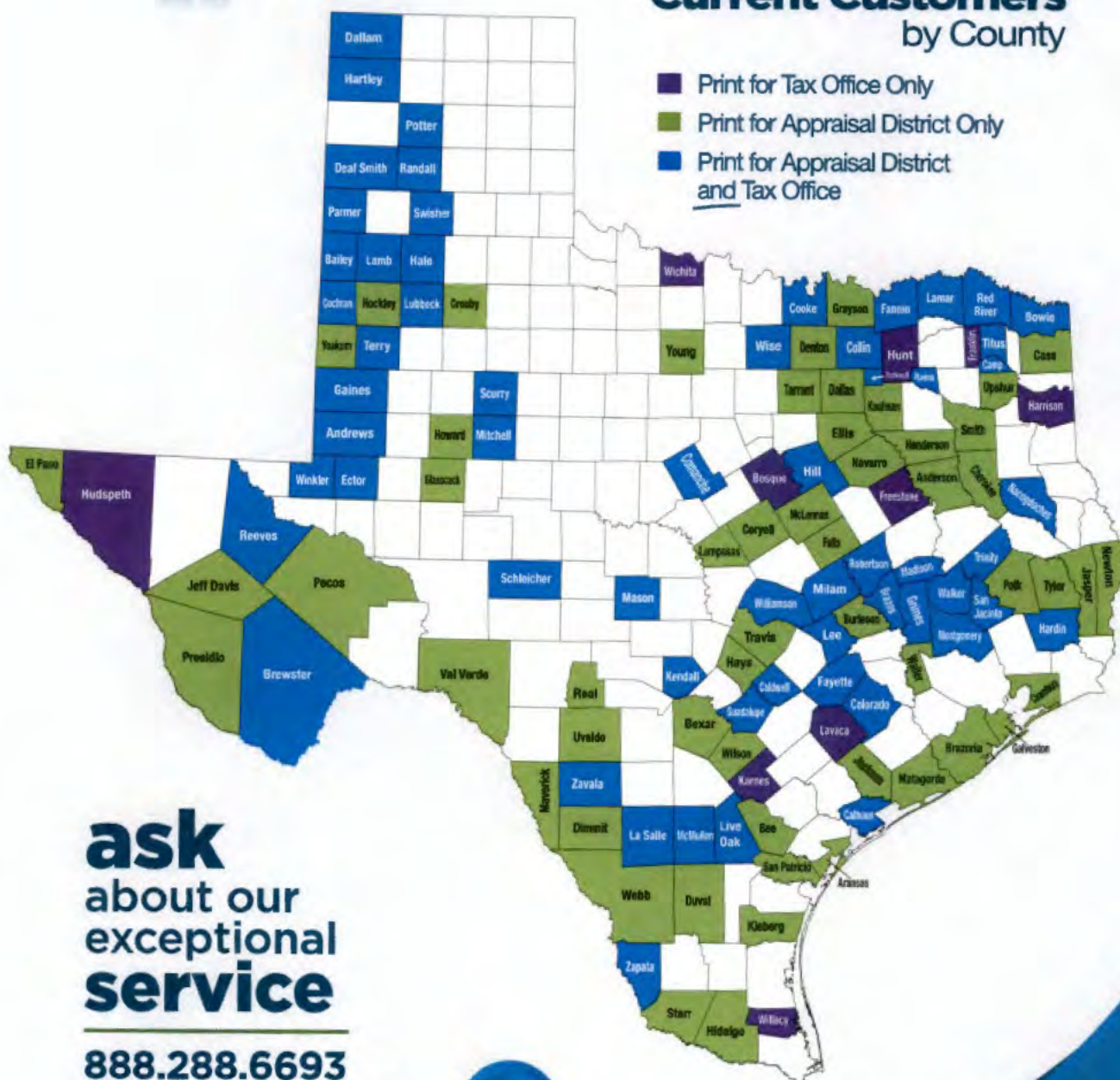
# 125 Texas Counties can't be wrong



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data + print + mail

## Current Customers by County

- Print for Tax Office Only
- Print for Appraisal District Only
- Print for Appraisal District  
and Tax Office



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**REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES**

**ATTACHMENT B: FINANCIAL INTEREST DISCLOSURE**

Bidder affirms that no officer, director, owner, or key employee of the company has a financial, business, or family relationship with any member of the Collin Central Appraisal District Board of Directors or with District management listed below, except as disclosed below, if applicable.

Marty Wright  
Chief Appraiser

Brian Swanson  
Deputy Chief – Business Operations

Phil Greaux  
Deputy Chief – Appraisal

Stephanie Cave-Bernal  
Deputy Chief – ARB, Research, & Customer Service

Ryan Matthews  
Deputy Chief – Technology

Toni Bryan  
Director – Business Operations & Finance

Tina Castillo  
Director - ARB/Agent Services

Shane Cheek  
Director – Information Services

Wendy Gilliland  
Director – Research Services

Eric Grusendorf  
Director – Residential Appraisal

Taylor Hamilton  
Director – Customer Service

Jason Harris  
Director – Information Technology

Sara McAfee  
Director – GIS/Mapping

Brad Richards  
Director – BPP Appraisal

Cindy Smith  
Director – Appraisal Support

Shawn Tilley  
Director – Commercial Appraisal

Dana Wilson  
Director – Land Appraisal

- ☒ No relationships or financial interests to disclose  
☐ The attached relationships/financial interests exist (*attach explanation*)

Company Name: Variverge, LLC

Authorized Representative Name: Mckenzie Parker

Signature: Mckenzie Parker

Date: 10/1/25



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

**ATTACHMENT C: CONFLICT OF INTEREST QUESTIONNAIRE**

This form is required by Chapter 176 of the Local Government Code. It must be completed and submitted by vendors who have a business relationship with a local government officer or a family member of the officer, as defined in the statute.

Vendors must complete the official CIQ form provided by the Texas Ethics Commission. The most recent version of the form and instructions are available at:

<https://www.ethics.state.tx.us/forms/conflict/>

- Attach the completed CIQ form to your bid submission, if applicable.
- Or sign below if there is no conflict of interest to disclose.

Pursuant to Chapter 176, Texas Local Government Code, the undersign certifies that no conflict of interest exists and no disclosure is required.

Company Name: VanVerge, LLC

Authorized Representative Name: Mckenzie Parker

Signature: Mckenzie Parker Date: 10/1/25



**REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES**

**ATTACHMENT D: CERTIFICATE OF INTERESTED PARTIES**

Pursuant to Section 2252.908, Texas Government Code, certain contracts require the completion of Form 1295 (Certificate of Interested Parties).

To comply:

- 1 Visit the Texas Ethics Commission website at <https://www.ethics.state.tx.us/filinginfo/1295/>.
- 2 Complete Form 1295 electronically and obtain a certificate number.
- 3 Print the completed form.
- 4 Have the form executed by an authorized company official and notarized.
- 5 Provide the notarized form to the District.

*The Contract will not be effective until the District receives the completed Form 1295.*



# CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.  
Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

## OFFICE USE ONLY CERTIFICATION OF FILING

1 Name of business entity filing form, and the city, state and country of the business entity's place of business.

VariVerge, LLC  
Dallas, TX United States

Certificate Number:  
2025-1376859

Date Filed:  
10/14/2025

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.

Collin Central Appraisal District

Date Acknowledged:

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

RFB No. IST-2026-PM  
Printing & Mailing Services

| 4 | Name of Interested Party | City, State, Country (place of business) | Nature of interest<br>(check applicable) |              |
|---|--------------------------|------------------------------------------|------------------------------------------|--------------|
|   |                          |                                          | Controlling                              | Intermediary |
|   | VariVerge, LLC           | Dallas, TX United States                 |                                          | X            |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |
|   |                          |                                          |                                          |              |

5 Check only if there is NO Interested Party. ☐

### 6 UNSWORN DECLARATION

My name is Mckenzie Parker, and my date of birth is 09/12/1988.

My address is 8949 Diplomacy Row, Dallas, TX, 75247, USA.  
(city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Tarrant County, State of Texas, on the 14<sup>th</sup> day of October, 2025.  
(month) (year)

Mckenzie Parker  
Signature of authorized agent of contracting business entity  
(Declarant)



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

**ATTACHMENT E: OTHER CERTIFICATIONS**

In submitting this bid, I certify as follows:

**Certification of No Boycott of Israel (Gov't Code Ch. 2271)**

The Vendor certifies that it does not boycott Israel and will not boycott Israel during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is  $\geq$  \$100,000).*

**Certification of No Boycott of Energy Companies (Gov't Code Ch. 2274, Subch. A)**

The Vendor certifies that it does not boycott energy companies and will not boycott energy companies during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is  $\geq$  \$100,000).*

**Certification of Non-Discrimination Against Firearm or Ammunition Companies (Gov't Code Ch. 2274)**

The Vendor certifies that it does not discriminate against a firearm entity or firearm trade association and will not discriminate during the term of this Contract.

**Non-Collusion Certification**

The Vendor certifies that this bid is genuine and not collusive.

**Certification Regarding Debarment / Suspension**

The Vendor certifies that the company is not debarred, suspended, or excluded from participation in Federal or State programs.

**Data Security & Confidentiality Certification**

The Vendor certifies that all District data will be safeguarded, used solely for contract purposes, encrypted in transit and at rest, and destroyed/returned at the end of the contract term.

The undersigned hereby further certifies that they have read and understands all of the above.

Company Name: Variverge, LLC

Authorized Representative Name: McKenzie Parker

Signature: McKenzie Parker Date: 10/1/25



REQUEST FOR BID  
RFB No. IST-2026-PM  
PRINTING & MAILING SERVICES

**ATTACHMENT F: W-9 FORM**

The W-9 form can be found on the IRS website here: <https://www.irs.gov/forms-instructions>



# Request for Taxpayer Identification Number and Certification

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give form to the  
requester. Do not  
send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type.  
See Specific Instructions on page 3.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)<br><b>VariVerge, LLC</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                     |
| 2 Business name/disregarded entity name, if different from above.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                     |
| 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.<br><input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate<br><input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . . <b>P</b><br>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.<br><input type="checkbox"/> Other (see instructions) | 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):<br>Exempt payee code (if any) _____<br>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____<br><br>(Applies to accounts maintained outside the United States.) |
| 3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                     |
| 5 Address (number, street, and apt. or suite no.). See instructions.<br><b>920 SW 9th Ave</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                     |
| 6 City, state, and ZIP code<br><b>Amarillo, TX 79101</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                     |
| 7 List account number(s) here (optional)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                     |
| Requester's name and address (optional)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                     |

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

|                                |             |
|--------------------------------|-------------|
| Social security number         |             |
| <div></div>                    | <div></div> |
| OR                             |             |
| Employer identification number |             |
| <div></div>                    | <div></div> |

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

|           |                                                 |                        |
|-----------|-------------------------------------------------|------------------------|
| Sign Here | Signature of U.S. person <i>Melody Westlake</i> | Date <i>01/01/2025</i> |
|-----------|-------------------------------------------------|------------------------|

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they



**G.2.**  
**Receive recommendation and vote on Aerial  
Photography.**

**November 13, 2025**





# Collin Central Appraisal District

November 4<sup>th</sup>, 2025

## Aerial Photography & Oblique Imagery Award of Contract Recommendation Executive Summary

The District solicited sealed bids for aerial photography and oblique imagery as we are at the end of a six-year contract with EagleView for their Pictometry products (bid packet example attached). The Information Technology department issued the Aerial Photography and Oblique Imagery request for bid (RFB) (IST-2025-APOI) on September 30th. The bid packet was additionally broadcast with the DemandStar online government bids service on September 30th. The public notice was published in the Dallas Morning News on September 30th and again on October 7th. The deadline to submit completed bids was on October 20th, 2025. Two sealed bids were received by the deadline and opened on October 20th at 3:01 pm:

| Vendor                                        | Location                   | 1yr Lowest Bid Amount |
|-----------------------------------------------|----------------------------|-----------------------|
| Dronalytics LLC                               | Liberty, NY                | \$493,230             |
| Pictometry International Corp., dba EagleView | Dallas, TX / Rochester, NY | \$364,650             |

Of the two sealed bids we are recommending a lower cost solution from EagleView for numerous reasons. We have enjoyed a long relationship with EagleView since 2003 for delivery of both oblique and vertical imagery; captured in the apex months of December/January in use for our appraisal cycle bringing accuracy and efficiency to our work products. Our current appraisal vendor software used on all staff and ARB panel rooms, has direct integration with EagleView's oblique and vertical images increasing our utility of the images and their live cloud services. Another massive feature of EagleView is CCAD's ability to license at the county level and then share imagery and hosted services to all entities within our county boundary! This is a unique industry option that we and all our entities benefit from!

Our last current budgeted contractual cost for comparison of EagleView is \$383,460 annually for three-inch primary image capture and no additional off-season flight annually. **We are now recommending the six-year one-inch primary image capture with off-season flight option of \$383,350 annually** which follows the existing funding pattern of line item 5450 – Aerial Photography and is currently funded for payment in 2026.

I have attached the complete EagleView RFB submission to this summary for your reference and to backfill on product and service details as the deliverables are rich in functionality and case uses for all Collin entities. I have also attached the six-year contract that does include a non-appropriation of funds clause so that we are not binding a future board to a past contract that they do not wish to continue to fund.

I have spared many technical usage/details in this summary for brevity so if you have questions, please let me know. Thank you in advance for your consideration.

**Ryan Matthews**

Deputy Chief Appraiser - Technology



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

**BID PACKET**



Bids Request issued on

**September 30, 2025**

Completed Bids to be received no later than

**October 20, 2025 at 3:00 PM (CDT)**

Submit Sealed Bids to

Attn: Ryan Matthews

**COLLIN CENTRAL APPRAISAL DISTRICT**

250 Eldorado Pkwy

McKinney, Texas 75069

Any questions should be emailed to

**[purchasing@cadcollin.org](mailto:purchasing@cadcollin.org)**

Bidder / Company Name: \_\_\_\_\_



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

**RFB Timeline of Events:**

| Event                          | Date                          | Time (CDT)     |
|--------------------------------|-------------------------------|----------------|
| RFB Released                   | September 30, 2025            |                |
| Newspaper Publication #1       | September 30, 2025            |                |
| Newspaper Publication #2       | October 7, 2025               |                |
| Deadline for Bidder Questions  | October 13, 2025              | 5:00 PM        |
| CCAD Response to Questions     | October 15, 2025              | 5:00 PM        |
| <b>Bid Submission Deadline</b> | <b>October 20, 2025</b>       | <b>3:00 PM</b> |
| Bid Opening                    | October 20, 2025              | 3:01 PM        |
| Bid Evaluation Period          | October 21 - November 4, 2025 |                |
| Anticipated Award Notification | November 17, 2025             |                |
| Contract Start Date            | January 1, 2026               |                |

*CCAD reserves the right to amend this timeline at its sole discretion.*



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

---

**1. General**

- Bidders shall submit signed bid providing proposed pricing and representing the ability to provide aerial photography and oblique imagery for 100% of Collin County, Texas, and comply with all technical and legal requirements of the proposed contract outlined below. Bidder shall provide all backup documents necessary to demonstrate its ability to perform any technical requirement in this Request and demonstrate that bidder will provide its goods and services at a price and in a manner that provides best value to the District.
  - Aerial photography shall be captured between December 15, 2025, and January 1, 2026, or as close as possible.
  - Final delivery of all imagery shall be on or before **February 15, 2026**, or as close as is reasonable.
  - Imagery must be geo-referenced to the Texas State Plane Coordinate System NAD83 Central Zone (horizontal) and NAVD88 (vertical).
  - Vendor must provide access via web page/application and REST services within 2 weeks of each flight. All necessary software must be included.
- 

**2. Oblique Imagery**

- Provide color oblique aerial photography of Collin County (approx. 886 sq. miles).
- Capture images from north, south, east, and west for 360° views.
- Each pixel must be geo-referenced.
- Accuracy must match the source DEM data.
- Must allow direct measurements on screen.
- Resolution: 3-inch to 1-inch.
- Must include software tools for cataloguing, viewing, measuring, and analyzing.  
**Note:** The District shall retain perpetual access rights to these tools unless otherwise specified in the bid.



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

---

**3. Aerial Mosaic**

- Provide 3-inch and 6-inch blend mosaic with pixel resolution no greater than 3 inches.
- 

**4. Flight Conditions**

- Imagery must be captured under clear conditions (no snow, ice, haze, fog, etc.).
- 

**5. Quality Assurance / Quality Control**

- Describe QA/QC procedures.
  - Explain re-flight process for bad images found during or after post-processing.
- 

**6. Web-Based Portal**

- Vendor-hosted portal for image access and dissemination.
  - Provide WMTS URLs for internal and third-party use.
  - Support GIS layer uploads or REST service integration.
- 

**7. Delivery**

- Contractor responsible for product distribution.
  - Deliverables to be provided to District via separate hard drives.
  - Final delivery of all data shall be made to the District by **March 20, 2026**.
  - Formats: ECW, JPG, or MrSID.
- 

**8. Disaster Re-Flight**

- Describe disaster coverage types and maximum area.



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

- Specify availability period for disaster services.
- 

**9. Integrations**

- Must be viewable in ESRI ArcGIS 10.x and ArcGIS Pro.
  - Must be compatible with Harris Govern PACS CAMA system (Matix GIS).
- 

**10. Sub-Organization Image and Service Sharing**

- Detail included municipalities/entities.
  - Clarify what services can be shared.
- 

**11. Other Technical Considerations**

- Describe any other critical technical details.
- 

**12. Technical Support**

- Provide onsite, phone, or web-based support for contract duration.
- 

**13. Training**

- Explain training offerings (on-site and online).
  - Include estimated man-hours for end users and technical staff.
- 

**14. Experience**

- Provide up to 3 similar project descriptions (preferably in Texas).
  - Include client contact info.
  - Describe company history, revenues, and corporate profile.
-



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

**15. Insurance**

- Maintain sufficient liability insurance.
- 

**16. Purchase Options**

- Bid should include District's turn-key annual cost for 1-year solution.
  - Bid should include District's cost to maintain access to all data during non-flight years.
  - Bid should include any licensing or upgrade fees.
  - Bid should describe cost-sharing/discounts due to shared access.
- 

**17. Renewal Options**

- Proposed contract shall grant District the right to renew the contract on the same terms and conditions as the original contract for up to 5 additional one-year terms, with the only change being an adjustment to the renewal price to adjust it (upward or downward) in accordance with the most recent CPI-W (Dallas-Fort Worth-Arlington, TX).
- 

**18. Multiple Year Contract Options**

- [Optional] Include pricing for 3-year and 6-year contracts.
- 

**19. Proprietary / Confidential Information**

- All bids are subject to Texas Public Information Act (Chapter 552).
  - Do not include trade secrets in your bid unless critical.
  - Clearly mark trade secrets as "Confidential" if included.
- 

**20. Availability of Funds**



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

- Multi-year options and any renewal would be subject to budget appropriation and Board ratification.
- 

**21. Deviations**

- Please note any deviations in your submission from the requirements in this bid.
- 

**22. Questions by Prospective Bidders**

- Questions must be submitted via email to Ryan Matthews at **ryan.matthews@cadcollin.org** by 3 p.m. (CDT) on **October 13, 2025**.
  - No pre-bid meeting is scheduled.
  - The District reserves the right to issue clarifications or addenda based on questions received.
- 

**23. Basis of Selection**

The contract will be awarded to the bidder who provides the goods and services at the best value for the District. In determining the best value to the District, it will consider:

- Price;
- Quality of the goods and services to be provided.
- The extent to which the goods and services meet the District's needs, including but not limited to the delivery timeline.
- Ability to comply with the technical requirements of this Request.
- The reputation of the bidder and its good and services.
- The bidder's past relationship with the District.

District may reject any and all bids and/or waive formalities.

---

**24. Deadline**

- Bids are due and will be opened on **October 20, 2025 at 3 p.m. (CDT)**.



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

- All bids should be submitted in sealed envelope with one printed copy and one digital copy (USB).
  - Email submissions will not be accepted.
  - Deliver to:  
**Ryan Matthews**  
Collin Central Appraisal District  
250 Eldorado Pkwy  
McKinney, TX 75069
  - Bids and the award of the contract are expected to be considered at Board of Directors meetings tentatively scheduled for **November 13, 2025**, and **December 18, 2025**.
  - The bid and any terms offered in the bid must remain open through December 31, 2025.
- 

**25. Contract Terms and Conditions**

- One-year contract with renewal options, though District reserve the right to award based upon any optional multi-year bid reference above.
  - Net 30 payment terms.
  - District will own all deliverables.
  - Penalties may apply for late or substandard delivery by bidder.
- 

**26. Attachments**

- Bidder references, disclosures, certificates and forms are attached to this bid that must be completed and included in bid packet.
-



**REQUEST FOR COMPETITIVE SEALED BID  
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY  
RFB: IST-2025-APOI**

**27. Acknowledgment and Signature**

- By signing below, the bidder acknowledges and agrees to all terms and conditions set forth in this Invitation for Bid. The bidder certifies that they are an authorized representative of the company and that the information provided is true and correct.

---

**Vendor Signature Block**

|                               |  |
|-------------------------------|--|
| <b>Vendor Name</b>            |  |
| <b>Vendor Signature</b>       |  |
| <b>Printed Signature Name</b> |  |
| <b>Title</b>                  |  |
| <b>Date</b>                   |  |

**Collin Central Appraisal District**

REQUEST FOR COMPETITIVE SEALED BID

AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY

RFB: IST-2025-APOI



REQUEST FOR BID  
ATTACHMENTS

**ATTACHMENT A: BIDDER REFERENCES**

**Ref-1**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_

Contract Calendar Years or Date Ranges: \_\_\_\_\_

Contract Description (including size & type of service, and estimated total dollar amount if available):

\_\_\_\_\_

~~~~~

Ref-2

Company Name: _____

Address: _____

Contact Name: _____ Email: _____

Contract Calendar Years or Date Ranges: _____

Contract Description (including size & type of service, and estimated total dollar amount if available):

~~~~~

**Ref-3**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_

Contract Calendar Years or Date Ranges: \_\_\_\_\_

Contract Description (including size & type of service, and estimated total dollar amount if available):

\_\_\_\_\_

\_\_\_\_\_



**REQUEST FOR BID  
ATTACHMENTS**

*(attach additional sheets if needed)*



**REQUEST FOR BID  
ATTACHMENTS**

**ATTACHMENT B: FINANCIAL INTEREST DISCLOSURE**

Bidder affirms that no officer, director, owner, or key employee of the company has a financial, business, or family relationship with any member of the Collin Central Appraisal District Board of Directors or with District management listed below, except as disclosed below, if applicable.

Marty Wright  
Chief Appraiser

Brian Swanson  
Deputy Chief – Business Operations

Phil Greaux  
Deputy Chief – Appraisal

Stephanie Cave-Bernal  
Deputy Chief – ARB, Research, & Customer Service

Ryan Matthews  
Deputy Chief – Technology

Toni Bryan  
Director – Business Operations & Finance

Tina Castillo  
Director - ARB/Agent Services

Shane Cheek  
Director – Information Services

Wendy Gilliland  
Director – Research Services

Eric Grusendorf  
Director – Residential Appraisal

Taylor Hamilton  
Director – Customer Service

Jason Harris  
Director – Information Technology

Sara McAfee  
Director – GIS/Mapping

Brad Richards  
Director – BPP Appraisal

Cindy Smith  
Director – Appraisal Support

Shawn Tilley  
Director – Commercial Appraisal

Dana Wilson  
Director – Land Appraisal

- ☐ No relationships or financial interests to disclose  
☐ The attached relationships/financial interests exist (*attach explanation*)

**Company Name:** \_\_\_\_\_

**Authorized Representative Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



**REQUEST FOR BID  
ATTACHMENTS**

**ATTACHMENT C: CONFLICT OF INTEREST QUESTIONNAIRE**

This form is required by Chapter 176 of the Local Government Code. It must be completed and submitted by vendors who have a business relationship with a local government officer or a family member of the officer, as defined in the statute.

Vendors must complete the official CIQ form provided by the Texas Ethics Commission. The most recent version of the form and instructions are available at:

<https://www.ethics.state.tx.us/forms/conflict/>

- Attach the completed CIQ form to your bid submission, if applicable.
- Or sign below if there is no conflict of interest to disclose.

~~~~~

Pursuant to Chapter 176, Texas Local Government Code, the undersign certifies that no conflict of interest exists and no disclosure is required.

Company Name: _____

Authorized Representative Name: _____

Signature: _____

Date: _____

**REQUEST FOR BID
ATTACHMENTS**

ATTACHMENT D: CERTIFICATE OF INTERESTED PARTIES

Pursuant to Section 2252.908, Texas Government Code, certain contracts require the completion of Form 1295 (Certificate of Interested Parties).

To comply:

- 1 Visit the Texas Ethics Commission website at <https://www.ethics.state.tx.us/filinginfo/1295/>.
- 2 Complete Form 1295 electronically and obtain a certificate number.
- 3 Print the completed form.
- 4 Have the form executed by an authorized company official and notarized.
- 5 Provide the notarized form to the District.

The Contract will not be effective until the District receives the completed Form 1295.

**REQUEST FOR BID
ATTACHMENTS**

ATTACHMENT E: OTHER CERTIFICATIONS & AFFIDAVITS

Certification of No Boycott of Israel (Gov't Code Ch. 2271)

Contractor verifies that it does not boycott Israel and will not boycott Israel during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is \geq \$100,000).*

Certification of No Boycott of Energy Companies (Gov't Code Ch. 2274, Subch. A)

Contractor verifies that it does not boycott energy companies and will not boycott energy companies during the term of this Contract. *(Applies if: company has 10+ employees, and contract value is \geq \$100,000).*

Certification of Non-Discrimination Against Firearm or Ammunition Companies (Gov't Code Ch. 2274)

Vendor verifies that it does not discriminate against a firearm entity or firearm trade association and will not discriminate during the term of this Contract.

Non-Collusion Affidavit

The undersigned certifies that this bid is genuine and not collusive.

Certification Regarding Debarment / Suspension

The undersigned certifies that the company is not debarred, suspended, or excluded from participation in Federal or State programs.

Data Security & Confidentiality Certification

Vendor certifies that all District data will be safeguarded, used solely for contract purposes, encrypted in transit and at rest, and destroyed/returned at the end of the contract term.

Company Name: _____

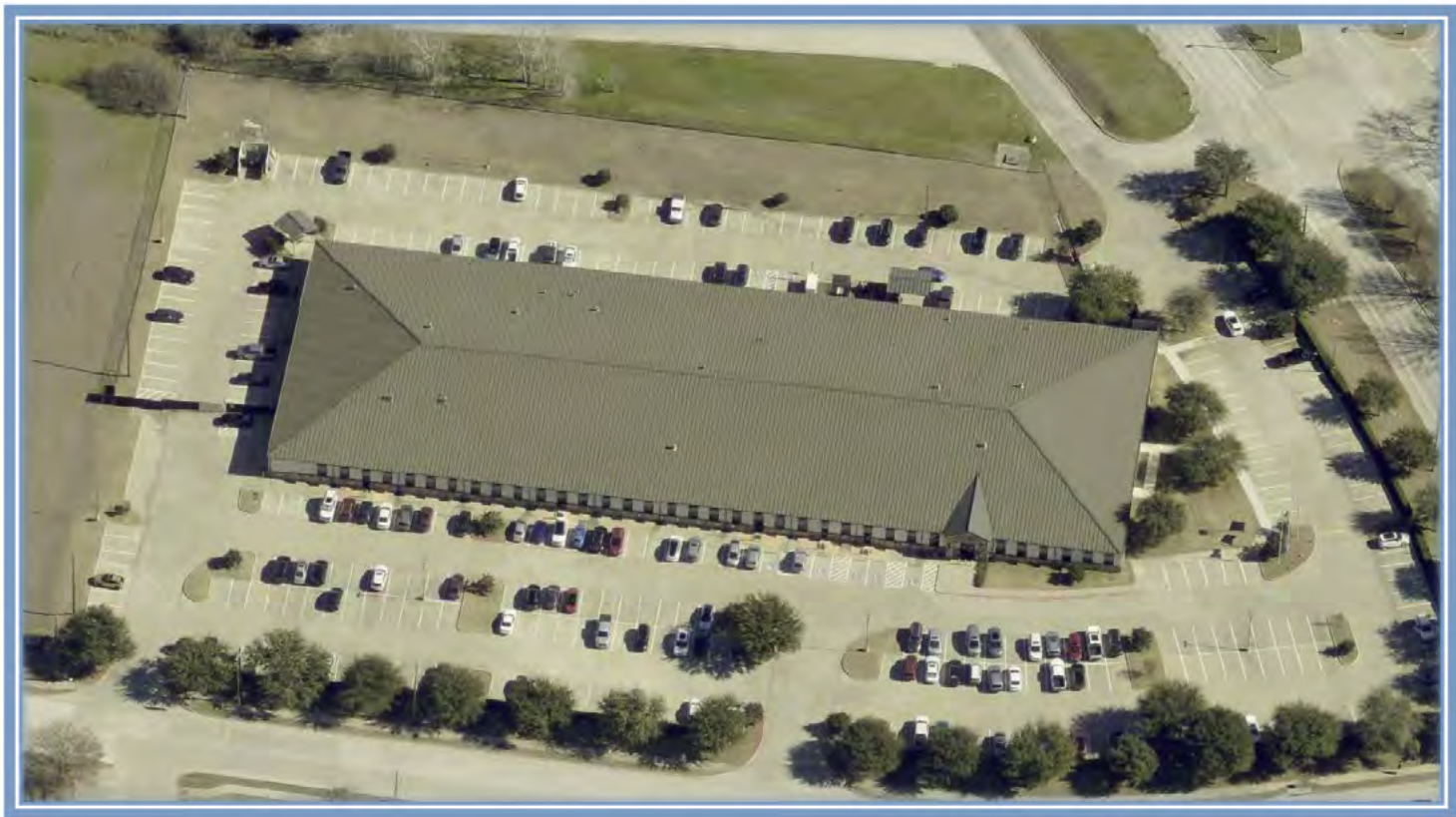
Authorized Representative Name: _____

Signature: _____

Date: _____

REQUEST FOR BID
ATTACHMENTS

ATTACHMENT F: W-9 FORM



EagleView Response to:

**Request for Competitive Sealed Bid –
Aerial Photography and Oblique Imagery
RFB: IST-2025-APOI**

Submitted By

Kevin Beers
Senior District Manager - Texas
(512) 850-7662
kevin.beers@eagleview.com

EagleView

25 Methodist Hill Dr.
Rochester, NY 14623
www.eagleview.com

10/20/2025

Ryan Matthews
Collin Central Appraisal District
250 Eldorado Pkwy
McKinney, TX 75069

Dear Ryan Matthews,

On behalf of Pictometry International Corp. (a member of the EagleView family of companies and herein referred to as “EagleView”), thank you for the opportunity to present our response to the Request for Competitive Sealed Bid – Aerial Photography and Oblique Imagery RFB: IST-2025-APOI. We have reviewed your requirements and believe they align with our strengths as the aerial imagery industry leader.

EagleView has been a trusted provider of digital mapping and high accuracy aerial imagery solutions since 2001. Having delivered products and services to Collin Central Appraisal District and similar clients for 25 years, we feel confident that EagleView has demonstrated the commitment to excellence expected of a trusted vendor.

Highlights of our proposal include:

- **Superior image clarity and quality:** EagleView will deploy its state-of-the-art, custom camera system to simultaneously collect high-quality ortho and oblique imagery at 1” resolution with an optional 2” resolution Ortho. Our proprietary capture system captures less atmosphere and produces images with an increased nadir perspective, better radiometric qualities, minimum building and feature lean, greater sharpness (less haze), and are truer to color and tone. We ensure our customers are satisfied with final imagery by performing in-house quality control checks throughout the process.
- **Timely delivery:** We understand the importance of efficient capture and delivery of aerial imagery within the mutually agreed timeframe. Many customers have built critical workflows based on the delivery of our solutions. Our fleet of 100+ aircraft, 500+ cameras, and a vast processing/production staff that runs two daily shifts means that we have the acquisition and processing capacity to meet the most aggressive timeframes. You can expect delivery of initial imagery via EagleView Cloud (“Early Access”) within 10-14 days post-capture.
- **Superior oblique imagery:** EagleView is the inventor of georeferenced aerial oblique imaging. Oblique imagery will be captured simultaneously with orthophotography. Images will be captured from all four cardinal directions to provide a 360° view of every property. A few benefits of our 360° Intelligent Oblique Imagery are:
 - Visibility of roofs and vertical structures (feature extraction, texturing)
 - Multiple views of a point of interest, including nadir
 - Better interpretation (building footprints, number of floors, etc.)
 - Higher redundancy & reliability
 - 3D vs 2.5D point clouds → more detailed 3D city models
 - Improvement of the true-orthophoto automated generation
- **Industry-leading platform and unique integrations:** Our web-based imagery viewing software, EagleView Cloud, provides licensed users with unlimited views and the ability to measure and

analyze both ortho and oblique imagery in conjunction with other GIS data. We do not limit your ability to distribute access to any authorized municipalities, departments, or contractors. We have no data limits on imagery usage, and you will never see an overage charge from us for using our software solutions or imagery. EagleView has established integrations with Esri ArcGIS products, and many widely used CAMA, CAD, and 911 software. In particular, EagleView has a proven and unique integration with Harris Govern's PACS CAMA and Matix GIS applications.

- **Access to historical and neighboring imagery:** EagleView has captured a great deal of imagery for Collin Central Appraisal District, and we are happy to provide continued access to this historical imagery along with access to imagery of neighboring Counties. All imagery can be accessed via our EagleView Cloud platform.
- **Ability to overlay GIS data:** Our platform offers the ability to overlay the GIS data both on ortho and oblique imagery. It provides users with the ability to label, search, and identify features based on current GIS data.
- **Disaster Response:** At no additional cost, EagleView will stand behind Collin Central Appraisal District in times of disaster through our RapidAccess Disaster Response Program (DRP). With DRP, we capture and deliver standard quality imagery of up to 200 square miles of areas affected by disasters, such as hurricanes and tornados rated EF4 and higher.

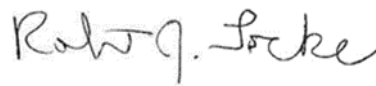
EagleView has a unique, unrivaled combination of industry knowledge, top-notch analytics, next generation data management, technology innovation, and reliability that we believe Collin CAD requires in a beneficial, cooperative vendor relationship and our proposal is built on this belief.

We appreciate the opportunity to participate in this process and look forward to further discussion. Thank you for your consideration.

Regards,

A handwritten signature in blue ink, appearing to read "K. Beers".

Kevin Beers
Senior District Manager - Texas
(512) 850-7662
kevin.beers@eagleview.com

A handwritten signature in blue ink, appearing to read "Robert Locke".

Robert Locke
President
(585) 487-1538 x4238
bob.locke@eagleview.com

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Executive Summary

Founded in 2000, Pictometry International Corp. pioneered the acquisition of georeferenced, oblique aerial imagery. Pictometry's patented camera system, which captures oblique and orthogonal imagery simultaneously, is the only one to receive U.S. Geological Survey certification. In January 2013, Pictometry International Corp. merged with EagleView Technologies, Inc., a provider of aerial roof measurements and property data reports.

EagleView combines imagery that reveals the finest and most crucial details with computer vision to help identify insights into any location from anywhere. By delivering timely, comprehensive answers to complex questions, we help professionals across various industries improve people's lives and make informed decisions.

At EagleView, we have become the unparalleled provider of aerial data and measurement and analytical tools through proprietary software and partner integrations. Our fleet of 100+ aircraft, 500 cameras (plus spares), and a vast processing/production staff gives us the acquisition and processing capacity to meet aggressive timeframes and, since our inception, we have created several proprietary software programs that have streamlined our flight planning, image capture, and processing procedures.

As the inventor of georeferenced oblique imagery, EagleView has captured and produced aerial imagery data since 2001. Today, EagleView flies and captures roughly 500,000 sq. miles per year and has a library of over 3 billion images. This imagery meets positional accuracy requirements, provides maximum features clarity, and exposes details otherwise obscured by atmospheric degradation. Imagery captured using our patented small-format cameras features less building lean than imagery produced using traditional large-format systems and in-house quality control checks throughout the process will ensure imagery meets specs.



EagleView for Government Use

Counties across the United States rely on EagleView's high-resolution imagery and data products to streamline operations, enhance decision-making, and improve service delivery to their communities. Our orthogonal and oblique imagery integrates seamlessly into GIS, CAMA, E-911, and other critical county systems, enabling staff to work more efficiently and with greater accuracy.

In **property appraisal and taxation**, EagleView imagery allows appraisers to detect unpermitted construction, document changes to properties, and ensure fair and equitable valuations without the need for constant field visits. Integration with CAMA systems ensures that property records are kept current, while historical imagery comparisons provide a defensible record of changes over time.

In **planning and GIS departments**, our georeferenced imagery supports parcel mapping, zoning updates, and long-range development planning. The availability of 3D models and high-accuracy obliques enables planners to perform view-shed analyses, visualize proposed developments, and engage the public with clear, detailed maps.

Public safety and emergency management teams leverage EagleView's imagery before and after storms, floods, or other disasters to perform FEMA-compliant damage assessments, coordinate recovery efforts, and enhance situational awareness. Our integrations with E-911 systems support accurate dispatching, routing, and address verification—capabilities that save valuable minutes during emergencies.

Public works departments use our imagery to monitor infrastructure, assess road and bridge conditions, and plan capital improvement projects. Vegetation encroachment, stormwater system inspections, and utility corridor monitoring can all be performed remotely, reducing the need for costly site visits.

Environmental and code compliance staff use EagleView products to track shoreline erosion, identify illegal dumping, detect land use violations, and monitor environmentally sensitive areas such as wetlands and habitats. These capabilities support regulatory compliance and help protect vital natural resources.

EagleView enables counties to enhance public transparency by offering residents secure, visualization-only access to county imagery through web-based portals. This fosters trust, improves community engagement, and ensures that decision-making is informed by accurate, shared information.

Our Experience with Collin CAD

EagleView is proud of the strong partnership we have established with Collin CAD, and humbled by the continued trust Collin CAD has placed with us to provide a critical part of your appraisal workflow – for over 20 years now, dating back to 2003.

Your Solution

In response to this request, EagleView has built a custom solution designed to support Collin CAD with aerial photography for 100 percent of Collin County. Our aim is to provide 1" GSD ortho and oblique imagery captured simultaneously during the Winter capture timeframe. As an additional option, EagleView can provide 2" GSD ortho imagery during an alternative time of year to support more frequent imagery needs. Deliverables will include all imagery accessible through EagleView's secure web and mobile applications, and a hard drive delivery of the ortho imagery. This solution is designed to ensure that Collin CAD receives high-quality, contiguous aerial imagery across the full 886-square-mile project area, delivered in a fiscally responsible manner while meeting the individual and collective business needs of all Collin CAD stakeholders.

The following sections of this response provide details of our proposed approach, technical capabilities, and specific responses to the requirements outlined in the RFCSB.

Approach and Methodology

1. General

- *Bidders shall submit signed bid providing proposed pricing and representing the ability to provide aerial photography and oblique imagery for 100% of Collin County, Texas, and comply with all technical and legal requirements of the proposed contract outlined below. Bidder shall provide all backup documents necessary to demonstrate its ability to perform any technical requirement in this Request and demonstrate that bidder will provide its goods and services at a price and in a manner that provides best value to the District.*
- *Aerial photography shall be captured between December 15, 2025, and January 1, 2026, or as close as possible.*
- *Final delivery of all imagery shall be on or before February 15, 2026, or as close as is reasonable.*
- *Imagery must be geo-referenced to the Texas State Plane Coordinate System NAD83 Central Zone (horizontal) and NAVD88 (vertical).*
- *Vendor must provide access via web page/application and REST services within 2 weeks of each flight. All necessary software must be included.*

Project Timeline

EagleView intends to capture imagery for Collin CAD during the desired capture window of December 15, 2025, to January 1, 2026. Collin CAD has a large capture area, in a challenging airspace with close proximity to Dallas-Fort Worth International Airport. Weather conditions and airspace limitations are just a couple of factors that can impact this capture timeframe, but EagleView will make our best efforts to complete the capture within the requested timeframe and project completion timelines are expected to be consistent with our proven track record on similar past deliveries.

Early Access of imagery will occur and be made available to Collin CAD within 7-14 days of capture, and before February 15, 2026. Final delivery of all data shall be made to Collin CAD by March 20, 2026, via on-line access and physical hard drive. In the event circumstances beyond EagleView's control impact this capture or delivery timeline, EagleView will promptly communicate with Collin CAD to explain the circumstances and take necessary corrective actions to provide the best possible outcome.

A further breakdown of the Project Timeline is available to view below:

Project Step	Collin CAD Timeline	EV Timeline
Capture	"Between December 15, 2025, and January 1, 2026, or as close as is reasonable"	3-4 weeks, with a target start date of December 15th
Early Access	"Vendor must provide access via web page/application and REST services within 2 weeks of each flight"	Provided within 1-2 weeks of capture start

Online Delivery	"Final delivery of all imagery shall be on or before February 15th, or as close as is reasonable"	Delivered within 3 weeks of capture called "done flying"; February 2 nd at the latest if done flying by target end date
Hard Drive Delivery	"Final delivery of all data shall be made to the District by March 20 th "	Delivered 30-45 days after capture called "done flying". February 26 th at the latest if done flying by target end date

Cloud Explorer EarlyAccess

We will provide Collin CAD with an expedited delivery of initial aerial imagery. At no additional cost, you will receive preliminary imagery within 7–14 days post-capture through Cloud Explorer EarlyAccess. With EarlyAccess, authorized users can login to Cloud Explorer, and access imagery immediately following preliminary processing and quality control checks (but prior to final processing). This imagery will remain available until we deliver final, fully processed imagery.



Access Imagery Faster. Within 7 to 14 days of capture, preliminary imagery will be delivered through the cloud-based Cloud Explorer platform. You can review this imagery right from your computer.

Delivery Coordinate System

The final ortho imagery delivery to Collin CAD will be geo-referenced to the Texas State Plane Coordinate System NAD83 Central Zone (horizontal) and NAVD88 (vertical) which is further detailed in the Delivery section of this proposal.

2. Oblique Imagery

- *Provide color oblique aerial photography of Collin County (approx. 886 sq. miles).*
- *Capture images from north, south, east, and west for 360° views.*
- *Each pixel must be geo-referenced.*
- *Accuracy must match the source DEM data.*
- *Must allow direct measurements on screen.*
- *Resolution: 3-inch to 1-inch.*
- *Must include software tools for cataloguing, viewing, measuring, and analyzing. Note: The District shall retain perpetual access rights to these tools unless otherwise specified in the bid.*

1" GSD Ortho and Oblique Imagery

EagleView captures color ortho imagery and oblique aerial imagery at angles of 40° to 45° from the north, south, east, and west to offer a 360° view of every property and parcel. Every pixel in EagleView's oblique and ortho imagery is georeferenced, giving users the ability to interact with, measure, and extract data from these actionable images which will match the source DEM data. Within EagleView Cloud Explorer, users can pan, zoom, and measure distance, angle, area, width, length, and height (for obliques only).

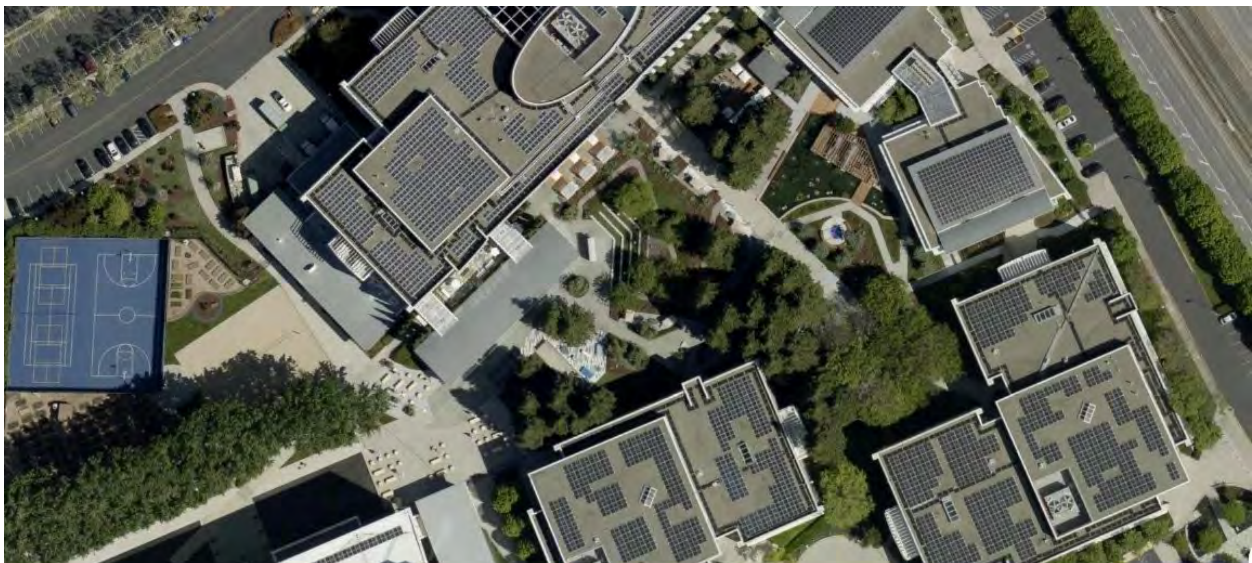
EagleView's proposed offering of 1" GSD aerial imagery provides state and local governments with increased clarity and unmatched oblique views of properties, buildings, and government assets.



View Imagery from all angles. With EagleView oblique imagery, users can measure and analyze properties from north, south, east, and west, as well as nadir views.



In addition, our industry-leading 1" resolution oblique imagery offering continues to push the boundaries of aerial imagery capture for infrastructure, delivering up to 15cm RMSE_{x,y} (ASPRS 2014) positional accuracy, and represents a unique capability in the market.



1" Ortho detailed imagery. *GIS and Planning professionals have increased confidence when making decisions and extracting planimetric features from orthomosaic imagery.*

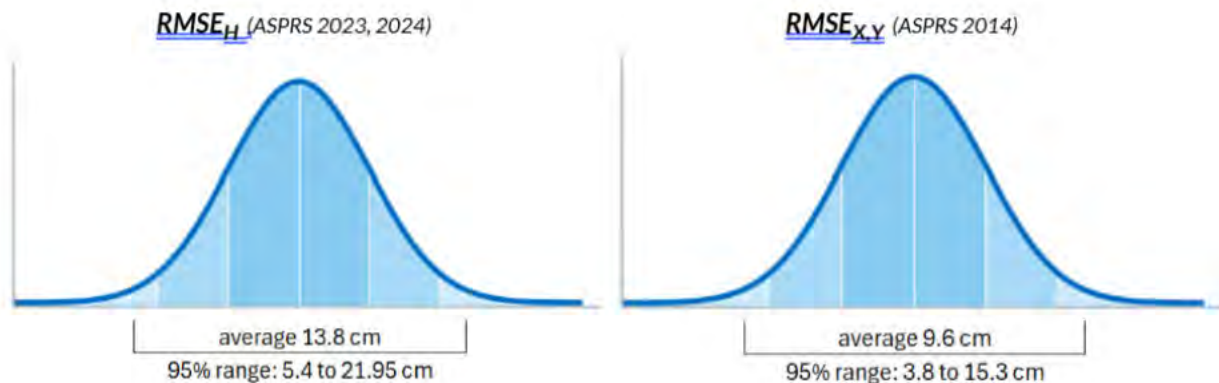
EagleView's 1" Orthoimagery offers the following resolutions and accuracies as reported below:

*Positional Accuracy for EagleView's Orthoimagery**

Positional Accuracy (cm)	Positional Accuracy (cm)	Source Ground Sample Distance (cm)
$RMSE_H$ (ASPRS 2023, 2024)	$RMSE_{x,y}$ (ASPRS 2014)	
≤20	≤15	2.5 (1in)

**Please note that EagleView relies on Airborne GPS and IMU data for direct georeferencing. No ground control is used in this option.*

Figure 1.1 Tested results of 1" GSD Orthoimagery



2" GSD Ortho (Optional add-on)

As an additional option, EagleView can provide an off-season 2" GSD Ortho (ortho-only) imagery capture during an alternative time of year to support more frequent imagery needs. Having updated imagery captured during the summer months or even into October has proven to be valuable to other appraisal districts in Texas to support the very tight timeline required for the appraisal cycle.

3. Aerial Mosaic

- *Provide 3-inch and 6-inch blend mosaic with pixel resolution no greater than 3 inches.*

To support government agencies when they need imagery for more than visualization, especially at specific standards or accuracy requirements, EagleView offers an aerial orthomosaic to support a wide range of government functions. This allows users to extract measurements that can serve as the foundation of various GIS and other applications, including 3-D modeling and change detection. Further specifications on our 2" GSD ortho optional add-on are detailed below.

Collin CAD can select from several options for this orthomosaic, including deresolving to 3" or 6" GSD if needed and from various formats that include ECW, MrSID, and JPG2000.



GIS and planning professionals can make decisions and extract features with greater confidence.

4. Flight Conditions

- *Imagery must be captured under clear conditions (no snow, ice, haze, fog, etc.).*

Flight Capture Conditions

EagleView's Flight Conditions for capture are noted in the table below:

Flight Conditions

<i>Minimum Sun Angle</i>	>25° or +/- 2 hours from solar noon when sun angle does not reach 25° for at least 4 hours in a day. Areas containing high-rise buildings such as downtown regions as well as any supplemental flight lines for those areas should be captured as close to solar noon as possible to minimize shadows.
<i>Cloud cover</i>	<5% of the final mosaic area may contain visible clouds. No clouds may be visible in portions of the final mosaic which include supplemental flight lines over tall buildings.
<i>Shadows</i>	Shadows shall not obscure any features within the imagery. Any structures, industrial, transportation features, or terrain details must be visible and their edges clearly defined vs surrounding pixel data.
<i>Smoke/fire</i>	<5% of the final mosaic area may contain visible smoke. Persistent smoke, such as from a factory or powerplant is acceptable.
<i>Snow/ice cover</i>	< 10% of the final mosaic area may contain visible snow or ice. If present, the rooftops and walls of structures and any transportation features must be visible. Snow associated with recreational facilities such as ski resorts and ice-skating rinks is acceptable.

<i>Flooding/standing water</i>	Flooding or standing water may be visible in imagery so long as no housing, industrial, or transportation features are impacted.
<i>Reflection/Glare</i>	Reflection from water should be minimized, and no reflections will obscure shoreline detail.
<i>Image Blemish, Artifacts, Noise, etc.</i>	Imagery should be free of any defects due to hardware or image processing errors. This includes any errors related to hardware failure, data corruption, excessive image compression, or over/under exposure.
<i>Radiometry and Color</i>	The appearance of the final mosaic represents the color on the ground at the time of capture. Color and radiometry adjustments shall be applied so that imagery from multiple days or captures appears consistent across the mosaic.

5. Quality Assurance / Quality Control

- *Describe QA/QC procedures.*
- *Explain re-flight process for bad images found during or after post-processing.*

Image Acquisition and Processing

At EagleView, image quality is of the utmost importance. To achieve the highest levels of accuracy and clarity, we employ advanced technology throughout our capture process. This includes the use of a precision gimbal system that minimizes camera tilt during flight, ensuring consistent alignment and sharpness across every image. Combined with our proprietary applications and rigorous quality controls, these measures allow EagleView to deliver imagery that meets the most demanding standards of precision and reliability.

For the initial flight, EagleView will develop a custom flight plan that covers the project area at the requested imagery GSD/resolution. For Collin CAD, the flight plans will cover all of Collin County at the requested resolution (1-2 inches GSD).

Flight plans consist of several flight lines, which tell pilots where to navigate, and each flight line contains waypoints that indicate when specific cameras will fire. Key components of the flight planning process include:

The Customer: The flight planning process begins with Collin CAD and EagleView's District Manager and Project Manager, who will work together to develop a map based on your AOI that the Collin CAD provided in the RFB process.

Airspace: A finalized map goes to Flight Planning, where the team reviews airspace classifications and possible restrictions in your AOI.

Elevation Data: Flight Planning reviews elevation data from the USGS National Elevation Dataset to generate an elevation grid and determine appropriate flight altitudes for the project. (If provided, custom elevation will be applied to images during processing).

Safety: Using elevation data, the Flight Planning team also determines whether the AOI is safe to fly. At all times, pilots must stay at least 3.22 kilometers (or 2 miles) from forward obstacles (i.e., mountains) and 0.805 km (or 0.5 miles) from lateral obstacles. Aircraft must be at least 305 meters

(or 1,000 feet) above ground level, and maximum altitudes must be at 3,810 meters (or 12,500 feet) and 4,876.8 meters (or 16,000 feet) above sea level, depending on the type of aircraft.

Tiering: Flight Planning groups sectors together based on airspace requirements, elevation data, and aircraft and camera system to be used. Flight Planning then generates flight lines in each of these tiers. Based on the tiers and flight parameters, Flight Planning uses EagleView software to assign a shot pattern that tells the cameras when to fire.

Special Considerations: To capture oblique imagery, flight lines may extend beyond the AOI. These “look-in lines” are necessary to capture oblique imagery across the entire AOI. Additional flight lines may be flown between tiers to capture all oblique views.

Communication: Pilots load flight plans onto the aircraft computer prior to capture. Pilots or Flight Operations use these flight plans to coordinate with Air Traffic Control each day of capture.

EagleView follows industry-standard quality control and imagery acquisition procedures. Our internal teams ensure the final deliverables meet Collin CAD accuracy and other required specifications. The following sections explain our processes in detail.

Step 1: Mission Planning

To ensure full coverage of the project area at the requested imagery resolution, EagleView’s Project Manager will work with Collin CAD to develop a flight plan that complies with airspace rules; and ensures safety.

Step 2: Image Acquisition Process

EagleView will capture imagery using its patented camera system in the Winter 2026 flight season during leaf-off conditions when the sun angle is 30° or greater.

Cameras

Aircraft will be equipped with our state-of-the-art proprietary patented camera system. It also includes an Applanix Position and Orientation System (POS) with a Global Positioning System (GPS) antenna and an Inertial Measurement Unit (IMU).

Camera Calibration

Cameras undergo a rigorous calibration process, developed by EagleView and licensed to the USGS, prior to image collection and as part of the manufacture. The calibration is performed through the capture of a series of images from prescribed locations and at varied orientations of a stationary target cage. Targets are identified in the images collected via a semi-automatic process, and a free-network bundle adjustment is performed to solve for camera interior orientation, including precise focal length, principal point location, and radial distortion coefficients. These parameters are then incorporated into the camera model used during subsequent image processing operations. EagleView also puts each camera through its color calibration process to ensure consistent representation of ground features.

In advance of capturing data, EagleView performs an additional aerial boresight calibration on each of the systems involved in a project. An adjustment is computed to solve for the alignment between the optical axis of the camera and the internal coordinate axes of the Inertial Measurement Unit (IMU). This adjustment is then applied to the imagery captured throughout each project. Each system completes a boresight flight at regular intervals to ensure sensors have stayed in alignment.

Capture Parameters

Throughout each capture mission, GPS/IMU data will be logged on the aircraft. The GPS data will be recorded at a minimum rate of 2Hz, and the IMU data will be logged at a minimum rate of 200Hz. Concurrently, multiple GPS reference stations will be logging data on the ground. These reference stations are typically part of the CAN-NET network. EagleView may set up and run a base station, as needed. The imagery will be nominally captured with a PDOP value of less than 8.0 and within 60 kilometers of an operating GPS reference station. EagleView limits its sensor to 6° of pitch and yaw. This limit can be used due to the narrow field of view of EagleView's cameras which, by design, limit the off-nadir distance of features at the edge of the frame.

Imagery will be captured at 24 bits per band with a planned forward overlap of 60% and a sidelap of 30%. Image collection will extend beyond the project area boundaries to produce full ortho imagery coverage. All ortho Images may provide an accurate top-down view that is rectified to align to a map grid and can be integrated into a GIS database. EagleView's systems use onboard IMU to control crab. These systems report errors above 15°. All errors are reviewed, and images may be rejected per scope of work and quality thresholds. Any area that needs to be addressed will be identified during our extensive coverage verification review. Areas will be re-flown accordingly.

Touch-up Flight

There are several levels of checks and balances at EagleView where the imagery is checked for anomalies and accepted or rejected for re-fly. The Geomatics team is the first level, scrutinizing the imagery immediately upon receipt from the pilot. While the planes are still in the area, they ascertain whether any re-flies are necessary and, if so, the re-flies are expedited back to EagleView's flight planning team for dispatch to the pilots. Initial imagery can be shared with the client to gain their acceptance of quality and accuracy.

Sun Angle

EagleView may capture images when there are clouds above the altitude of the aircraft. In fact, the best lighting for the EagleView images is when there is a light, high cloud cover, as this provides the most consistent Lambertian lighting coverage. The preferred capture windows are when the leaf canopies are off, and the ground is not obscured by snow or ice.

Step 3: Post-Processing of Imagery

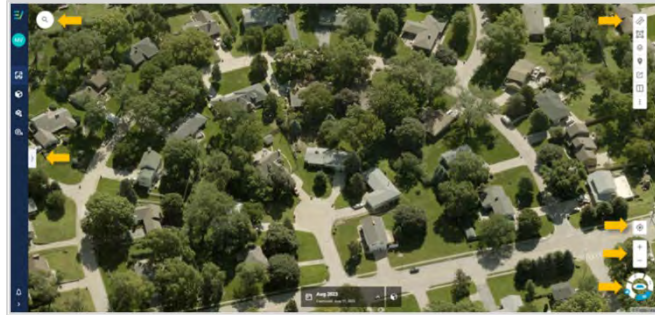
EagleView's Geomatics team will post-process the imagery, turning the raw data into georeferenced imagery and ensuring image quality.

Step 1: Upon receipt, the Geomatics team will copy data from the hard drive to the server, which will automatically back up the data. Once copy is complete, EagleView's software will develop the raw images, applying color, contrast, and sharpness to each image frame.

Step 2: Using Applanix POSPac software, the Geomatics team will refine positional data by combining Inertial Measurement Unit (IMU) data with the GPS receiver's raw observables. These include pseudorange and phase, which provide the distance between the satellite and the receiver. This process will produce the Smoothed Best Estimate of Trajectory (SBET) for the flight. POSPac software, the Geomatics team will refine positional data by combining Inertial Measurement Unit (IMU) data with the GPS receiver's raw observables. These include pseudorange and phase, which provide the distance

between the satellite and the receiver. This process will produce the Smoothed Best Estimate of Trajectory (SBET) for the flight.

Step 3: The Geomatics team will use EagleView's proprietary software to apply the trajectory data (SBET) to the imagery based on the individual time stamps associated with each image frame. Once this process is complete, images will be georeferenced (or tied to specific geographic coordinates). The location (X, Y, Z) and orientation (Roll, Pitch, Yaw) values derived from the SBET and assigned to each frame will serve as the initial exterior orientation (EO) values for the aerial triangulation phase of processing, if applicable to the project.



EagleView's Geomatics team will post-process imagery, turning the raw data into georeferenced imagery. With georeferenced imagery, users will have the power to perform measurements on imagery and view the location of individual pixels.

Step 4: The Geomatics team will review the quality of the images and inspect for potential issues related to color, camera defects, environmental conditions, capture platform anomalies, cloud cover, shadows, glare, and motion blur. If images do not meet quality standards, the team will mark imagery for recapture. EagleView reviews imagery while aircraft are still in the project area for efficient deployment should a re-fly be necessary.

Step 5: The Geomatics team will perform a verification process to determine image-to-image and camera-to-camera accuracy. Using EagleView's proprietary software, the team will compare common points in different images. The team will check calculated coordinates for a point in one image against the coordinates for the same point in other images that cover the same location. We will investigate inconsistencies. Imagery will be reprocessed if the team identifies points that do not meet EagleView's quality standards.

Step 6: We will orthorectify orthophotos to remove horizontal displacement caused by terrain height variation, earth curvature, and camera-based distortions. The Geomatics team will incorporate the best available digital elevation model (DEM), geo-referenced exterior orientation values, and calibrated camera model parameters into imagery during orthorectification. Images will be rotated to point true north. The Geomatics team will use EagleView's proprietary software to ensure image pixels are the same dimension. Once orthorectified, images will have a consistent scale, allowing for accurate measurements of distance and direction.

Preparing Deliverables

We will produce deliverables once all imagery from the area of interest has been post-processed and orthorectified. We use our proprietary software to mosaic ortho imagery and produce ortho sector tiles. Prior to production of area-wide mosaics, the Geomatics team will review tiles to verify proper coverage and identify any image issues.

We will copy all ortho data to a hard drive. A member of the Quality Control team will review all deliverables. We then upload final imagery to EagleView Cloud, and the Customer Technical Support team ships a hard drive of imagery to you.

Quality Control

EagleView has relied on strict quality and project management controls to ensure projects meet customer specifications and are delivered on time and within budget. With these controls in place, we continue to grow our business and secure repeat customers. Our imagery library has grown from 229 million images in 2013 to more than 3 billion images today.

Key quality assurance steps include, but are not limited to, the following:

Quality Checkpoint	Description
<i>System Calibration</i>	Sensors are calibrated for lens distortion, system geometry, color response, and accurate bore sighting.
<i>Flight Altitude</i>	With a digital elevation model, flight plans are tiered at different altitudes to allow for complete image overlaps and consistent resolution and ensure safety.
<i>Image Acquisition</i>	The flight management system performs several real-time quality checks during capture operations. The system immediately flags images captured when the aircraft experiences excessive roll, pitch, or yaw, and immediately recaptures frames with significant glare from solar reflection.
<i>Receiving</i>	Upon receipt of captured imagery, Geomatics inspects images algorithmically and physically for color, camera defects, environmental conditions, capture platform anomalies, cloud cover, shadows, glint, and motion blur. If images do not meet quality standards, the team marks imagery for recapture.
<i>Re-fly</i>	EagleView ships drives containing imagery and data to its processing facility while aircraft are still in the area. If a re-fly is needed, EagleView can dispatch pilots quickly.
<i>GPS Post-Processing</i>	Differential GPS and IMU post-processing are handled using Applanix POSPac suite of software. The resulting solution is held to strict accuracy standards.
<i>Digital Elevation Model</i>	EagleView compiles elevation data from multiple sources, including customer-provided data, EagleView LiDAR data, and best available public domain data. EagleView reviews the quality of the elevation data before orthorectification. When areas of poor quality or change are identified, EagleView derives data using internal methods to update and yield a more accurate elevation model.
<i>Metadata</i>	Each set of orthophoto deliverables includes XML metadata containing information about the processing, quality, and accuracy. The finalized metadata files are validated for compliance with the Federal Geographic Data Committee (FGDC) Content Standard for Digital Geospatial Metadata (CSDGM), Version. 2 (FGDC-STD-001-1998).

Deliverables

EagleView performs a final QA/QC check on deliverables to ensure they meet the customer's desired specifications.

6. Web-Based Portal

- *Vendor-hosted portal for image access and dissemination.*
- *Provide WMTS URLs for internal and third-party use.*
- *Support GIS layer uploads or REST service integration.*

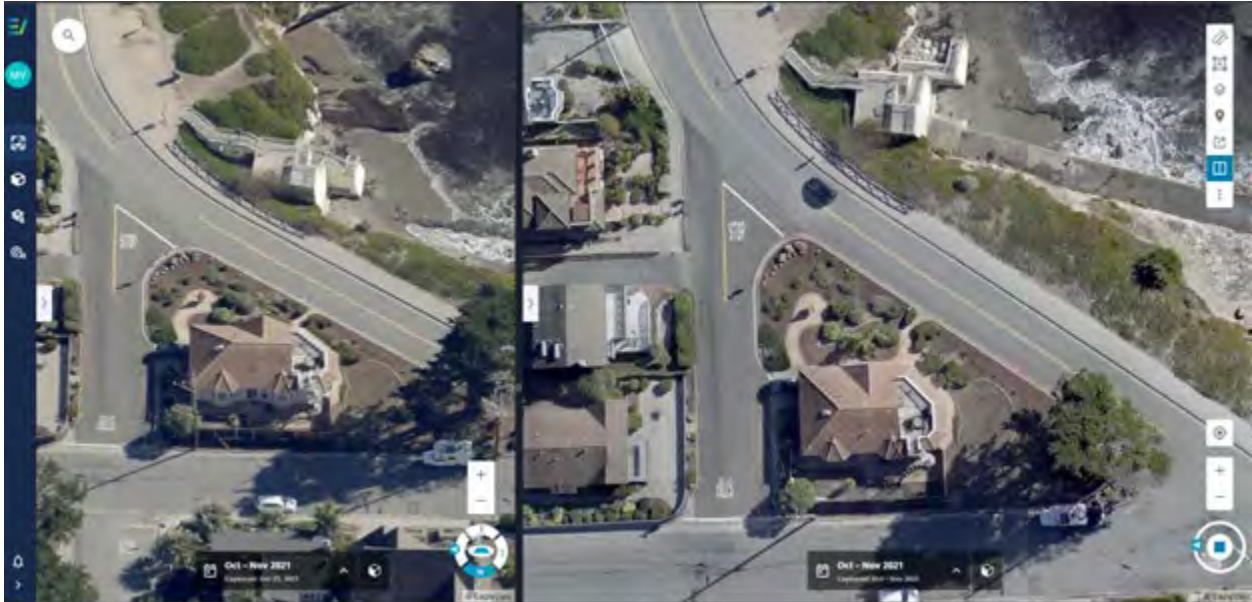
Web-Based Portal Overview

EagleView Cloud Explorer provides easy access to EagleView imagery in an intuitive, easy-to-use web interface that allows users to efficiently view and analyze imagery.

Toolbar buttons provide fast access to application features and users can quickly locate any point of interest by panning, zooming, or with a quick search. A single click on the compass switches users to a view from an entirely different direction. Once users find their target location, they can measure, annotate, analyze and export imagery and data as a file.

EagleView Cloud Explorer is a dynamic and comprehensive browser-based solution, designed specifically for utilizing EagleView's oblique aerial imagery. Users can view, measure, and analyze aerial imagery with precision. Thousands of government customers use EagleView imagery to make informed, accurate decisions every day, and EagleView Cloud Explorer is the primary tool supporting these users.

With no download required, EagleView Cloud Explorer is supported in the most recent versions of Mozilla Firefox, Safari, Microsoft Edge, and Google Chrome and is built for mobile optimization, providing a wide range of access options for users. For navigation, toolbar buttons provide fast access to application features and users can quickly locate a point of interest by panning or zooming your maps and images or by entering an address to search for. A single click lets users view a location from a different direction.



Dynamic Features. *EagleView Cloud Explorer offers a dynamic list of features—such as Dual Pane view—designed to help users make fast, informed decisions with greater efficiency.*

EagleView Cloud Explorer includes a wide range of features for Collin CAD users, including:

View Aerial Imagery

- View overhead ortho and side-facing oblique images from a desired location.
- Access available historical imagery by selecting any previous flights on our timeline.
- Pan the current image to view the surrounding area or view a location from different directions with a single click. View more images captured from the same direction within our expansive thumbnail gallery.
- Zoom in or out to show a world view, a particular country, city, community, or neighborhood. Oblique images show neighborhoods and communities in great detail.
- Display images in two panes simultaneously (Dual Pane mode) and choose when to synchronize images in the two panes.
- Review Early Access imagery only a few days after image capture.

Search for Images and GIS Data

- Search unique criteria like address, landmark name, city, or country or search by geographic coordinates (latitude, longitude).
- Search for text and data within GIS layers.

Analyze Images with Measurement Tools

- Measure distance, height, area, elevation, slope, bearing and more.
- Save and edit measurements (for example: move points, add points, move an entire measurement, or change units of measure).

Annotate Images

- Annotate images with text, lines, circles, polygons, or markers (icons).
- Select annotation properties before or after creation.

Overlay GIS Layers

- Overlay images with available GIS data, including layers published through Esri REST map and feature services.
- Turn layers on or off (including contour lines and street names).
- Group, reorder, and rename layers in the list for easier access.
- Customize the density and colors of elevation contour lines.
- Perform a spatial search using the identify tool to highlight areas of important GIS data.

Export Images

- Export the image shown in the image pane as a PDF or as a graphics file (in JPEG, PNG formats).

Set User Preferences

- Set application preferences on a per-user basis.

The EagleView Cloud imagery and software service, which features clear imagery, precise measurements, and easy-to-use analysis tools, helps government organizations make informed and timely decisions. With EagleView Cloud, Collin CAD can choose a customized imagery delivery cadence and will be able to access our detailed 1" GSD oblique imagery. It provides:

High-Resolution Imagery

View properties with clear, natural-looking oblique and orthogonal images. Options range from 6" GSD to 1" GSD.



Viewing and Measurement Tools

User-friendly tools to measure distance, height and area on images. Extensive integrations within CAMA, 911, CAD, ESRI ArcGIS Pro and Experience Builder, and other common platforms reduce the need for multiple tools.

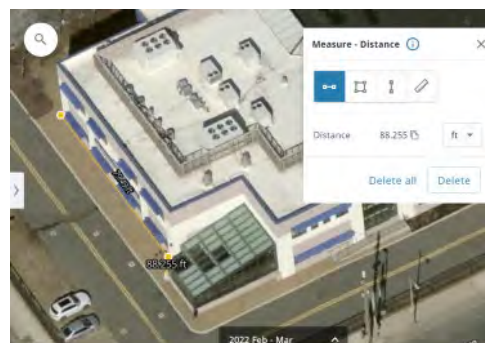


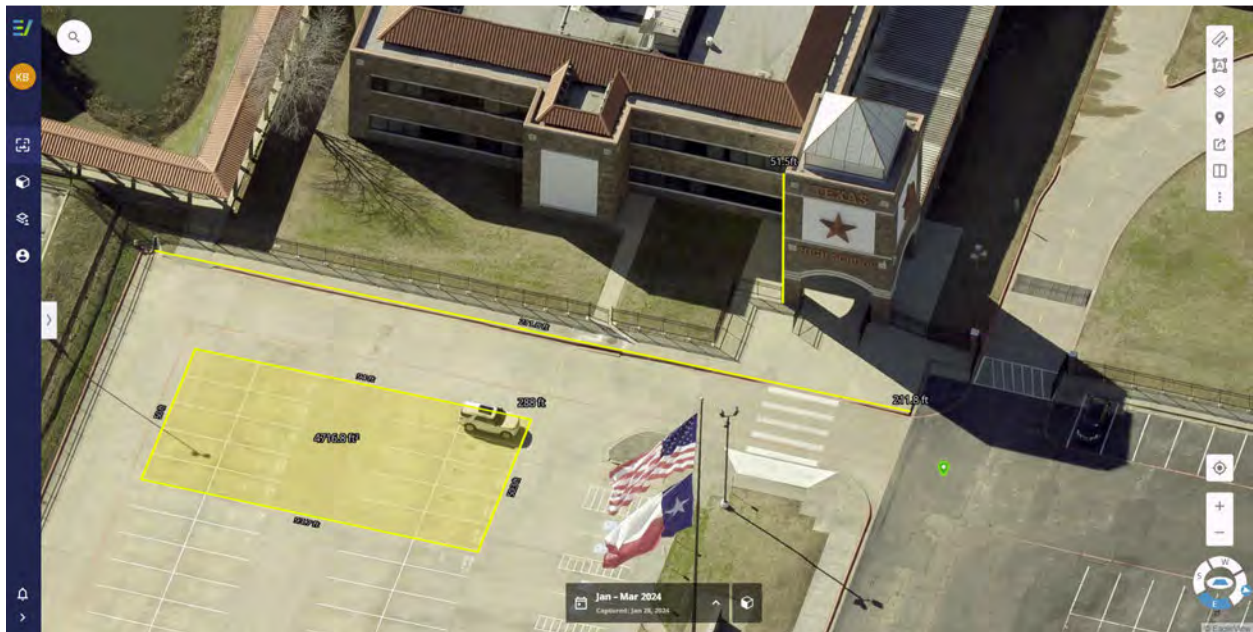
Image Archives

View historical imagery, including disaster response. Users can access up to three years of historical oblique imagery.



EagleView Cloud also supports flexible access with Single Sign-On (SSO) capabilities, increased security measures, and unlimited concurrent users, making it beneficial for various government departments. Individual agency benefits include:

- **GIS:** View imagery simultaneously from multiple angles accurately overlaid with GIS data
- **Public Safety:** Improve response times and prepare to address emergencies and natural disasters
- **Public Works:** Reduce field visits by remotely inspecting and analyzing infrastructure
- **Tax Assessment:** Quickly and accurately perform property assessments



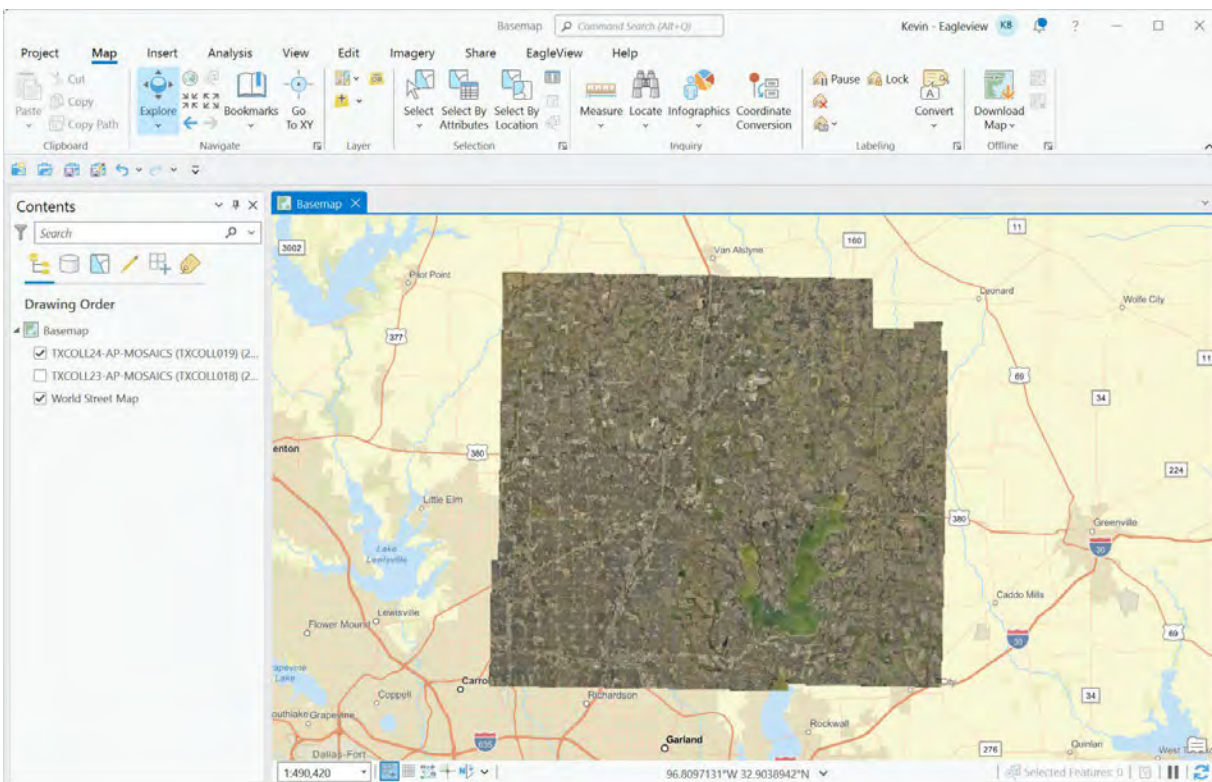
Measuring what Matters. With EagleView Cloud Explorer, users can measure a variety of spatial attributes such as distance, area, and height. Once a measurement is taken, it can be saved and easily edited—whether by adding or moving points, shifting the entire measurement, or changing the units of measure to suit specific needs.

Web Mapping and Web Map Tile Services (WMTS)

EagleView's legacy CONNECT Image Service and new EagleView Cloud WMTS will allow Collin CAD to connect to a service to access orthomosaics available within the Collin CAD account.

Our WMTS conforms with the OGC version 1.0.0 specification. These web services can be accessed in most mainstream GIS or mapping applications that are capable of consuming orthomosaics compliant with OGC WMS/WMTS specifications for use internally and on public-facing websites. Example applications include, but are not limited to, Esri ArcGIS Pro, ArcGIS Server and ArcGIS Online, Autodesk, and QGIS.

If other third-party software packages can use WMS or WMTS that conform with the OGC specification, they will also be compatible. The projection for the map service is WGS84.



Esri-compatible WMS and WMTS. Our Web Map Tile Service integrates with Esri's ArcGIS Pro (as seen above), ArcGIS Server and ArcGIS Online as well as other common GIS applications.

7. Delivery

- *Contractor responsible for product distribution.*
- *Deliverables to be provided to District via separate hard drives.*
- *Final delivery of all data shall be made to the District by March 20, 2026.*
- *Formats: ECW, JPG, or MrSID.*

EagleView will handle all aspects of delivery to Collin CAD, including on-line delivery for use in the above-mentioned platforms, as well as physical delivery of the ortho products on hard drives shipped directly to Collin CAD.

The tables below further details product distribution and delivery formats for our 1" Ortho and Oblique and 2" Ortho (optional add-on). Our intention is that all delivery of data will be made to the district by March 20, 2026 as indicated in our project timeline. If circumstances beyond EagleView's control impact this timeline, EagleView will promptly communicate with Collin CAD to explain the circumstances and take necessary corrective actions to provide the best possible outcome.

Product: 1" Ortho and Oblique Capture and Delivery Specifications

<i>1" Ortho Frame Imagery</i>	Nominal .9" GSD Ortho Imagery Orthomosaic Resolution: .9" (Best Available Provided)
<i>1" Oblique Imagery</i>	Nominal 1.2" GSD oblique imagery
<i>1" Ortho Positional Accuracy</i>	1" GSD Ortho Imagery at 15cm $RMSE_{x,y}$
<i>Orthomosaic Content Specifications (AOI)</i>	<ul style="list-style-type: none"> Fully automated photogrammetric orthomosaic. Imagery may contain seamlines Project-wide color and contrast balancing
<i>Metadata and Reporting</i>	Metadata: Metadata generated that meets FGDC Standards, upon request Shapefile(s) with discrete deliverable boundaries and directional metadata
<i>Orthomosaic Deliverable Format (Online)</i>	Access Methods: <ul style="list-style-type: none"> Available via web-based viewer (Cloud Explorer) Also available via WMS/WMTS (Image Service)
<i>Orthomosaic Deliverable Format (Physical)</i>	Projection/Coordinate System: NAD83 Central Zone Datum: NAVD88 File Format: <ul style="list-style-type: none"> Mosaic Tiles <ul style="list-style-type: none"> Available in JPEG, GeoTiff, JPEG2000, PNG, ECW, MrSID (All Versions) with world file Includes separate Pictometry Map Image (PMI) trailer file Project-Wide Mosaic <ul style="list-style-type: none"> Available in ECW, MrSID (All versions) format

<i>Oblique Imagery Deliverable Format</i>	Access method: Available via web-based viewer (Cloud Explorer)
<i>Delivery Timeline</i>	Best efforts to make ortho imagery available online and/or ready for physical delivery within 30 days of capture completion. See Project Timeline for more information.
Product: 2" Ortho Capture and Delivery Specifications (Optional add-on)	
Product	Nominal 2"
<i>Ortho Frame Imagery</i>	<ul style="list-style-type: none"> Nominal 2" GSD ortho imagery
<i>Metadata and Reporting</i>	Metadata: <ul style="list-style-type: none"> Metadata generated that meets FGDC Standards upon request Shapefile(s) with discrete deliverable boundaries and directional metadata
<i>Orthomosaic Deliverable Format (Online)</i>	Resolution: nominal 2" GSD (Best Available Provided) Access Methods: <ul style="list-style-type: none"> Available via web-based viewer (Cloud Explorer) – for three years at no cost. Also available via WMS/WMTS (Image Service) – for three years at no cost.
<i>Orthomosaic Deliverable Format (Physical)</i>	Resolution: 2" GSD (Best Available Provided) Projection/Coordinate System: NAD83 Central Zone Datum: NAVD88 File Format: <ul style="list-style-type: none"> Mosaic Tiles <ul style="list-style-type: none"> Available in JPEG, GeoTiff, JPEG2000, PNG, ECW, MrSID (All Versions) with world file Includes separate Pictometry Map Image (PMI) trailer file Project-Wide Mosaic <ul style="list-style-type: none"> Available in ECW, MrSID (All versions) format

8. Disaster Re-Flight

- *Describe disaster coverage types and maximum area.*
- *Specify availability period for disaster services.*

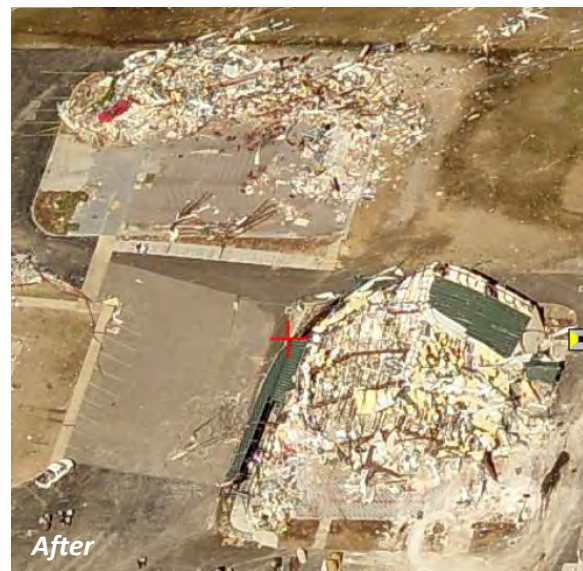
Disaster Response Program (RapidAccess)

Collin CAD will be eligible for our Disaster Response Program (DRP) described below under the terms of the pursuant agreement. Customer must be in good standing with EagleView to maintain eligibility for DRP, and the coverage period will correspond to the term of the agreement. Subject to EagleView resources availability.

A. Disaster Re-Flight Coverage Imagery at No Additional Charge – EagleView will, upon request of Customer and at no additional charge, provide standard quality imagery of up to 200 miles of affected areas (as determined by EagleView) upon the occurrence of any of the following events during any period Customer is eligible for the DRP:

- **Hurricane:** areas affected by hurricanes of Category II and higher
- **Tornado:** areas affected by tornadoes rated EF4 and higher
- **Wildfires:** areas affected by wildfires
- **Terrorist:** areas affected by damage from terrorist attack
- **Earthquake:** areas affected by damage to critical infrastructure resulting from earthquakes measured at 6.0 or higher on the Richter scale

B. Discounted Rate – Coverage for areas affected by the events set forth above exceeding 200 square miles will be, subject to EagleView resource availability, offered to Collin CAD at the then current DRP rates. Also, coverage for areas affected by hurricanes below Category II, tornadoes below EF4 or earthquakes rated below 6.0 on the Richter scale, flooding meeting or exceeding the major flood stage, wildfires impacting population centers, or other disasters as agreed to between the customer and EagleView will be, subject to EagleView resource availability, offered to Customer at the then current DRP rates.



9. Integrations

- *Must be viewable in ESRI ArcGIS 10.x and ArcGIS Pro.*
- *Must be compatible with Harris Govern PACS CAMA system (Matix GIS).*

Esri Integration

Our integration options will benefit Collin CAD users who regularly work inside other mapping platforms such as the Esri® ArcGIS® Solutions Suite.

EagleView is a Gold Partner of good standing in the Esri Partner Network. EagleView orthophotography is fully compatible with Esri applications, and EagleView produces several integrations with Esri products to accommodate oblique imagery and tools. EagleView offers integration solutions for:

- ArcGIS Desktop
- ArcGIS Server
- ArcGIS Pro
- ArcGIS Web AppBuilder
- ArcGIS Experience Builder

These integrations support location synchronization with the Esri map window to provide oblique imagery viewing, navigation and analysis, as well as GIS vector layer overlays.

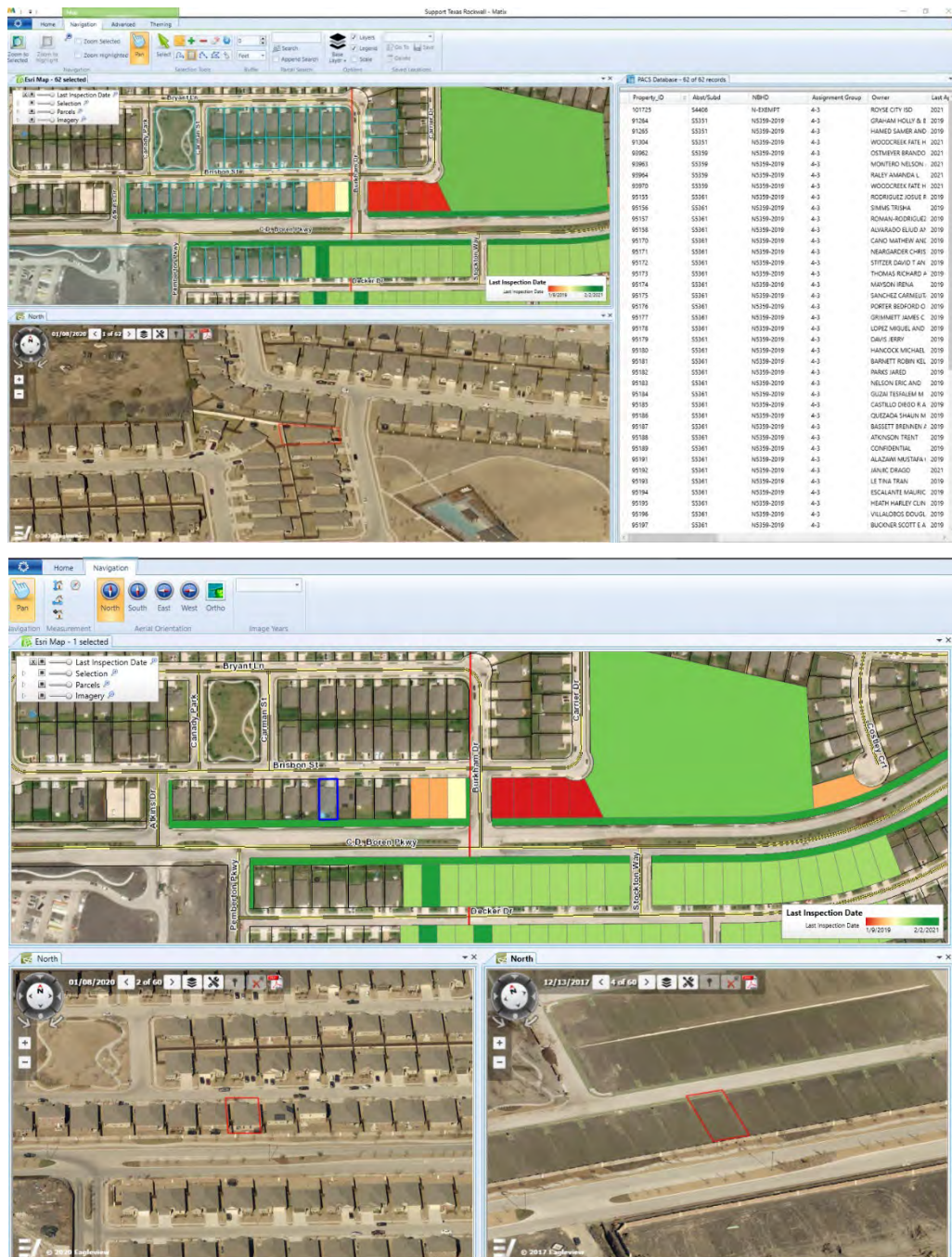


Easily Integrate and Interpret Data. Users can review and analyze change-detection data against the backdrop of high-resolution aerial imagery in existing mapping platforms, including ESRI ArcMap (shown above).

Harris Govern - PACS CAMA & Matix GIS

Harris Govern provides integrated assessment and tax collection software suites to state and local governments, with a complete line of services and exceptional client support. Their CAMA solution

integrates viewing disparate data sources together in a user-friendly system that is compliant with EagleView. A letter on behalf of Harris Govern furthering detailing their support for EagleView's unique oblique imagery integration with PACS and Matix may be found in the attachments section of this proposal on Page 54.



Oblique Imagery Integration. EagleView imagery integrates with both Harris Govern's PACS GIS Viewer and Matix GIS system to serve the needs of Collin CAD.

10. Sub-Organization Image and Service Sharing

- *Detail included municipalities/entities.*
- *Clarify what services can be shared.*

Under EagleView licensing, Collin CAD can share the oblique imagery, software, and access to the online services with any Collin CAD agency, political unit, or subdivision (municipality) located totally or substantially within Collin County's boundaries ("Authorized Subdivisions").

EagleView offers dual ownership of the orthogonal imagery; and a perpetual, non-exclusive, non-transferable limited license for use of the oblique imagery and software; and a non-exclusive, non-transferable limited right license to access the online services for the duration of the subscription purchased.

Collin CAD work products that incorporate jpeg images is allowable under license so long as all copyright notices or other notices contained in the imagery is not removed or altered and not for commercial resale or commercial redistribution. Collin CAD may also provide hard copies or jpeg copies of images of individual properties or structures (but not bulk orders of multiple properties or structures) to individual members of the public requesting them.

Collin CAD is responsible for compliance by each Authorized Subdivision (as defined above) therefore the Authorized Subdivisions shall have the same access levels as Collin CAD.

11. Other Technical Considerations

- *Describe any other critical technical details.*

Aerial Equipment & Procedures

To manage capacity and ensure timely delivery to customers across the U.S., EagleView relies on our comprehensive flight planning procedures and robust fleet for efficient capture and delivery.

EagleView's Fleet

We maintain a fleet of 100+ aircraft, including Cessna 172 and 182 single-engine and Piper Aztec twin-engine airplanes, strategically based across the United States. This fleet allows us to logistically capture imagery in different regions simultaneously.

We train all pilots on our technology, policies, and procedures. We require flight vendors and pilots to maintain and operate aircraft in strict accordance with the regulations of the Federal Aviation Administration (FAA) and the Civil Aeronautics Board and the Civil Aviation Directorate (TCCA).



Aircraft Resources Available for Efficient Captures.
EagleView will fly a Cessna 172 single-engine aircraft (below), or Piper Aztec twin-engine aircraft (above) based on project specifications.

Pilots follow strict procedures for automatic detection and rejection of any capture that goes beyond the parameters set forth for the project. Pilots have the authority to vector off flight lines as required by current flight conditions, air traffic, and air traffic control. In these instances, our software automatically records where the pilot suspended the flight line, allowing the pilot to later resume collection and obtain complete coverage. Depending on the needs of the customer and capture conditions, pilots can resume the flight where it was suspended re-fly the flight line where the interruption occurred, or re-fly the sortie.



EagleView will collaborate with Collin CAD to develop a custom flight plan that:

- Covers the area of interest (AOI) at the requested imagery resolution (GSD)
- Follows airspace rules
- Ensures safety

Flight plans consist of several flight lines, which tell pilots where to navigate, and each flight line contains waypoints that indicate when specific cameras will fire.

Optional Products & Services

For Collin CAD's reference, the following are several EagleView additional product offerings that may be of interest. Further details, product demonstrations, and pricing is available upon request.

ChangeFinder

EagleView's ChangeFinder consists of a change-detection service coupled with the intuitive change-detection software solution, CONNECTAssessment. These allow users to compare structure and property changes from two different sets of imagery. With these tools, GIS professionals, real property tax agencies, planning departments, and economic development users can reduce field visits with desktop analysis, saving time, travel expenses, and labor costs.

ChangeFinder detects additions to existing structures, demolitions, new construction, or other changes to property features. The process involves comparing existing building outline data with latest imagery to detect changes. A "candidate file" in file geodatabase format, consisting of GIS polygon building outlines, is provided where possible changes, new buildings, and demolitions are categorized into separate shapefiles. These candidate shapefiles are then loaded into EagleView's Change Analysis Viewer, or, if contracted, into CONNECTAssessment, giving the ability to quickly analyze the new and old imagery in a side-by-side view. The candidate files can also be viewed in any GIS application that reads file geodatabase or shapefile formats.



ChangeFinder. Automatically detect property changes from year-to-year, making property assessments easier and faster.

EagleView's historical imagery can be accessed via our Cloud Explorer platform – including Cloud Explorer and Cloud Mobile, as well as our Esri add-ons for access within ArcGIS. Further, our solutions provide the ability to view historical and current imagery side by side for easy comparison.

Sketch Inspect

For assessors, challenges to their valuation schedules come from both taxing entities and homeowners. With Sketch Inspect, assessors will shave significant time from the task of maintaining sketch data, while providing accurate and unbiased real property estimates. While other programs can find changes between two sets of aerial imagery, EagleView's Sketch Inspect is the *only one on the market* to find structures without a previous sketch, find historical errors in property sketches, and analyze non-sketched appraised items.

Assessors can use their existing CAMA to provide a smooth workflow. If the CAMA is not currently integrated with Sketch Inspect, deliverable times will adjust but remain within the contracted timeframe. Sketch Inspect provides accurate sketches to maximize tax revenue for the jurisdiction while remaining fair and equitable to property owners. Sketch Inspect also improves assessment workflows by:

- Reducing the need for field visits
- Providing a desktop workflow
- Highlighting the biggest discrepancies to tackle first
- Showing how to update sketches in the CAMA to reflect what is on the ground

EagleView's Sketch Inspect can be used by assessors to verify and maintain sketch data for taxing municipalities. Through the automated process, imagery-derived building outlines are compared with existing CAMA sketches, highlighting properties with any discrepancy. *With Sketch Inspect, users can leverage a single tool to ensure the accuracy of property sketches, track building dimensions for valuation purposes, and review, validate, and update data.*



View and manage sketches, find and review inaccuracies, and identify structures that don't have sketches in one comprehensive platform.

Further benefits to Sketch Inspect include:

- **Saving time:** Reduce the need for field visits and support efficiency by identifying the biggest discrepancies that should be addressed first.
- **Convenience:** Sketch Inspect offers the ability to manage the process entirely in a single desktop workflow.
- **Ease of use:** Learn how to update sketches in the CAMA to reflect what is on the ground.
- **Future analytics:** Build on iterations in the initial delivery and keep track through future assessments.

Data Layers (AI-derived)

EagleView Data Layers serve as an information superstructure, working in tandem with EagleView imagery to support data-driven decision-making processes.



Informed analysis and decision making. *EagleView Data: Structure uses machine learning to provide new insights for government agencies.*

Our “Structures” data layer allows government users across agencies to superimpose data sets as layers over high-resolution aerial imagery for improved analysis and decision making. Through EagleView’s machine learning capabilities, Structures provides greater operational efficiency through data delivery that is faster and more frequent than manual processes.

Structures uses machine learning to generate vectorized data which contains geometries and attributes for:

- Building Outlines (Roofs & Decks as a single outline)
- Roof Outlines
- Deck Outlines
- Pool Outlines

Structures supports a wide range of government agencies and processes:

Property Assessment	Planning and Development	Disaster Management
Accurately evaluate property values by overlaying property boundaries on aerial imagery and gain valuable context for tracking changes over time, accessing updated property information, and help ensure fair property assessments.	Gain crucial insights by superimposing building outline, geometries, and attributes onto aerial imagery to make informed decisions regarding suitable areas for development, infrastructure needs, and areas of preservation.	Assess and plan responses effectively by overlaying data layers on recent or historical aerial imagery to identify vulnerable areas or outlines of buildings that may have been destroyed.

Structures are available through an offline delivery and as a feature of EagleView Cloud Explorer. It can also be licensed for public-facing websites and integrated into third-party products.

12. Technical Support

- *Provide onsite, phone, or web-based support for contract duration.*

Technical Support

Customer Support – EagleView shall provide customer support, as needed during the term of the agreement. Hours of support are 8:30 a.m. to 8:30 p.m. EST Monday through Friday at 1-855-337-1526 or customersupport@eagleview.com.

Scope and Level of Support

EagleView provides multi-tiered support to ensure continuous, reliable service:

Availability – 24/7 monitoring and support for critical issues, with standard business hours (8:30 AM–8:30 PM ET) for routine requests.

Channels – Support available via phone, email, and customer portal, with a dedicated account manager for enterprise customers.

Support Tiers –

- o Tier 1 – Basic troubleshooting and known issues
- o Tier 2 – Technical specialists for advanced support
- o Tier 3 – Engineering-level problem resolution

Service Level Agreement (SLA)

Uptime Target – 99.9% average system availability (excluding planned maintenance).

Response & Resolution Times – Defined by issue priority level.

Accuracy & Delivery Commitments – For applicable services, including premium accuracy guarantees.

Remediation SLAs – Specific timelines for addressing vulnerabilities based on severity.

Full SLA Access – Complete SLA documentation, including detailed response and resolution targets, is available upon request or as part of the formal contract.

Though EagleView does not have a formal SLA or maintenance policy, EagleView releases features, fixes, and updates on a continuous basis. Customer will be notified of major releases or downtime via one or both methods of in-app notifications and notices on our status page (<https://eagleview.statushub.io/>).

Data Safeguards

EagleView maintains redundant online data and application delivery systems to prevent loss of access due to equipment or connectivity failures. This redundancy is tested periodically, and EagleView is constantly focused on improved redundancy solutions. All online solutions are equipped to provide greater than 99.5% uptime performance for all online customers.

Our systems are hosted by Amazon Web Services (AWS) and utilize redundant containers and databases running in geographically separate data centers as well as geographically separate image storage.

EagleView software is hosted in a secure data center supplied by Amazon Web Services (AWS). AWS has hosting locations across the United States. EagleView and AWS take exceptional measures to safeguard any data and make sure it is not stored or accessed by unauthorized personnel. Data is stored in a secure database, and each database has individual accounts and passwords to restrict access to the application servers associated with each client. Further, only the imagery EagleView captures for the Collin CAD will be stored and processed, but no Collin CAD data (personal or otherwise) is received, processed or stored.

EagleView follows industry-standard data recovery procedures. We can recover data up to the previous incremental backup. The current daily backup and the log backup are stored locally. Thirty days of backups, including the current backups, are stored at our alternate co-location server facility. Old backups are archived based on an agreed timeframe. EagleView/AWS also has replication established and uses it for backup/disaster recovery.

AWS performs a regular disaster recovery testing process, and customers are informed about the testing. Results can be shared upon request.

With Cloud Explorer, Collin CAD users can share imagery, location details, GIS layers, and workspaces across various user and departments. Collin CAD can assign administrative users who can create separate departments and user logins within Cloud Explorer. Imagery and GIS layers can be shared throughout the organization. The assigned EagleView Regional Technical Manager, Customer Support representative, and Regional Technical Trainer can assist with setup, if needed.

13. Training

- *Explain training offerings (on-site and online).*
- *Include estimated man-hours for end users and technical staff.*

Training

EagleView offers comprehensive and detailed training, including on-location training which is unmatched in the industry. Users will learn best practices and how to use and manage our imagery and software within existing workflows. Our training program has increased the use of imagery and software throughout our customers' organizations.

EagleView's practical training is designed to show Collin CAD users how their EagleView deliverables can significantly enhance the ease with which they do their jobs, while increasing the results they are charged with achieving. EagleView has found that its user-focused, onsite training increases the use of EagleView's imagery, software, and products exponentially throughout the customer's organization. Full, electronic documentation is included for the end-user and advanced training sessions including technical documentation.

The complete training will be structured to Collin CAD's needs and included as part of EagleView's imagery contract at no additional cost. Below are examples of the standard training offerings that are available, and our Technical Training team will work with you to customize a training plan that best fits your needs.

Administrator Training – One 2-3-hour session, via *Zoom*

This training is designed to teach the customers GIS and IT support staffs how to support EagleView's Web-Based Cloud Explorer environment.

End User Orientation Training – Up to four 3-hour sessions with 25 people per session.

These sessions (at a Collin CAD site or web-based, as appropriate) will educate the end user to the myriads of possibilities now open to them through EagleView's images and their own GIS data.

Depending on the users' needs, EagleView's trainers can train on either web based or desktop solutions.

Advanced User Training (Hands-on) – One 3-hour session for one group with up to 25 people

This training (onsite or web-based) provides hands-on interaction with EagleView's software to end users chosen by Collin CAD enabling them to learn first-hand the functions covered in the Orientation Session.

Web-based Training – Collin CAD employees can also register at learning.eagleview.com for additional, instructor-led, web-based training at any time for no additional cost.

14. Experience

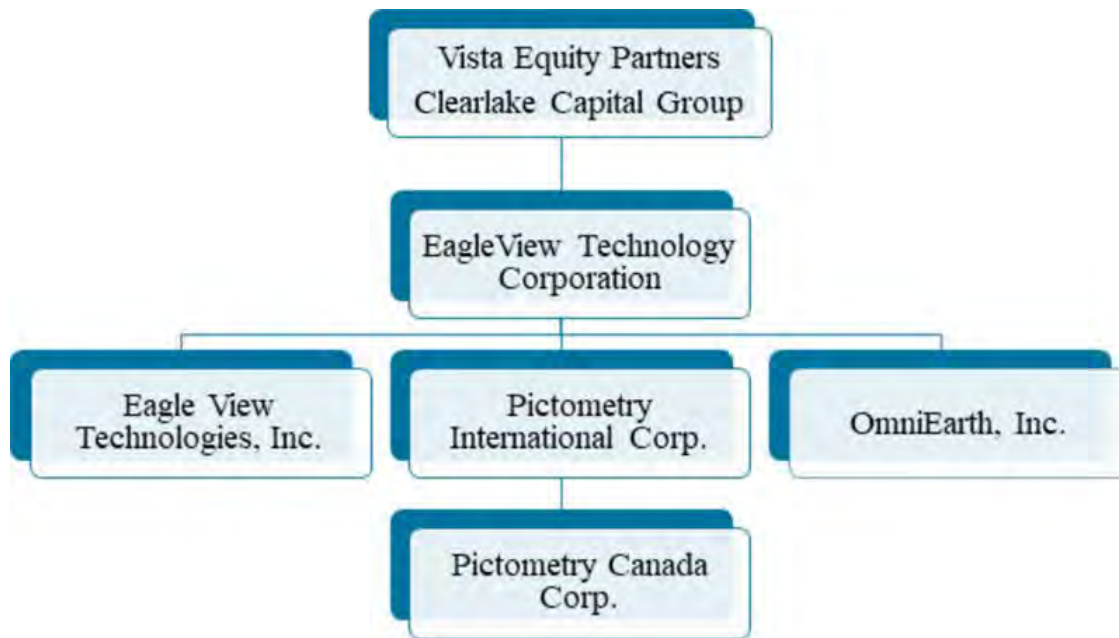
- *Provide up to 3 similar project descriptions (preferably in Texas).*
- *Include client contact info.*
- *Describe company history, revenues, and corporate profile.*

Project Descriptions / References

Descriptions of three Texas based projects including client contact information may be found in Attachment A – Bidder References.

Company Overview

Pictometry International Corp. pioneered the acquisition of georeferenced, oblique aerial imagery. Pictometry's patented camera system, which captures oblique and orthogonal imagery simultaneously, is the only one to receive U.S. Geological Survey certification. In January 2013, Pictometry International Corp. merged with Eagle View Technologies, Inc., a provider of aerial roof measurements and property data reports.



At EagleView, we have become the unparalleled providers of aerial data and measurement and analytical tools through proprietary software and partner integrations. EagleView has extensive experience delivering aerial imagery and data and software solutions since 2001 to government customers, including more than 2,000 U.S. counties and municipalities and approximately 80 Canadian cities and provinces. EagleView has also captured ortho and oblique imagery in all 50 states, including 90% of urbanized area census tracts and the top 133 U.S. cities. EagleView has been a trusted partner working with Collin CAD since 2003.

EagleView has earned several awards and accolades during this time, including:

- Pictometry named a Top Workplace by the Rochester *Democrat and Chronicle*
- EagleView named one of best companies to work for in *Seattle Business Magazine*
- Ranked #62 on the Deloitte Technology Fast500™ list
- Industry Innovation Award from the MRCA for EagleView mobile app
- Excellence in Global Strategy Award from the International Business Council of Greater Rochester

EagleView is not a publicly traded entity, and our financial results are not published or disclosed to the public. We can share detailed financial information later in the procurement process if needed, following the execution of a Non-Disclosure Agreement (NDA).

Project Team

The Project Manager (PM) for the Collin CAD project, Toni Latimer, will oversee a team of internal project planners and production managers. The PM will estimate a schedule of milestones, monitor progress against them, and act, as necessary, to keep projects on time. All teams involved will track project progress, from contract and planning through delivery, within our internal Customer Relationship Management (CRM) system.

In addition to Project Management, the in-house teams integral to the capture and production of your aerial imagery include Flight Operations, Geomatics, Professional Processes and Survey Operations, Photogrammetry, Customer Technical Services and Training, and Regional Technical and District managers. We describe these team members in greater detail below.

Jonathan Garner, Sr. Program Manager: Manages entire program from initiation to delivery. Prior to transitioning into his current role, he served as a Geospatial Image Processor before advancing to Senior Geospatial Image Processor and as a GIS/Mapping Specialist. Since joining EagleView in 2009, Mr. Garner has successfully managed many projects, including multi-state projects, which required the organization and capture of imagery across a span of thousands of kilometers.

Toni Latimer, PMO Regional Manager: Coordinates with Collin CAD's internal teams to ensure the project meets specifications and expectations. Toni is the point of contact for troubleshooting and escalating the problem for a satisfying resolution. Their experience working with large projects – both in size and cost – makes Toni the perfect project manager for both large and small capture areas.

Flight Operations, led by Chad Rhinewald, Sr. Director of Imagery Acquisition: Follows processes based on nearly 20 years of experience capturing orthogonal imagery in highly controlled and congested airspace. It monitors a fleet of 100+ aircraft, ensuring enough resources can be dedicated to each project and projects can be started and completed on time.

The **Professional Processes and Survey Operations** team, led by **Carl Schoenthal**, ensures professional **processes** are established and quality standards achieved throughout the project.

The **Photogrammetric Department**, led by **Joseph Lynch, Director of Geomatics & Photogrammetric Production**, is responsible for photogrammetric processes to ensure final orthomosaics meet accuracy requirements and specifications.

Customer Technical Support Manager: Manages the team that supports Collin CAD's use of imagery across different platforms.

15. Insurance

- *Maintain sufficient liability insurance*

EagleView is committed to maintaining sufficient liability insurance and can provide further documentation upon request.

Purchase & Renewal Options

16. Purchase Options

- *Bid should include District's turn-key annual cost for 1-year solution.*
- *Bid should include District's cost to maintain access to all data during non-flight years.*
- *Bid should include any licensing or upgrade fees.*
- *Bid should describe cost-sharing/discounts due to shared access.*

17. Renewal Options

- *Proposed contract shall grant District the right to renew the contract on the same terms and conditions as the original contract for up to 5 additional one-year terms, with the only change being an adjustment to the renewal price to adjust it (upward or downward) in accordance with the most recent CPI-W (Dallas-Fort Worth-Arlington, TX).*

18. Multiple Year Contract Options

- *[Optional] Include pricing for 3-year and 6-year contracts.*

EagleView is positioned to offer Collin CAD both Oblique and Ortho imagery that meets or exceeds the requirements of the RFCSB. Our proposal includes a turn-key annual flight – including 1" GSD Oblique and Ortho imagery captured during the Winter, leaf-off conditions.

As an additional option, EagleView can provide an off-season 2" Ortho imagery capture during an alternative time of year to support more frequent imagery needs. Pricing for this option has also been provided below.

The proposed image captures each encompass the entire AOI as requested by Collin CAD in this RFCSB, with 100% coverage of Collin County.

One-Year Pricing, with Renewal Options

A) Turn-key Annual Cost – 1-Year: \$364,650

1. With added off-season 2" GSD Ortho Imagery: \$397,375

Renewal Pricing Adjustment - Proposed contract shall grant Collin CAD the right to renew the contract on the same terms and conditions as the original contract for up to 5 additional one-year terms. EagleView also proposes the added benefit of locking this pricing for the full 6 years (1-year + 5 option renewals), regardless of adjustments to the Consumer Price Index (CPI-W).

Multi-Year Pricing Options

EagleView would like to propose the following 3-year and 6-year contract options with added discounting for Collin CAD's consideration. As required by law, either option below would include a non-appropriation clause which would be subject to Collin CAD legal review and approval.

B) Turn-key Annual Cost – 3-Year: \$359,975

1. With added off-season 2" GSD Ortho Imagery: \$392,700

C) Turn-key Annual Cost – 6-Year: \$350,625

1. With added off-season 2" GSD Ortho Imagery: \$383,350

Non-Flight Year Access

Annual Cost for Software/Imagery Access During Non-Flight Year: \$40,000

Licensing/Upgrade Fees

All licensing and upgrade fees are included in the pricing above.

Cost-Sharing Discounts

All applicable discounts are included in the pricing above. Sharing with taxing entities is permitted as noted previously in this response, and there is no additional cost to do so.

Deviations

21. Deviations

- *Please note any deviations in your submission from the requirements in this bid.*

We are taken exemption with the third bullet of item 25 (shown below). Contract Terms and Conditions related to the following, “District will own all deliverables.”

25. Contract Terms and Conditions

- One-year contract with renewal options, though District reserve the right to award based upon any optional multi-year bid reference above.
- Net 30 payment terms.
- District will own all deliverables.
- Penalties may apply for late or substandard delivery by bidder.

EXCEPTIONS FOR EAGLEVIEW’S

RESPONSE TO COLLIN CENTRAL APPRAISAL DISTRICT

Should Collin CAD have any concerns with EagleView’s exception listed below, EagleView is agreeable to further negotiate this exception in order to come to a mutually agreeable contract for this project.

Eagleview retains ownership of all copies of orthogonal images and will grant ownership to Collin CAD in all copies of orthogonal imagery delivered to Collin CAD. Eagleview retains exclusive ownership of all oblique imagery and will extend a license for use of oblique imagery to Collin CAD.

Attachments/Certificates/Affidavits

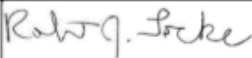
Vendor Signature Block

REQUEST FOR COMPETITIVE SEALED BID
AERIAL PHOTOGRAPHY AND OBLIQUE IMAGERY
RFB: IST-2025-APOI

27. Acknowledgment and Signature

- By signing below, the bidder acknowledges and agrees to all terms and conditions set forth in this Invitation for Bid. The bidder certifies that they are an authorized representative of the company and that the information provided is true and correct.

Vendor Signature Block

Vendor Name	Pictometry International Corp.
Vendor Signature	
Printed Signature Name	Robert Locke
Title	President
Date	10/20/2025

Collin Central Appraisal District

REQUEST FOR COMPETITIVE SEALED BID AERIAL
PHOTOGRAPHY AND OBLIQUE IMAGERY RFB: IST-
2025-APOI

Attachment A – Bidder References

**REQUEST FOR BID
ATTACHMENTS**

ATTACHMENT A: BIDDER REFERENCES

Ref-1

Company Name: Tarrant Appraisal District

Address: 2500 Handley Ederville Rd, Fort Worth, TX 76118

Contact Name: Brian Lipka, Information Services Director Email: blipka@tad.org

Contract Calendar Years or Date Ranges: 2024 – 2029

Contract Description (including size & type of service, and estimated total dollar amount if available):

EagleView has worked with Tarrant since 2004. Currently providing annual county-wide 3" oblique and certified ortho imagery, as well as bundled software, integrations, training & support. Annual contract amount is approximately \$400k.

Ref-2

Company Name: Henderson County Appraisal District

Address: 1751 Enterprise St, Athens, TX 75751

Contact Name: Linda Moncada, Deputy Chief Appraiser Email: lindam@hcadtx.org

Contract Calendar Years or Date Ranges: 2025 – 2031

Contract Description (including size & type of service, and estimated total dollar amount if available):

EagleView has worked with Henderson since 2013. Currently providing annual oblique and ortho imagery with a mix of 1" and 6" GSD, as well as bundled software, integrations, training & support – plus our Sketch Inspect solution. Annual contract amount is approximately \$240k.

Ref-3

Company Name: Ellis Appraisal District

Address: 400 Ferris Ave, Waxahachie, TX 75165

Contact Name: Kathy Rodrigue, Chief Appraiser Email: kathy@elliscad.com

Contract Calendar Years or Date Ranges: 2024 – 2027

Contract Description (including size & type of service, and estimated total dollar amount if available):

EagleView has worked with Ellis since 2007. Currently providing annual oblique and ortho imagery with a mix of 3" and 6" GSD, as well as bundled software, integrations, training & support – plus our ChangeFinder solution. Annual contract amount is approximately \$165k.

Attachment B – Financial Interest Disclosure

REQUEST FOR BID
ATTACHMENTS

ATTACHMENT B: FINANCIAL INTEREST DISCLOSURE

Bidder affirms that no officer, director, owner, or key employee of the company has a financial, business, or family relationship with any member of the Collin Central Appraisal District Board of Directors or with District management listed below, except as disclosed below, if applicable.

Marty Wright
Chief Appraiser

Brian Swanson
Deputy Chief – Business Operations

Phil Greaux
Deputy Chief – Appraisal

Stephanie Cave-Bernal
Deputy Chief – ARB, Research, & Customer Service

Ryan Matthews
Deputy Chief – Technology

Toni Bryan
Director – Business Operations & Finance

Tina Castillo
Director - ARB/Agent Services

Shane Cheek
Director – Information Services

Wendy Gilliland
Director – Research Services

Eric Grusendorf
Director – Residential Appraisal

Taylor Hamilton
Director – Customer Service

Jason Harris
Director – Information Technology

Sara McAfee
Director – GIS/Mapping

Brad Richards
Director – BPP Appraisal

Cindy Smith
Director – Appraisal Support

Shawn Tilley
Director – Commercial Appraisal

Dana Wilson
Director – Land Appraisal

- ☒ No relationships or financial interests to disclose
☐ The attached relationships/financial interests exist (*attach explanation*)

Company Name: Pictometry International Corp., dba EagleView

Authorized Representative Name: Robert Locke, President - Government Solutions

Signature: Robert Locke
Robert Locke (Oct 7, 2025 14:23:09 EDT)

Date: Oct 7, 2025

Attachment C – Conflict of Interest Questionnaire

REQUEST FOR BID
ATTACHMENTS

ATTACHMENT C: CONFLICT OF INTEREST QUESTIONNAIRE

This form is required by Chapter 176 of the Local Government Code. It must be completed and submitted by vendors who have a business relationship with a local government officer or a family member of the officer, as defined in the statute.

Vendors must complete the official CIQ form provided by the Texas Ethics Commission. The most recent version of the form and instructions are available at:

<https://www.ethics.state.tx.us/forms/conflict/>

- Attach the completed CIQ form to your bid submission, if applicable.
- Or sign below if there is no conflict of interest to disclose.

Pursuant to Chapter 176, Texas Local Government Code, the undersign certifies that no conflict of interest exists and no disclosure is required.

Company Name: Pictometry International Corp., dba EagleView

Authorized Representative Name: Robert Locke, President - Government Solutions

Signature: Robert Locke
Robert Locke (Oct 7, 2025 14:23:09 EDT)

Date: Oct 7, 2025

Attachment D – Certificate of Interested Parties

TEXAS ETHICS COMMISSION

Certificate of Interested Parties - Submitted

Submitted on 2025-10-10 07:47:49.239

Unique Certificate Identifier: 2025-1375320

Attachment E – Other Certifications and Affidavits

REQUEST FOR BID
ATTACHMENTS

ATTACHMENT E: OTHER CERTIFICATIONS & AFFIDAVITS

Certification of No Boycott of Israel (Gov't Code Ch. 2271)

Contractor verifies that it does not boycott Israel and will not boycott Israel during the term of this Contract. (Applies if: company has 10+ employees, and contract value is \geq \$100,000).

Certification of No Boycott of Energy Companies (Gov't Code Ch. 2274, Subch. A)

Contractor verifies that it does not boycott energy companies and will not boycott energy companies during the term of this Contract. (Applies if: company has 10+ employees, and contract value is \geq \$100,000).

Certification of Non-Discrimination Against Firearm or Ammunition Companies (Gov't Code Ch. 2274)

Vendor verifies that it does not discriminate against a firearm entity or firearm trade association and will not discriminate during the term of this Contract.

Non-Collusion Affidavit

The undersigned certifies that this bid is genuine and not collusive.

Certification Regarding Debarment / Suspension

The undersigned certifies that the company is not debarred, suspended, or excluded from participation in Federal or State programs.

Data Security & Confidentiality Certification

Vendor certifies that all District data will be safeguarded, used solely for contract purposes, encrypted in transit and at rest, and destroyed/returned at the end of the contract term.

Company Name: Pictometry International Corp., dba EagleView

Authorized Representative Name: Robert Locke, President - Government Solutions

Signature: Robert Locke
Robert Locke (Oct 7, 2025 14:23:09 EDT)

Date: Oct 7, 2025

Attachment F – W-9 Form

Form W-9
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

Give form to the
requester. Do not
send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	<div style="border-bottom: 1px solid black; margin-bottom: 5px;"> 1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Pictometry International Corp., dba EagleView </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> 2 Business name/disregarded entity name, if different from above. </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 65%; padding: 5px;"> 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input checked="" type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) </div> <div style="width: 30%; padding: 5px;"> 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.) </div> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> 3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions. <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 55%; padding: 5px;"> 5 Address (number, street, and apt. or suite no.). See instructions. PO Box 735288 6 City, state, and ZIP code Dallas, TX 75373-5288 </div> <div style="width: 40%; padding: 5px;"> 7 List account number(s) here (optional) </div> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"> 8 Requester's name and address (optional) </div>
--	--

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number <div style="border-bottom: 1px solid black; height: 20px; width: 100%;"></div>
OR Employer identification number <div style="background-color: black; color: blue; font-size: 2em; padding: 10px; text-align: center;">Redacted</div>

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person Stephen P. Dorton

Date Feb 7, 2025

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Harris Govern Integration Support Letter



Harris Govern
760 North Watters Road, Suite 100
Allen TX 75013
Sales Phone: (972) 881-1858
Support Phone: (972) 265-7300

October 14, 2025

Joe Oddi
Director, Partner Strategies - EagleView
25 Methodist Hill Drive
Rochester, NY 14623

Dear Joe,

Further to our conversation, I wanted to confirm that Harris Govern's Matix software solution, which is a module in our CAMA solutions (OpenForms, RealWare, and PACS), includes sample code to enable bidirectional navigation between the Matix viewer and the EagleView/Pictometry oblique imagery service.

EagleView/Pictometry is the only oblique imagery service for which sample code has been developed and installation instructions are available for its use in conjunction with our Matix software.

Sincerely,

A handwritten signature in blue ink, appearing to read "CKIM", is positioned above the printed name.

Chang Kim
VP of Sales and Marketing
ckim@harriscomputer.com
(972) 265-7300 Extension 77303



CUSTOMER NAME:	Collin Central Appraisal District
ATTN:	Ryan Matthews
CUSTOMER ADDRESS:	250 Eldorado Pkwy McKinney, Texas 75069-8023
CUSTOMER PHONE:	(469) 742-9200
CUSTOMER E-MAIL:	ryan.matthews@cadcollin.org

MASTER SERVICES AGREEMENT

This Master Services Agreement (“Agreement”) is entered into as of the date of last signature below (the “Effective Date”) by and between the Customer identified above (“Customer”) and Pictometry International Corp. dba EagleView, a corporation formed under the laws of the State of Delaware, with a place of business at 25 Methodist Hill Drive, Rochester, NY 14623 (“EagleView”). Customer and EagleView may be referred to individually as “Party” and, collectively, as “Parties.” EagleView will provide the Products and Services in accordance with and subject to the conditions of this Agreement during the applicable Term.

GENERAL TERMS AND CONDITIONS

1. DEFINITIONS

1.1. “Account” means an account created for Customer by EagleView for the purpose of providing access to the Products and Services.

1.2. “Activation” means the point in time when Customer has access to an Account and the Products and Services are available to Customer.

1.3. “Authorized User” means: (i) any employee or elected or appointed official of the Customer authorized by Customer to use the Products and Services; (ii) any additional users as may be defined in an Order Form (such as governmental subdivisions and their employees or elected or appointed officials) all of whom are considered to be agents of Customer for the purposes of Section 1.3; or (iii) a contractor of Customer, so long as Customer gives written notice of its intent to use such contractor to EagleView prior to being granted access to the Products and Services and, unless EagleView expressly waives such requirement for any individual, has entered into a written agreement with EagleView authorizing such access.

1.4. “Confidential Information” means any non-public information that is identified as or would be reasonably understood to be confidential and/or proprietary as disclosed by a Party (“Discloser”) to another Party (“Recipient”). Confidential Information of EagleView includes, but is not limited to: (a) the Products and Services including any related software code and Documentation; (b) the terms of this Agreement including all Order Forms and statements of work, as applicable, and related pricing, and (c) EagleView’s roadmaps, product plans, product designs, architecture, technology and technical information, security audit reviews, business and marketing plans, and business processes, however disclosed. Confidential Information will not include information that was (a) at the time of disclosure, through no fault of the Recipient, already known and generally available to the public; (b) at the time of disclosure to Recipient already rightfully known to the Recipient without any obligation of confidentiality; (c) disclosed to the Recipient by a third party who had the right to make the disclosure without any confidentiality restrictions; or (d) independently developed by the Recipient without access to or use of the Discloser’s Confidential Information.

1.5. “Documentation” means the materials describing the features and functions of the Products and Services as may be updated from time to time by EagleView.

1.6. “Fee” means the fees charged by EagleView for the Products and Services as identified in an Order Form or an invoice issued by EagleView.

1.7. “Intellectual Property Rights” means all worldwide intellectual property rights whether registered or unregistered including copyrights, patents, patent applications, trademarks, service marks, trade secrets, and all other proprietary rights.



1.8. “Malware” means any software program or code intended to harm, destroy, interfere with, corrupt, or cause undesired effects on program files, data, or other information, executable code, or application software macros.

1.9. “Order Form” means a mutually agreeable order signed and dated by both Parties describing the Products and Services purchased by Customer. The Parties may enter into several Order Forms with each Order Form made part of this Agreement. In the event of a conflict between the terms of this Agreement and an Order Form, the Order Form will prevail; provided that notwithstanding anything to the contrary, no Order Form shall exist or be effective except to the extent it is governed by this Agreement.

1.10. “Products and Services” means EagleView’s proprietary products, services and content, whether or not identified in an Order Form, developed and owned or licensed by EagleView, its Affiliates (defined as its directors, officers, employees, agents, representatives, advisors, and persons or entities which are controlled by or are under common control with EagleView), and/or their licensors.

2. ACCESS AND USE OF THE PRODUCTS AND SERVICES

2.1. Access to the Products and Services. Subject to Customer’s compliance with the terms of this Agreement, EagleView hereby grants to Customer the right to access and use the Products and Services identified on an Order Form(s) for its internal business purpose on a limited, revocable, non-exclusive, non-transferable basis in accordance with the scope of use identified in the Order Form. Unless a different term of the license grant to Products and Services is set forth in an Order Form, the right to access and use the Products and Services for its internal business purpose during the term of any Order Form(s) is the only right granted to Customer under this Agreement and any Order Form(s). EagleView will have no liability for any loss or damage arising from Customer’s failure to comply with the terms of this Agreement. EagleView will provide Customer a primary administrator Account for managing and granting access to its Authorized Users. Customer will be responsible for activating Authorized Users through use of the Account. Customer and its Authorized Users are responsible for maintaining the confidentiality of all passwords.

2.2. Access Restrictions. Access by Customer and its Authorized Users to the Products and Services is subject to the following conditions:

2.2.1. Customer will not access the Products and Services or Confidential Information of EagleView in a way that might adversely affect the security, stability, performance, or functions of the Products and Services.

2.2.2. Customer will not directly or indirectly: (a) resell or sublicense the Products and Services, (b) modify, disassemble, decompile, reverse compile, reverse assemble, reverse engineer, or translate any portion of the software related to the Products and Services; (c) create derivative works from the Products and Services; (d) use the Products and Services in violation of applicable law or the rights of others; (e) perform any vulnerability or penetration testing of the Products and Services; (f) cause harm in any way to the Products and Services or cause Malware to harm the Products and Services; (g) work around the Products and Services’ technical limitations; (h) remove any proprietary notices from the Products and Services, software related to the Products and Services, documentation or any other EagleView materials furnished or made available hereunder; (i) access the software related to the Products and Services in order to build a competitive product or service; or (j) copy any features, functions or graphics of the software related to the Products and Services.

2.2.3. Customer will not use the Products and Services in connection with any data that: (a) may create a risk of harm or loss to any person or property; (b) constitutes or contributes to a crime or tort; (c) is illegal, unlawful, harmful, pornographic, defamatory, infringing, or invasive of personal privacy or publicity rights; (d) contains any information that Customer does not have the right to use; or (e) use the Products and Services, or any software or documentation related to the Products and Services, in violation of export control laws and regulations.

2.2.4. Customer and its Authorized Users shall only use the Products and Services for the use and purpose set out in this Agreement, and for no other purpose.



2.2.5. EagleView may suspend the Products and Services if EagleView determines, in its reasonable discretion, that suspension is necessary to protect Customer or the Products and Services from operational, security, or other material risk, or if the suspension is ordered by a court or other tribunal. In such event(s), EagleView will provide notice of suspension to Customer as soon as reasonably practicable.

2.3. Account Use. Customer is responsible for maintaining and keeping confidential its Account information, including passwords, usernames, and email addresses. If Customer becomes aware of: (i) any violation of the terms of this Agreement by an Authorized User or unauthorized access to an Account, or (ii) any compromise to an Account including unauthorized access to or disclosure of any Account information, passwords, usernames or login credentials, then Customer must promptly suspend any relevant access and notify EagleView.

2.4. Reservation of Rights. Except for the limited rights expressly granted herein, EagleView and its Affiliates retain all right, title and interest in all Intellectual Property Rights and technology related to EagleView's proprietary Products and Services. Customer will preserve and keep intact all EagleView copyright, patent, and/or trademark notices presented in connection with the Products and Services. Customer will not assert any implied or other rights in or to any of EagleView's Intellectual Property Rights or Products and Services. From time to time, Customer may provide suggestions, ideas, enhancement requests, or other information on its use of the Products and Services ("Feedback"). Customer agrees that EagleView will have all right, title, and interest to use such Feedback without any restrictions and without any payment or other compensation to Customer.

3. PAYMENT

3.1. Fees. Customer will pay the Fees within thirty (30) days of receipt of invoice. EagleView will have the right to assess a late payment charge on any overdue amounts equal to the lesser of: (i) one and one-half percent (1.5%) per month, or (ii) the maximum rate allowed by applicable law. Additional or different payment terms may be set forth in the Order Form. All Fees paid pursuant to this Agreement and any applicable Order Form are non-refundable and all Products and Services ordered pursuant to an Order Form are non-cancelable, unless expressly stated to the contrary in the Order Form. In the event that EagleView seeks legal recourse for the collection of any unpaid Fees from Customer, Customer will be responsible for all of EagleView's costs of such collection action if EagleView is the prevailing party. If any Fees are overdue by more than thirty (30) days, EagleView may, without limiting its other rights and remedies, suspend the Products and Services until such amounts are paid in full, provided that, EagleView will give Customer at least ten (10) days' prior notice that its account is overdue.

3.2. Pricing Changes. If any Order Form is subject to renewal or extension, automatic or otherwise, EagleView may adjust the pricing for any Products and Services upon any renewal or extension of an Order Form by providing notice thereof at least ninety (90) days prior to the date for such renewal or extension.

3.3. Taxes. The Fees do not include any levies, duties excise, sales, use, value added or other taxes, tariffs, or duties that may apply to the Products and Services ("Taxes"). Customer is responsible for paying all Taxes associated with its purchases hereunder. If EagleView has the legal obligation to collect Taxes from Customer, Customer will pay that amount to EagleView unless Customer provides EagleView with a valid tax exemption certificate authorized by the applicable taxing authority prior to billing. For clarity, EagleView is solely responsible for taxes assessable against it based on its income, property, and employees.

4. TERM AND TERMINATION

4.1. Term. The term of this Agreement will commence on the Effective Date and will remain in effect for so long as there exists an open Order Form and for a period of twelve (12) months thereafter ("Term"). After expiration or early termination, Customer will not have any access to content or any Products and Services.

4.2. Termination; Suspension. Either Party may terminate this Agreement or any Order Form upon written notice to the other Party if: (i) the non-terminating Party materially breaches this Agreement or any Order Form and fails to cure such breach within thirty (30) days of delivery of written notice; or (ii) if the other Party becomes the subject of a petition in bankruptcy or any other proceeding relating to insolvency, receivership, liquidation, or assignment for the benefit of creditors. EagleView may suspend access to the Products and Services in the event



Customer is in material breach of this Agreement and such breach has not been cured within thirty (30) days' written notice to Customer. In the event of suspension due to Customer's material breach of this Agreement, Customer will remain liable for all Fees applicable to the Term that would have been paid had access to the Products and Services not been suspended.

4.3. Effect of Termination on Fees: EagleView Breach. In the event this Agreement is terminated by Customer for a material breach by EagleView, (a) where EagleView has fully delivered imagery to Customer, no refund of fees will be made, or (b) where Customer, at the time of termination, is accessing on-line imagery and data access and/or software related to any Products and Services, EagleView will refund any unused prorated, prepaid fees for the Products and Services.

4.4. Effect of Termination on Fees: Customer Breach. In the event this Agreement is terminated by EagleView for a material breach by Customer or due to section 4.2 (ii) applying, Customer will be responsible for all Fees and Taxes under any current Order Form(s).

4.5. Survival. Upon any expiration or termination of any Order Form or this Agreement, the following sections will survive with respect thereto: 2.4 (Reservation of Rights), 3 (Payment), 5 (Confidentiality), 7 (Indemnification), 8 (Limitation of Liability), and 9 (General Provisions).

5. CONFIDENTIALITY

5.1. Obligations. Each Party will hold the other Party's Confidential Information in confidence with at least as much care as it holds its own Confidential Information, and neither Party will disclose any of the other Party's Confidential Information to any third party. Each Party may use the Confidential Information solely for purposes of its performance under this Agreement, and may disclose such information to its employees, subcontractors and professional advisors only on a need-to-know basis, provided that such employees, subcontractors and professional advisors are bound by obligations of confidentiality at least as restrictive as those set forth in this Agreement.

5.2. Required Disclosure. The Recipient may disclose Confidential Information as required by court order, Freedom of Information Act request, or otherwise by law, provided that it gives the Discloser prior written notice of such disclosure (to the extent legally permitted) as well as reasonable assistance if Discloser seeks a protective order to prevent the disclosure. Any disclosure pursuant to this Section 5.2 will be restricted to include the least amount of Confidential Information necessary to comply with the law or order. All costs incurred by the Recipient in connection with complying with such order will be paid solely by the Recipient.

6. WARRANTIES

6.1. Mutual Warranties. Each Party represents and warrants to the other Party that: (i) it is an organization duly organized, validly existing and in good standing under the laws of the jurisdiction of its formation, has all requisite power and authority to carry on its business and to own and operate its properties and assets; and (ii) the individual signing this Master Services Agreement and any Order Forms has the requisite authority to bind the party to this Agreement and the Order Form, respectively.

6.2. EagleView Warranty. EagleView warrants that (i) it will provide the Products and Services with commercially reasonable care and skill; and (ii) the Products and Services will conform to the then-current Documentation in all material respects. In the event of a breach of this warranty, Customer's sole and exclusive remedy will be as described in Section 4.3 Payments Upon Termination.

6.3. Disclaimer. EXCEPT FOR EXPRESS WARRANTIES SET FORTH IN THIS AGREEMENT, EAGLEVIEW MAKES NO ADDITIONAL REPRESENTATION OR WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED IN FACT OR BY OPERATION OF LAW, OR STATUTORY, AS TO ANY MATTER WHATSOEVER. EAGLEVIEW EXPRESSLY DISCLAIMS ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. EAGLEVIEW DOES NOT WARRANT THAT THE PRODUCTS AND SERVICES (INCLUDING ANY SUPPORT SERVICES) WILL BE ERROR FREE, WILL MEET CUSTOMER'S REQUIREMENTS, OR WILL BE TIMELY OR SECURE. CUSTOMER WILL NOT HAVE THE RIGHT TO MAKE OR PASS ON ANY REPRESENTATIONS OR WARRANTY ON BEHALF OF CUSTOMER TO ANY THIRD PARTY. TO THE



MAXIMUM EXTENT PERMITTED BY LAW, THE PRODUCTS AND SERVICES AND SUPPORT SERVICES ARE PROVIDED "AS IS."

7. INDEMNIFICATION

7.1. EagleView Indemnification. EagleView will defend Customer against any claim, demand, suit or proceeding made by a third party alleging that the Products and Services infringes the intellectual property rights of such third party and will pay all costs or damages that are finally awarded by a court of competent jurisdiction (including reasonable attorneys' fees) or agreed to in a written settlement signed by EagleView; provided, however, that Customer will: (i) notify EagleView in writing within ten (10) calendar days of its receipt of notice of the claim, (ii) give EagleView sole control of the defense and settlement of the claim (except that EagleView will not settle any claim that results in liability or an admission of liability by Customer without Customer's prior written consent), and (iii) provide EagleView with all reasonable assistance, information, and authority necessary to perform EagleView's obligations under this paragraph. Notwithstanding the foregoing, EagleView will have no liability for any claim of infringement or misappropriation to the extent such claim arises from: (i) use of the Products and Services in combination with materials including software, hardware, or content not furnished by EagleView; or (ii) Customer's breach of this Agreement.

7.2. Remedies. In the event the Products and Services are held or is believed by EagleView to infringe or misappropriate any Intellectual Property Rights of a third party, EagleView will have the option, at its expense, to: (i) replace the Products and Service with a non-infringing equivalent, (ii) modify the Products and Services to be non-infringing, (iii) obtain for Customer a license to continue using the Products and Services; or (iv) terminate this Agreement or any relevant Order Form and refund any prepaid, prorated fees for the remainder of the Term. The foregoing remedies constitute Customer's sole and exclusive remedies and EagleView's sole liability with respect to any third-party infringement claim.

7.3. Customer Indemnification. Customer will, at its expense, defend EagleView from and against all third party claims and will pay any costs, losses or damages that are finally awarded (including reasonable attorneys' fees) or agreed to in settlement to the extent arising out of Customer's breach of this Agreement, provided that (i) EagleView notifies Customer in writing within ten (10) calendar days of its receipt of written notice of the claim, (ii) Customer has sole control of the defense and settlement of the claim (except that Customer will not settle any claim that results in liability or an admission of liability by EagleView without EagleView's prior written consent), and (iii) EagleView provides Customer with all reasonable assistance, information, and authority necessary to perform Customer's obligations under this paragraph.

8. LIMITATION OF LIABILITY

8.1. Consequential Damages. TO THE EXTENT PERMITTED BY LAW, IN NO EVENT WILL EITHER PARTY OR ITS AFFILIATES BE LIABLE TO THE OTHER FOR ANY INDIRECT, INCIDENTAL, CONSEQUENTIAL, COVER, BUSINESS INTERRUPTION, SPECIAL, OR PUNITIVE DAMAGES OF ANY KIND OR NATURE, INCLUDING, BUT NOT LIMITED TO, LOSS OF USE, DATA, PROFITS, REVENUE, OR GOODWILL, WHETHER AN ACTION IS BASED IN CONTRACT, TORT, OR OTHERWISE, REGARDLESS OF WHETHER EITHER PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

8.2. Limitation of Liability. EXCLUDING EITHER PARTY'S INDEMNIFICATION OBLIGATIONS PURSUANT TO SECTION 7, TO THE EXTENT PERMITTED BY LAW, THE AGGREGATE AND CUMULATIVE LIABILITY OF EITHER PARTY INCLUDING ALL THEIR AFFILIATES REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT OR TORT (INCLUDING BUT NOT LIMITED TO NEGLIGENCE) WILL IN NO EVENT EXCEED THE TOTAL AMOUNT OF FEES PAID AND PAYABLE BY CUSTOMER IN THE TWELVE MONTHS PRECEDING THE ACTIONS GIVING RISE TO THE CLAIM.

9. GENERAL PROVISIONS

9.1. Export Laws. The Products and Services and derivatives thereof may be subject to export laws and regulations of the United States and other jurisdictions. EagleView and Customer each represent that it is not named on any U.S. government denied-party list. Customer will not permit any user to access, use, export, reexport, or transfer, directly or indirectly, any Products and Services or content in a U.S.-embargoed country or region



(including but not limited to Cuba, Iran, North Korea, Sudan, Syria, Crimea, or Russia) or in violation of any U.S. export law or regulation.

9.2. No Third-Party Beneficiaries. Except as specifically identified in this Agreement, nothing in this Agreement is intended to confer upon any person other than the Parties and their respective successors or permitted assigns, any rights, remedies, obligations, or liabilities whatsoever.

9.3. Independent Contractors. Nothing contained in this Agreement will be deemed or construed as creating a joint venture or partnership between any of the Parties hereto. Neither Party will have the power or authority to control the activities or operations of the other. At all times, the status of the Parties will be that of independent contractors.

9.4. Force Majeure. Except with respect to Customer's payment obligations, each Party will be excused from performance under this Agreement, will not be deemed to be in breach hereof, and will have no liability to the other Party whatsoever if either party is prevented from performing any of its obligations hereunder, in whole or in part, as a result of a Force Majeure Event. A "Force Majeure Event" means an event or occurrence beyond the control of the nonperforming Party, such as an act of God or of the public enemy, embargo or other act of government in either its sovereign or contractual capacity, government regulation, travel ban or request, court order, civil disturbance, terrorism, war, quarantine restriction, epidemic, virus, fire, weather, flood, accident, strike, slowdown, delay in transportation, electrical power outage, interruption or degradation in electronic communications systems, inability to obtain necessary labor, materials or manufacturing facilities, and other similar events. In the event of any delay resulting from a Force Majeure Event, any date of delivery hereunder will be extended for a period equal to the time lost because of the delay.

9.5. Security Assessment. Upon reasonable request, EagleView will assist Customer in its EagleView security risk assessments by completing forms and providing reports that provide Customer with generally available information relating to EagleView's information security practices. Such information will include high level overviews of implemented security measures, such as access controls, encryption, or other means, where appropriate, and will provide details relating to how Customer's Confidential Information is disclosed, accessed, processed, and stored (as applicable).

9.6. Assignment. Neither Party may assign any of its rights or obligations hereunder, whether by operation of law or otherwise, without the other Party's prior written consent (not to be unreasonably withheld); provided, however, either Party may assign this Agreement in its entirety (including all Order Forms), without the other Party's consent to its Affiliate or in connection with a merger, acquisition, corporate reorganization, or sale of all or substantially all of its assets. Subject to the foregoing, this Agreement will bind and inure to the benefit of the Parties and their respective successors and permitted assigns.

9.7. Governing Law. This Agreement will be governed by the laws of the state the Customer is located in without regard to conflict of law principles. The Parties agree that any claims, legal proceedings, disputes and litigation arising out of or in connection with this Agreement will be brought solely in the state or federal courts located in the jurisdiction in which the Customer is based.

9.8. Severability & Waiver. The failure of either Party to exercise any right or the waiver by either Party of any breach, will not prevent a subsequent exercise of such right or be deemed a waiver of any subsequent breach of the same, or any other provision of this Agreement. All waivers must be in writing and signed by the Party waiving its rights. If any section of this Agreement is held to be invalid or unenforceable, the remaining sections of this Agreement will remain in force to the extent feasible.

9.9. Notices. Notwithstanding anything to the contrary in this Agreement, notices and other communications may be given or made pursuant to this Agreement via electronic mail. Notwithstanding the foregoing, any notice concerning a material breach, violation, or termination hereof must be in writing and will be delivered: (a) by certified or registered mail; or (b) by an internationally recognized express courier or overnight delivery service. All written notices or other written communications to EagleView will be provided to the address listed above and addressed to: ATTENTION: LEGAL DEPARTMENT. All written notices to Customer will be sent to the address identified on the Order Form and addressed to the individual signing said Order Form and will be deemed to have been duly given when delivered personally, when deposited in the U.S. mail, certified or registered mail, or when



deposited with an overnight courier or delivery service. With respect to notices and other communications regarding EagleView's privacy policy, support plan, or other similar provisions, such notices will be deemed given when posted to EagleView's website (www.eagleview.com) or e-mailed to the Customer's Account administrator(s).

9.10. Execution in Counterparts. This Agreement may be executed in one or more counterparts, each of which will be deemed to be an original and all of which together will constitute only one agreement. The execution and delivery of counterparts of this Agreement by electronic mail, electronic form (including execution by way of an electronic or other signature stamp), website submission, facsimile, or by original manual signature, regardless of the means or any such variation in pagination or appearance will be binding upon the Parties executing this Agreement.

9.11. Order of Precedence. In the event of any conflict, or inconsistency among the terms and conditions contained in documents comprising the Agreement, such conflict or inconsistency shall be resolved according to the following order of precedence, with the first document listed having the highest precedence: any exhibits in the order of their attachment (for example, Exhibit A, then Exhibit B, etc.), the Order Form, and this Agreement.

9.12. Entire Agreement. This Agreement, along with the Order Form(s), and any attached exhibits, which are all incorporated into this Agreement by reference, contains the entire understanding of the Parties with respect to the subject matter hereof and supersedes all prior agreements, oral or written, and all other communications between the Parties relating to such subject matter. The Parties agree that any term or condition stated in a Customer purchase order is null and void. This Agreement may not be amended or modified except by mutual written agreement. In the event that any court holds any provision of this Agreement as null, void, or otherwise ineffective or invalid, such provision will be deemed to be restated to reflect as nearly as possible the original intentions of the Parties in accordance with applicable law, and the remaining provisions will remain in full force and effect. The unenforceability of any provision of this Agreement will not affect the validity of the remaining provisions hereof. A waiver by either Party of a breach or failure to perform hereunder will not constitute a waiver of any subsequent breach or failure.

[Signature page follows]



CUSTOMER	EAGLEVIEW
COLLIN CENTRAL APPRAISAL DISTRICT	PICTOMETRY INTERNATIONAL CORP. DBA EAGLEVIEW
	a Delaware corporation
SIGNATURE:	SIGNATURE:
NAME:	NAME:
TITLE:	TITLE:
EXECUTION DATE:	EXECUTION DATE:

EXHIBIT A
AGREEMENT NON-STANDARD TERMS AND CONDITIONS

The terms and conditions of this Exhibit A include all mutually agreed upon changes to the terms and conditions of this Agreement. In the event of any conflict, or inconsistency among the terms and conditions contained in documents comprising the Agreement, such conflict or inconsistency shall be resolved according to the following order of precedence, with the first document listed having the highest precedence: any exhibits in the order of their attachment (for example, Exhibit A, then Exhibit B, etc.), the Order Form, and this Agreement.

Not applicable to this Agreement.

[Remainder of page intentionally left blank]



ORDER FORM

CUSTOMER NAME:	Collin Central Appraisal District
ORDER FORM TERM (DURATION):	6 year(s)
ORDER FORM EFFECTIVE DATE:	
MASTER SERVICES AGREEMENT EFFECTIVE DATE: This Order Form is governed by the terms and conditions of the Master Services Agreement with the effective date listed between Pictometry International Corp. dba EagleView and Collin Central Appraisal District.	

ORDER #
LC-10015144

BILL TO
Collin Central Appraisal District
Ryan Matthews
250 Eldorado Pkwy
McKinney, Texas 75069-8023
(469) 742-9200
ryan.matthews@cadcollin.org

SHIP TO
Collin Central Appraisal District
Ryan Matthews
250 Eldorado Pkwy
McKinney, Texas 75069-8023
(469) 742-9200
ryan.matthews@cadcollin.org

CUSTOMER ID	SALES REP	REFRESH FREQUENCY
A1208530	Kevin Beers	Annual

REFRESH 1		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 1in	High resolution, measurable oblique and orthogonal imagery. Oblique image frames collected at 1.4in GSD or better, orthogonal image frames collected at 1in GSD or better. Orthomosaic imagery produced at 1in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Image frames and orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 1in	Provides an offline copy of the orthomosaic tiles and mosaics at 1in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.
12	EagleView Cloud - Capture History	Includes access to historical ortho and oblique frame imagery from the EagleView archive. Quantity represents the number of calendar years of archive imagery available in EagleView Cloud.
1	Eagleview Cloud - Software - Plus	Provides an unlimited number of authorized users the ability to login and access the EagleView Cloud software and analytics via the web-based EagleView Cloud platform. This software provides a robust complement of tools for engaging with imagery as well as additional project and collaboration tools, and access to mobile application. Requires the purchase of an EagleView - Imagery entitlement.



1	EagleView Cloud - Comprehensive Integration Bundle	Provides activation of integrations between the EagleView Cloud platform and compatible customer environments (including compatible CAMA providers, 911/PSAP, Cityworks, and ESRI/GIS) and via the Integrated Web Application.
1	EagleView Cloud - Authorized Subdivisions	Extends the ability for a contracting county or non-state consortium of counties the ability to authorize access to their EagleView Cloud organization to any political unit or subdivision located totally or substantially within their boundary.
1	EagleView Cloud - Early Access	Provides entitlement to imagery from counties neighboring the imagery AOI as part of EagleView Cloud. Also provides entitlement to Early Access to refreshed imagery captures which allows authorized users to use new imagery immediately following its preliminary processing and quality control checks and prior to its final processing. Early Access imagery will become available incrementally as it is processed, and it will remain available until final, fully processed imagery is made available through other means.
1	EagleView Cloud - Disaster Response Program	Includes access to the EagleView Disaster Response Program which offers flights after an emergency or disaster. Refer to the attached detailed description of the Disaster Response Program.

REFRESH 2		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 2in Ortho	High resolution, measurable orthogonal imagery. Image frames collected at 2in GSD or better. Orthomosaic imagery produced at 2in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 3		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 1in	Provides an offline copy of the orthomosaic tiles and mosaics at 1in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.

935	Eagleview Reveal - 1in	High resolution, measurable oblique and orthogonal imagery. Oblique image frames collected at 1.4in GSD or better, orthogonal image frames collected at 1in GSD or better. Orthomosaic imagery produced at 1in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Image frames and orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 4		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 2in	Provides an offline copy of the orthomosaic tiles and mosaics at 2in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.

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REFRESH 5		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 1in	High resolution, measurable oblique and orthogonal imagery. Oblique image frames collected at 1.4in GSD or better, orthogonal image frames collected at 1in GSD or better. Orthomosaic imagery produced at 1in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Image frames and orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 6		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 2in	Provides an offline copy of the orthomosaic tiles and mosaics at 2in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.
935	Eagleview Reveal - 2in Ortho	High resolution, measurable orthogonal imagery. Image frames collected at 2in GSD or better. Orthomosaic imagery produced at 2in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 7		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 1in	High resolution, measurable oblique and orthogonal imagery. Oblique image frames collected at 1.4in GSD or better, orthogonal image frames collected at 1in GSD or better. Orthomosaic imagery produced at 1in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Image frames and orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 1in	Provides an offline copy of the orthomosaic tiles and mosaics at 1in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.

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REFRESH 8		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 2in Ortho	High resolution, measurable orthogonal imagery. Image frames collected at 2in GSD or better. Orthomosaic imagery produced at 2in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 9		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 1in	Provides an offline copy of the orthomosaic tiles and mosaics at 1in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.
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REFRESH 10		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 2in	Provides an offline copy of the orthomosaic tiles and mosaics at 2in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.
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REFRESH 11		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - 1in	High resolution, measurable oblique and orthogonal imagery. Oblique image frames collected at 1.4in GSD or better, orthogonal image frames collected at 1in GSD or better. Orthomosaic imagery produced at 1in GSD from orthorectified orthogonal imagery via a fully automated photogrammetric process which includes project-wide color and contrast balancing. Visible seamlines may be present. Image frames and orthomosaics available as 3-band RGB. Delivery to be provided via online Eagleview's online platform applications and APIs. Imagery extent based on a delivery grid shapefile approved by Eagleview.
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REFRESH 12		
QTY	PRODUCT NAME	PRODUCT DESCRIPTION
935	Eagleview Reveal - Physical Delivery - Orthomosaic - 2in	Provides an offline copy of the orthomosaic tiles and mosaics at 2in GSD. Imagery extent based on a delivery grid shapefile approved by Eagleview. Tiles and mosaics output as industry standard 3-band RGB files with formats selectable by the customer. Delivery made via online download or physically via a hard drive media.
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FEES

2026 Payment (Due at Activation): \$383,350.00

2027 Payment (Due at First Anniversary of Activation): \$383,350.00

2028 Payment (Due at Second Anniversary of Activation): \$383,350.00

2029 Payment (Due at Third Anniversary of Activation): \$383,350.00

2030 Payment (Due at Fourth Anniversary of Activation): \$383,350.00

2031 Payment (Due at Fifth Anniversary of Activation): \$383,350.00



Ownership of Delivered Orthogonal Imagery to Customer: Customer shall own the copies of the orthogonal imagery delivered to Customer by EagleView pursuant to this Order Form. EagleView shall own all copies of the orthogonal imagery, including all formats in which such copies are maintained (including, but not limited to, electronic), that remain in EagleView's possession and reserves all rights thereto. All inventions, discoveries, improvements, technology, designs, works of authorship, patents, copyrights, technical information, data, databases, software, business information, and other information used to create the orthogonal imagery remain the sole and exclusive property of EagleView. All oblique imagery, software, online services and online content, or other deliverables not specifically mentioned above which are produced by EagleView pursuant to this Order Form remain the sole and exclusive property of EagleView.

Non-appropriation of Funds: Notwithstanding anything in this Agreement to the contrary, in the event that the funds due for deliverables under the terms and conditions of this Agreement are not lawfully appropriated, the following provisions shall apply:

- a. Customer shall provide EagleView with written documentation of non-appropriation of funds from its funding source ninety (90) days prior to commencement of a subsequent refresh;
- b. This Agreement shall remain in full force and effect, however commencement of the subsequent refresh shall be deemed postponed until such time as funds for the subsequent refresh have been appropriated and all other sums due under the terms and conditions of this Agreement have been paid by Customer. In the event that the postponement exceeds eighteen months, EagleView reserves the right to terminate any and all obligations with respect to the postponement and all subsequent deliverables included in this Agreement; and
- c. If Customer, or any party authorized under the terms and conditions of this Agreement to use the licensed products set forth in this Order Form, is in possession of licensed products for which EagleView has not been fully compensated in accordance with the payment terms of this Agreement, Customer or such authorized party shall immediately cease use of those licensed products, purge those licensed products from all Customer and authorized party computers, and return those licensed products to EagleView.

PRODUCT PARAMETERS

Disaster Response Program ("DRP")

If EagleView Cloud - Disaster Response Program is listed in the above product table, then this section applies to this Order Form. If EagleView Cloud - Disaster Response Program is not listed in the above product table, then this section does not apply to this Order Form.

This Order Form includes eligibility for the DRP described below so long as the customer remains under an active services agreement and in good standing with EagleView. Imagery captured through DRP will be captured "as-is".

- A. Disaster Coverage Imagery at No Additional Charge – EagleView will, upon request of Customer and at no additional charge, provide standard quality imagery of up to 200 square miles of affected areas (as determined by EagleView) upon the occurrence of any of the following events during any period Customer is eligible for DRP:
- Hurricane: areas affected by hurricanes of Category 2 and higher.
 - Tornado: areas affected by tornados rated EF4 and higher.
 - Terrorist: areas affected by damage from terrorist attack.
 - Earthquake: areas affected by damage to critical infrastructure resulting from earthquakes measured at 6.0 or higher on the Richter scale.
 - Tsunami: areas affected by damage to critical infrastructure resulting from tsunamis.
- B. Discounted Rate – Coverage for areas affected by the events set forth above exceeding 200 square miles will be, subject to EagleView resource availability, offered to Customer at the then-current DRP rates. Also, coverage for areas affected by hurricanes below Category II, tornadoes below EF4 or earthquakes rated below 6.0 on the Richter scale, flooding meeting or exceeding the major flood stage, wildfires impacting population centers, or other disasters as agreed to between the customer and EagleView, will be, subject to EagleView resource availability, offered to Customer at the then current DRP rates.



This Order Form is incorporated by reference into the Master Services Agreement between EagleView and Customer.

CUSTOMER	EAGLEVIEW
COLLIN CENTRAL APPRAISAL DISTRICT	PICTOMETRY INTERNATIONAL CORP. DBA EAGLEVIEW
	a Delaware corporation
SIGNATURE:	SIGNATURE:
NAME:	NAME:
TITLE:	TITLE:
EXECUTION DATE:	EXECUTION DATE:

G.3.

**Receive recommendation and vote on off-site
data backup and disaster recovery.**

November 13, 2025



Collin Central Appraisal District

October 28th, 2025

Off-Site Data Backup and Disaster Recovery Executive Summary

For many years we have been leveraging Datto services for onsite and remote backup of district servers and workstations as well as our core warm-failover disaster recovery efforts. We have multiple years of backups hosted in the Datto cloud that total over 299 terabytes. This subscription includes a local backup server, infinite cloud retention, and cloud recovery in case of emergency. We would like to change our Datto MSP (reseller) from UBISpor to ESEI (a HUB vendor) after finding more-favorable pricing using state purchasing agreements with DIR.

We are at the end of our current contract and ESEI gave the lowest quote for 1 year of service at a monthly rate of \$3,334.55. We have been very pleased with the backup service that Datto provides and have verified that ESEI can port our tenant account if approved. This amount is budgeted and fully funded in 2026 from 5770 - Computer Software Licensing & Subscriptions.

I have attached ESEI's quote to this summary for your review totaling \$40,014.60 for 12 months after DIR discount. We will be able to immediately utilize our existing Datto backup appliance under ESEI and will later migrate to the new included Siris 5 appliance after a local transfer takes place.

If you have any questions, please let me know. Thank you in advance for your consideration.

Ryan Matthews

Deputy Chief Appraiser - Technology

QUOTE

Date: September 24, 2025
Quote # COL09222025

ESEI
5400 Suncrest Dr., Ste. B3
El Paso, TX 79912
Tel.: 915-587-7902
Fax: 915-587-7768
jarico@esei.com

TO Collin CAD
Attn. Jason Harris
250 El Dorado Parkway
McKinney, TX 750690

SALESPERSON	JOB	QUOTE GOOD FOR:	
JAR	Datto Siris 5 Appliance and Cloud Back-Up Services - Rev. 1	30 days	

QTY	DESCRIPTION	UNIT PRICE	LINE TOTAL
12 months	S5-60 Datto Siris 5 60TB Appliance and Cloud Back-Up Services with Infinite Cloud Retention and a 1-year commitment. Services include onboarding, maintenance and remote technical support. The Siris 5 60TB appliance will be provisioned with a NIC Card with 10G SFP ports. Standard Limited Hardware Warranty included for the subscription term.	\$3,923.00	\$47,076.00
	DIR 15% Discount	\$588.45	\$7,061.40
	Total	\$7,061.40	\$40,014.60
		Shipping	\$ 0.00
		SUBTOTAL	\$40,014.60
		SALES TAX	\$ 0.00
		TOTAL	\$40,014.60

Terms & Conditions

- The proposed services outlined in this quote are eligible under our Texas DIR - Data Storage, Data Communications & Networking Equipment and Related Services Contract No. DIR-CPO-5372.
- Standard Delivery - 4 to 6 weeks
- Datto Unified Backup Terms of Use apply to this quote and subsequent Service Level Agreement (SLA)
- Services will be invoiced and paid in advance for the current month's services. Upon execution of a Service Level Agreement, Client agrees to a payment for the first month of the service; this amount may reflect a partial month proration based on the actual number

of days in the current month. ESEI will invoice for next month's IT Performance Management services by the 5th of each calendar month. All payments are due by the 10th of each month.

- Pricing is valid for thirty days from the date of this Quote.
- All product pricing and other information is based on the latest information available and is subject to change.
- ESEI reserves the right to cancel this Quote and Customer purchase orders arising from pricing errors.
- All sales are final. No return will be accepted after 15 days of delivery. A 15% re-stocking fee will be charged on all returned items.
- Taxes and/or freight charges listed on this Quote are only estimates. The final amounts shall be stated on the relevant invoice.
- Additional freight charges will be applied if Customer requests expedited shipping. Please indicate any tax exemption status on your purchase order and send your tax exemption certificate to accounting@esei.com as applicable.

Thank you for your business!

Accepted by: _____ Date: _____

G.4.
**Receive recommendation and vote on server
cluster replacement.**

November 13, 2025



Collin Central Appraisal District

October 29th, 2025

Server Cluster Replacement Executive Summary

We are requesting to replace a 2021 Dell outgoing Microsoft Windows server cluster responsible for our CAMA (Computer Assisted Mass Appraisal) server environment. This cluster has already been extended via maintenance agreement to get an additional year of use past the Board of Directors' approved hardware replacement schedule (attached).

After reviewing an updated like-for-like Dell cluster solution we were shocked by the state DIR pricing and sought out other solution providers under interlocal co-op purchasing agreements. After our review we found Lenovo offering the most competitive solution under TIPS that we were able to scale inside our existing budget to cover not only the target CAMA cluster but also off-load from a second cluster (60 virtual servers) that will be up for replacement in 2026. The final Lenovo discount was 65% off MSRP! The four-cluster node servers are covered by a 5-year warranty with 24x7 support and 4-hour response time. Once implemented, this new cluster would provide ample resources to host over eighty virtual machines onsite, including our primary CAMA database virtual servers.

We are seeking to purchase this four node Storage Spaces Direct Windows Server cluster from Lenovo, at a total cost not to exceed **\$230,000, which is fully funded in line item 5700 – Computer Equipment for 2025**. This purchase would be racked and configured by IST staff. Attached to this summary you will find the quote from Lenovo, the hardware build details, and the hardware replacement schedule for your reference.

If you have any questions, please let me know. Thank you in advance for your consideration.

Ryan Matthews

Deputy Chief Appraiser - Technology



Pricing Proposal
Quotation #: 26789864
Created On: 10/24/2025
Valid Until: 2/9/2026

TX-Collin Central Appraisal District

Jason Harris

250 Eldorado Parkway
McKinney, TX 75069
United States
Phone: 9725765256
Fax:
Email: Jason.Harris@cadcollin.org

Inside Sales Executive

Bryan Kicinski

Phone: 7325071359
Fax:
Email: bryan_kicinski@shi.com

All Prices are in US Dollar (USD)

Product	Qty	Retail	Your Price	Total
1 CUSTOM THINKSYSTEM SR630 V4 COLLIN COUNTY MC00020213 02/20/2026 Lenovo - Part#: 7DG9S6JB00 Contract Name: TIPS - Technology Solutions, Products and Services Contract #: 230105 Note: In Stock	4	\$166,462.03	\$56,554.02	\$226,216.08
			Total	\$226,216.08

Additional Comments

Please Note: Lenovo has a zero returns policy on any custom build machines. Lenovo also does not allow returns on open box/phased out products. For these products, orders are non-cancellable and non-returnable from point of order.

Due to the potential impact of any current or future tariffs, the price and availability of hardware items on this quote may be subject to change.

Maximize your technology's lifecycle with SHI's services to recover, redeploy, remarket, and recycle your devices. For more information, contact AssetRecoveryServices@SHI.com

Thank you for choosing SHI-GS! The pricing offered on this quote proposal is valid through the expiration date set above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order.

**SHI Government Solutions, Inc. is 100% Minority Owned, Woman Owned Business.
TAX ID# 22-3695478; DUNS# 14-724-3096**

The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.

Customer Name: COLLIN COUNTY 1213347657
Customer Number:



Bid Request No. Created On: BRDN2009095927
Master Contract No. 23-Oct-2025
Contract: MC00020213
5327524405

Sales Representative: Phone Number: Mike Travis
Email: mtravis@lenovo.com Yes
Deal Registered:

NOTE: Effective 5/10/2021 the format of this quote has changed. Additional recommended products are included in this quote. These recommended products are NOT required for purchase and should be added as recommended only to customer quotes.

This Lenovo quote is a **preliminary quote and the final contract** will be released to distribution and should be used to generate your final pricing, after distributor markup, to our customer. **Please note that CTO quotes will result in one custom PN and one price for a CTO Config + Warranty, please use the PDF contract to verify final PN and price.** Channel Partners, please work with your distributor before generating your final pricing quote to our end-user customer. Once you know an order is forthcoming, please let me know so I can ensure this bid pricing is released to distribution for order placement and fulfillment.

PRODUCT AND SERVICE DETAILS

Part Number	Description	F/	Qty	List Price	Unit Price	Start Date	End Date	Total
7DG9S6JB00	ThinkSystem SR630 V4 - 3yr Warranty	F	4			23-Oct-2025	20-Feb-2026	



Did you know that Lenovo can help wrap all of your hardware, software and services into a single cost-effective fixed monthly payment by using Lenovo Financial Services? Conserve capital, lower your cost of use and gain top performance with ongoing support. **Ask us how!**

CONFIGURATION DETAILS

Components	Description	Qt
7DG9S6JB00	ThinkSystem SR630 V4 - 3yr Warranty	4
C1XE	ThinkSystem 1U V4 10x2.5" Chassis	1
C3JB	ThinkSystem General Computing - Power Efficiency	1
BVGL	Data Center Environment 30 Degree Celsius / 86 Degree Fahrenheit	1
C5QV	Intel Xeon 6517P 16C 190W 3.2GHz Processor	2
C1XJ	ThinkSystem 1U V4 Performance Heatsink	2
C0TQ	ThinkSystem 64GB TruDDR5 6400MHz (2Rx4) RDIMM	32
5977	Select Storage devices - no configured RAID required	1
C0ZS	ThinkSystem 2.5" U.2 VA 15.36TB Read Intensive NVMe PCIe 5.0 x4 HS SSD	8
C21X	ThinkSystem 1U V4 10x2.5" NVMe Gen5 Backplane	1
BCD4	ThinkSystem Intel E810-DA2 10/25GbE SFP28 2-Port OCP Ethernet Adapter	1
BCD6	ThinkSystem Intel E810-DA2 10/25GbE SFP28 2-Port PCIe Ethernet Adapter	3
C1YH	ThinkSystem SR630 V4 x16/x16 PCIe Gen5 Cable Riser 1	1
C1Z7	ThinkSystem SR630 V4 Full Height+Low Profile Riser1 Cage	1
C1Z4	ThinkSystem SR630 V4 x16 PCIe Gen5 Riser 2	1
C0U4	ThinkSystem 1300W 230V/115V Titanium CRPS Premium Hot-Swap Power Supply	2
6311	2.8m, 10A/100-250V, C13 to C14 Jumper Cord	2
C1YT	ThinkSystem 1U V4 Performance Fan Module	4
C1YP	ThinkSystem 1U V4 Standard Media Bay	1
C2DH	ThinkSystem Toolless Slide Rail Kit V4	1
AV1X	Lenovo 3m Passive 25G SFP28 DAC Cable	8
BPKQ	TPM 2.0 with Secure Boot	1
B7XZ	Disable IPMI-over-LAN	1
BK14	Low voltage (100V+)	1
9201	Windows Specify	1
9205	Drop-in-the-Box Specify	1
9206	No Generic Preload Specify	1
B8KJ	ThinkSystem 1U 10x2.5" NVMe HDD Type Label	1
BZ7F	ThinkSystem WW Lenovo LPK, Birch Stream	1

C20Q	ThinkSystem 1300W TT power rating label WW	1
B97B	XCC Label	1
AWF9	ThinkSystem Response time Service Label LI	1
C1ZN	ThinkSystem SR630 V4 Agency label with ES&CE&UKCA	1
AUTQ	ThinkSystem small Lenovo Label for 24x2.5"/12x3.5"/10x2.5"	1
C20D	ThinkSystem SR630 V4 model name Label	1
BQPS	ThinkSystem logo Label	1
C211	ThinkSystem BHS SR630 V4 1U PCIe number 1-3 and OCP number Label	1
C20J	ThinkSystem SR630 V4 Service Label for WW	1
C1XL	ThinkSystem Power Cable, PIC Power 2x3+6P to PIC Power 2x3+6P, 480mm	1
C1XM	ThinkSystem PCIe 5.0 Cable, MCIO 8X STR TO MCIO 8X STR, 250mm	3
C1XN	ThinkSystem PCIe 5.0 Cable, MCIO 8X STR TO MCIO 8X STR, 350mm	2
BE0E	N+N Redundancy With Over-Subscription	1
B0ML	Feature Enable TPM on MB	1
C3NP	ThinkSystem SR630 V4 MI-BF Cbl Riser to P9	1
CAR5	SR630 V4 Laser service indicator	1
C3NU	ThinkSystem SR630 V4 MI-10x2.5" NVMe G5 BP	1
C4DV	ThinkSystem SR630 V4 MotherBoard	1
C3K9	XClarity Platinum Upgrade v3	1
AVEN	ThinkSystem 1x1 2.5" HDD Filler	2
BPP5	OCP3.0 Filler with screw	1
B8NK	ThinkSystem 1U Super Cap Holder Dummy	1
C1Z8	ThinkSystem 1U V4 Low Profile Riser Cage	1
C26Y	ThinkSystem V4 CPU HS Clip	2
CA7N	ThinkSystem SR630 V4 System I/O board v2	1
C5XG	ThinkSystem SR630 V4 General Config PKG AC+CL	1
CBDC	ENERGY STAR Certification Country	1
7S0XCTO8WW	XClarity Controller Prem-FOD	4
SCY0	Lenovo XClarity XCC3 premier - FOD	1
5372SWX	xSeries HIPO	4
SDFT	Windows Server 2025 Datacenter (16 core) - MultiLang (not preinstalled)	1
5641PX5	XClarity Pro, Per Endpoint w/5 Yr SW S&S	4
1341	Lenovo XClarity Pro, Per Managed Endpoint w/5 Yr SW S&S	1
3444	Registration only	1
7S1SCTO8WW	Windows Server 2025 Addl Lic	4
SDCR	Windows Server 2025 Datacenter Additional License (16 core) (No Media/Key) (POS Only)	1
7S1SCTO5WW	Windows Server 2025	4
3523	Drop-in-the-Box	1
SDAM	Windows Server 2025 Datacenter (16 core) - MultiLang (not preinstalled)	1
3444	Registration only	1
5372SWX	xSeries HIPO	4
SDGU	Windows Server 2025 Datacenter Additional License (16 core) (No Media/Key) (POS Only)	1
7Q01CTS4WW	SERVER PREMIER 24X7 4HR RESP	4
QAJQ	SR630 V4	1
QA18	Premier	1
QA0Y	Months	60
QA12	24x7 4hr Resp	1
7Q01CTSAWW	SERVER KEEP YOUR DRIVE ADD-ON	4
QAJQ	SR630 V4	1
QAK6	KYD	1
QA0Y	Months	60

Distributor	Partner Number	Partner Address
TD Synnex US	1213385517	

Reseller	Partner Number	Partner Address
SHI International Corp	1213379140	290 Davidson Ave



Collin Central Appraisal District

CCAD Hardware Replacement Cycle

Desktop Replacement 5 years

- Standard PC
- Laptop
- Workstation
- Thin client

Printer Replacement 7 years

- Ink
- Laser (standard duty)

Scanner Replacement 5 years

- Flatbed (standard duty)
- Flatbed with document feeder
- Multifunction scanners

System Printer Replacement 3 years

- Laser (large capacity)
- Color Laser

System Scanner Replacement 7 years

- Flatbed (large capacity)
- Mass lift scanners

Plotter Replacement 3 years

- Standard laser/Ink 14" width printing and above
- Multifunction laser/Ink 14" width printing and above

Server Replacement 3 years

- All machines loaded with server OS software

Network Device Replacement 3 years

- Switches
- Hubs
- Wireless Access Points
- Routers
- Bridges
- Tape libraries
- UPS batteries
- Projectors

Hardware Recycle

In the event that hardware is still in good working condition, can handle its future capacity and parts are still stocked, we will pursue a hardware upgrade or defer replacement.

G.5.

Receive recommendation and vote on District's 2026 health insurance carriers, including option for employees to select from either a High Deductible Health Plan (HDHP), with a Health Saving Account (HSA) or traditional PPO medical plan, with medical reimbursement.

November 13, 2025



Collin Central Appraisal District

November 13, 2025

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

RE: 2026 Employee Insurance

This document is a summary of the 2026 employee insurance recommendation from Mr. Ryan Hanratty, with Swingle, Collins & Associates.

➤ Remain with our 2025 current insurance carriers for 2026.

- Blue Cross Blue Shield of Texas for medical
- Blue Cross Blue Shield of Texas for dental
- Superior Vision for vision
- Blue Cross Blue Shield of Texas for basic life & ADD
- Blue Cross Blue Shield of Texas for voluntary Life & ADD
- Blue Cross Blue Shield of Texas for short/long-Term disability
- Unum for long-term care for current employees
- First Stop Health for Telemedicine

Increase Health Savings Account (HSA) and medical reimbursement from \$4,300 annually to \$4,400 annually, based on increased contribution amount allowed by the IRS.

Mr. Hanratty will report to the Board regarding the renewal proposal process and negotiations.

Attachment: Spreadsheet showing 2025 costs, 2026 renewal proposal and 2026 projected cost after negotiations.

SwingleCollins & Associates

Collin Central Appraisal District Marketing Proposal

Presented by: Swingle Collins and Associates

Presented: October 2025

Plan Design:				Blue Cross Blue Shield of Texas Current/Renewal						Alternate 1 : Blue Cross Blue Shield of Texas NEGOTIATED FINAL SOLD					
				HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)		HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)	
				In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network	In-Network	Out-of-Network
Office Visit Co-Pay (Primary/Premium)				Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$50 Co-Pay	Ded + 50%	Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$50 Co-Pay	Ded + 50%
Specialist Co-Pay				Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$100 Co-Pay	Ded + 50%	Ded + 0%	Ded + 30%	\$40 Co-Pay	Ded + 30%	\$100 Co-Pay	Ded + 50%
Virtual Visits				Up to \$50	N/A	\$0	N/A	\$0	N/A	Up to \$50	N/A	\$0	N/A	\$0	N/A
Individual Deductible				\$5,000	\$10,000	\$5,000	\$10,000	\$5,250	\$10,500	\$5,000	\$10,000	\$5,000	\$10,000	\$5,250	\$10,500
Family Deductible				\$10,000	\$20,000	\$10,000	\$20,000	\$15,750	\$31,500	\$10,000	\$20,000	\$10,000	\$20,000	\$15,750	\$31,500
Co-Insurance (Member Pays)				0%	30%	30%	30%	30%	50%	0%	30%	30%	30%	30%	50%
OOP Max Individual				\$5,000	Unlimited	\$5,600	\$20,000	\$5,850	Unlimited	\$5,000	Unlimited	\$5,600	\$20,000	\$5,850	Unlimited
OOP Max Family				\$10,000	Unlimited	\$10,200	\$60,000	\$17,550	Unlimited	\$10,000	Unlimited	\$10,200	\$60,000	\$17,550	Unlimited
Deductible Included in OOP				Included		Included		Included		Included		Included		Included	
Emergency Room				Deductible + 0%		\$100 Co-Pay/Visit + Ded + 30%		\$500 Co-Pay/Visit + Ded + 30%		Deductible + 0%		\$100 Co-Pay/Visit + Ded + 30%		\$500 Co-Pay/Visit + Ded + 30%	
Preventive Care				\$0		\$0	Ded + 30%	\$0	Ded + 50%	\$0		\$0	Ded + 30%	\$0	Ded + 50%
Urgent Care Co-Pay				Ded + 0%	Ded + 30%	\$65 Co-Pay	Ded + 30%	\$75 Co-Pay	Ded + 50%	Ded + 0%	Ded + 30%	\$65 Co-Pay	Ded + 30%	\$75 Co-Pay	Ded + 50%
Pharmacy Co-Pay (In-Network)				In-Network		In-Network		In-Network		In-Network		In-Network		In-Network	
Pharmacy OOP				N/A		\$1,000 Ind / \$3,000 Family		N/A		N/A		\$1,000 Ind / \$3,000 Family		N/A	
Preferred Generic Drugs (30-Day Supply)				Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$0 / \$10 Co-Pay		Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$0 / \$10 Co-Pay	
Non-Preferred Generic Drugs (30-Day Supply)				Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$10 Co-Pay / \$20 Co-Pay		Deductible + 0%		\$20 Co-Pay / \$25 Co-Pay		\$10 Co-Pay / \$20 Co-Pay	
Preferred Brand Drugs (30-Day Supply)				Deductible + 0%		\$40 Co-Pay / \$50 Co-Pay		\$50 Co-Pay / \$70 Co-Pay		Deductible + 0%		\$40 Co-Pay / \$50 Co-Pay		\$50 Co-Pay / \$70 Co-Pay	
Non-Preferred Brand Drugs (30-Day Supply)				Deductible + 0%		\$60 Co-Pay / \$70 Co-Pay		\$100 Co-Pay / \$120 Co-Pay		Deductible + 0%		\$60 Co-Pay / \$70 Co-Pay		\$100 Co-Pay / \$120 Co-Pay	
Preferred Specialty Drugs (30-Day Supply)				Deductible + 0%		\$20 / \$40 / \$60		\$150 Co-Pay		Deductible + 0%		\$20 / \$40 / \$60		\$150 Co-Pay	
Non-Preferred Specialty Drugs (30-Day Supply)				Deductible + 0%		\$20 / \$40 / \$60		\$250 Co-Pay		Deductible + 0%		\$20 / \$40 / \$60		\$250 Co-Pay	
				Billed Monthly Premium						Billed Monthly Premium					
Enrollment				HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)		HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)	
				Current	Renewal	Current	Renewal	Current	Renewal	Proposed		Proposed		Proposed	
Employee Only				133	0	\$891.70	\$1,080.91	\$1,020.31	\$1,207.80	\$1,195.27	\$1,400.97	\$1,059.93	\$1,059.93	\$1,229.46	\$1,229.46
Employee + Spouse				1	0	\$2,050.73	\$2,485.77	\$2,346.50	\$2,777.59	\$2,748.88	\$3,221.81	\$2,437.54	\$2,437.54	\$2,827.38	\$2,827.38
Employee + Child(ren)				3	0	\$1,604.88	\$1,945.43	\$1,836.35	\$2,173.81	\$2,151.25	\$2,521.45	\$1,907.68	\$1,907.68	\$2,212.76	\$2,212.76
Employee + Family				1	0	\$2,764.10	\$3,350.52	\$3,162.76	\$3,743.85	\$3,705.09	\$4,342.57	\$3,285.51	\$3,285.51	\$3,810.93	\$3,810.93
Total Employees				138	0										
Total Monthly Premium						\$128,226	\$155,434	\$0	\$0	\$15,299	\$17,932	\$0	\$0	\$15,737	\$15,737
Current Annual Renewal Premium							\$1,722,297						\$1,825,698		
Renewal Annual Premium							\$2,080,389								
Change vs Current \$							\$358,091						\$103,401		
Change vs Current %							21%						6%		
				Company Monthly Costs						Company Monthly Costs					
				HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)		HSA MTBCP007H		PPO MMB422 (Retiree)		PPO MTBCP538 (Formerly PPO MTBCP038)	
% of Premium				Current	Renewal	Current	Renewal	Current	Renewal	Proposed		Proposed		Proposed	
Employee				100%	100%	\$891.70	\$1,080.91	\$1,020.31	\$1,207.80	\$1,195.27	\$1,400.97	\$1,059.93	\$1,059.93	\$1,229.46	\$1,229.46
Employee + Spouse				-	-	\$891.70	\$1,080.91	\$1,020.31	\$1,207.80	\$1,195.27	\$1,400.97	\$1,059.93	\$1,059.93	\$1,229.46	\$1,229.46
Employee + Child(ren)				-	-	\$891.70	\$1,080.91	\$1,020.31	\$1,207.80	\$1,195.27	\$1,400.97	\$1,059.93	\$1,059.93	\$1,229.46	\$1,229.46
Employee + Family				-	-	\$891.70	\$1,080.91	\$1,020.31	\$1,207.80	\$1,195.27	\$1,400.97	\$1,059.93	\$1,059.93	\$1,229.46	\$1,229.46
Total Monthly Premium						\$123,055	\$149,166	\$0	\$0	\$14,343	\$16,812	\$0	\$0	\$14,754	\$14,754
Current Annual Cost to Company							\$1,648,774						\$1,747,891		
Renewal Annual Cost to Company							\$1,991,727						\$99,117		
Change vs Current \$							\$342,953						6%		
Change vs Current %							21%								
				Employee Monthly Deductions						Employee Monthly Deductions					
Employee				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employee + Spouse				\$1,159.03	\$1,404.86	\$1,326.19	\$1,569.79	\$1,553.61	\$1,820.84	\$1,232.87	\$1,377.61	\$1,377.61	\$1,377.61	\$1,597.92	\$1,597.92
Employee + Child(ren)				\$713.18	\$864.52	\$816.04	\$966.01	\$955.98	\$1,120.48	\$758.68	\$847.75	\$847.75	\$847.75	\$983.30	\$983.30
Employee + Family				\$1,872.40	\$2,269.61	\$2,142.45	\$2,536.05	\$2,509.82	\$2,941.60	\$1,991.75	\$2,225.58	\$2,225.58	\$2,225.58	\$2,581.47	\$2,581.47
				Employee Semi-Monthly Deductions						Employee Semi-Monthly Deductions					
Employee				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employee + Spouse				\$579.52	\$702.43	\$663.10	\$784.90	\$776.81	\$910.42	\$616.44	\$688.81	\$688.81	\$688.81	\$798.96	\$798.96
Employee + Child(ren)				\$356.59	\$432.26	\$408.02	\$483.01	\$477.99	\$560.24	\$379.34	\$423.88	\$423.88	\$423.88	\$491.65	\$491.65
Employee + Family				\$936.20	\$1,134.81	\$1,071.23	\$1,268.03	\$1,254.91	\$1,470.80	\$995.88	\$1,112.79	\$1,112.79	\$1,112.79	\$1,290.74	\$1,290.74
				2026: \$4,400 HSA Contribution 2025: \$4,300 HSA Contribution						2026: \$4,400 HRA Contribution 2025: \$4,300 HRA Contribution					
				In-Network Changes						In-Network Changes					
				Ind Ded went from \$5,000 to \$5,250						Ind Ded went from \$5,000 to \$5,250					
				Fam Ded went from \$14,700 to \$15,750						Fam Ded went from \$14,700 to \$15,750					
				Ind OOP went from \$5,600 to \$5,850						Ind OOP went from \$5,600 to \$5,850					
				Fam OOP went from \$14,700 to \$17,550						Fam OOP went from \$14,700 to \$17,550					
				Office visit co-pay went from \$45 to \$50						Office visit co-pay went from \$45 to \$50					
				Specialist co-pay went from \$90 to \$100						Specialist co-pay went from \$90 to \$100					

Plan Design:		Blue Cross Blue Shield of Texas Current/Renewal		Alternate 1 : Blue Cross Blue Shield of Texas NEGOTIATED
1	Plan Name	DTNHR01		DTNHR01
2	Contributory Status	Contributory		Contributory
3	Calendar Year Deductible	\$25 Individual / \$75 Family		\$25 Individual / \$75 Family
4	Annual Maximum Per Individual	\$3,000		\$3,000
5	Out-of-Network Reimbursement	90% U&C		90% U&C
6	Deductible Waived for Preventive	Yes		Yes
7	Preventive & Diagnostic	100%		100%
8	Basic	80%		80%
9	Major	50%		50%
10	Waiting Periods	None		None
11	Endodontics/ Periodontics	Basic		Basic
12	Orthodontia	50% to \$2,000 Lifetime Max		50% to \$2,000 Lifetime Max
13	Rate Guarantee	1 Year		1 Year
14		Billed Monthly Premiums		Billed Monthly Premiums
15	Enrollment	Current	Renewal	Proposed
16	Employee 126	\$50.87	\$58.50	\$55.96
17	Employee + Spouse 14	\$101.77	\$117.04	\$111.95
18	Employee + Child(ren) 17	\$130.48	\$150.05	\$143.53
19	Employee + Family 12	\$199.70	\$229.66	\$219.67
20	Total Employees 169			
21	Total Monthly Premium	\$12,449	\$14,316	\$13,694
22	Annual Premium	\$149,388		
23	Renewal Annual Premium	\$171,796		\$164,332
24	Change vs Current \$	\$22,408		\$14,944
25	Change vs Current %	15%		10%
26		Company Monthly Costs		Company Monthly Costs
27	% of Premium	Current	Renewal	Proposed
28	Employee 100%	\$50.87	\$58.50	\$55.96
29	Employee + Spouse 50%	\$50.87	\$58.50	\$55.96
30	Employee + Child(ren) 39%	\$50.87	\$58.50	\$55.96
31	Employee + Family 25%	\$50.87	\$58.50	\$55.96
32	Total Monthly Premium	\$8,597	\$9,887	\$9,457
33	Annual Premium	\$103,164		
34	Renewal Annual Premium	\$118,638		\$113,487
35	Change vs Current \$	\$15,474		\$10,323
36	Change vs Current %	15%		10%
37		Employee Monthly Costs		Employee Monthly Costs
38		Current	Renewal	Proposed
39	Employee	\$0.00	\$0.00	\$0.00
40	Employee + Spouse	\$46.28	\$58.54	\$55.99
41	Employee + Child(ren)	\$72.40	\$91.55	\$87.57
42	Employee + Family	\$135.32	\$171.16	\$163.71
43		Employee Semi-Monthly Costs		Employee Semi-Monthly Costs
44		Current	Renewal	Proposed
45	Employee	\$0.00	\$0.00	\$0.00
46	Employee + Spouse	\$23.14	\$29.27	\$28.00
47	Employee + Child(ren)	\$36.20	\$45.78	\$43.79
48	Employee + Family	\$67.66	\$85.58	\$81.86

Plan Design:		Superior Vision Current/Renewal	
1 Network		Superior Select Southwest Network	
2 Contributory Status		Contributory	
3 EXAMINATION			
4 Eye Exam		\$10 Co-Pay	Up to \$35
5 MATERIALS			
6 Frames (Subject to Plan Allowance)		Up to \$200 + 20%	Up to \$70
7 Single Vision Lenses		100% after \$25 Co-Pay	Up to \$25
8 Bifocal Lenses		100% after \$25 Co-Pay	Up to \$40
9 Trifocal Lenses		100% after \$25 Co-Pay	Up to \$45
10 CONTACT LENSES (In Lieu of Frames)			
11 Elective		Up to \$200 + 10%/20%	Up to \$80
12 Medical Necessary		100% after \$25 Co-Pay	Up to \$150
13 FREQUENCY			
14 Exam/Frames/Lenses/Contacts		12/12/12/12	
15 Participation Requirements		-	
16 Rate Guarantee		Through 12/31/2027	
17		Billed Monthly Premiums	
18 Enrollment	Enrollment	<u>Current</u>	<u>Renewal</u>
19 Employee	112	\$7.82	\$7.82
20 Employee + Spouse	9	\$14.77	\$14.77
21 Employee + Child(ren)	11	\$15.69	\$15.69
22 Employee + Family	12	\$24.60	\$24.60
23 Total Employees	144		
24 Total Monthly Premium		\$1,477	\$1,477
25 Current Annual Premium		\$17,719	
26 Renewal Annual Premium		\$17,719	
27 Change vs Current \$		\$0	
28 Change vs Current %		0%	
29		Company Monthly Costs	
30 % of Premium	% of Premium	<u>Current</u>	<u>Renewal</u>
31 Employee	100%	\$7.82	\$7.82
32 Employee + Spouse	53%	\$7.81	\$7.81
33 Employee + Child(ren)	50%	\$7.81	\$7.81
34 Employee + Family	32%	\$7.82	\$7.82
35 Total Monthly Premium		\$1,126	\$1,126
36 Current Annual Premium		\$13,511	
37 Renewal Annual Premium		\$13,511	
38 Change vs Current \$		\$0	
39 Change vs Current %		0%	
40		Employee Monthly Costs	
41		<u>Current</u>	<u>Renewal</u>
42 Employee		\$0.00	\$0.00
43 Employee + Spouse		\$6.96	\$6.96
44 Employee + Child(ren)		\$7.88	\$7.88
45 Employee + Family		\$16.78	\$16.78
46		Employee Semi-Monthly Costs	
47		<u>Current</u>	<u>Renewal</u>
48 Employee		\$0.00	\$0.00
49 Employee + Spouse		\$3.48	\$3.48
50 Employee + Child(ren)		\$3.94	\$3.94
51 Employee + Family		\$8.39	\$8.39

Plan Design:		Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1	Benefit Amount	2X Annual Salary up to \$300,000	
2	Total Eligible Employees	160	
3	Volume	\$23,191,000	
2	Accidental Death & Dismemberment (AD&D)	Same as Basic Life Amount	
3	Waiver of Premium	To 65, if disabled prior to age 60	
4	Guarantee Issue	\$300,000	
5	Conversion	Included	
6	Portability	Included	
7	Accelerated Life Benefit	Lesser of 75% up to \$250,000	
8	Age Reduction		
9	Age 65	65%	
10	Age 70	55%	
11	Age 75	70%	
12	Age 80	80%	
13	Rate Guarantee	Through 12/31/2028	
14		Billed Premium	
15		<u>Current</u>	<u>Renewal</u>
16	Basic Life Rate / \$1,000	\$0.127	\$0.127
17	Basic AD&D Rate / \$1,000	\$0.016	\$0.016
18	Total Rate / \$1,000	\$0.143	\$0.143
21	Estimated Annual Premium	\$39,796	\$39,796
19	Change vs Current \$	\$0	
20	Change vs Current %	0%	

Voluntary Life and ADD

Plan Design:		Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1	Employee - Benefit Amount	Increments of \$10,000	
2	Maximum Benefit	The lesser of 5X Annual Salary or \$500,000	
3	Accelerated Life Benefit	Lesser of 75% up to \$250,000	
4	Portability	Available	
5	Conversion	Available	
6	Waiver of Premium	To age 65, if disabled prior to 60	
7	Guaranteed Issue (GI)	\$100,000	
8	Minimum Participation Requirements	25% of Eligible Employees	
9	Age Reductions	Same as Basic Life	
10	Suicide Exclusion	1 Year	
11	Spouse - Benefit Amount	Increments of \$5,000	
12	Maximum Benefit	\$500,000 (Not to exceed 100% of EE Benefit)	
13	Guaranteed Issue (GI)	\$25,000	
14	Children: Birth to 14 Days	\$1,000	
15	Children: Age 15 Days to 6 Months	\$1,000	
16	Children: Age 6 Months to 26 Years	Increments of \$2,000	
17	Maximum Benefit	\$10,000	
18	Guaranteed Issue (GI)	\$10,000	
19	Employee Age Brackets	Rate per \$1,000 (Includes AD&D)	
20		<u>Current</u>	<u>Renewal</u>
21	< 30	\$0.093	\$0.093
22	30 - 34	\$0.112	\$0.112
23	35 - 39	\$0.122	\$0.122
24	40 - 44	\$0.134	\$0.134
25	45 - 49	\$0.186	\$0.186
26	50 - 54	\$0.279	\$0.279
27	55 - 59	\$0.448	\$0.448
28	60 - 64	\$0.678	\$0.678
29	65 - 69	\$1.288	\$1.288
30	70 +	\$2.102	\$2.102
31	Spouse Age Brackets	Rate per \$1,000 (Includes AD&D)	
32		<u>Current</u>	<u>Renewal</u>
33	< 30	\$0.108	\$0.108
34	30 - 34	\$0.127	\$0.127
35	35 - 39	\$0.137	\$0.137
36	40 - 44	\$0.149	\$0.149
37	45 - 49	\$0.201	\$0.201
38	50 - 54	\$0.294	\$0.294
39	55 - 59	\$0.463	\$0.463
40	60 - 64	\$0.693	\$0.693
41	65 - 69	\$1.303	\$1.303
42	70 +	\$2.117	\$2.117
43	Accidental Death & Dismemberment (AD&D)	AD&D Rate per \$1,000	
44	Employee AD&D Rate	\$0.018 per \$1,000	\$0.018 per \$1,000
45	AD&D Benefit Amount	Same as Basic Life	
46	Spouse Rate Information	Rate per \$1,000	
47		<u>Current</u>	<u>Renewal</u>
48	Spouse AD&D Rate	\$0.033 per \$1,000	\$0.033 per \$1,000
49	Spouse Life Rate	Based on Employee's Age	
50	Spouse Benefit Termination	Spouse benefit terminates at Employee retirement	
51	Dependent Rate Information	Rate per \$1,000	
52		<u>Current</u>	<u>Renewal</u>
53	Child Life Rate / \$1,000	\$0.120 per \$1,000	\$0.120 per \$1,000
54	Child AD&D Rate / \$1,000	\$0.022 per \$1,000	\$0.022 per \$1,000

Plan Design:	Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1 Contribution Status	Employer Paid	
2 Tax Free Benefit	No	
3 Bonus & Commissions	Excluded	
4 Benefit Amount	60% of your Monthly Earnings	
5 Benefit Maximum	\$8,000	
6 Elimination Period	90 Days	
7 Pre-Existing Exclusion	3/12	
8 Survivor Benefit	3X Last Monthly Benefit	
9 Partial Disability Test	80%/60%	
10 Rehabilitation	Incentivized	
11 Own Occupation Period	24 Months	
12 Duration	To SSNRA	
13 Definition of Disability	And	
14 Rate Guarantee	Through 12/31/2028	
15 Volume	\$593,477	
15	Billed Premium	
16	<u>Current</u>	<u>Renewal</u>
17 Total Rate / \$100	\$0.351	\$0.351
19 Estimated Annual Premium	\$24,997	\$24,997
18 Change vs Current \$	\$0	
19 Change vs Current %	0%	

Plan Design:	Blue Cross Blue Shield of Texas (Dearborn) Current/Renewal	
1 Contribution Status	Employer Paid	
2 Tax Free Benefit	No	
3 Bonus & Commissions	Excluded	
4 Benefit Amount	60% of your Weekly Earnings	
5 Benefit Maximum	\$2,000	
6 Elimination Period - Accident	14 Days	
7 Elimination Period - Sickness	14 Days	
8 Pre-Existing Exclusion	None	
9 Duration	11 Weeks	
10 Rate Guarantee	Through 12/31/2028	
11 Volume	\$137,729	
11	Billed Premium	
12	<u>Current</u>	<u>Renewal</u>
13 Total Rate / \$10	\$0.240	\$0.240
15 Estimated Annual Premium	\$39,666	\$39,666
14 Change vs Current \$	\$0	
15 Change vs Current %	0%	



Current virtual urgent care and \$7.45 PEPM and Virtual Mental Health is \$1.75 PEPM for a total of \$9.20 PEPM.

Adding Whole Mental Health at an additional PEPM of \$3.45.
Total PEPM for all would be \$12.65 Per Employee Per Month.

Re: New Enrollments for Group Long Term Care Policy Number 00094830

We are writing to inform you that we will discontinue accepting new enrollments into Group Long Term Care (GLTC) policies, including your company's policy, as of February 1, 2026. Please retain this letter with your policy.

Existing insureds are not impacted by this action. Please read the full letter for important information, including on plan administration.

We are making this change due to shifts in the market and evolving customer needs. Since these group plans were designed more than three decades ago, there have been significant and accelerating changes in the LTC business: people are living longer and requiring more extended care than was expected when these products were first priced, which has led to higher claim costs and premium increases. We recognize the financial burden that rate increases place on your company and the enrollees in your group plan. These increases are necessary to ensure the product remains actuarially sound, which in turn protects your coverage and our ability to meet claims. We anticipate continued rate increase activity to address the evolving demands of this business.

This decision is also consistent with the evolution of the employment benefits market, with employers shifting focus towards broader offerings, including voluntary benefits, financial wellness, and more flexible insurance solutions. We regularly review and adjust our product offerings to ensure we have the right solutions to meet the evolving needs of our diverse customer base.

Following the discontinuation of accepting new enrollments on February 1st, 2026, you will maintain responsibility for administering the group plan for your covered employees, inclusive of any future rate actions that must be implemented. If you no longer wish to administer the plan, we are available to speak with you regarding terminating the policy while offering continuation of coverage to your existing insureds.

If the policy is terminated, you will be relieved of all administrative and policyholder duties, and existing insureds will have the option to continue their inforce coverage on a direct billed basis at their current premium level, subject to any future rate increases.

We value your partnership and the trust you have placed in Unum. We remain committed to supporting you and your covered employees through this transition.

**COLLIN CENTRAL APPRAISAL DISTRICT
2026 GROUP INSURANCE SUMMARY CALCULATIONS**

2025 CALCULATED INSURANCE COST:			2026 PROJECTED COST AT RENEWAL:			2026 PROJECTED COST, AS NEGOTIATED:		
ITEM	MONTHLY	ANNUAL	RENEW FACTOR	PROJ. MONTHLY	PROJ. ANNUAL	RENEW FACTOR	PROJ. MONTHLY	PROJ. ANNUAL
Medical (BCBS)	\$924.05	\$11,088.60	21.00%	\$1,118.10	\$13,417.21	6.00%	\$979.49	\$11,753.92
Dental (BCBS)	\$50.86	\$610.32	15.00%	\$58.49	\$701.87	10.00%	\$55.95	\$671.35
Vision (SUPERIOR)	\$7.82	\$93.84	0.00%	\$7.82	\$93.84	0.00%	\$7.82	\$93.84
Long-term care (Unum)*	\$11.37	\$136.44	0.00%	\$11.37	\$136.44	0.00%	\$11.37	\$136.44
First Stop Health, Telemedicine	\$7.45	\$89.40	0.00%	\$7.45	\$89.40	0.00%	\$7.45	\$89.40
*Life / Disability (BCBS)	\$72.59	\$871.10	0.00%	\$72.59	\$871.10	0.00%	\$72.59	\$871.10
IDSshield	<u>\$9.95</u>	<u>\$119.40</u>	<u>0.00%</u>	<u>\$9.95</u>	<u>\$119.40</u>	<u>0.00%</u>	<u>\$9.95</u>	<u>\$119.40</u>
Subtotal	\$1,084.09	\$13,009.10		\$1,285.77	\$15,429.26		\$1,144.62	\$13,735.45
HSA/Medical Reimbursements	<u>\$358.33</u>	<u>\$4,300</u>		<u>\$366.66</u>	<u>\$4,400</u>		<u>\$366.66</u>	<u>\$4,400</u>
Grand Total (Per Employee)	\$1,442.42	\$17,309.06		\$1,652.43	\$19,829.18		\$1,511.28	\$18,135.37
Number of Employees Budgeted	171	171		178	178		178	178
Projected Grand Total Cost	\$246,654.17	\$2,959,850.00		\$294,132.81	\$3,529,593.74		\$269,008.02	\$3,228,096.27
Line-Item Budget		<u>\$2,978,000.00</u>			<u>\$3,342,000.00</u>			<u>\$3,342,000.00</u>
Projected Line-Item Balance Y.E.		\$18,150.00	Projected Line-Item Balance Y.E.	-\$187,593.74		Projected Line-Item Balance Y.E.		\$113,903.73
Annual Budget Per Employee		\$17,415.20	Annual Budget Per Employee	\$18,775.28		Annual Budget Per Employee		\$18,775.28

Color Codes: Yellow = Current 2025 Projected Cost. Gray = 2026 Initial Renewal Rates. Green = Negotiated Rates Being Recommended for 2026.

** The Texas Department of Insurance has approved the Unum request for a rate adjustment for employee purchased plans with inflation adjustments to benefits to be paid. The plan premium was changed on all clients that selected the inflation adjusted benefits at their initial enrollment. The employee can choose to avoid their premium increase by waiving the inflation adjustment to their benefit. The District's cost per employee will not change, since it is a fixed benefit, without inflation adjustment. Our initial coverage began in 2009 and our premiums have not changed since our initial enrollment.*



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The average ID Theft issue
takes 330 hours to repair

Identity theft in the digital age, a few stats:

- Texas ranks 6th in the nation in ID Theft
- TX Driver's License theft: 28 million hacked in 2021.
- 2400 TX Driver's Licenses went to criminals Jan-Jul 2023
- Most identity theft will NOT show up on a credit report
- 1 in 4 thefts are reported by 30-39 year olds
- 60% of ID Theft does NOT include credit card theft

Norma P, Euless TX, IDShield Customer



"I was alerted a loan was being opened in my name, immediately called IDShield, they were so helpful and took the time to explain everything and assured me that they would protect me. This is the kind of service you need when you have been violated and your identity has been compromised. Thank you!"



Sheryl Powers, Your Servicing Agent



C: 817-988-6780

O: 214-935-5500



powers@mpoweredadvantage.com



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Per Pay Period deductions:

	<u>Family</u>	<u>Individual</u>
IDShield	\$9.21	\$4.59

Family = member, partner, unmarried dependents thru age 25 at home or full time college, guardianship thru age 17.

Sheryl Powers, Your Servicing Agent

C: 817-988-6780

O: 214-935-5500

✉ sherylapowers@gmail.com

🌐 MPoweredAdvantage.com

G.6.

Review and discuss changes on Medical Reimbursement, Policy #1001 for 2026, for employees selecting traditional PPO medical plan.

November 13, 2025



Collin Central Appraisal District

POLICY NUMBER: 1001

POLICY NAME: MEDICAL REIMBURSEMENT POLICY

All full-time active employees on the District's non-HSA Medical Plan, Blue Cross MTBCP038, are eligible to participate in the District's medical reimbursement program. The reimbursement program is applicable to medical, dental and vision covered expenses for the employee only.

Eligible employees can receive a maximum of ~~\$4,300~~ **\$4,400** in reimbursements per budget year. Any unused portion of the ~~\$4,300~~ **\$4,400** annual reimbursement allowance cannot be carried forward, in part or whole, to any future budget year, or retroactively applied to a prior budget year. This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the medical reimbursement program as they deem appropriate. The Chief Appraiser shall develop and implement a medical reimbursement procedure that adheres to this policy. This policy has been reviewed by the Board of Directors and is hereby continued through the end of budget year ~~2025~~ **2026**.

Adopted: January 22, 2009

Board Minutes: 1-22-2009

Amended: November 19, 2020

Resolution #: 2020-1093

Amended: November 18, 2021

Resolution #: 2021-1102

Amended: October 27, 2022

Resolution #: 2022-1116

Amended: October 27, 2022

Resolution #: 2022-1116

Amended: October 26, 2023

Resolution #: 2023-1130

Amended: October 24, 2024

Resolution #: 2024-1140

Amended: November 13, 2025

Resolution #: 2025-1149



Collin Central Appraisal District

POLICY NUMBER: 1001

POLICY NAME: MEDICAL REIMBURSEMENT POLICY

All full-time active employees on the District's non-HSA Medical Plan, Blue Cross MTBCP038, are eligible to participate in the District's medical reimbursement program. The reimbursement program is applicable to medical, dental and vision covered expenses for the employee only. Eligible employees can receive a maximum of \$4,400 in reimbursements per budget year. Any unused portion of the \$4,400 annual reimbursement allowance cannot be carried forward, in part or whole, to any future budget year, or retroactively applied to a prior budget year. This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the medical reimbursement program as they deem appropriate. The Chief Appraiser shall develop and implement a medical reimbursement procedure that adheres to this policy. This policy has been reviewed by the Board of Directors and is hereby continued through the end of budget year 2026.

Adopted: January 22, 2009

Board Minutes: 1-22-2009

Amended: November 19, 2020

Resolution #: 2020-1093

Amended: November 18, 2021

Resolution #: 2021-1102

Amended: October 27, 2022

Resolution #: 2022-1116

Amended: October 27, 2022

Resolution #: 2022-1116

Amended: October 26, 2023

Resolution #: 2023-1130

Amended: October 24, 2024

Resolution #: 2024-1140

Amended: November 13, 2025

Resolution #: 2025-1149

G.7.

**Review and discuss changes on District's HSA
Contribution, Policy #1005 for 2026, for
employees selecting HDHP with Health Savings
Account.**

November 13, 2025



Collin Central Appraisal District

POLICY NUMBER: 1005

POLICY NAME: HEALTH SAVINGS ACCOUNT (HSA)

All full-time active employees on the District's High Deductible Health Plan (HDHP), Blue Cross MTBCPOO7H HSA, are eligible for contributions to their HSA by the District. The District will contribute monthly to each eligible employee's HSA, based on a ~~\$4,300~~ **\$4,400** annual maximum. The District will make a reasonable effort to deposit contributions for the current month within the first fifteen calendar days of the current month.

For employees new to the District during calendar year ~~2025~~ **2026**, the District will make a one-time initial contribution of \$300 to establish the employee's HSA account. Thereafter, the District will make monthly contributions, as outlined above.

This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the High Deductible Health Plan (HDHP), and/or alter or eliminate contributions to the Health Savings Account (HSA), as they deem appropriate.

The Chief Appraiser shall develop and implement a Health Savings Account (HSA) contribution procedure that adheres to this policy.

This policy has been reviewed by the Board of Directors and is hereby adopted through the end of budget year ~~2025~~ **2026**.

Adopted: October 27, 2011

Resolution #: 2011-1019

Adopted: November 18, 2021

Resolution #: 2021-1101

Amended: November 19, 2020

Resolution #: 2020-1092

Amended: October 27, 2022

Resolution #: 2022-1115

Amended: October 26, 2023

Resolution #: 2023-1131

Amended: October 24, 2024

Resolution #: 2024-1141

Amended: November 13, 2025

Resolution #: 2025-1150



Collin Central Appraisal District

POLICY NUMBER: 1005

POLICY NAME: HEALTH SAVINGS ACCOUNT (HSA)

All full-time active employees on the District's High Deductible Health Plan (HDHP), Blue Cross MTBCPOO7H HSA, are eligible for contributions to their HSA by the District. The District will contribute monthly to each eligible employee's HSA, based on a \$4,400 annual maximum. The District will make a reasonable effort to deposit contributions for the current month within the first fifteen calendar days of the current month.

For employees new to the District during calendar year 2026, the District will make a one-time initial contribution of \$300 to establish the employee's HSA account. Thereafter, the District will make monthly contributions, as outlined above.

This policy will be reviewed annually by the Board of Directors and the Board at their sole discretion may continue, alter or eliminate the High Deductible Health Plan (HDHP), and/or alter or eliminate contributions to the Health Savings Account (HSA), as they deem appropriate.

The Chief Appraiser shall develop and implement a Health Savings Account (HSA) contribution procedure that adheres to this policy.

This policy has been reviewed by the Board of Directors and is hereby adopted through the end of budget year 2026.

Adopted: October 27, 2011

Resolution #: 2011-1019

Adopted: November 18, 2021

Resolution #: 2021-1101

Amended: November 19, 2020

Resolution #: 2020-1092

Amended: October 27, 2022

Resolution #: 2022-1115

Amended: October 26, 2023

Resolution #: 2023-1131

Amended: October 24, 2024

Resolution #: 2024-1141

Amended: November 13, 2025

Resolution #: 2025-1150

G.8.
Receive recommendation and vote on
Resolution # 2025-95, group insurance
carriers.

November 13, 2025



Collin Central Appraisal District

BOARD OF DIRECTORS

Brian Mantzey-Chairman
Richard Grady-Secretary
Scott Grigg-Assessor
Alvin Benton
Andrew Cook

Randal Shinn
Jerry Tartaglino
Veronica Yost
Sumbel Zeb

CHIEF APPRAISER

Marty Wright

BOARD OF DIRECTORS RESOLUTION # 2025-95

The Collin Central Appraisal District Board of Directors met in open session on November 13, 2025. The Board, with a quorum present, by a vote of _____ (for) and _____ (against) adopted the following resolution: ***Be it resolved that the Collin Central Appraisal District Board of Directors hereby approves the following group insurance carriers for 2026, as listed below, based on details presented in public session on November 13, 2025.***

CARRIER	COVERAGE TYPE
BCBS	Medical
BCBS	Dental
Superior Vision	Vision
BCBS	Life, Short-Term Disability and Long-Term Disability
Unum	Long-term Care
First Stop Health	Online Doctor Care and Online Mental Health Counselors
IDShield	Identity Theft Protection

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this _____ day of _____, 2025.

Brian Mantzey, Chairman

(and/or)

Richard Grady, Secretary

G.9.

**Receive recommendation and vote on
Resolution # 2025-1149, Board Policy #1001.**

November 13, 2025



Collin Central Appraisal District

BOARD OF DIRECTORS

Brian Mantzey-Chairman
Richard Grady-Secretary
Scott Grigg-Assessor
Alvin Benton
Andrew Cook

Randal Shinn
Jerry Tartaglino
Veronica Yost
Sumbel Zeb

CHIEF APPRAISER

Marty Wright

BOARD OF DIRECTORS RESOLUTION # 2025 - 1149

The Collin Central Appraisal District Board of Directors met in open session on November 13, 2025. The Board, with a quorum present, by a vote of _____ (for) and _____ (against) adopted the following resolution:

Be it resolved that the Collin Central Appraisal District Board of Directors hereby continues Board Policy #1001 through calendar year 2026, regarding reimbursements of medical, dental and vision expenses for employees only, not to exceed \$4,400 annually, from the 2026 adopted Budget, pursuant to Board Policy #1001.

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this _____ day of _____, 2025.

Brian Mantzey-Chairman

(and/or)

Richard Grady-Secretary

G.10.

**Receive recommendation and vote on
Resolution # 2025-1150, Board Policy #1005.**

November 13, 2025



Collin Central Appraisal District

BOARD OF DIRECTORS

Brian Mantzey-Chairman
Richard Grady-Secretary
Scott Grigg-Assessor
Alvin Benton
Andrew Cook

Randal Shinn
Jerry Tartaglino
Veronica Yost
Sumbel Zeb

CHIEF APPRAISER

Marty Wright

BOARD OF DIRECTORS RESOLUTION # 2025 - 1150

The Collin Central Appraisal District Board of Directors met in open session on November 13, 2025. The Board, with a quorum present, by a vote of _____ (for) and _____ (against) adopted the following resolution:

Be it resolved that the Collin Central Appraisal District Board of Directors hereby continues Board Policy #1005 through calendar year 2026, regarding contributions to employees' Health Savings Accounts in the amount of \$4,400 annually, from the 2026 adopted Budget, pursuant to Board Policy #1005.

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this _____ day of _____, 2025.

Brian Mantzey-Chairman

(and/or)

Richard Grady-Secretary

G.11.

**Recieve recommendation and vote on
appointing the 2026 Appraisal Review Board
Officers.**

November 13, 2025



COLLIN APPRAISAL REVIEW BOARD

250 Eldorado Pkwy, McKinney, TX 75069

Phone: 469.742.9288 • Web: www.collinarb.org

November 5, 2025

Collin Central Appraisal District Board of Directors
The Honorable Chairman Brian Mantzey
250 Eldorado Parkway
McKinney, Texas 75069

Re: Appraisal Review Board (ARB) 2026 Member and Officer Recommendations

Board of Directors of the Collin Central Appraisal District (Board):

On behalf of the 2025 ARB officers, I present recommendations to the Board for: 1) new ARB members, 2) reapplying members, and 3) ARB officer positions of Chairman, Vice Chairman, and Secretary, with all appointments to take effect on January 1, 2026.

I. Appointment of New ARB Members

The ARB officers and commissioners recommend the appointment of 28 applicants as new ARB members. The appointees are listed in **Table 1**, along with education and experience information as identified in the applicant application and interview process. These recommendations result from the Board-approved application and interview process as conducted by the ARB Commissioners. Based on the ARB Commissioner's review of available information, the recommended applicants meet the eligibility requirements under the Texas Property Tax Code (Code) and are deemed qualified to serve on the ARB.

A Board motion of approval is requested, followed by notification of appointees as outlined in the attached letter, "Appointments to Collin CAD Appraisal Review Board for 2026-2027."

*The contingent new ARB member recommendations (4 applicants), listed in **Table 2**, are proposed for appointment if any member from **Table 1** or current ARB members are unable to serve. The selection process, eligibility, and qualifications align with those in **Table 1**. If necessary, a Board motion of approval and appointment letter will be requested at a later date.*

The New ARB Member applicants who are either ineligible or not recommended for appointment are listed in **Table 3**.

II. Appointment of Reapplying ARB Members

The 2025 ARB has 21 members currently in their 1st or 2nd terms which expire on December 31, 2025. Nineteen (19) have reapplied for subsequent terms with 18 recommended for renewal. Reapplying members are evaluated throughout the year by ARB officers, mentors, and performance-based feedback from other members. Recommendations for reappointments are based on their performance in the areas listed below.

Dependability:

- a. Attendance at scheduled meetings, training sessions, hearings, and overall availability when needed.

Involvement & Participation:

- a. Contributions as a member of a 3-member panel.
- b. Abilities to serve as Chair of a single and/or 3-member panel.
- c. Contributions to ARB training and mentorship.

Knowledge:

- a. Commercial, Residential, Land, and/or Business Personal Property expertise and knowledge.
- b. Overall potential to serve on the ARB, as needed, including, but not limited to future interest in serving as an ARB officer, Policy & Procedure Committee, and ARB Commissioner.

The 18 applicants recommended for appointment to a new term are listed in **Table 4**. Members with performance deficiencies in the evaluation areas are not recommended for reappointment.

A Board motion of approval is requested, followed by notification of appointees as outlined in the attached letter, "Appointments to Collin CAD Appraisal Review Board for 2026-2027."

III. Appointment of ARB Officers

In accordance with Code §6.42(a) and CCAD Policy No. 114, the Board of Directors (Board) will annually appoint the Chairman and Secretary of the Appraisal Review Board from its general membership. At the ARB's discretion, a Vice Chairman may also be included. In August 2025, the Board approved the process for selecting ARB Officers, effective January 1, 2026. As of the announced deadline for the ARB members to declare candidacy for an officer position, the following candidates were received:

ARB Chairman – Nancy Bittner

ARB Vice Chairman – Bert Leatch, Deborah Daniel

ARB Secretary – Karyn Farthing

The ARB members have recommended Bert Leatch as the Vice Chairman, based on a majority vote from 54 of the current 60 members. The background, resume, and qualifications of the recommended ARB officers are provided in **Table 5**.

A Board motion of approval is requested, with subsequent notifications of the officers as outlined in the attached letter, "Appointment of Collin Appraisal Review Board Officers for 2025."

Thank you for your consideration.

Regards,

George Chollar

George Chollar
Chairman, Collin ARB

CC: Marty Wright, Chief Appraiser
Stephanie Cave-Bernal, Deputy Chief Appraiser
Tina Castillo, Director of ARB and Agent Services
Chris Nickell, Taxpayer Liaison Officer

TABLE 1. New Member Applicants recommended by the ARB Commissioners for appointment (subject to completion of Background Check) effective January 1, 2026.

Candidate	Commissioner Interview Comments, Feedback, and Qualification information
1. Matthew T. Cason	<ul style="list-style-type: none"> • Education: Degree, Christian Ministry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Sales Agent, Mortgage Banking experience ○ Professional real estate appraiser from 2001 – 2015 ○ Understand difference between mass appraisal and being a professional realtor ○ Calm under pressure, excellent communicator
2. Kenneth Clowes	<ul style="list-style-type: none"> • Education: UK O Level (General Certificate of Education) • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Managing Director at ATC Trust (retired) ○ Background in Law, Taxation and Accounting ○ Experience as a Trust Banker, good understanding of real estate valuation techniques ○ Strong ability analyzing data and working as part of a small team ○ Good communication skills
3. Kevin J. Cortez	<ul style="list-style-type: none"> • Education: BA Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Professional Management Services, Director ○ Experienced business consultant providing management services to small to medium businesses ○ Good understanding of ARB and how process works ○ Good communicator, excellent analytical skills
4. Celeste H. Cox	<ul style="list-style-type: none"> • Education: BA Spanish/Secondary Education • Experience/Background/Skills: <ul style="list-style-type: none"> ○ CEO level experience Habitat for Humanity and Housify, executive leadership, property evaluation ○ Experience in conflict resolution and financial analysis ○ Familiar with financial statements and appraisals ○ Very good communication skills, used to making decisions quickly
5. Trammell Davis	<ul style="list-style-type: none"> • Education: Masters Certificate Homeland Security, BBA Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Financial Analyst at USAA (retired) ○ CPA (inactive), mortgage loan originator, financial analyst ○ Excellent experience suited for commercial panel member
6. Dale P DeShazo	<ul style="list-style-type: none"> • Education: MBA Finance, BS AgriBusiness • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Texas Licensed Property & Casualty/Life & Health Insurance Agent ○ Taught Texas Insurance agent CE classes ○ Lampasas County ARB and BOD ○ Extensive banking/commercial experience with appraisal responsibilities ○ Has served on several grand jury panels ○ Asked very good and specific questions

	<ul style="list-style-type: none"> ○ Protested property value in 2024, impressed with professionalism of all involved
7. Kristine L. Edens	<ul style="list-style-type: none"> • Education: AAS Physical Therapy • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent ○ Experienced in resolving disputes
8. Rebecca E. Ferrill	<ul style="list-style-type: none"> • Education: BSBA Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Has served as Director of Human Resources at 2 hospitals ○ Service oriented also work as volunteer tax preparer ○ Demonstrated ability to handle tough situations ○ Familiar with protest process, good communication skills
9. Shana L. Fishman	<ul style="list-style-type: none"> • Education: BS Communication • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Education (retired) ○ Personable and good communicator
10. Elizabeth Griffin	<ul style="list-style-type: none"> • Education: BS Psychology/Sociology • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Mortgage Underwriter at Supreme Lending (retired) ○ Realtor and underwriting experience ○ Good residential knowledge, good communication skills
11. Dennis A. Guth	<ul style="list-style-type: none"> • Education: BS Industrial Mgmt./Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent (retired) ○ Professional experience in leadership roles ○ Active community volunteer – HOA Board of Directors and Elections ○ Works well as a member of a team, excellent communicator
12. Clayton Harbeck	<ul style="list-style-type: none"> • Education: BS Social Science/Economics • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Senior Management at multiple technology companies across North Texas including EDS ○ Since retirement has served as a middle/high school substitute teacher and elections clerk/judge ○ Asked very relevant questions, excellent communication skills
13. Norman F. Harris II	<ul style="list-style-type: none"> • Education: MBA Finance, MA Pharmacology, BA Chemistry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Business, Senior Manager (retired) ○ Extensive data experience ○ Former ARB in another county, impressed with what he has seen in Collin County ○ Enthusiastic participation, interested in being on commercial panels
14. Kathrin Hayden	<ul style="list-style-type: none"> • Education: Associate Hotel Management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Total Loss Specialist at State Farm Insurance ○ Texas Real Estate Agent (inactive) ○ Experienced insurance adjuster and in real estate ○ Clearly understands evidence matters
15. Alice C. Jones	<ul style="list-style-type: none"> • Education: BBA Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Commercial Banker, Senior VP at Bank OXK (retired)

	<ul style="list-style-type: none"> ○ 25 years experience in commercial real estate lending ○ Engaged and asked good questions ○ Stated she likes routine and structure
16. Pauleen A. Kocak	<ul style="list-style-type: none"> • Education: MBA – University of Dallas • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Finished career in medical facility management as COO of Texas Vision and Laser Center ○ Strong operations, financials, payroll, budgeting and staffing experience ○ Excellent communication skills, asked insightful questions
17. Anil Kumar	<ul style="list-style-type: none"> • Education: PhD MIS/IB, MBA, Bachelor of Commerce • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Professor of Business Analytics, East Texas A&M University ○ Analytical, able to evaluate large amounts of data quickly ○ High intellectual curiosity, very calm, pleasant demeanor
18. Paul L. Lastrapes	<ul style="list-style-type: none"> • Education: BS Marketing • Experience/Background/Skills: <ul style="list-style-type: none"> ○ FAA Air Traffic Controller (retired) ○ Objective and calm demeanor ○ Impressive team work and negotiation experience
19. Julie M. Maher	<ul style="list-style-type: none"> • Education: BS Management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Director/Chief of Staff to CTO Hewlett-Packard ○ Spent an hour with a current ARB officer before applying to be sure ARB would be a good fit for her ○ Service minded, Excellent communication skills
20. Philip S. Merkel	<ul style="list-style-type: none"> • Education: MS Math/Statistics, BS Math/History • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Real Estate Agent (retired) ○ Good analytical skills
21. Margaret L. Muenchau	<ul style="list-style-type: none"> • Education: BS Education/Music • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Sales, Arrow Electronics (retired) ○ Strong commitment to serving her community ○ Good understanding of ARB and how process works ○ Comfortable analyzing data in a short time frame, good communicator
22. Gary R. Murtha	<ul style="list-style-type: none"> • Education: MBA, BS Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ CPA, Senior VP Finance at PepsiCo (retired) ○ Professional experiences that will enable commercial, land and residential hearings ○ Asks good questions, strong communication skills
23. James L. Scanlon	<ul style="list-style-type: none"> • Education: MS Corporate Finance, BS Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ President of an LLC, responsible for financials, daily operations ○ Excellent communication skills ○ Demonstrated strong knowledge of managing difficult situations ○ Confident, assertive, and willing to be part of a team of panel members

24. Hanayya A. Shah	<ul style="list-style-type: none"> • Education: MS Social Sciences, BA Applied Psychology • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent ○ Asked excellent questions ○ Believes in importance of a fair and transparent appraisal process
25. Daniel J. Sheehan	<ul style="list-style-type: none"> • Education: BA, Business Administration • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Senior Director at JC Penney (retired) ○ Sales Support Manager at The Home Depot (retired)
26. Joseph C. Skibek	<ul style="list-style-type: none"> • Education: MA, BA Criminal Justice • Experience/Background/Skills: <ul style="list-style-type: none"> ○ U.S. Government (retired), Career in law enforcement and military ○ Trained and highly skilled in situation de-escalation ○ Team oriented and states best approach to working as a team is more listening than talking
27. Alethea M. Stern	<ul style="list-style-type: none"> • Education: BS Business Admin, Graduate studies in management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Paralegal certificate, mini-MBA program ○ Senior Manager, Marketing (retired), Mortgage foreclosure specialist ○ Excellent communication skills, detail oriented, forms well thought out relevant questions
28. Stella Veal	<ul style="list-style-type: none"> • Education: Masters Conflict Resolution • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Instructional Designer/Instructor at Grayson College ○ Certified Teacher ○ Extensive board experience on city boards, Junior League ○ Excellent listening skills, high interest in learning and training

TABLE 2. Contingent New Member Applicants recommended by the ARB Commissioners for appointment (subject to completion of Background Check) effective as needed for a future date.

29. Timothy W. Baker	<ul style="list-style-type: none"> • Education: BS MIS • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Customer director at EDS, VP at Philips Electronics ○ Small business consultant (retired)
30. Lisa Broussard	<ul style="list-style-type: none"> • Education: Business Administration Certificate • Experience/Background/Skills: <ul style="list-style-type: none"> ○ NMLS license (inactive), TX Real Estate Sales Agent (active) ○ Assistant loan officer experience
31. James P. Edwards	<ul style="list-style-type: none"> • Education: BS Business mgmt./Math Engineering • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Underwriter and site inspector, self employed ○ Residential, commercial, industrial, land experience
32. Damanjit Singh	<ul style="list-style-type: none"> • Education: BS Math, Physics, Chemistry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ LLC Assistant Manager, Gas Station owner/operator ○ Tax preparation experience with H&R Block and AARP ○ Managed residential rental properties

TABLE 3. New Member Applicants that are either not eligible or not recommended for appointment.

Candidates <u>not</u> recommended for appointment	Comments from Candidate Application and/or Commissioner Interview
33. Tiffany L. Bozeman	Resident of Denton County
34. Pamela D. Edwards	Late Application, related to BOD member or CCAD employee
35. Paul D. Fowler	No response to interview request
36. Victor R. Faraci	Late Application
37. Sylvia F. Gilliam	Not recommended by ARB Commissioner at this time
38. Ellen Harbeck	Withdrew application
39. Sermando G. Johnson	Withdrew application
40. Keith F. Magee	Late application
41. Patricia E. Moncus	Withdrew application
42. Abeje Nega	No response to interview request
43. Patrica L. Newhouse	Withdrew application
44. Raja R. Narumanchi	Not recommended by ARB Commissioner at this time
45. Ashton Parson	No response to interview request
46. Sheila M. Patterson	Late Application
47. Melissa M. Pittman	Appeared before ARB for compensation in prior 2 years
48. Shaheena Suhaibu	Resident of Collin County less than 2 years
49. George T. Taylor	No response to interview request
50. Jan W. True	Current member of City of Plano Board of Adjustment

TABLE 4. Reapplying Member applicants recommended for appointment to subsequent term effective January 1, 2026.

Applicant	Years ARB Experience	Recommended Appointment Term	Recommended Appointment Type
1. Karyn R. Farthing	2	2 nd	Regular
2. Susie J. Granger	2	2 nd	Regular
3. Richard S. Hill	2	2 nd	Regular
4. Daniel H. Reich	2	2 nd	Regular
5. Barbara A. Martinez	2	2 nd	Regular
6. Brian C. Seals	2	2 nd	Regular
7. Jerry L. Shepherd	2	2 nd	Regular
8. Peter J. Stringer	2	2 nd	Regular
9. Rejeev Talwar	2	2 nd	Regular
10. Kopek K. Yuen	2	2 nd	Regular
11. Janis M. Robins	3	3 rd	Regular
12. Nancy M. Bittner	4	3 rd	Regular

13. Richard A. DiVirgilio	4	3 rd	Regular
14. Betty Hartman	4	3 rd	Regular
15. Steven L. Hubbard	4	3 rd	Regular
16. Don W. Lasher	4	3 rd	Regular
17. Craig N. Perry	4	3 rd	Regular
18. James H. Trewin	4	3 rd	Regular

TABLE 5. ARB Officer Recommendation by the ARB, that if appointed, would take term January 1, 2026.

Officer Position	Background, Experience, and Responsibilities
Chairperson- Nancy Bittner	<ul style="list-style-type: none"> • MBA, CPA (inactive) • Over 30 years of experience as corporate financial manager and CFO • 4 years of ARB experience with extensive knowledge in Commercial, BPP, Land and Residential property protest cases, 1 year as ARB Vice Chairperson. • Skilled in evaluating complex financial and legal evidence. • Responsible for coordinating member training and mentoring, assisting the Chairman and Secretary with daily activities and events planning, and serving as a substitute on panels, as needed.
Vice Chairperson- Bert Leatch	<ul style="list-style-type: none"> • Bachelors in Business Administration • Over 40 years of experience as Controller at Texas Instruments responsible for product delivery, forecasting, closing the books, and recruiting • 3 years of ARB experience with extensive knowledge in Commercial, BPP, Land and Residential property protest cases • Supported ARB with preparation and delivery of training and mentoring activities
Secretary- Karyn Farthing	<ul style="list-style-type: none"> • BA in Interdisciplinary Studies, Business Major • 30 years of experience in corporate management (Director and VP) at various business and financial institutions • 2 years of ARB experience • Supported ARB with preparation and delivery of training

Officer Resumes provided below.

Nancy Mandell Bittner

6120 Cove Creek Lane
Frisco, TX 75034
214-563-6309 (C)

PROFESSIONAL EXPERIENCE

- | | |
|---|-------------------------|
| <u>CATHOLIC CHARITIES OF DALLAS, (CCD) Dallas, TX</u> | 10/2019 – 6/2018 |
| <ul style="list-style-type: none">- Chief Financial Officer (CFO) | |
| <u>PEPSICO, INC., Plano, TX</u> | 12/2003 – 6/2018 |
| <ul style="list-style-type: none">- Chief Financial Officer (CFO) – Information Technology- Vice President of Planning, IT- Senior Director of Planning, IT | |
| <u>ALIXPARTNERS. LLC, Dallas, TX</u> | 3/2002-12/2003 |
| <ul style="list-style-type: none">- Bankruptcy and Turnaround Consultant | |
| <u>AMERISERVE, INC., Addison, TX</u> | 1/1998 – 11/2001 |
| <ul style="list-style-type: none">- Vice President of Planning | |
| <u>FRITO-LAY. INC. Plano / Chicago</u> | 9/1992 – 1/1998 |
| <ul style="list-style-type: none">- Senior Director of Finance- Various Finance Manager/Analyst roles | |
| <u>PROCTOR & GAMBLE, Cincinnati, OH</u> | Summer 1991 |
| <ul style="list-style-type: none">- Joint Finance and Marketing Intern | |
| <u>ARTHUR ANDERSEN, Sacramento, CA</u> | 7/1987 – 7/1990 |
| <ul style="list-style-type: none">- Senior Auditor | |

EDUCATION, CERTIFICATIONS AND ASSOCIATIONS

- Kellogg Graduate School of Management, Northwestern University –MBA**
- Majors in Finance, Marketing, International Business and Transportation – June 1992
- University of California at Davis – BA**
- Major in Economics and minor in Anthropology – June 1986
- Certified Public Accountant, State of California (inactive)**
- Member, California State Board of Accountancy
 - Member, AICPA

BERT J. LEATCH
1015 Burnet Drive
Allen, Texas 75002
(972) 972-754 (Cell) (469) 656-1577 (Home)

SUMMARY

Extensive experience in financial planning, analysis, business planning cost control and collection of receivables. Can assume responsibility, set realistic goals and priorities, delegate responsibility to qualified personnel, monitor activities and ensure a uniform and efficient flow of operations. Strong interpersonal written and oral communications skills.

EXPERIENCE

1980 - Oct 2021 **TEXAS INSTRUMENTS, INC. DALLAS, TEXAS**

Oct 2010 - Oct 2021 **CREDIT and COLLECTIONS MANAGER**

Responsible for managing the activities of credit approval and credit collection. Develops, implements and maintains systems, procedures and policies. Recommends credit limits, handles special credit arrangements, and problem collection accounts. Oversees analysis of accounts receivable and aging of accounts. Manages the cash application team responsible for booking all cash activity in the North America region.

Apr 2003 - Oct 2010 **DIRECTOR of FINANCE & OPERATIONS**

Responsible for coordinating, administering and controlling financial and order fulfillment operations. Review, analyze and interpret financial and budgetary reports. Direct all aspects of accounting operations and the preparation of annual financial forecasts. Establish operational objectives and assignments. Involved in developing, modifying, and executing company policies which affect immediate operation(s) and may also have company-wide effect.

Nov 2001 - Mar 2003 **FINANCIAL PLANNING MANAGER**

Manage the financial planning organization within the High Volume Analog & Logic business, a \$1.7b organization. To ensure the financial health of the organization, provide management with information and analysis to make better business decisions and support the data needs. To provide leadership in the areas of financial forecasting, profitability analysis and growth of individuals within the financial organization.

Aug 1999 - Oct 2001 **BUSINESS PLANNING MANAGER**

Responsible for managing all aspects of the business planning organization of the Broadband Access Group. This includes all activities from order entry to final product delivery. This also includes forecasting revenue over multiple time periods, ensuring all required system data is in place and growing individuals that are in the planning organization.

Aug 1997 - Jul 1999 **PROGRAM MANAGER**

Manage Mature product portfolio that generates \$150 million of revenue annually. Responsibilities include, but are not limited to identifying, prioritizing and directing the team to address customer and product issues. Specifically focused on facilitating all required resources to achieve maximized financial results from an internal standpoint, and strong customer satisfaction from an external standpoint.

EDUCATION

B.A. - Business Administration

Dallas Baptist University

Dallas, Texas

A.S. - Accounting

Richland College

Dallas, Texas

Karyn Farthing
20171 County Road 590
Nevada, TX 75173
214-929-4693

PROFESSIONAL EXPERIENCE

FARTHING BOOKKEEPING SOLUTIONS , Nevada, TX - CEO, Owner	06/2023 – PRESENT
EQUIFAX , Atlanta, GA (Fin-Tech) - Vice President - Service Delivery Operations	09/2018 – 09/2021
HOUGHTON MIFFLIN HARCOURT , Orlando, FL (Education) - Director - Customer Experience Operations	08/2013 – 09/2018
eLOYALTY , a TELETECH COMPANY, Denver, CO (BPO) - Executive Director – Professional Services	10/2010 – 08/2013
IBM , Greenbelt, MD (Consulting) - Senior Vendor Relationship Manager	10/2009 – 09/2010
BEAUTICONTROL – Carrollton, TX (Multi-level Marketing) - Director - Contact Center Operations	02/2008 – 09/2009
HOME DEPOT , Dallas, TX (Retail Home Improvement) - Director - Contact Center Operations	03/2006 – 01/2008
ALLIANCE DATA , (now Bread Financial) Dallas, TX (BPO) - Vice President – Corporate Support Operations	10+ years

EDUCATION

B.A. Interdisciplinary Studies, Business Major, University of Texas, Dallas, TX
Summa cum Laude, 2002



COLLIN APPRAISAL REVIEW BOARD

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November 5, 2025

George Chollar, Chairman
Collin Central Appraisal District Appraisal Review Board
250 Eldorado Pkwy
McKinney, TX 75069

Re: Officer Appointments to Collin CAD Appraisal Review Board for 2026

Pursuant to Texas Property Tax Code § 6.42(a) and CCAD Policy No. 114, the following ARB members are appointed as Officers of the Appraisal Review Board for the Collin County Appraisal District for a term from January 1, 2026 to December 31, 2026, except and until otherwise provided by law:

ARB Chairman: Nancy Bittner

ARB Vice Chairman: Bert Leatch

ARB Secretary: Karyn Farthing

Thank you,

Brian Mantzey
Chairman, Collin CAD Board of Directors

CC: Marty Wright, Chief Appraiser
Stephanie Cave-Bernal, Deputy Chief Appraiser
Tina Castillo, Director of ARB and Agent Services
Chris Nickell, Taxpayer Liaison Officer

G.12.

**Receive recommendation and vote on
appointing the 2026 Appraisal Review Board
Membership.**

November 13, 2025



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November 5, 2025

Collin Central Appraisal District Board of Directors
The Honorable Chairman Brian Mantzey
250 Eldorado Parkway
McKinney, Texas 75069

Re: Appraisal Review Board (ARB) 2026 Member and Officer Recommendations

Board of Directors of the Collin Central Appraisal District (Board):

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A Board motion of approval is requested, followed by notification of appointees as outlined in the attached letter, "Appointments to Collin CAD Appraisal Review Board for 2026-2027."

*The contingent new ARB member recommendations (4 applicants), listed in **Table 2**, are proposed for appointment if any member from **Table 1** or current ARB members are unable to serve. The selection process, eligibility, and qualifications align with those in **Table 1**. If necessary, a Board motion of approval and appointment letter will be requested at a later date.*

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- a. Attendance at scheduled meetings, training sessions, hearings, and overall availability when needed.

Involvement & Participation:

- a. Contributions as a member of a 3-member panel.
- b. Abilities to serve as Chair of a single and/or 3-member panel.
- c. Contributions to ARB training and mentorship.

Knowledge:

- a. Commercial, Residential, Land, and/or Business Personal Property expertise and knowledge.
- b. Overall potential to serve on the ARB, as needed, including, but not limited to future interest in serving as an ARB officer, Policy & Procedure Committee, and ARB Commissioner.

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III. Appointment of ARB Officers

In accordance with Code §6.42(a) and CCAD Policy No. 114, the Board of Directors (Board) will annually appoint the Chairman and Secretary of the Appraisal Review Board from its general membership. At the ARB's discretion, a Vice Chairman may also be included. In August 2025, the Board approved the process for selecting ARB Officers, effective January 1, 2026. As of the announced deadline for the ARB members to declare candidacy for an officer position, the following candidates were received:

ARB Chairman – Nancy Bittner

ARB Vice Chairman – Bert Leatch, Deborah Daniel

ARB Secretary – Karyn Farthing

The ARB members have recommended Bert Leatch as the Vice Chairman, based on a majority vote from 54 of the current 60 members. The background, resume, and qualifications of the recommended ARB officers are provided in **Table 5**.

A Board motion of approval is requested, with subsequent notifications of the officers as outlined in the attached letter, "Appointment of Collin Appraisal Review Board Officers for 2025."

Thank you for your consideration.

Regards,

George Chollar

George Chollar
Chairman, Collin ARB

CC: Marty Wright, Chief Appraiser
Stephanie Cave-Bernal, Deputy Chief Appraiser
Tina Castillo, Director of ARB and Agent Services
Chris Nickell, Taxpayer Liaison Officer

TABLE 1. New Member Applicants recommended by the ARB Commissioners for appointment (subject to completion of Background Check) effective January 1, 2026.

Candidate	Commissioner Interview Comments, Feedback, and Qualification information
1. Matthew T. Cason	<ul style="list-style-type: none"> • Education: Degree, Christian Ministry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Sales Agent, Mortgage Banking experience ○ Professional real estate appraiser from 2001 – 2015 ○ Understand difference between mass appraisal and being a professional realtor ○ Calm under pressure, excellent communicator
2. Kenneth Clowes	<ul style="list-style-type: none"> • Education: UK O Level (General Certificate of Education) • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Managing Director at ATC Trust (retired) ○ Background in Law, Taxation and Accounting ○ Experience as a Trust Banker, good understanding of real estate valuation techniques ○ Strong ability analyzing data and working as part of a small team ○ Good communication skills
3. Kevin J. Cortez	<ul style="list-style-type: none"> • Education: BA Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Professional Management Services, Director ○ Experienced business consultant providing management services to small to medium businesses ○ Good understanding of ARB and how process works ○ Good communicator, excellent analytical skills
4. Celeste H. Cox	<ul style="list-style-type: none"> • Education: BA Spanish/Secondary Education • Experience/Background/Skills: <ul style="list-style-type: none"> ○ CEO level experience Habitat for Humanity and Housify, executive leadership, property evaluation ○ Experience in conflict resolution and financial analysis ○ Familiar with financial statements and appraisals ○ Very good communication skills, used to making decisions quickly
5. Trammell Davis	<ul style="list-style-type: none"> • Education: Masters Certificate Homeland Security, BBA Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Financial Analyst at USAA (retired) ○ CPA (inactive), mortgage loan originator, financial analyst ○ Excellent experience suited for commercial panel member
6. Dale P DeShazo	<ul style="list-style-type: none"> • Education: MBA Finance, BS AgriBusiness • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Texas Licensed Property & Casualty/Life & Health Insurance Agent ○ Taught Texas Insurance agent CE classes ○ Lampasas County ARB and BOD ○ Extensive banking/commercial experience with appraisal responsibilities ○ Has served on several grand jury panels ○ Asked very good and specific questions

	<ul style="list-style-type: none"> ○ Protested property value in 2024, impressed with professionalism of all involved
7. Kristine L. Edens	<ul style="list-style-type: none"> • Education: AAS Physical Therapy • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent ○ Experienced in resolving disputes
8. Rebecca E. Ferrill	<ul style="list-style-type: none"> • Education: BSBA Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Has served as Director of Human Resources at 2 hospitals ○ Service oriented also work as volunteer tax preparer ○ Demonstrated ability to handle tough situations ○ Familiar with protest process, good communication skills
9. Shana L. Fishman	<ul style="list-style-type: none"> • Education: BS Communication • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Education (retired) ○ Personable and good communicator
10. Elizabeth Griffin	<ul style="list-style-type: none"> • Education: BS Psychology/Sociology • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Mortgage Underwriter at Supreme Lending (retired) ○ Realtor and underwriting experience ○ Good residential knowledge, good communication skills
11. Dennis A. Guth	<ul style="list-style-type: none"> • Education: BS Industrial Mgmt./Business • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent (retired) ○ Professional experience in leadership roles ○ Active community volunteer – HOA Board of Directors and Elections ○ Works well as a member of a team, excellent communicator
12. Clayton Harbeck	<ul style="list-style-type: none"> • Education: BS Social Science/Economics • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Senior Management at multiple technology companies across North Texas including EDS ○ Since retirement has served as a middle/high school substitute teacher and elections clerk/judge ○ Asked very relevant questions, excellent communication skills
13. Norman F. Harris II	<ul style="list-style-type: none"> • Education: MBA Finance, MA Pharmacology, BA Chemistry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Business, Senior Manager (retired) ○ Extensive data experience ○ Former ARB in another county, impressed with what he has seen in Collin County ○ Enthusiastic participation, interested in being on commercial panels
14. Kathrin Hayden	<ul style="list-style-type: none"> • Education: Associate Hotel Management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Total Loss Specialist at State Farm Insurance ○ Texas Real Estate Agent (inactive) ○ Experienced insurance adjuster and in real estate ○ Clearly understands evidence matters
15. Alice C. Jones	<ul style="list-style-type: none"> • Education: BBA Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Commercial Banker, Senior VP at Bank OXK (retired)

	<ul style="list-style-type: none"> ○ 25 years experience in commercial real estate lending ○ Engaged and asked good questions ○ Stated she likes routine and structure
16. Pauleen A. Kocak	<ul style="list-style-type: none"> • Education: MBA – University of Dallas • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Finished career in medical facility management as COO of Texas Vision and Laser Center ○ Strong operations, financials, payroll, budgeting and staffing experience ○ Excellent communication skills, asked insightful questions
17. Anil Kumar	<ul style="list-style-type: none"> • Education: PhD MIS/IB, MBA, Bachelor of Commerce • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Professor of Business Analytics, East Texas A&M University ○ Analytical, able to evaluate large amounts of data quickly ○ High intellectual curiosity, very calm, pleasant demeanor
18. Paul L. Lastrapes	<ul style="list-style-type: none"> • Education: BS Marketing • Experience/Background/Skills: <ul style="list-style-type: none"> ○ FAA Air Traffic Controller (retired) ○ Objective and calm demeanor ○ Impressive team work and negotiation experience
19. Julie M. Maher	<ul style="list-style-type: none"> • Education: BS Management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Director/Chief of Staff to CTO Hewlett-Packard ○ Spent an hour with a current ARB officer before applying to be sure ARB would be a good fit for her ○ Service minded, Excellent communication skills
20. Philip S. Merkel	<ul style="list-style-type: none"> • Education: MS Math/Statistics, BS Math/History • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Real Estate Agent (retired) ○ Good analytical skills
21. Margaret L. Muenchau	<ul style="list-style-type: none"> • Education: BS Education/Music • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Sales, Arrow Electronics (retired) ○ Strong commitment to serving her community ○ Good understanding of ARB and how process works ○ Comfortable analyzing data in a short time frame, good communicator
22. Gary R. Murtha	<ul style="list-style-type: none"> • Education: MBA, BS Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ CPA, Senior VP Finance at PepsiCo (retired) ○ Professional experiences that will enable commercial, land and residential hearings ○ Asks good questions, strong communication skills
23. James L. Scanlon	<ul style="list-style-type: none"> • Education: MS Corporate Finance, BS Accounting • Experience/Background/Skills: <ul style="list-style-type: none"> ○ President of an LLC, responsible for financials, daily operations ○ Excellent communication skills ○ Demonstrated strong knowledge of managing difficult situations ○ Confident, assertive, and willing to be part of a team of panel members

24. Hanayya A. Shah	<ul style="list-style-type: none"> • Education: MS Social Sciences, BA Applied Psychology • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Licensed Real Estate Agent ○ Asked excellent questions ○ Believes in importance of a fair and transparent appraisal process
25. Daniel J. Sheehan	<ul style="list-style-type: none"> • Education: BA, Business Administration • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Senior Director at JC Penney (retired) ○ Sales Support Manager at The Home Depot (retired)
26. Joseph C. Skibek	<ul style="list-style-type: none"> • Education: MA, BA Criminal Justice • Experience/Background/Skills: <ul style="list-style-type: none"> ○ U.S. Government (retired), Career in law enforcement and military ○ Trained and highly skilled in situation de-escalation ○ Team oriented and states best approach to working as a team is more listening than talking
27. Alethea M. Stern	<ul style="list-style-type: none"> • Education: BS Business Admin, Graduate studies in management • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Paralegal certificate, mini-MBA program ○ Senior Manager, Marketing (retired), Mortgage foreclosure specialist ○ Excellent communication skills, detail oriented, forms well thought out relevant questions
28. Stella Veal	<ul style="list-style-type: none"> • Education: Masters Conflict Resolution • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Instructional Designer/Instructor at Grayson College ○ Certified Teacher ○ Extensive board experience on city boards, Junior League ○ Excellent listening skills, high interest in learning and training

TABLE 2. Contingent New Member Applicants recommended by the ARB Commissioners for appointment (subject to completion of Background Check) effective as needed for a future date.

29. Timothy W. Baker	<ul style="list-style-type: none"> • Education: BS MIS • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Customer director at EDS, VP at Philips Electronics ○ Small business consultant (retired)
30. Lisa Broussard	<ul style="list-style-type: none"> • Education: Business Administration Certificate • Experience/Background/Skills: <ul style="list-style-type: none"> ○ NMLS license (inactive), TX Real Estate Sales Agent (active) ○ Assistant loan officer experience
31. James P. Edwards	<ul style="list-style-type: none"> • Education: BS Business mgmt./Math Engineering • Experience/Background/Skills: <ul style="list-style-type: none"> ○ Underwriter and site inspector, self employed ○ Residential, commercial, industrial, land experience
32. Damanjit Singh	<ul style="list-style-type: none"> • Education: BS Math, Physics, Chemistry • Experience/Background/Skills: <ul style="list-style-type: none"> ○ LLC Assistant Manager, Gas Station owner/operator ○ Tax preparation experience with H&R Block and AARP ○ Managed residential rental properties

TABLE 3. New Member Applicants that are either not eligible or not recommended for appointment.

Candidates <u>not</u> recommended for appointment	Comments from Candidate Application and/or Commissioner Interview
33. Tiffany L. Bozeman	Resident of Denton County
34. Pamela D. Edwards	Late Application, related to BOD member or CCAD employee
35. Paul D. Fowler	No response to interview request
36. Victor R. Faraci	Late Application
37. Sylvia F. Gilliam	Not recommended by ARB Commissioner at this time
38. Ellen Harbeck	Withdrew application
39. Sermando G. Johnson	Withdrew application
40. Keith F. Magee	Late application
41. Patricia E. Moncus	Withdrew application
42. Abeje Nega	No response to interview request
43. Patrica L. Newhouse	Withdrew application
44. Raja R. Narumanchi	Not recommended by ARB Commissioner at this time
45. Ashton Parson	No response to interview request
46. Sheila M. Patterson	Late Application
47. Melissa M. Pittman	Appeared before ARB for compensation in prior 2 years
48. Shaheena Suhaibu	Resident of Collin County less than 2 years
49. George T. Taylor	No response to interview request
50. Jan W. True	Current member of City of Plano Board of Adjustment

TABLE 4. Reapplying Member applicants recommended for appointment to subsequent term effective January 1, 2026.

Applicant	Years ARB Experience	Recommended Appointment Term	Recommended Appointment Type
1. Karyn R. Farthing	2	2 nd	Regular
2. Susie J. Granger	2	2 nd	Regular
3. Richard S. Hill	2	2 nd	Regular
4. Daniel H. Reich	2	2 nd	Regular
5. Barbara A. Martinez	2	2 nd	Regular
6. Brian C. Seals	2	2 nd	Regular
7. Jerry L. Shepherd	2	2 nd	Regular
8. Peter J. Stringer	2	2 nd	Regular
9. Rejeev Talwar	2	2 nd	Regular
10. Kopek K. Yuen	2	2 nd	Regular
11. Janis M. Robins	3	3 rd	Regular
12. Nancy M. Bittner	4	3 rd	Regular

13. Richard A. DiVirgilio	4	3 rd	Regular
14. Betty Hartman	4	3 rd	Regular
15. Steven L. Hubbard	4	3 rd	Regular
16. Don W. Lasher	4	3 rd	Regular
17. Craig N. Perry	4	3 rd	Regular
18. James H. Trewin	4	3 rd	Regular

TABLE 5. ARB Officer Recommendation by the ARB, that if appointed, would take term January 1, 2026.

Officer Position	Background, Experience, and Responsibilities
Chairperson- Nancy Bittner	<ul style="list-style-type: none"> • MBA, CPA (inactive) • Over 30 years of experience as corporate financial manager and CFO • 4 years of ARB experience with extensive knowledge in Commercial, BPP, Land and Residential property protest cases, 1 year as ARB Vice Chairperson. • Skilled in evaluating complex financial and legal evidence. • Responsible for coordinating member training and mentoring, assisting the Chairman and Secretary with daily activities and events planning, and serving as a substitute on panels, as needed.
Vice Chairperson- Bert Leatch	<ul style="list-style-type: none"> • Bachelors in Business Administration • Over 40 years of experience as Controller at Texas Instruments responsible for product delivery, forecasting, closing the books, and recruiting • 3 years of ARB experience with extensive knowledge in Commercial, BPP, Land and Residential property protest cases • Supported ARB with preparation and delivery of training and mentoring activities
Secretary- Karyn Farthing	<ul style="list-style-type: none"> • BA in Interdisciplinary Studies, Business Major • 30 years of experience in corporate management (Director and VP) at various business and financial institutions • 2 years of ARB experience • Supported ARB with preparation and delivery of training

Officer Resumes provided below.

Nancy Mandell Bittner

6120 Cove Creek Lane
Frisco, TX 75034
214-563-6309 (C)

PROFESSIONAL EXPERIENCE

CATHOLIC CHARITIES OF DALLAS, (CCD) Dallas, TX **10/2019 – 6/2018**

- Chief Financial Officer (CFO)

PEPSICO, INC., Plano, TX **12/2003 – 6/2018**

- Chief Financial Officer (CFO) – Information Technology
- Vice President of Planning, IT
- Senior Director of Planning, IT

ALIXPARTNERS. LLC, Dallas, TX **3/2002-12/2003**

- Bankruptcy and Turnaround Consultant

AMERISERVE, INC., Addison, TX **1/1998 – 11/2001**

- Vice President of Planning

FRITO-LAY. INC. Plano / Chicago **9/1992 – 1/1998**

- Senior Director of Finance
- Various Finance Manager/Analyst roles

PROCTOR & GAMBLE, Cincinnati, OH **Summer 1991**

- Joint Finance and Marketing Intern

ARTHUR ANDERSEN, Sacramento, CA **7/1987 – 7/1990**

- Senior Auditor

EDUCATION, CERTIFICATIONS AND ASSOCIATIONS

Kellogg Graduate School of Management, Northwestern University –MBA

- Majors in Finance, Marketing, International Business and Transportation – June 1992

University of California at Davis – BA

- Major in Economics and minor in Anthropology – June 1986

Certified Public Accountant, State of California (inactive)

- Member, California State Board of Accountancy
- Member, AICPA

BERT J. LEATCH
1015 Burnet Drive
Allen, Texas 75002
(972) 972-754 (Cell) (469) 656-1577 (Home)

SUMMARY

Extensive experience in financial planning, analysis, business planning cost control and collection of receivables. Can assume responsibility, set realistic goals and priorities, delegate responsibility to qualified personnel, monitor activities and ensure a uniform and efficient flow of operations. Strong interpersonal written and oral communications skills.

EXPERIENCE

1980 - Oct 2021 **TEXAS INSTRUMENTS, INC. DALLAS, TEXAS**

Oct 2010 - Oct 2021 **CREDIT and COLLECTIONS MANAGER**

Responsible for managing the activities of credit approval and credit collection. Develops, implements and maintains systems, procedures and policies. Recommends credit limits, handles special credit arrangements, and problem collection accounts. Oversees analysis of accounts receivable and aging of accounts. Manages the cash application team responsible for booking all cash activity in the North America region.

Apr 2003 - Oct 2010 **DIRECTOR of FINANCE & OPERATIONS**

Responsible for coordinating, administering and controlling financial and order fulfillment operations. Review, analyze and interpret financial and budgetary reports. Direct all aspects of accounting operations and the preparation of annual financial forecasts. Establish operational objectives and assignments. Involved in developing, modifying, and executing company policies which affect immediate operation(s) and may also have company-wide effect.

Nov 2001 - Mar 2003 **FINANCIAL PLANNING MANAGER**

Manage the financial planning organization within the High Volume Analog & Logic business, a \$1.7b organization. To ensure the financial health of the organization, provide management with information and analysis to make better business decisions and support the data needs. To provide leadership in the areas of financial forecasting, profitability analysis and growth of individuals within the financial organization.

Aug 1999 - Oct 2001 **BUSINESS PLANNING MANAGER**

Responsible for managing all aspects of the business planning organization of the Broadband Access Group. This includes all activities from order entry to final product delivery. This also includes forecasting revenue over multiple time periods, ensuring all required system data is in place and growing individuals that are in the planning organization.

Aug 1997 - Jul 1999 **PROGRAM MANAGER**

Manage Mature product portfolio that generates \$150 million of revenue annually. Responsibilities include, but are not limited to identifying, prioritizing and directing the team to address customer and product issues. Specifically focused on facilitating all required resources to achieve maximized financial results from an internal standpoint, and strong customer satisfaction from an external standpoint.

EDUCATION

B.A. - Business Administration

Dallas Baptist University

Dallas, Texas

A.S. - Accounting

Richland College

Dallas, Texas

Karyn Farthing
20171 County Road 590
Nevada, TX 75173
214-929-4693

PROFESSIONAL EXPERIENCE

FARTHING BOOKKEEPING SOLUTIONS , Nevada, TX - CEO, Owner	06/2023 – PRESENT
EQUIFAX , Atlanta, GA (Fin-Tech) - Vice President - Service Delivery Operations	09/2018 – 09/2021
HOUGHTON MIFFLIN HARCOURT , Orlando, FL (Education) - Director - Customer Experience Operations	08/2013 – 09/2018
eLOYALTY , a TELETECH COMPANY, Denver, CO (BPO) - Executive Director – Professional Services	10/2010 – 08/2013
IBM , Greenbelt, MD (Consulting) - Senior Vendor Relationship Manager	10/2009 – 09/2010
BEAUTICONTROL – Carrollton, TX (Multi-level Marketing) - Director - Contact Center Operations	02/2008 – 09/2009
HOME DEPOT , Dallas, TX (Retail Home Improvement) - Director - Contact Center Operations	03/2006 – 01/2008
ALLIANCE DATA , (now Bread Financial) Dallas, TX (BPO) - Vice President – Corporate Support Operations	10+ years

EDUCATION

B.A. Interdisciplinary Studies, Business Major, University of Texas, Dallas, TX
Summa cum Laude, 2002



COLLIN APPRAISAL REVIEW BOARD

250 Eldorado Pkwy, McKinney, TX 75069

Phone: 469.742.9288 • Web: www.collinarb.org

November 5, 2025

George Chollar, Chairman
Collin Central Appraisal District Appraisal Review Board
250 Eldorado Pkwy
McKinney, TX 75069

Re: Appointments to Collin CAD Appraisal Review Board for 2026 – 2027

Pursuant to Texas Property Tax Code § 6.41 and § 6.414, the following members are appointed to the Appraisal Review Board for the Collin County Appraisal District for a term of the duration, beginning date and ending date as stated below, except and until otherwise provided by law:

New appointments (not currently serving), One-year term, Beginning January 1, 2026, and Expiring December 31, 2026:

Regular Members	Auxiliary Members
1. Kristine L. Edens	1. Elizabeth Griffin (Auxiliary)
2. Rebecca E. Ferrill	2. Dennis A. Guth (Auxiliary)
3. Shana L. Fishman	3. Kathrin Hayden (Auxiliary)
4. Philip S. Merkel	4. Alice C. Jones (Auxiliary)
5. Stella Veal	5. Daniel J. Sheehan (Auxiliary)

New appointments (not currently serving), Two-year term, Beginning January 1, 2026, and Expiring December 31, 2027:

Regular Members	Auxiliary Members
1. Matthew T. Cason	14. Joseph C. Skibek (Auxiliary)
2. Kevin Kenneth Clowes	15. Anil Kumar (Auxiliary)
3. J. Cortez	16. Clayton Harbeck (Auxiliary)
4. Celeste H. Cox	17. Julie M. Mahar (Auxiliary)
5. Trammel Davis	18. Hanayya A. Shah (Auxiliary)
6. Dale P. DeShazo	
7. Norman F. Harris II	
8. Pauleen A. Kocak	
9. Paul L. Lastrapes	
10. Margaret L. Muenchau	
11. Gary R. Murtha	
12. Aletha M. Stern	
13. James L. Scanlon	

Reappointments for 2nd Term, Two-year term, Beginning January 1, 2026, and Expiring December 31, 2027:

1. Karyn R. Farthing
2. Susie J. Granger
3. Richard S. Hill
4. Barbara A. Martinez
5. Daniel H. Reich
6. Brian C. Seals
7. Jerry L. Shepherd
8. Peter J. Stringer
9. Rejeev Talwar
10. Kopek K. Yuen

Reappointments for 3rd Term, Two-year term, Beginning January 1, 2026, and Expiring December 31, 2027:

1. Nancy M. Bittner
2. Richard A. DiVirgilio
3. Betty R.G. Hartman
4. Steven L. Hubbard
5. Don W. Lasher
6. Craig N. Perry
7. Janis M. Robins
8. James H. Trewin

Pursuant to Texas Property Tax Code § 6.41(d-3), please notify the appointees of their appointments, and when and where they are to appear.

Thank you,

Brian Mantzey
Chairman, Collin CAD Board of Directors

CC: Marty Wright, Chief Appraiser
Stephanie Cave-Bernal, Deputy Chief Appraiser
Tina Castillo, Director of ARB and Agent Services
Chris Nickell, Taxpayer Liaison Officer

G.13.

**Receive recommendation and vote on
appointing the District's 2026 Taxpayer Liaison
Officer (TLO).**

November 13, 2025



Collin Central Appraisal District

November 13, 2025

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

RE: Appoint 2026 Taxpayer Liaison Officer (TLO)

Mr. Chris Nickell has expressed his desire to continue to serve the Board of Directors in the capacity of TLO.

Mr. Nickell has served as the district's TLO since late 2021, before that he was appointed to the ARB in 2017 and during his tenure served as the Vice Chair in 2019 and Chair in 2020. In his time as TLO he has consistently exhibited outstanding skills, unwavering commitment, and a strong work ethic. His exceptional attention to detail, timely problem-solving abilities have repeatedly impressed both myself and colleagues alike.

It is my recommendation that the board appoint Mr. Chris Nickell as the district's TLO for the 2026.

G.14.

**Receive a report regarding Policy #1008
Spending Appraisal Review Board Funds.**

November 13, 2025



Collin Central Appraisal District

November 13, 2025

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

A handwritten signature in black ink, appearing to read "Marty Wright".

RE: ARB Policy #1008 Report

The Appraisal Review Board Policy #1008, section e.12, requires the chief appraiser to report costs associated with meals: whether catered, during training, or routine daily allowances.

- The attached summary outlines the District's expenditures year to date.
- The cost allowances for these expenditures are the subject of revisions to Policy #1008 if any change in allowance is to be made.

Attachment: ARB Summary of Expenses (YTD 10-31-2025)

CCAD APPRAISAL REVIEW BOARD EXPENSES
ACTUAL COMPARED TO BUDGET
AS OF 10/31/2025

Description	YTD 2025	2025 Budget	YE 2024 Actual	2024 Budget	YE 2023 Actual	2023 Budget	YE 2022 Actual	2022 Budget
<u>ARB OPERATING EXPENSES:</u>								
Compensation (hearings & hourly pay)	\$864,724		\$706,853		\$787,527		\$579,665	
Allowances (meals & stipends)	\$58,262		\$49,745		\$49,996		\$47,530	
Training	\$5,381		\$7,326		\$4,804		\$3,200	
Total for compensation, meals allowances, & training	\$928,367	\$991,800	\$763,924	\$801,800	\$842,327	\$851,800	\$630,395	
Catering (orientation lunch & end-of-season)	\$2,266	\$3,500	\$2,290	\$3,500	\$1,952	\$3,500	\$955	
Catering (training related)	\$3,647	\$3,500	\$4,729	\$3,500	\$3,584	\$3,500	\$4,123	
Snacks or other sundry misc	\$1,166	\$1,200	\$1,175	\$1,200	\$1,200	\$1,200	\$958	
Total for catering, snacks, and other misc	\$7,079	\$8,200	\$8,194	\$8,200	\$6,735	\$8,200	\$6,037	
Total ARB operating expenses	\$935,445	\$1,000,000	\$772,118	\$810,000	\$849,062	\$860,000	\$636,432	\$650,000
	\$0		\$0					
<u>ARB ADDITIONAL EXPENSES:</u>								
Legal expense	\$12,056	\$30,000	\$16,860	\$30,000	\$8,750	\$30,000	\$14,831	\$25,000

G.15.

Receive recommendation and vote on allocating 2026 budget funds for the Appraisal Review Board's independent legal counsel.

November 13, 2025



Collin Central Appraisal District

November 13, 2025

TO: Board of Directors

FROM: Marty Wright, Chief Appraiser

RE: ARB's legal expense allocation - 2026

The Texas Property Tax Code, beginning in 2012, requires the ARB to have independent legal counsel. The Board of Directors, in accordance with the Tax Code and the Independent Professional Services section g.5, of the Appraisal Review Board Policy #1008, allocated \$30,000 for the ARB's 2025 legal counsel expenses. The Board must annually review and allocate budget funds to cover the cost of the ARB's legal expenses.

History of ARB Legal Expenses:

YEAR	EXPENSE
2025 YTD	\$12,056
2024	\$16,860
2023	\$8,750
2022	\$14,831
2021	\$15,015
2020	\$7,574
2019	\$8,311
2018	\$17,433
2017	\$16,398

I am requesting that the ARB legal expense allocation be maintained at \$30,000, for budget year 2026.

G.16.

Recieve recommendation and discuss line-item transfers within the 2025 Budget.


November 13, 2025



Collin Central Appraisal District

November 5, 2025

TO: Board of Directors

FROM: Brian Swanson, Deputy Chief of Business Operations and Compliance 

RE: 2025 Budget line-item transfers

FUND NAME	2025 BUDGET	ACTUAL YTD AS OF 10/31/2025	BUDGET BALANCE 10/31/2025	PROJECTED COST REMAINING	PROJECTED LINE ITEM (SHORTFALL) OR OVERAGE	ADJUSTED LINE ITEM TOTAL REQUESTED (ROUNDED)
Computer Software Maintenance- #5780	\$325,000	\$282,752	\$42,248	\$56,700	-\$14,452	\$20,000
					FUNDS NEEDED	BALANCE
Computer Software, License & Subscription - #5770	\$750,000	\$483,884	\$266,116	\$236,000	-\$20,000	\$10,116
Appraisal Review Board- #5300	\$1,000,000	\$934,470	\$65,530	\$78,000	-\$12,470	\$17,500
					FUNDS NEEDED	BALANCE
Contingency - #7000	\$300,000	\$17,500	\$282,500	\$0	-\$17,500	\$265,000
Legal Expense -#5200	\$2,500,000	\$2,597,357	-\$79,357	\$604,000	-\$683,357	\$700,000
					FUNDS NEEDED	BALANCE
Contingency - #7000	\$300,000	\$17,500	\$282,000	-\$17,500	-\$265,000	\$0
Legal Reserves	\$1,700,000	\$0	\$1,700,000	\$0	-\$435,000	\$1,265,000

#1 Computer Software Maintenance - #5780 This line-item needs to be adjusted because of the combination of vendors Harris Govern and BIS Consulting. BIS Consulting was formerly in #5770, but those services now fall under #5780 because of the maintenance aspect. This change caused the overage.

#2 Appraisal Review Board - #5300 – This line-item will need a slight adjustment for the ongoing ARB hearings that have taken place through out the months of August, September, October, and November. The increase in protests and the large increase by one property tax agency has caused the need for the additional weeks of hearings. We will use the Contingency #7000 to pay this small overage.

#3 Legal Expense - #5200 - due to the massive volume of lawsuits that have been filed in 2024 and continued into 2025, and the other legal services that the District uses throughout the year, we need to adjust the legal expense line item to cover the potential shortfall. We will use the remainder of the Contingency #7000 to fund part of this adjustment, and the rest of the adjustment will come from the Litigation Reserves.

All of these line-item transfers do not affect the overall budget total, and the use of reserves for the legal budget is warranted in this situation.

G.17.

**Receive recommendation and vote on
Resolution # 2025-1151, line-item transfers.**

November 13, 2025



Collin Central Appraisal District

BOARD OF DIRECTORS

Brian Mantzey-Chairman
Scott Grigg-Assessor
Andrew Cook
Jerry Tartaglino
Randal Shinn

Richard Grady-Secretary
Veronica Yost
Sumbel Zeb
Alvin Benton

CHIEF APPRAISER

Marty Wright

BOARD OF DIRECTORS RESOLUTION # 2025 - 1151

The Collin Central Appraisal District Board of Directors met in open session on November 13, 2025. The Board, with a quorum present, by a vote of _____ (for) and _____ (against) adopted the following resolution:

“Be it resolved that the Collin Central Appraisal District Board of Directors hereby approves the line-item transfers with the 2025 budget as listed on the following page, including transfer of legal reserves from below the line, effective immediately.”

In witness whereof, I have hereunto set my hand as an Officer of Collin Central Appraisal District Board of Directors, this _____ day of _____, 2025.

Brian Mantzey-Chairman

(and/or)

Richard Grady-Secretary



Collin Central Appraisal District

November 13, 2025

FUND NAME	2025 BUDGET	ACTUAL YTD AS OF 10/31/2025	BUDGET BALANCE 10/31/2025	PROJECTED COST REMAINING	PROJECTED LINE ITEM (SHORTFALL) OR OVERAGE	ADJUSTED LINE ITEM TOTAL REQUESTED (ROUNDED)
Computer Software Maintenance- #5780	\$325,000	\$282,752	\$42,248	\$56,700	-\$14,452	\$20,000
					FUNDS NEEDED	BALANCE
Computer Software, License & Subscription - #5770	\$750,000	\$483,884	\$266,116	\$236,000	-\$20,000	\$10,116
Appraisal Review Board- #5300	\$1,000,000	\$934,470	\$65,530	\$78,000	-\$12,470	\$17,500
					FUNDS NEEDED	BALANCE
Contingency - #7000	\$300,000	\$17,500	\$282,500	\$0	-\$17,500	\$265,000
Legal Expense -#5200	\$2,500,000	\$2,597,357	-\$79,357	\$604,000	-\$683,357	\$700,000
					FUNDS NEEDED	BALANCE
Contingency - #7000	\$300,000	\$17,500	\$282,000	-\$17,500	-\$265,000	\$0
Legal Reserves	\$1,700,000	\$0	\$1,700,000	\$0	-\$435,000	\$1,265,000

H.1.

Taxpayer Liaison Officer Report

November 13, 2025



Collin Central Appraisal District Taxpayer Liaison Officer

Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly Status Report

DATE: 11.13.2025

1. We received 218 Customer Service Survey Cards from August-October. With 1090 possible boxes checked, 1032 were Excellent, 6 was Satisfactory, 8 Need Improvement, 10 Unsatisfactory and 34 were not marked.
2. We have received 6 new complaints during this period. 3 were settled for various reasons and 3 are ongoing.



Collin Central Appraisal District Taxpayer Liaison Officer

Memo

TO: Board of Directors

FROM: Chris Nickell, Taxpayer Liaison Officer

RE: Monthly TDLR Status Report

DATE: 11.13.2025

1. We received one TDLR complaint (PTP20250016185) in late June involving Solar Exemptions, which was responded to July 10th. Mr. Wright received a response from the TDLR, Kristina Rojas-Stompel, *"We do not believe the evidence in this instance is sufficient to establish a violation was committed. Therefore, I am closing this case with no further action."*
2. TDLR complaint PTP20250008265 for disaster relief filed by the new owner, Surrender Kakkireni. Mr. Swanson replied with evidence on 3/19/2025. The last communication we have received from the TDLR was August 4, 2025 *"The case is open and under review"*

H.2.

2025 ARB Chairman Report.

November 13, 2025



COLLIN APPRAISAL REVIEW BOARD

250 Eldorado Pkwy, McKinney, TX 75069

Phone: 469.742.9288 • Web: www.collinarb.org

November 5, 2025

Collin Central Appraisal District Board of Directors
The Honorable Chairman Brian Mantzey
250 Eldorado Parkway
McKinney, Texas 75069

Re: Appraisal Review Board (ARB) 2025 Status Report

Board of Directors of the Collin Central Appraisal District (Board):

This status report provides a summary of the ARB activities and membership for 2025 and a brief overview of plans for 2026. It has been a privilege to serve as Chairman of the ARB in 2025. I could not have done this without the support of my fellow officers – Vice Chair, Nancy Bittner and Secretary, Dianne Faltys. I am also pleased and fortunate to work with a group of talented and cooperative ARB members that enable the ARB to operate successfully.

Some of the factors related to the operation of the ARB in 2025 are summarized below:

- 2025 was another record year for protests with 137,761 protests filed, up 16.1% from 2024.
 - Agent protests increased to 117,599 as compared to 98,410 in 2024 (up 19.5%).
 - Owner protests decreased slightly to 20,162 as compared to 20,218 in 2024.
- With the increase in Agent vs. Owner protests, the Agents have also requested 3-member panels, unlike the requests for single-member panels in 2024. This has resulted in an increase in the time per hearing for each protest.
- On July 11, the last day of the Collin ARB main protest season, the undetermined value under protest was at 6.55%. This was above the July 20th 5% threshold specified by Tax Code 41.12(b), but below the 10% threshold approved by the Board of Directors as allowed by Tax Code 41.12(c). The appraisal records were successfully transferred to the CAD on July 11th as planned.
- 2025 began with a total of 63 ARB members. At the end of June, we were at 60 members and currently at 59 members. While sufficient to staff 15 panels with three members each during the main protest season, we were challenged to staff all panels during the extra weeks scheduled in August through October.
- Plans were put in place in 2025 to increase the number of panel rooms from 15 to 16, allowing more cases to be heard each hearing day. Plans were also made to increase the ARB membership to 72 members for 2026. The objective being to accommodate the additional panel room and expected increases in protests filed by property owners and agents. The increased number of members will also allow the ARB to address potential attrition and provide flexibility in member scheduling, which has been a challenge in 2025.

Training will continue to be a top priority. As detailed below new members receive 56 hours of training while returning members receive at least 40 hours:

- **January** – New members complete 8 hours of orientation training, including 2 hours of state mandated training on the Public Information and Open Meetings Acts.
- **March or April** – Mandatory Comptroller training, consisting of 16 hours for new members, and 8 hours for returning members. Topics include hearing practices and procedures, Texas Property Tax Code (Code), appraisal methods, etc.
- **May** – All members receive an additional 24 hours of training including:
 - Legal Workshop from the ARB Attorney, Roy Armstrong (6 hours)
 - Hearing best practices, Types of Motions, Exemptions, etc.
 - Hearing Procedures and evidence analysis training for Residential, BPP, Land, & Commercial protests
- **June – September** – Just-in-Time mini-training sessions (15-20 minutes) provided weekly or bi-weekly for special topics as needed based on hearing situations or types of hearings scheduled. As needed, special topic sessions are provided by the ARB attorney, Roy Armstrong, based on unique hearing requirements.
- **October** – Additional workshop with 8 hours of training presented by the ARB attorney, Roy Armstrong to include:
 - Supplemental protests/motions related to the Code Sections, 25.25 & 41.411
 - Other legal requirements, and protest hearing best practices

As of the end of October, the ARB heard over 73,000 cases, which is equivalent to over 1,100 cases per hearing day. This could not have been accomplished without the many dedicated individuals within the District who support the ARB throughout the year. The District staff that supports the ARB are passionate about their work and strive to provide the best possible service in support of the ARB and the county. This dedicated staff works tirelessly to ensure that the ARB functions smoothly and efficiently. These individuals include the following:

- Stephanie Cave and Tina Castillo lead an excellent team of approximately 30 customer service professionals consisting of full-time and seasonal staff. Every effort is made to ensure that every property owner and agent is greeted, their evidence processed and directed to a hearing room as efficiently as possible. Ms. Cave, Ms. Castillo, and their staff play a vital role in ensuring all inquiries are handled promptly and efficiently. Both are highly regarded for their knowledge of the Code, attention to detail, ability to handle complex tasks, and managing a team of excellent personnel. Their scheduling of hearings, coordination of daily events, and reaction to unpredictable events is superb.
- The IST team led by Ryan Matthews and supported by Jason Harris, Jale Stankovic, Andy Rojas and those who are working behind the scenes, support the ARB in the operation, maintenance, and enhancing of a variety of technology-based solutions, and when requested, implement custom solutions to improve efficiency and productivity. Every morning, the team ensures each of the 15-panel room computer systems are on-line, operating correctly and ready to go for the day's hearings. Their work is vital to the operations of the ARB.
- The Accounting & Payroll team led by Toni Bryan and supported by Rusty Craig and Nalia Rivera expertly support the ARB with vendor payments and weekly payroll processing. We are in the second year of the ACH payment system for direct deposits to ARB member bank

accounts. This continues to be a time-saver for the ARB officers and members. The ARB officers greatly appreciate their assistance with coordinating food catering, off-site training, and recommendations with cost effective approaches to the ARB's needs.

- Robert Wood, the Building Operations Manager is another great individual that supports the District and the ARB. Mr. Wood is always willing to go the extra mile to assist us with any facility needs. In the past year, he has responded to multiple facility-related requests, such as replacing defective chairs, adjusting the room temperature, or quietening a squeaky door hinge. He will also be instrumental in coordinating the addition of the 16th panel room in time for hearings in 2026. No task is too large or too small. In addition, it is not uncommon to see him happily greeting visitors, providing directions, or ensuring any unhappy visitors properly exit the building. Mr. Wood provides exceptional service to both the public and the ARB.

Overall, the District is fortunate to have such great people working together. Their dedication, expertise, and commitment to excellence have made significant contributions to the ARB's ability to perform its duties in 2025 and support the property owners in Collin County.

And lastly, I would like to thank the Board for its support. In 2025 the Board assisted the ARB with facilitation of an effective ARB member recruitment process. With the receipt of over 50 new member applications, the appointment of Commissioners to review applications and interview candidates has once again been effective in getting qualified candidates to serve on the ARB for 2026. We greatly appreciate your support and look forward to collaborating on these functions to enhance efficiency for all involved.

Looking ahead to 2026:

The ARB membership will be increased from the current 59 members to 72 members for 2026. This membership will allow us to staff 16 panel rooms with 3 members each, accommodate time-off needs and provide backup for unexpected situations. With 12 members whose third term expires on December 31, 2025, we plan to add 28 new members effective January 1, 2026. Any attrition in 1Q2026 may necessitate the appointment of additional members. Appointments being made comply with the Code, "so that the terms of as close to one-half of the members as possible expire each year" and to the adherence of quorum requirements through a balance of Regular and Auxiliary member appointments.

In 2026, the ARB will be well served by the incoming new officers – Chairperson Nancy Bittner, Vice Chairperson Bert Leatch, and Secretary Karyn Farthing. Each of these individuals have multiple years of ARB experience, have contributed to training and mentoring activities, have participated in all types of property hearings and bring expertise from their prior careers that will benefit the ARB.

A summary of the EOY 2025 and Projected 2026 member plan is provided below:

Year 2025 EOY Summary					Year 2026 Plan				
Total	59				Total	72			
Regular	49				Regular	52			
Auxiliary	10				Auxiliary	20			
Quorum	26				Quorum	27			
			Reapply in	Final Year			Reapply in	Final Year	
			4Q2025				4Q2026		
Term 1	Yr 1	9			Term 1	Yr 1	28	10	
	Yr 2	11	11			Yr 2	9	9	
Term 2	Yr 2	2			Term 2	Yr 2	0		
	Yr 3	6	1			Yr 3	12	2	
	Yr 4	9	9			Yr 4	6	5	
Term 3	Yr 4	0			Term 3	Yr 4	0		
	Yr 5	17		7		Yr 5	7		
	Yr 6	5		5		Yr 6	10		10
	Total	59	21	12		Total	72	26	10
	Reapply + Final Year		33			Reapply + Final Year		36	
			56%					50.0%	

On behalf of the ARB officers and members, we thank you for all of your support!

Regards,

George Chollar

George Chollar, ARB Chairman
Collin Appraisal Review Board

CC: Marty Wright, Chief Appraiser
Stephanie Cave-Bernal, Deputy Chief Appraiser
Tina Castillo, Director of ARB and Agent Services
Chris Nickell, Taxpayer Liaison Officer

H.3. 2025 Protest Report

November 13, 2025



Collin Central Appraisal District

October 29, 2025

TO: Board of Directors



FROM: Stephanie Cave-Bernal, Deputy Chief Appraiser, ARB, Customer Service, & Research

RE: 2025 Protest Report

- As of October 29, 2025, a total of 137,761 have been filed, indicating an 16% increase from 2024.
- Of these protests, approximately 106,380 were Residential properties, 9429 Commercial properties, 17,075 Land, and 4877 Business Personal Property (BPP).
- Approximately 117,599 protests were filed by agents, while 20,162 were filed by property owners.
- The Appraisal Department settled approximately 38,183 protests, avoiding hearings and post ARB appeals on those properties.
- The total number of no shows in 2025 is 6591, compared to 6857 last year.
- There are approximately 5,084 properties under review, with only 72 of those filed by property owners.
- The total assessed value of the properties under appeal is estimated at \$3 billion with around \$2.9 billion of that being Residential properties.
- Post certification, the ARB has been running multiple session monthly, running 15 panels to hear the outstanding protests.

COLLIN CENTRAL APPRAISAL DISTRICT

2025 Inquiry and Protest Stats

October 29, 2025	2021	2022	2023	2024	2025	2025 MORE INFO
<u>INQUIRY STATS</u>						<i>Per Day</i>
PHONE	498	389	1,993	735	639	21
CHANGE FROM PRIOR YR	-50.89%	-21.89%	412.34%	-63.12%	-13.06%	
COUNTER (INCLUDES KIOSK)	205	643	6,944	4,896	5,598	187
TOTAL INQUIRIES	703	1,032	8,937	5,631	6,237	 606
CHANGE FROM PRIOR YR	-47.77%	46.80%	765.99%	-36.99%	10.76%	<i>more inquiries</i>
<u>EFILE PROTEST STATS</u>						
ELIGIBLE PROPERTIES	324,032	335,938	347,533	361,193	459,393	
EFILE PROTESTS	20,896	24,430	21,023	14,546	14,938	
CHANGE FROM PRIOR YR	-4.81%	16.91%	-13.95%	-30.81%	2.69%	
% OF EFILE TO ELIGIBLE	6.45%	7.27%	6.05%	4.03%	3.25%	
<u>PROTEST STATS</u>						<i>Yr-over-Yr</i>
TAXPAYER PROTESTS	26,721	32,990	30,574	20,218	20,162	
AGENT PROTESTS	52,712	65,987	84,741	98,410	117,599	
TOTAL PROTESTS	79,433	98,977	115,315	118,628	137,761	 19,133
CHANGE FROM PRIOR YR	-2.81%	24.60%	16.51%	2.87%	16.13%	<i>more protest</i>
<u>ARB HEARING STATS</u>						<i>ARB Hearings</i>
TAXPAYER HEARINGS	4,055	8,057	7,350	3,671	4,733	
WITHDRAWALS-PFWD	1,521	3,312	2,479	1,233	1,399	
S&W's	14,818	10,475	11,198	8,795	8,166	
NO-SHOWS	5,520	10,500	8,605	5,794	5,254	
PHONE HEARINGS (TP and AGT)	7,259	6,703	11,559	11,507	17,347	
AGENT HEARINGS	23,176	36,632	43,981	56,660	68,375	
WITHDRAWALS-PFWD	8,884	7,661	10,539	10,150	8,133	
S&W's	16,678	16,756	23,964	25,141	30,017	
NO-SHOWS	1,436	2,149	1,380	1,021	1,337	
TOPLINES	15,663	25,335	26,043	33,611	33,720	
TOTAL HEARINGS	27,231	44,689	51,331	60,331	73,108	
CHANGE FROM PRIOR YR	16.75%	64.11%	14.86%	17.53%	21.18%	
TOTAL NO-SHOW RATE	20.35%	22.06%	16.28%	10.15%	8.27%	

H.4.
3rd Qtr 2025 Binding Arbitration Report.

November 13, 2025



Collin Central Appraisal District

October 08, 2025

TO: Board of Directors

FROM: Tina Castillo, Director of ARB & Agents Services

RE: 3rd Quarter 2025 - Arbitration Report

The Texas Property Tax Code Section 41A gives property owners the right to appeal an Appraisal Review Order through binding arbitration.

- There have been 405 Requests for Binding Arbitration filed for 2025.
- The total certified market value of the properties under appeal is \$ 350,395,736 . The difference between the certified value of the properties and the requestor opinion of value is \$ 59,444,618 .
- Below is a representation of the current 2025 arbitration case load, along with the 2024 statistics, as reference.

ARBITRATION STATUS	2025	ARBITRATION STATUS	2024
Active	210	Active	1
Rejected	0	Rejected	2
Withdrawn	22	Withdrawn	26
Dismissed	0	Dismissed	0
Settled	169	Settled	98
District	4	District	63
Taxpayer/Agent	0	Taxpayer/Agent	46
TOTAL	405	TOTAL	236

ARBITRATED BY	2025	ARBITRATED BY	2024
Agent	372	Agent	181
Taxpayer	33	Taxpayer	55
TOTAL	405	TOTAL	236

PROPERTY TYPE	2025	PROPERTY TYPE	2024
Residential	133	Residential	107
Land	22	Land	18
Commercial	195	Commercial	97
BPP	55	BPP	4
TOTAL	405	TOTAL	236

H.5.
3rd Qtr 2025 Investment/Collateral Report

November 13, 2025



QUARTERLY INVESTMENT AND COLLATERAL REPORT

For the Quarter Ended

September 30, 2025

Prepared by

Valley View Consulting, L.L.C.

The investment portfolio of the Collin Central Appraisal District is in compliance with the Public Funds Investment Act and the District's Investment Policy and Strategies. We certify that we have reviewed this quarterly investment report, as of and for the period stated above, that is being submitted for acceptance by the Board of Directors of the Collin Central Appraisal District. To the best of our knowledge and belief, in all material respects the Investment Report was prepared in accordance with the guidelines presented in the Government Code, Chapter 2256 (Public Funds Investment Act) and the Investment Policy adopted by the Board of Directors of the Collin Central Appraisal District. There have been no material misrepresentations in the report by the inclusion or exclusion of information. An effective system of internal controls has been established to ensure that material financial information is recorded in the accounting system and reported in this report. There were no material weaknesses in internal control during this period covered by the report or thereafter.

Signed copy on file

Brian Swanson, Deputy Chief Appraiser - Business Operations and Compliance

Date

Signed copy on file

Toni Bryan - Director of Business Operations and Finance

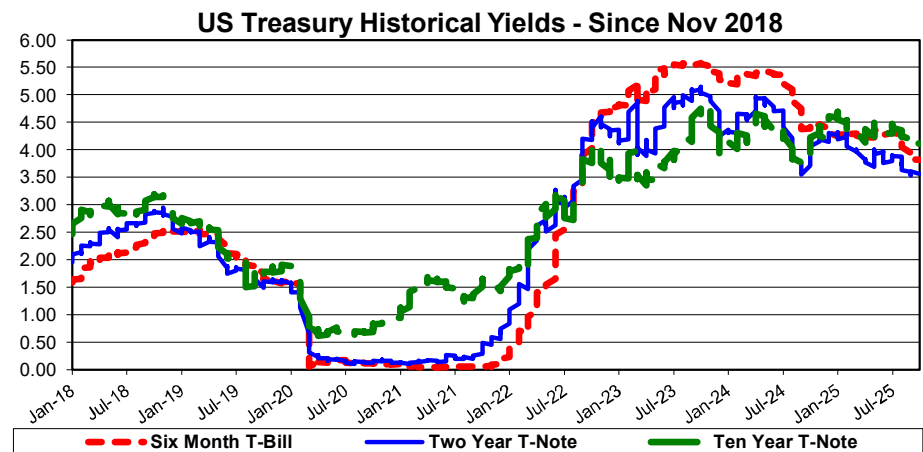
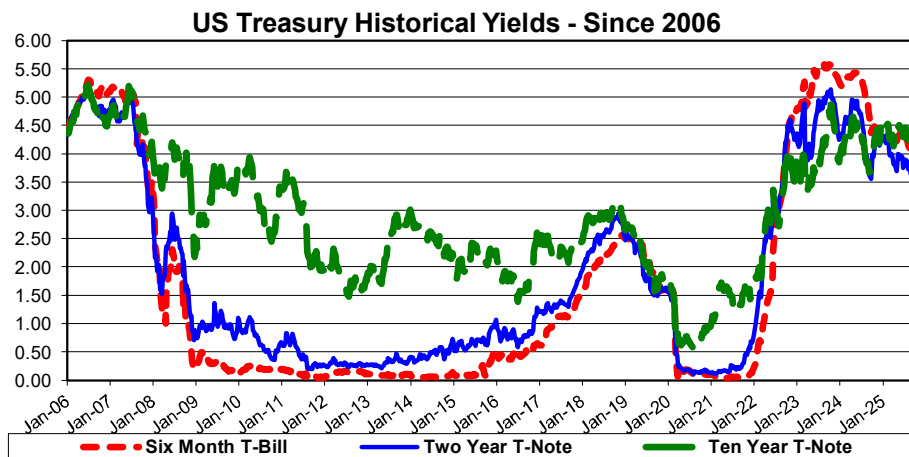
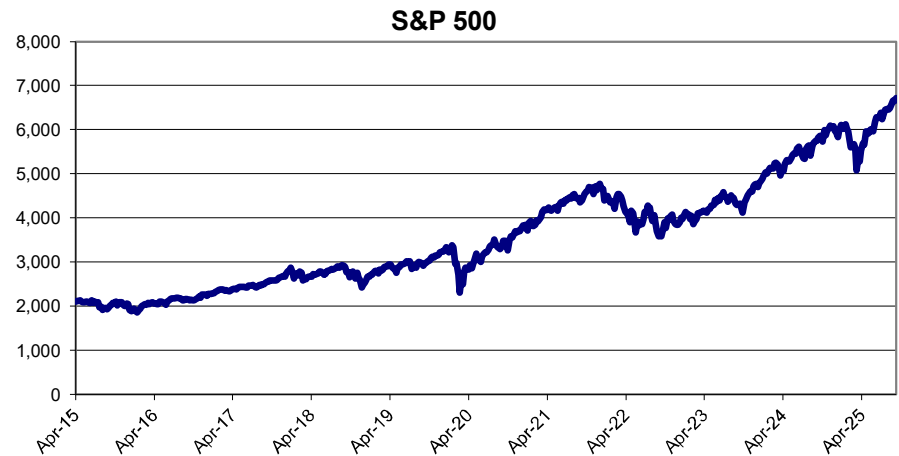
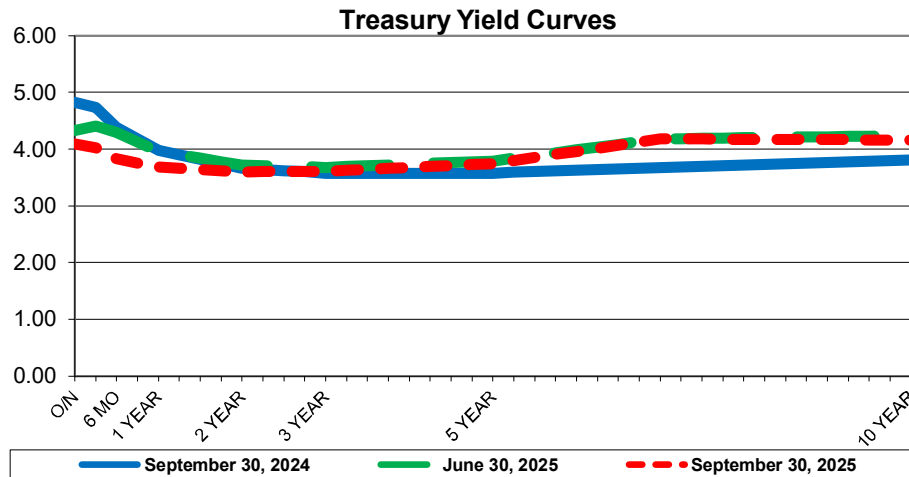
Date

Disclaimer: These reports were compiled using information provided by the District. No procedures were performed to test the accuracy or completeness of this information. The market values included in these reports were obtained by Valley View Consulting, L.L.C. from sources believed to be accurate and represent proprietary valuation. Due to market fluctuations these levels are not necessarily reflective of current liquidation values. Yield calculations are not determined using standard performance formulas, are not representative of total return yields, and do not account for investment advisor fees.

Economic Overview

9/30/2025

The Federal Open Market Committee (FOMC) cut the Fed Funds target range to 4.00% - 4.25% September 17th (Effective Fed Funds trade +/-4.08%). Expectations for additional rate cuts remain - projecting two more 0.25% cuts before year-end. Sep Non-Farm Payroll was delayed by the government shut down. Second Quarter 2025 GDP (final) increased to + 3.8%. The S&P 500 Stock Index continued climbing and reached a new high (+/-6,700). The yield curve condensed with a slight upward slope. Crude Oil remains in the low \$60s. Inflation continues above the FOMC 2% target (Core PCE +/-2.9% and Core CPI +/-3.1%). The Markets still face uncertain economic outlooks, tariff impacts and political conflicts.



Summary

Quarter End Results by Investment Category:

Asset Type	June 30, 2025			September 30, 2025		
	Ave. Yield	Book Value	Market Value	Ave. Yield	Book Value	Market Value
DDA/MMA/Pool	4.23%	\$ 14,456,235	\$ 14,456,235	4.20%	\$ 18,908,177	\$ 18,908,177
Securities/CDs	4.58%	22,713,630	22,713,630	4.44%	18,714,902	18,714,902
Totals	4.45%	\$ 37,169,865	\$ 37,169,865	4.32%	\$ 37,623,079	\$ 37,623,079

Current Quarter Average Yield (1)

Total Portfolio	4.32%
Rolling Three Month Treasury	4.24%
Rolling Six Month Treasury	4.17%
TexPool	4.25%

Fiscal Year-to-Date Average Yield (2)

Total Portfolio	4.32%
Rolling Three Month Treasury	4.31%
Rolling Six Month Treasury	4.26%
TexPool	4.29%

Interest Earnings (Approximate)

This Quarter	\$ 377,729
Fiscal Year-to-Date	\$ 1,162,560

(1) **Current Quarter Average Yield** - based on adjusted book value, realized and unrealized gains/losses and investment advisory fees are not considered. The yield for the reporting month is used for bank, pool, and money market balances.

(2) **Fiscal Year-to-Date Average Yields** - calculated using quarter end report yields and adjusted book values and does not reflect a total return analysis or account for advisory fees..

**Holdings Report
September 30, 2025**

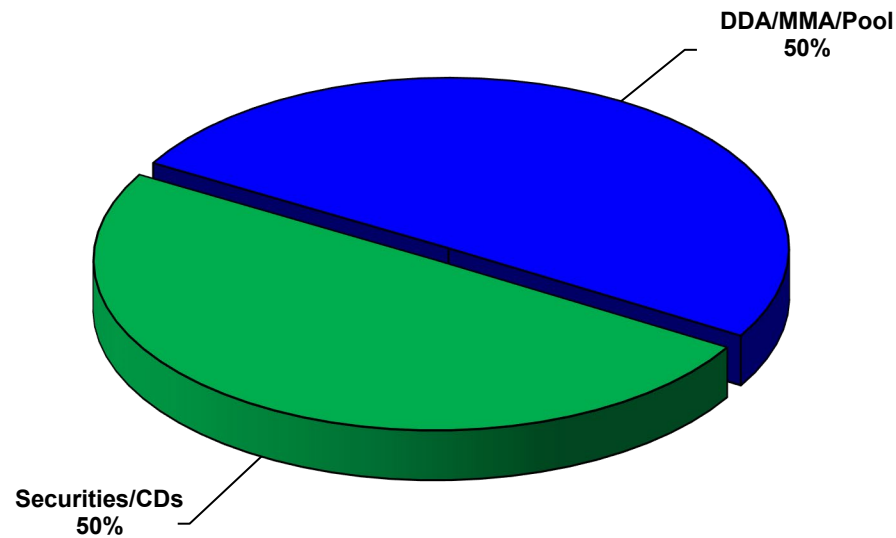


Issuer	Coupon	Settlement Date	Maturity Date	Face Value	Book Value	Market Price	Market Value	YTM @ Cost	Days To Maturity
Texas Capital Bank Operating	0.00	09/30/25	10/01/25	\$ 437,670	\$ 437,670	1.00	\$ 437,670	0.00	1
Texas Capital Bank ARB account	0.00	09/30/25	10/01/25	10,000	10,000	1.00	10,000	0.00	1
Texas Capital Bank MMA	4.30	09/30/25	10/01/25	18,460,508	18,460,508	1.00	18,460,508	4.30	1
East West Bank CD	4.29	01/17/25	10/17/25	2,061,331	2,061,331	100.00	2,061,331	4.38	17
East West Bank CD	4.36	06/23/25	12/23/25	2,132,452	2,132,452	100.00	2,132,452	4.46	84
East West Bank CD	4.28	01/16/25	01/16/26	2,165,671	2,165,671	100.00	2,165,671	4.37	108
East West Bank CD	4.25	02/18/25	02/18/26	2,053,087	2,053,087	100.00	2,053,087	4.34	141
UBank CD	4.67	10/02/24	04/02/26	2,095,048	2,095,048	100.00	2,095,048	4.75	184
BOK Financial CDARS	4.21	06/26/25	06/25/26	2,022,503	2,022,503	100.00	2,022,503	4.30	268
American Nat'l Bank of TX CD	4.26	01/29/25	07/29/26	2,064,404	2,064,404	100.00	2,064,404	4.33	302
UBank CD	4.88	10/02/24	10/02/26	2,099,401	2,099,401	100.00	2,099,401	4.97	367
BOK Financial CDARS	3.93	06/26/25	06/24/27	1,010,503	1,010,503	100.00	1,010,503	4.01	632
BOK Financial CDARS	3.93	06/26/25	06/24/27	1,010,503	1,010,503	100.00	1,010,503	4.01	632
				\$37,623,079	\$37,623,079	\$37,623,079		4.32	116
								(1)	(2)

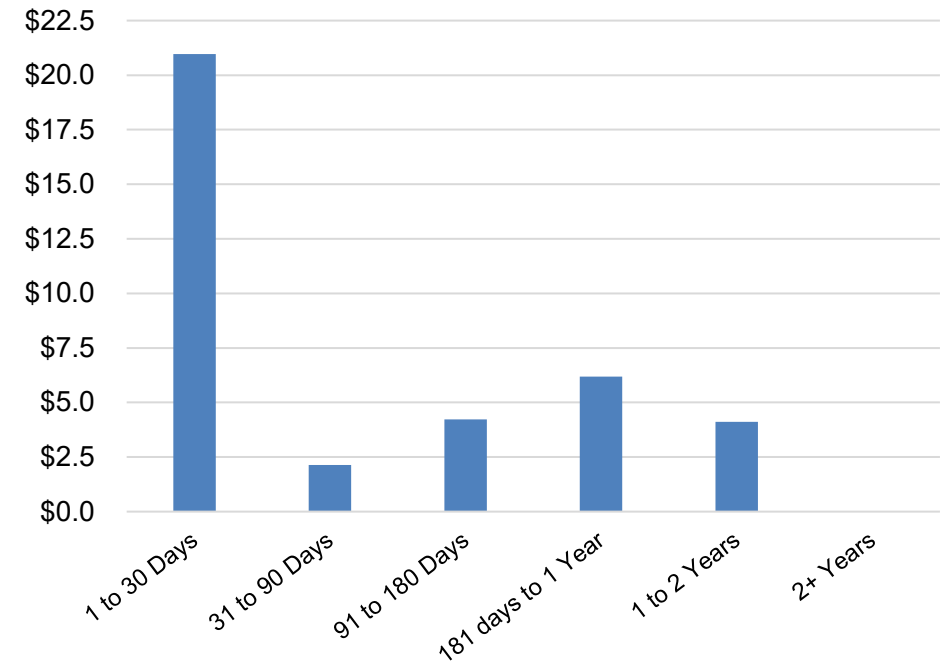
(1) Weighted average yield to maturity - The weighted average yield to maturity is based on adjusted book value, realized and unrealized gains/losses and investment advisory fees are not considered.

(2) Weighted average life - For purposes of calculating weighted average life, pool investments are assumed to have a one day maturity.

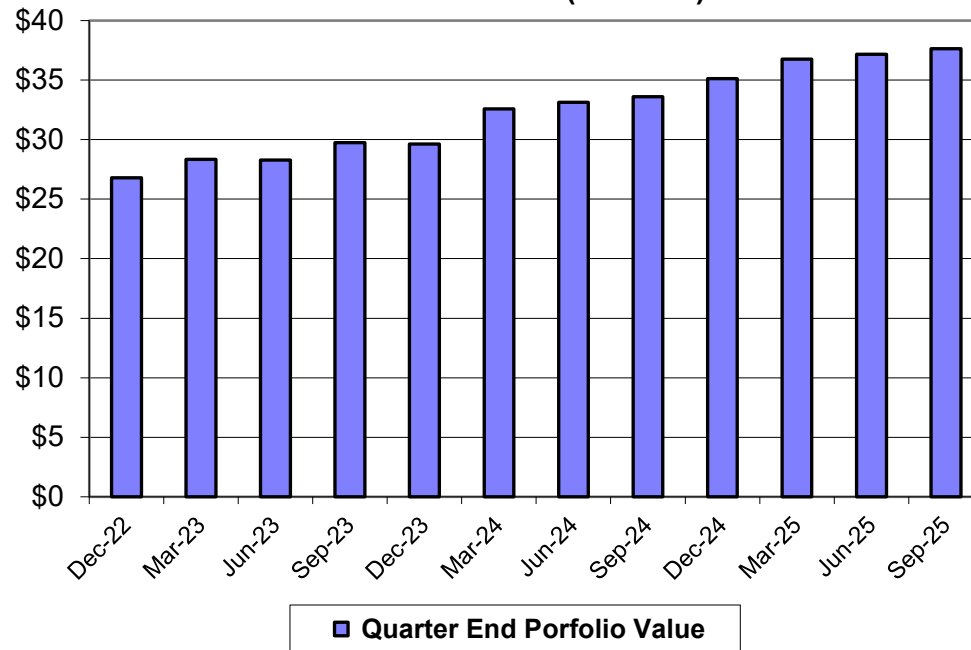
Portfolio Composition



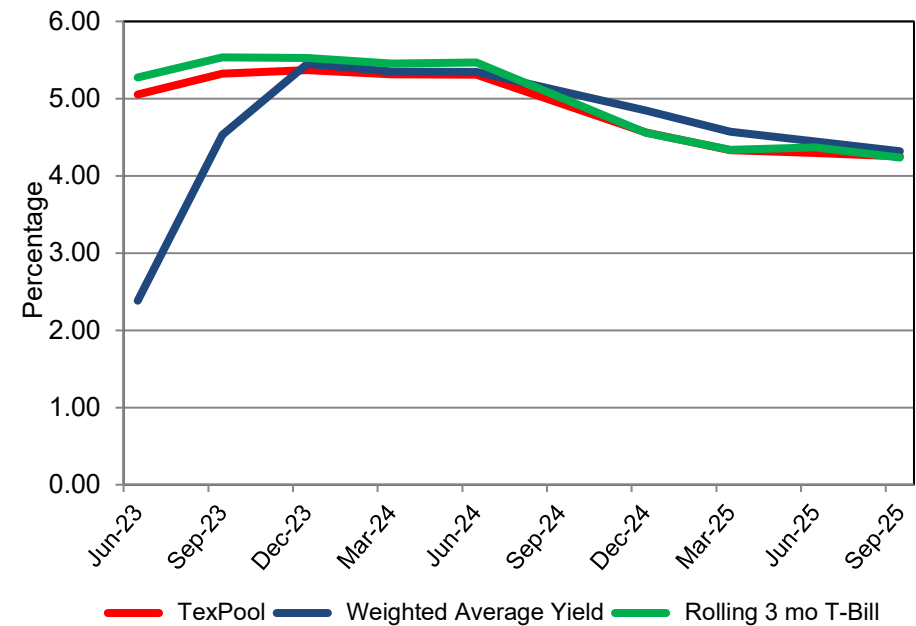
Distribution by Maturity Range (Millions)



Total Portfolio (Millions)



Total Portfolio Performance



Book & Market Value Comparison
September 30, 2025



Issuer	Yield	Maturity Date	Book Value 06/30/25	Increases	Decreases	Book Value 09/30/25	Market Value 06/30/25	Change in Market Value	Market Value 09/30/25
South State Bank Operating	0.000	10/01/25	\$ 500,000	\$ —	\$ (500,000)	\$ —	\$ 500,000	\$ (500,000)	\$ —
South State Bank sweep	0.000	10/01/25	983,797	—	(983,797)	—	983,797	(983,797)	—
Texas Capital Bank Operating	0.000	10/01/25	107,289	330,381	—	437,670	107,289	330,381	437,670
Texas Capital Bank ARB account	0.000	10/01/25	10,000	—	—	10,000	10,000	—	10,000
Texas Capital Bank MMA	4.300	10/01/25	12,855,149	5,605,359	—	18,460,508	12,855,149	5,605,359	18,460,508
East West Bank CD	5.220	07/14/25	4,202,405	—	(4,202,405)	—	4,202,405	(4,202,405)	—
East West Bank CD	4.380	10/17/25	2,039,163	22,168	—	2,061,331	2,039,163	22,168	2,061,331
East West Bank CD	4.460	12/23/25	2,109,147	23,305	—	2,132,452	2,109,147	23,305	2,132,452
East West Bank CD	4.370	01/16/26	2,142,434	23,236	—	2,165,671	2,142,434	23,236	2,165,671
East West Bank CD	4.340	02/18/26	2,031,212	21,875	—	2,053,087	2,031,212	21,875	2,053,087
UBank CD	4.750	04/02/26	2,070,675	24,374	—	2,095,048	2,070,675	24,374	2,095,048
BOK Financial CDARS	4.300	06/25/26	2,001,154	21,349	—	2,022,503	2,001,154	21,349	2,022,503
American Nat'l Bank of TX CD	4.330	07/29/26	2,042,473	21,931	—	2,064,404	2,042,473	21,931	2,064,404
UBank CD	4.970	10/02/26	2,073,891	25,509	—	2,099,401	2,073,891	25,509	2,099,401
BOK Financial CDARS	4.010	06/24/27	1,000,539	9,965	—	1,010,503	1,000,539	9,965	1,010,503
BOK Financial CDARS	4.010	06/24/27	1,000,539	9,965	—	1,010,503	1,000,539	9,965	1,010,503
Total / Average	4.317		\$ 37,169,865	\$ 6,139,416	\$ (5,686,202)	\$ 37,623,079	\$ 37,169,865	\$ 453,214	\$ 37,623,079

Collateral Position
September 30, 2025

	Texas Capital Bank	American National Bank	East West Bank	BOK Financial	UBank
Collateral Value	\$ 19,000,000	\$ 2,843,002	\$ 8,501,000	\$ —	\$ 4,040,000
+ FDIC Insurance (1)	250,000	250,000	250,000	4,293,510	250,000
Total Enhancement	\$ 19,250,000	\$ 3,093,002	\$ 8,751,000	\$ 4,293,510	\$ 4,290,000
 Total Deposits	 \$ 18,908,177	 \$ 2,064,404	 \$ 8,412,539	 \$ 4,043,510	 4,194,449
 Collateral Required <i>(less FDIC Insurance)</i>	 \$ 18,658,177	 \$ 1,814,404	 \$ 8,162,539	 \$ 3,793,510	 \$ 3,944,449
 Excess Coverage	 \$ 341,823	 \$ 1,028,598	 \$ 338,461	 \$ 250,000	 \$ 95,551
Percentage Coverage	102%	150%	104%	106%	102%
 Collateral Type:					
Municipal Bonds		\$ 2,843,002			\$ 4,040,000
Agency Letter of Credit	\$ 19,000,000		\$ 8,501,000		\$ 2,095,000
<i>(LOC expiration date)</i>	<i>04/30/26</i>		<i>02/23/26</i>		<i>Exp: 04/03/26</i>
					\$ 1,945,000
					<i>Exp: 10/05/26</i>

(1) Includes Certificate of Deposit Account Registry Service and Insured Cash Sweep balances less than \$250,000 per institution.

H.6.
3rd Qtr 2025 Vendor Report.

November 13, 2025

COLLIN CENTRAL APPRAISAL DISTRICT
ACTIVE VENDOR LIST
FOR 3RD QUARTER 2025

Count	Vendor	Description of services
1	ABACUS COMPUTERS INC (NEW)	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
2	ADP INC	PAYROLL, TAXES, OR FEES
3	AFFILIATED COMMUNITONS, INC.	UTILITIES
4	AFFILIATED COM-NET, INC.	UTILITIES
5	AFLAC	EMPLOYEE BENEFITS
6	AIRCRAFT BLUEBOOK	PUBLICATIONS AND/OR RESEARCH
7	AIRPAC, INC	PUBLICATIONS AND/OR RESEARCH
8	ALFORD INSURANCE AGENCY	SUPPLIES OR MISC G&A SERVICES
9	ALT SERVICES	SUPPLIES OR MISC G&A SERVICES
10	AMERICA TO GO, LLC	CONFERENCE CENTER RENTAL OR CATERING
11	AMERICAN SERVICES	FACILITIES MAINTENANCE, REPAIRS, REMODEL
12	APPRAISAL INSTITUTE	MEMBERSHIP, DUES, LICENSES, ETC.
13	ARMSTRONG & ARMSTRONG, P.C.	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
14	AT&T - FIBER	UTILITIES
15	AT&T - MAIN LOCAL	UTILITIES
16	AT&T - MOBILITY	UTILITIES
17	AT&T - U VERSE	UTILITIES
18	BATTERIES PLUS	SUPPLIES OR MISC G&A SERVICES
19	BCC SOFTWARE	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
20	BETSY ROSS FLAG GIRLS INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
21	BIS CONSULTING	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
22	BLUECROSS BLUESHIELD (LIFE&STLT)	EMPLOYEE BENEFITS
23	BLUECROSS BLUESHIELD OF TEXAS	EMPLOYEE BENEFITS
24	BUSINESS & LEGAL RESOURCES	PUBLICATIONS AND/OR RESEARCH
25	CAPITOL APPRAISAL GROUP, LLC	PROFESSIONAL SERVICES (UTILITIES APPRAISAL SRVS)
26	CAPITOL BLIND AND DRAPERY CO.	FACILITIES MAINTENANCE, REPAIRS, REMODEL
27	CARD SERVICE CENTER	CREDIT CARD MERCHANT
28	CARENOW CORPORATE	NEW HIRE AND/OR TESTING RELATED
29	CCIM INSTITUTE	MEMBERSHIP, DUES, LICENSES, ETC.
30	CDW-G	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
31	CERBERUS	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
32	CINTAS FIRST AID	SUPPLIES OR MISC G&A SERVICES
33	CINTAS SANI CLEAN #163	FACILITIES MAINTENANCE, REPAIRS, REMODEL
34	CITY OF MCKINNEY	UTILITIES
35	CITY OF MCKINNEY POLICE DEPARTMENT	UTILITIES
36	CIVIC PLUS	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
37	COLLIN COUNTY CHAPTER TAAO	MEMBERSHIP, DUES, LICENSES, ETC.
38	COLLIN COUNTY COMMUNITY COLLEGE DISTRICT	CONFERENCE CENTER RENTAL OR CATERING
39	COLORIT GRAPHICS SERVICES	PRINTING AND/OR POSTAGE & DELIVERY
40	COMPUNETIX, INC.	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
41	CONATSER, DAN E	EDUCATION, TRAVEL, OR TRAINER
42	COSTAR REALTY INFORMATION INC	PUBLICATIONS AND/OR RESEARCH
43	CUSHMAN & WAKEFIELD	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
44	CYPRESS VALLEY LANDSCAPING (purchased Haynes Landscape)	FACILITIES MAINTENANCE, REPAIRS, REMODEL
45	DALLAS BUSINESS JOURNAL	PUBLICATIONS AND/OR RESEARCH
46	DALLAS MORNING NEWS	PUBLICATIONS AND/OR RESEARCH
47	DELL MARKETING	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
48	DEX IMAGING	EQUIPMENT LEASE OR MAINTENANCE
49	DLT SOLUTIONS LLC	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
50	DSS	UTILITIES
51	DSS FIRE INC	UTILITIES
52	ELLIOTT ELECTRIC SUPPLY	FACILITIES MAINTENANCE, REPAIRS, REMODEL
53	ESRI INC	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
54	EVERBRIDGE, INC	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
55	EXPERIAN MARKETING SOLUTIONS	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE

COLLIN CENTRAL APPRAISAL DISTRICT
ACTIVE VENDOR LIST
FOR 3RD QUARTER 2025

56	FASTVUE, INC.	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
57	FEDEX OFFICE	PRINTING AND/OR POSTAGE & DELIVERY
58	FERRELLGAS	FACILITIES MAINTENANCE, REPAIRS, REMODEL
59	FIRST STOP HEALTH	EMPLOYEE BENEFITS
60	FISH WINDOW CLEANING	FACILITIES MAINTENANCE, REPAIRS, REMODEL
61	FRONTIER WASTE - MCKINNEY	UTILITIES
62	GREAT AMERICA FINANCIAL SERVICES	EQUIPMENT LEASE OR MAINTENANCE
63	GSO ARCHITECTS	PROFESSIONAL SERVICES (ARCHITECH)
64	HAND, MICHAEL L.	EDUCATION, TRAVEL, OR TRAINER
65	HARRIS GOVERN	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
66	HAVEN TECHNOLOGY CORP	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
67	HAYNES LANDSCAPE & MAINTENANCE, INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
68	HERITAGE BROKERAGE SERVICES	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
69	HEXAGON GEOSPATIAL	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
70	HOLT CAT	FACILITIES MAINTENANCE, REPAIRS, REMODEL
71	HOME DEPOT	SUPPLIES OR MISC G&A SERVICES
72	HUMPHREY & ASSOCIATES, INC. (NEW)	FACILITIES MAINTENANCE, REPAIRS, REMODEL
73	IAAO LOCK BOX	MEMBERSHIP, DUES, LICENSES, ETC.
74	IDERA	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
75	IN BLOOM	SUPPLIES OR MISC G&A SERVICES
76	INDECO SALES, INC.	FURNITURE, CUBICALS, SMALL EQUIPMENT
77	INSIGHTS PUBLIC SECTOR	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
78	INSURICA EXPRESS	NOTARY PUBLIC RELATED
79	INTEX ELECTRICAL CONTRACTORS, INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
80	IREM	MEMBERSHIP, DUES, LICENSES, ETC.
81	IRON MOUNTAIN	FACILITIES MAINTENANCE, REPAIRS, REMODEL
82	J.D. POWER VALUATION SERVICES	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
83	JONES, MICHAEL R	EDUCATION, TRAVEL, OR TRAINER
84	JOPLIN'S	FACILITIES MAINTENANCE, REPAIRS, REMODEL
85	JUST APPRAISED INC	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
86	JUST FOIA	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
87	JUST TEXAS	PUBLICATIONS AND/OR RESEARCH
88	KATZMANN, TINA	EDUCATION, TRAVEL, OR TRAINER
89	KLEIMAN, MELVYN (formerly Humetrics)	NEW HIRE AND/OR TESTING RELATED
90	LAYER 2 GmbH	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
91	LEGAL SHIELD / ID SHIELD	EMPLOYEE BENEFITS
92	M&M FENCING AND WELDING, INC.	FACILITIES MAINTENANCE, REPAIRS, REMODEL
93	MARSHALL & SWIFT	PUBLICATIONS AND/OR RESEARCH
94	MASSEY SERVICE, INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
95	MC PURE CLEANING, LLC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
96	MCROBERTS & COMPANY	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
97	MEDIUM GIANT COMPANY, INC	PUBLICATIONS AND/OR RESEARCH
98	METRO COUNCIL OF APPRAISAL DISTRICTS	MEMBERSHIP, DUES, LICENSES, ETC.
99	MICHAEL'S KEYS, INC.	FACILITIES MAINTENANCE, REPAIRS, REMODEL
100	MURLEY PLUMBING	FACILITIES MAINTENANCE, REPAIRS, REMODEL
101	MYPRINTCHOICE	PRINTING AND/OR POSTAGE & DELIVERY
102	NATIONWIDE RETIREMENT SOLUTIONS	EMPLOYEE BENEFITS
103	NCR PAYMENT SOLUTION, FL LLC	CREDIT CARD MERCHANT OR BANK FEES
104	NORTH CENTRAL TX COG	MEMBERSHIP, DUES, LICENSES, ETC.
105	ONE SOURCE COMMERCIAL FLOORING, INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
106	PAPERTONE ENTERPRISES LLC	SUPPLIES OR MISC G&A SERVICES
107	PARAGON ROOFING INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
108	PERDUE, BRANDON, FIELDER, COLLINS, MOTT	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
109	PICTOMETRY	AERIAL PHOTOGRAPHY
110	PITNEY BOWES LEASE	EQUIPMENT LEASE OR MAINTENANCE
111	PITNEY BOWES RESERVE ACCOUNT	PRINTING AND/OR POSTAGE & DELIVERY
112	PITNEY BOWES SUPPLIES	SUPPLIES OR MISC G&A SERVICES
113	PLANO OFFICE SUPPLY	SUPPLIES OR MISC G&A SERVICES

COLLIN CENTRAL APPRAISAL DISTRICT
ACTIVE VENDOR LIST
FOR 3RD QUARTER 2025

114	PLANO PEST CONTROL	FACILITIES MAINTENANCE, REPAIRS, REMODEL
115	PRICEWATERHOUSECOOPERS	PUBLICATIONS AND/OR RESEARCH
116	PROPERTY TAX EDUCATION COALITION, INC	EDUCATION, TRAVEL, OR TRAINER
117	PROSTAR SERVICES, INC	SUPPLIES OR MISC G&A SERVICES
118	QUALITY PERSONNEL SERVICE	EMPLOYMENT AGENCY (SEASONAL TEMPS)
119	RING CENTRAL, INC. (NEW)	UTILITIES
120	ROCKIN G DRYWALL & CONSTRUCTION	FACILITIES MAINTENANCE, REPAIRS, REMODEL
121	ROWE, RONALD	EDUCATION, TRAVEL, OR TRAINER
122	ROYAL CATERING, INC. (NEW)	SUPPLIES OR MISC G&A SERVICES
123	SAM'S CLUB	SUPPLIES OR MISC G&A SERVICES
124	SAUNDERS & WALSH, PLLC	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
125	SERVICE FIRST	EQUIPMENT LEASE OR MAINTENANCE
126	SHELL ENERGY SOLUTIONS	UTILITIES
127	SHI GOVERNMENT SOLUTIONS	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
128	SHRED-IT USA LLC	SUPPLIES OR MISC G&A SERVICES
129	SPECTRUM ENTERPRISE	UTILITIES
130	STAPLES BUSINESS CREDIT	SUPPLIES OR MISC G&A SERVICES
131	SUPERIOR VISION OF TEXAS	EMPLOYEE BENEFITS
132	SWINGLE COLLINS & ASSOCIATES	EMPLOYEE BENEFITS
133	TAAD	MEMBERSHIP, DUES, LICENSES, ETC.
134	TAAD-IAAO CHAPTER	MEMBERSHIP, DUES, LICENSES, ETC.
135	TAAO	MEMBERSHIP, DUES, LICENSES, ETC.
136	TASB, INC.	MEMBERSHIP, DUES, LICENSES, ETC.
137	TCDRS	EMPLOYEE BENEFITS
138	TDLR	MEMBERSHIP, DUES, LICENSES, ETC.
139	TEXAS ARCHIVES	SUPPLIES OR MISC G&A SERVICES
140	TEXAS COMPTROLLER CO-OP	MEMBERSHIP, DUES, LICENSES, ETC.
141	TEXAS COMPTROLLER OF PUBLIC ACCOUNTS	SUPPLIES OR MISC G&A SERVICES
142	TEXAS DEPARTMENT OF PUBLIC SAFETY	SUPPLIES OR MISC G&A SERVICES
143	THE EXEMPTION PROJECT, INC.	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
144	THOMSON REUTERS	PUBLICATIONS AND/OR RESEARCH
145	TML-IRP	INSURANCE (GENERAL LIAB AND W/C)
146	TOTAL BEVERAGE SYSTEMS	SUPPLIES OR MISC G&A SERVICES
147	TRABOLD COMPANY	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
148	TRANE US INC	FACILITIES MAINTENANCE, REPAIRS, REMODEL
149	TRUE PRODIGY TECH SOLUTIONS LLC	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
150	U.S. POSTAL SERVICE	PRINTING AND/OR POSTAGE & DELIVERY
151	UBISTOR, INC.	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
152	UNUM LIFE INSURANCE CO OF AMERICA	EMPLOYEE BENEFITS
153	USER SCAPE	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
154	VAIL & PARK, P.C.	PROFESSIONAL SERVICES (CPA)
155	VALBRIDGE PROPERTY ADVISORS	LITIGATION, EXPERT WITNESS, OR OTHER LEGAL
156	VALLEY VIEW CONSULTING, LLC	PROFESSIONAL SERVICES (INVESTMENT ADVISORS)
157	VARIVERGE LLC	PRINTING AND/OR POSTAGE & DELIVERY
158	WAITWHILE, INC.	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE
159	WASTE CONNECTIONS OF TEXAS	UTILITIES
160	WEX HEALTH INC	EMPLOYEE BENEFITS
161	YOURMEMBERSHIP.COM, INC.	NEW HIRE AND/OR TESTING RELATED
162	ZOHO CORP	COMPUTER SUBSCRIPTION, LICENSE, HARDWARE/SOFTWARE

NOTES:

- 1) New vendors are highlighted in bright yellow.
- 2) In 2nd quarter, two vendors were moved to inactive status, thus, coming off the list and reducing the total count.
- 3) This list EXCLUDES employees, deputy sheriffs, arbitrators, ARB members, and other non-vendor names.
- 4) Two vendors were marked inactive which reduced the total count compared to last quarter.

H.7.
3rd Qtr 2025 Litigation Report.

November 13, 2025



Collin Central Appraisal District

November 4, 2025

TO: Board of Directors

FROM: Brian Swanson, Deputy Chief of Business Operations and Compliance 

RE: 2025 3Q Litigation Report Update

As of the date of this report, we have the following litigation information:

- We have been served 892 lawsuits for 2025 with a total certified value of \$29,744,807,540. This number will continue to grow over the next few months as the 60-day deadline to file is always changing this time of year based on the date of hearings throughout the fall. The deadline is a moving target as the rule states the clock starts from the date that the owner/agent receives the ARB Order.
- At this same point last year, we had 877 lawsuits that had been served, which is a slight 1.7% increase over 2024. We expect to have a similar number of lawsuits as we have in 2024.
- We currently have over 80% of the 2024 suits settled, 97% of the 2023 lawsuits settled, more than 99% of 2022 settled.
- The chart below illustrates the year, current status, citations, total PID's, and certified values over the last five years which were updated as of the October 2, 2025 supplement:

**COLLIN CENTRAL APPRAISAL DISTRICT
LITIGATION SUMMARY
November 4, 2025**

YEAR	STATUS	CITATIONS	PID'S UNDER SUIT	PID'S ON CERTIFIED ROLL	PERCENTAGE OF PID'S UNDER SUIT	CERTIFIED VALUE	CERTIFIED MARKET VALUE FOR THE COUNTY	PERCENTAGE OF CERTIFIED MARKET VALUE
2022	IN PROGRESS	1	10			\$ 393,560,008		
	LITIGATION FINALIZED	541	934			\$ 18,161,513,080		
		542	944	416,402	0.23%	\$ 18,555,073,088	\$ 249,800,560,435	7.43%
2023	IN PROGRESS	17	19			\$ 1,448,152,927		
	LITIGATION FINALIZED	795	1606			\$ 29,156,123,535		
		812	1625	432,655	0.38%	\$ 30,604,276,462	\$ 292,865,809,167	10.45%
2024	IN PROGRESS	183	281			\$ 5,759,911,401		
	LITIGATION FINALIZED	747	1283			\$ 25,518,154,098		
		930	1564	451,347	0.35%	\$ 31,278,065,499	\$ 316,071,150,857	9.90%
2025	IN PROGRESS	832	1428			\$ 28,231,130,892		
	LITIGATION FINALIZED	60	72			\$ 1,513,676,648		
		892	1500	472,407	0.32%	\$ 29,744,807,540	\$ 336,463,024,895	8.84%
2022-2025	IN PROGRESS	1,033	1,738			\$ 35,832,755,228		
	LITIGATION FINALIZED	2,143	3,895			\$ 74,349,467,361		
	GRAND TOTALS>>>>	3,176	5,633	1,772,811	0.32%	\$ 110,182,222,589	\$ 1,195,200,545,354	9.15%

H.8. Litigation Cost Report.

November 13, 2025

Legal Expense Summary (by expense code and vendor)
Total as of 10/31/2025

LEGAL EXPENSE BY EXPENSE CODE

Name	2025 YTD Total	2025 Budget	2024 YE Total	2023 Total	2022 Total	2021 Total
LITIGATION	\$2,027,494		\$2,158,735	\$1,542,499	\$1,265,087	\$1,282,281
EXPERT/APPRaisal	\$449,202		\$269,032	\$388,942	\$278,266	\$266,111
GENERAL	\$66,046		\$51,098	\$59,600	\$47,361	\$45,539
PERSONNEL	\$2,360		\$2,173	\$7,597	\$49,063	\$23,216
ARBITRATION	\$15,550		\$64,400	\$36,900	\$17,100	\$15,050
SUBTOTAL	\$2,560,651	\$2,470,000	\$2,545,438	\$2,035,539	\$1,656,876	\$1,632,197
ARB RELATED	\$16,256	\$30,000	\$16,860	\$8,750	\$16,031	\$15,015
TOTAL	\$2,576,907	\$2,500,000	\$2,562,298	\$2,044,289	\$1,672,908	\$1,647,212
	103.08%					
	\$0					

LEGAL EXPENSE BY VENDOR

Name	2025 YTD Total	2024 Total	2023 Total	2022 Total	2021 Total
1 ARBITRATION&SUBPOENA RELATED	\$15,550	\$64,400	\$36,900	\$17,100	\$15,050
2 ARMSTRONG & ARMSTRONG	\$16,256	\$16,860	\$8,750	\$16,031	\$15,015
3 CUSHMAN & WAKEFIELD	\$135,160	\$0	\$0	\$0	\$37,600
FISHER & PHILLIPS LLC	\$0	\$0	\$0	\$0	\$209
FRANK PRICE	\$0	\$0	\$0	\$4,000	\$10,000
4 HBS REAL ESTATE	\$9,250	\$74,600	\$172,750	\$85,000	\$104,050
MALIN GROUP, THE	\$0	\$0	\$0	\$31,916	\$38,461
5 MCROBERTS AND COMPANY	\$43,500	\$33,450	\$95,250	\$72,850	\$74,500
NPV ADVISORS	\$0	\$0	\$17,500	\$19,500	\$0
6 PERDUE, BRANDON, FIELDER	\$2,288	\$3,029	\$2,779	\$2,500	\$3,036
PHILLIPS MURRAH PC	\$0	\$0	\$0	\$0	\$384
7 SAUNDERS & WALSH, PLLC	\$2,093,611	\$2,208,978	\$1,606,918	\$1,355,010	\$1,337,407
8 VALBRIDGE PROPERTY ADVISORS	\$261,292	\$160,982	\$103,442	\$69,000	\$11,500
TOTAL	\$2,576,907	\$2,562,298	\$2,044,289	\$1,672,908	\$1,647,212

H.9.
**CCAD Representation by Saunders, Walsh &
Beard**

November 13, 2025



SAUNDERS, WALSH & BEARD

ATTORNEYS & COUNSELORS

CRAIG RANCH PROFESSIONAL PLAZA
6850 TPC DRIVE, SUITE 210
MCKINNEY, TEXAS 75070
(214) 919-3555
E-FAX (214) 615-9019
WWW.SAUNDERSWALSH.COM

October 13, 2025

Via Email bkmantzey@gmail.com

Mr. Brian Mantzey, Board Chairman
Collin Central Appraisal District
250 El Dorado Parkway
McKinney, Texas 75069

Re. CCAD Representation by Saunders, Walsh & Beard

Dear Chairman Mantzey:

The law firm of Saunders, Walsh & Beard ("SWB") has had the honor of representing the Collin Central Appraisal District ("CCAD" or "District") since 2018. Prior to 2018, Lewis Isaacks, Jennifer Pettit, and myself (all partners at SWB) represented CCAD while we were partners at the law firm of Gay, McCall, Isaacks, Gordon & Roberts. Our partners' representation of CCAD has been ongoing for more than 30 years.

You requested that I provide you with information related to the scope of this firm's legal services to the District and its Board of Directors. Over the last 30+ years, our partners have provided legal services that include:

- Representing and defending the District in Appraisal Review Board and District Court proceedings;
- Providing counsel to the District's Board of Directors on matters of policy and procedure, ensuring compliance with all applicable laws;
- Providing counsel to the District's Board of Directors in contracting with its Chief Appraiser (and assisting the Board in drafting said contracts);
- Providing counsel to the District's Board of Directors, Chief Appraiser, and staff, on employment matters;
- Providing legal opinions to the Board of Directors, Chief Appraiser, and District staff, to ensure compliance with the law on issues including, but not limited to:
 - Open Meetings Act requirements;

- Proper public procurement of contractors and vendors;
 - Conflict of interest issues;
 - Contract drafting and negotiations with vendors;
 - Insurance coverage issues; and
 - Numerous miscellaneous legal compliance matters.
- Providing advice and counsel to the District's Board of Directors, Chief Appraiser, and staff on day-to-day legal issues that arise.

As detailed above, our firm has regularly provided legal opinions and advice to the District's Board, Chief Appraiser, and staff on an as-needed basis during our decades long representation of the District. It is important to note that **the District's Board is part of the Appraisal District that we represent**. For this reason, questions regarding our representation of the *Board* are somewhat confusing. While the *organization* of Collin Central Appraisal District is, and has at all times during this period, been our client, the District's Board is part of the organization we represent. So long as the questions or issues requested to be addressed are being done for the District, our legal advice and fiduciary duties all fall under that umbrella of representation for our client, the Appraisal District, of which the Directors are a part and to which they owe duties of their own.

I hope this addressed your questions. However, if there are any additional questions, as always, I would be happy to answer them.

Very truly yours,
SAUNDERS, WALSH & BEARD



Mark A. Walsh, Managing Partner

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