



# THE TAX ASSESSOR-COLLECTORS ASSOCIATION OF TEXAS

An Association to secure the benefits of organized ideas and discussion of mutual problems  
that will advance and maintain proper efficiency and dignity of the County Tax Office.

[www.tacaoftexas.org](http://www.tacaoftexas.org)

## “2020 VISION: PREPARING FOR THE FUTURE”

TACA BOARD MEETING  
TAC LEGISLATIVE CONFERENCE  
TAC BUILDING, 4<sup>TH</sup> FLOOR, NORTH ROOM  
FRIDAY, SEPTEMBER 6<sup>TH</sup>, 2019, 11:30 A.M.

### OFFICERS

CATHY C. TALCOTT, PCAC  
PRESIDENT  
COMAL COUNTY  
[talcoc@co.comal.tx.us](mailto:talcoc@co.comal.tx.us)

TAMMY McRAE, PCAC  
PRESIDENT-ELECT  
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[tammy.mcrae@mctx.org](mailto:tammy.mcrae@mctx.org)

RANDY RIGGS, CPA, PCC  
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LARRY GADDES, PCAC, CTA  
SECRETARY-TREASURER  
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MICHELLE FRENCH, PCC  
IMMEDIATE PAST PRESIDENT  
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### DIRECTORS

KEVIN KIESCHNICK, PCC  
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DONNA WILLIS  
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SHAY LUEDEKE, CTOP  
BELL COUNTY  
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ALBERT URESTI, CTOP  
BEXAR COUNTY  
[albert.uresti@bexar.org](mailto:albert.uresti@bexar.org)

- I. Call to Order – Cathy Talcott
- II. Prayer and Pledges – Cathy Talcott
- III. Roll Call – Larry Gaddes
- IV. Introductions and Guests – Cathy Talcott
- V. Presidential Activity Report – Cathy Talcott
  - A. Meetings and Other Activities
- VI. Secretary-Treasurer Report – Larry Gaddes
  - A. Approval of Minutes
    1. June 8, 2019 PreConf Board Meeting, Moody Gardens
    2. June 12, 2019 Special Called Meeting, Moody Gardens
    3. June 12, 2019 Business Meeting, Moody Gardens
    4. June 13, 2019 New Board Meeting, Moody Gardens
    5. June 21, 2019 Special Called Meeting, Conference Call
    6. August 14, 2019 Board Meeting, Vintage Villas
  - B. Approval of Financials
    1. June 2019
    2. July 2019
  - C. Amended Budget Recap
  - D. Audit Committee Report
- VII. Old Business
  - A. VG Young Conference Update – Peter McGuill
  - B. Galveston & Austin Conference Update – Allison Getz, Amy Law-son and Sarah Lazarowitz
  - C. Committee Updates – TBD
  - D. Board Retreat Follow-Up and Presentations
- VIII. Executive Session
- IX. New Business
  - A. Director of Education update – Tammy McRae
  - B. CTOP – additional DMV LMS requirements – Tammy McRae
  - C. PTEC Course CE requirements – Tammy McRae
  - D. TACA Retention Schedule – Larry Gaddes
  - E. Determine date for next board meeting – Cathy Talcott
- X. Other Business
- XI. Adjourn



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## “2020 VISION: PLANNING FOR THE FUTURE”

### PRESIDENT’S ACTIVITIES REPORT

June 13 – September 6, 2019

#### OFFICERS

CATHY C. TALCOTT, PCAC  
PRESIDENT  
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June 13 – TACA Board Meeting in Galveston

June 19 - Attended San Antonio Regional Meeting in Bandera

June 21 – TACA Special Board Meeting Conference Call

June 27 - Conference call with Justin Carothers & Dawn Noufer (TAC) RE: new list serve

June 28 - Attended congratulatory reception, hosted by my staff for Comal County

July 5 - Traveled to Austin to arrange Board Retreat

July 10 - Conference call with Planning Committee for Board Retreat

July 18 - Attended Big Country Regional Meeting in Abilene

July 22 - Attended TIADA Conference in San Antonio

July 31 - Sent response requested by Attorney General regarding Scofflaw, compiled by Bruce Stidham with input from Randy Riggs, Ruben Gonzales & Michelle French

August 14 - Attended Board Retreat in Austin

August 15 - Attended Central Texas Regional Meeting in Bryan

August 23 - Attended meeting at Comptroller’s Office with DMV, including Shay Luedeke, Sharon Carlson, Ronnie Keister, Tammy McRae and Michelle French regarding HB 1543

August 26-28 - Attended TAAO Conference in San Antonio

September 4-6 - Attended TAC Legislative Conference in Austin

September 6 - TACA Board Meeting in Austin

***TACA PreConference BOARD MEETING***

***June 8, 2019***

***3:00 p.m. – Vine Room***

***Moody Gardens***

***7 Hope Boulevard***

***Galveston, TX 77554***

- I. Call to Order- The meeting was called to order by President Michelle French at 3:05 p.m.
- II. Prayer & Pledge- The prayer was given by Cathy Talcott and Tammy McRae led the pledges to the US and Texas Flags
- III. Introductions & Guests - Board members in attendance were Michelle French, Cathy Talcott, Tammy McRae, Randy Riggs, Bruce Stidham, Kevin Kieschnick, Larry Gaddes, Donna Willis and Teri Garvey Hanks. Guests in attendance were John R. Ames, Sarah Lazarowitz, Amy Lawson, Katy Reagan, Justin Carothers, Allison Getz, Gwenda Tschirhart and Ruben Gonzalez.
- IV. Presidential Activity – Michelle French provided her report in written form. She traveled to Austin to testify and was honored on the House and Senate floor. She also attended the DMV Technology meeting and the tollway authority meeting.
- V. Secretary/Treasurer Report-
  - a. Approval of Minutes – Cathy Talcott moved to approve the minutes as submitted. Kevin Kieschnick seconded the motion. All approved, motion carried.
  - b. Financial Reports – Reports were presented for March through May. Bruce Stidham moved to approve the financial reports as submitted. Donna Willis seconded the motion. All approved, motion carried.
- VI. Old Business
  - a. Annual Conference Program – Allison Getz recognized Amy Lawson and Sarah Lazarowitz and thanked them for all of their work.
  - b. Annual Conference Logistics – Amy Lawson reported that there are currently 379 registered for the conference, 168 are TACs and more deputies. Currently 70 are registered for the additional class. There are at least 50 first time attendees. All numbers are more than last year.
  - c. Annual Conference Vendors/Sponsors – Sarah Lazarowitz gave an update on all vendors past and present. Currently there are 56 booths sold and just over \$109,000 has been received. This is the most vendors the association has ever had.
- VII. New Business
  - a. Acceptance of Resignation – A letter from Linda Bridge announcing her resignation was read. Randy Riggs moved to accept the resignation seconded by Tammy McRae. All approved, motion carried.
  - b. Committee Updates
    1. Advisory Subcommittee Scholarship – John R. Ames announced that Wendy Burgess of Tarrant County was recommended to receive the scholarship for this conference.
    2. Bylaws – Randy Riggs reviewed the amendments that will be voted on in the business meeting.
    3. Education Update – Tammy McRae reported that 9 PTEC courses have been taught so far this year with 118 students. Income generated by these courses was \$14,700. 56

members will receive certificates this conference. The new registration process has gone exceedingly well. John R. Ames reported that in total there are 360 PCCs and 200 CTOPs. There are only 20 PCACs and 18 PDACs.

4. Legislative Committee – Ronnie Keister reported that the session is over. Some successes were in the DMV and DPS sunset committees. Our TABC bill passed. SB 2 received input regarding the calendar. He also discussed the recognition process for Senators and Legislators. Katy Reagan went into some detail of some of the work during the session.

5. 20 Year Service Report – Gwenda Tschirhart announced the recipients of the recognition. She also reported that all but one county TACs are members of the association.

6. PTEC – Tammy McRae reported the schedule of the PTEC course updates.

7. TAC Board Member Update – John R. Ames submitted a written report. He reported that the board just met last month. TAC hosted a 50<sup>th</sup> Anniversary reception that was well attended. Judge Susan Redford, Executive Director, has a new program to recognize employees. Appointments to several opportunities were approved and several staff reports were received by the board.

6. TXDMV Board Report – Tammy McRae expressed the feeling of honor bestowed upon her. She has been working feverishly to master the learning curve. She has been appointed to the Legislative, and Projects and Operations Committees. She relayed several updates received from the board.

VIII. Executive Session

IX. Other business – Larry Gaddes announced his efforts to establish a retention schedule for TACA.

X. Next Board Meeting: Thursday, June 13, 2019 @ 7:30 p.m. in the Ivy Room at Moody Gardens, Galveston

XI. Adjourn – Tammy McRae moved to adjourn, seconded by Bruce Stidham. All voted in favor. Meeting adjourned at 6:08 pm.

Respectfully Submitted,  
Randy Riggs  
Secretary/Treasurer



June 12, 2019

Special Called Board Meeting to consider Life Membership

President Michelle French called a meeting of the Board to order at 8:58 am to consider the awarding of Life Membership.

All were present except for Linda Bridge.

The committee proposed the following individuals for life membership.

Burleson County	Curtis Doss	17 years
Wharton County	Patrick Kabala	26 years
Kerr County	Diane Bolin	12 years
Ector County	Barbara Horn	13 years
Somervell County	Darlene Chambers	15 years
Hayes County	Luanne Caraway	24 years
Montague County	Sydney Nowell	16 years
Eastland County	Sandy Cagle	21 years
Jones County	Mary Ann Lovelady	18 years
Webb County	Patricia Barrera	24 years
Dewitt County	Susie Dryer	25 years

Cathy Talcott moved that the Board approve the recommendation. Tammy McRae seconded the motion. All approved, motion carried.

Meeting was adjourned at 9:00 am.

Respectfully submitted,

Randy Riggs

Secretary/Treasurer

## TACA Business Meeting

June 12, 2019

Moody Gardens, Galveston, Floral Hall

- I. Call To Order – President Michelle French called the meeting to order at 9:08 a.m.
- II. Prayer and Pledges: Justin Carothers offered the prayer, Albert Uresti led the Pledges to the US and Texas Flags
- III. Official Count of Tax Assessor/Collectors- The initial count was 142 TACs. The final count was 147 TACs.
- IV. Financial Reports - Randy Riggs presented the year-end financial report. He also shared some financial aspects of annual conferences.
- V. Election of 2019-2020 Board Officers & Directors presented by Mary Ann Waters.
  - a. President Elect: Nominated was Tammy McRae. President Michelle French asked if there were any nominations from the floor. Ro’Vin Garrett moved that nominations cease and Tammy McRae be accepted by acclamation. Gwenda Tschirhart seconded the motion. All approved, motion carried.
  - b. VP External: Nominated was Randy Riggs. President Michelle French asked if there were any nominations from the floor. John R. Ames moved that nominations cease and Randy Riggs be accepted by acclamation. Teri Garvey Hanks seconded the motion. All approved, motion carried.
  - c. Vice President Internal: Nominated was Bruce Stidham. President Michelle French asked if there were any nominations from the floor. Sheriff Ed Miller moved that nominations cease and Bruce Stidham be accepted by acclamation. Gwenda Tschirhart seconded the motion. All approved, motion carried.
  - d. Secretary-Treasurer: Nominated was Larry Gaddes. President Michelle French asked if there were any nominations from the floor. Gwenda Tschirhart moved that nominations cease and Larry Gaddes be accepted by acclamation. John R. Ames seconded the motion. All approved, motion carried.
  - e. Directors: Nominated were Shay Luedeke, Christina McMurray, Gwenda Tschirhart, Albert Uresti and Donna Willis. The nominations were for the two 2-year positions that came up this year. President Michelle French asked if there were any nominations from the floor. Hearing none, each nominee had the opportunity to address the membership. Michelle French addressed balloting. A secret ballot vote was taken. After votes were tabulated, the following votes were received: Shay Luedeke-91 votes; Christina McMurray-33 votes; Gwenda Tschirhart-26 votes; Albert Uresti-68 votes; Donna Willis-69 votes. Shay Luedeke and Donna Willis were elected to the 2 year term of Director.
  - f. Other: With the election of Larry Gaddes as Secretary-Treasurer, there exists a director position with an unexpired term. Nominated were Christina McMurray, Gwenda

Tschirhart, and Albert Uresti. Justin Carothers moved that nominations cease, seconded by Sherry Mueck. All approved, motion carried. A secret ballot vote was taken. After votes were tabulated, the following votes were received: Christina McMurray-37 votes; Gwenda Tschirhart-32 votes; Albert Uresti-75 votes. Albert Uresti was elected to the unexpired term.

- VI. Committee Reports Requiring Action of the Membership:
- a. By-Laws – Randy Riggs, Vice Chair, presented the changes as properly disclosed on the website. First item was Article IV, Section A, Section B and Section G. relating to making the sections gender neutral. Second item was Article III, Section D and Article IV, Section G. replacing “regular member” with “active member.” The committee moved for the approval. Seconded by Sherry Mueck. Discussion followed. Motion passed with one no vote.
- VII. Committee Reports with No Action Needed:
- a. Advisory – Teri Garvey Hanks, Chair, reported no activity.
  - b. Audit – Tammy McRae reported that the audit will be conducted in August with the results reported at the November meeting.
  - c. Awards – Jeri Cox, Chair, reported that scoring was done for the Distinguished Service Award and congratulations again to Gary Barber.
  - d. Comptroller Liaison – Cathy Talcott gave a report for all the activity for the entire year.
  - e. Education – Tammy McRae reported that this has been an active year. Course locations have expanded. 9 courses so far have been offered educating 181 students with revenue of \$14,730. She also mentioned that the new elective will be Special Inventory Tax. John R. Ames reported that we currently have 538 certifications.
  - f. Elections – Mary Ann Waters reported on the results disclosed earlier in the meeting.
  - g. Finance – John R. Ames, Chair, reported that the budget was prepared, presented and adopted this year earlier than it ever has. The committee evaluated the matching of revenue with expenses for education, conference and general accounts. Findings resulted in the board voting to raise the dues for the upcoming year.
  - h. Historical - Kim Sweet, Chair, presented Past President Teri Garvey Hanks with her presidential book.
  - i. Honorary Membership – Dot Borchardt had no report.
  - j. Legislative – Ronnie Keister, Chair, reported that the committee survived the session. He reported several legislative awards of members that were beneficial to our cause.
  - k. Life Membership – Dot Borchardt, Chair, read the list of 11 new life members approved by the board in an earlier vote.
  - l. Membership – Gwenda Tschirhart, Chair, recognized the 20 year service awards
  - m. Program – Allison Getz, Chair, expressed appreciation for the opportunity to serve. She recognized Sherry Mueck for the new mentor program. She also requested input to make the conference relevant to the needs of the association. It will be her recommendation in the future that each TAC should be able to stay in the host hotel.
  - n. Public Information - Billie Page, Chair, reported the activity of the committee for the year. She announced some changes for next year and wanted input from the membership.

- o. Regional Coordinating - Cristyn Hallmark, Chair, reported the activity for the year. She encourages better communication within the regions this next year.
- p. Resolutions - Teresa Garth, Chair, had no report.
- q. Security - Tommy Smyth, Chair, reported that the committee continues to have great meetings. He reported that cyber security continues to be a critical topic.
- r. Site – Ronnie Keister, Chair, reported that the Board voted to accept Amarillo as the location for the 2022 conference.
- s. TxDMV Liaison - Kevin Kieschnick, Chair, reported that most issues revolved around the legislative session. The committee dealt with the new equipment guide.
- t. Technology - Justin Carothers, Chair, reported that while breaking the reservation system at the hotel we broke the list serve. He thanked Tammy McRae and John Ames for assisting with the issue.

VIII. Liaisons and Representatives Reports:

- a. Secretary of State – Gwenda Tschirhart reminded everyone of the upcoming election seminar.
- b. Texas Park and Wildlife - Monte Shaw had no update at this time.
- c. Texas Dept. of Housing and Community Affairs - Robin Harper reported no significant issues.
- d. Texas Alcohol and Beverage Commission – Albert Uresti reminded everyone of the upcoming class. He also touched on the current collection issues.
- e. Texas Assoc. of Vehicle Theft Investigators - Ruben Gonzalez reported the annual meeting was in Galveston. A main concern was the increase of work dealing with the 68A program.
- f. Texas Association of Counties - John R. Ames reported that TAC turned 50 years old this year. He stressed the importance of the association as well as expressed appreciation for all they do for TACA. An upcoming focus this next year will be NACO membership and involvement.
- g. Property Tax Education Coalition - Tammy McRae reported that the coalition meets quarterly. Based on the legislative session, the PTEC courses will need to be revised.
- h. DMV Board – Tammy McRae expressed her excitement at being able to represent TACA on the board. She looks forward to seeking out your input and receiving it.

IX. Presentation of 2019-20 Committee Chairs – Cathy Talcott

- a. Advisory – Michelle French
- b. Audit – Bruce Stidham, Kevin Kieschnick and Wendy Burgess
- c. Awards – Robin Burgess and Tammy Walker, Gwenda Tschirhart
- d. By-Laws-Justin Carothers, Larry Gaddes
- e. Comptroller Liaison – Cathy Talcott, Larry Gaddes
- f. Education - Tammy McRae, Becky Robles
- g. Elections – Mary Ann Waters, Donna Brice
- h. Finance – Gary Barber, Randy Riggs
- i. Historical-Kim Sweet, John R. Ames
- j. Honorary-Dot Borchgardt, Luana Howell

- k. Legislative - Ronnie Keister, Larry Gaddes, Ro'Vin Garrett, Kevin Kieschnick, Shay Luedeke, Kristy Roe
- l. Life Membership – Dot Borchardt, Luana Howell
- m. Membership - Gwenda Tschirhart, Becky Robles
- n. Program - Allison Getz, Karen Lane
- o. Public Info - Billie Page, Teresa McCoy
- p. Regional Coordinating - Cristyn Hallmark, Monica Foster
- q. Resolutions-Teresa Garth, Rexann Furlow
- r. Security-Thomas Smyth, Richard Brown
- s. Site – Ronnie Keister, Kristy Roe
- t. Technology-Justin Carothers, Shay Luedeke
- u. TxDMV-Michelle French, Becky Robles

Liaisons

- a. SOS – Gwenda Tschirhart
  - b. TxP & W- Daryl John
  - c. TABC-Albert Uresti
  - d. TDHCA-Deborah Sevcik
  - e. Tx Assoc of Veh Theft & Comm Affairs-Ruben Gonzalez
  - f. TAC-Randy Riggs
  - g. PTEC-Tammy McRae
- X. Adjourned at 11:23 AM

Respectfully Submitted-Randy H. Riggs, Secretary/Treasurer

***TACA NEW BOARD MEETING***

***June 13, 2019***

***7:30 a.m. – Ivy Room***

***Moody Gardens***

***7 Hope Boulevard***

***Galveston, TX 77554***

- I. Call to Order- The meeting was called to order by President Cathy Talcott at 7:32 a.m.
- II. Prayer & Pledge- The prayer was given by Cathy Talcott and Shay Luedeke led the pledges to the US and Texas Flags
- III. Introductions & Guests - Board members in attendance were Cathy Talcott, Tammy McRae, Randy Riggs, Bruce Stidham, Larry Gaddes, Kevin Kieschnick, Donna Willis, Shay Luedeke, Albert Uresti and Michelle French. Guests in attendance were John R. Ames, Sarah Lazarowitz, Amy Lawson, Katy Reagan and Michele Mund.
- IV. Secretary/Treasurer Report-
  - a. Internal Audit – Cathy Talcott announced that the audit meeting will be held Tuesday, September 3, 2019 from 3 until 6 pm at the Texas Association of Counties North Room. Members of the committee are Bruce Stidham, Kevin Kieschnick and Wendy Burgess.
  - b. Leadership Class Selection/Appointment – Larry Gaddes announced that our association no longer selects a member for the program. All participants are selected through an application process with the Texas Association of Counties.
  - c. Ratify President’s Chair Appointments & Extensions - Kim Sweet, Historical Chair, and Justin Carothers, Technology Chair, have both served more than four years. Michelle French moved to extend their service and ratify the appointment for the ensuing year. Bruce Stidham seconded the motion. All voted in favor, motion passed.
- V. Old Business
  - a. Update of Previous Year – Michelle French announced that this past year has been busy and fantastic. She also stressed how well the board worked together this past year.
  - b. VG Young Update – Tammy McRae announced that there will be an upcoming planning meeting and that Sherry Mueck will be chairing the planning for TACA.
- VI. New Business
  - a. TAC/County Progress Wrap Up – Amy Lawson reminded the board that the advanced class was held at the beginning of the conference and that there will be a wrap up meeting later this summer. Sarah Lazarowitz

mentioned that the funding records had been broken.

- b. Set Date for next Board Meeting – The next board meeting will be on Friday, September 6, 2019 from 11 – 2 following the Texas Association of Counties Legislative Conference.

VII. Other Business – Cathy Talcott reported on her meeting regarding the Comptroller Advisory Group. The board is recommending Larry Gaddes and Ro’Vin Garrett as our representatives.

Cathy Talcott would like to create a committee to perform the service that Sherry Mueck provided at this conference.

Larry Gaddes informed the board of the transition occurring in the Secretary/Treasurer office and asked for patience from the board.

Albert Uresti addressed forming a Special Investigation Unit as a resource for the members of our association.

Cathy Talcott recognized John R. Ames to address the Education Director position. John R. Ames recommended that the board hire an Education Director. He mentioned that he would be willing to continue as the Education Director during a transition period until the next board meeting in September if the board agreed to hire an Education Director. Otherwise, he would continue until the end of June 2019 and turn everything over on July 1<sup>st</sup>. The board agreed to put this on the agenda for the next board meeting and John R. Ames stated that June 30, 2019 will be his last day as the Education Director. Cathy Talcott formed a committee to immediately address the issue consisting of Tammy McRae, Randy Riggs, Bruce Stidham and Larry Gaddes.

VIII. Adjourn – The meeting was adjourned by Cathy Talcott at 8:49 am.

Respectfully Submitted,  
Randy Riggs  
Secretary/Treasurer

## TACA Board Minutes

Friday, June 21st, 2019

### Special Called Meeting – Conference Call

- I. Call to Order - Cathy Talcott called the meeting to order at 2:00 PM.
- II. Roll Call - Larry Gaddes performed a roll call of attendees to verify that the following were on the call: Cathy Talcott, Tammy McRae, Randy Riggs, Bruce Stidham, Larry Gaddes, Michelle French, Donna Willis, Shay Luedeke, and Albert Uresti. Kevin Kieschnick was not able to attend the call.
- III. Old Business - There was no old business to discuss.
- IV. New Business - Cathy Talcott proposed discussing the agenda items.
  - a. Shay Luedeke made a motion to accept John Ames' resignation effective June 30<sup>th</sup>. Michelle French seconded the motion. The motion passed unanimously.
  - b. Tammy McRae made a motion to accept Ro'Vin Garrett as education director effective July 1<sup>st</sup>. Randy Riggs seconded the motion. The motion passed unanimously.
  - c. Cathy proposed a board meeting to discuss short and long-range planning for the association. Members agreed, and plans will be made to determine a date and format for the meeting.
- V. Other business –
  - a. Tammy McRae provided an update on the ad hoc committee progress on gathering information on acquiring an education director.
  - b. Larry Gaddes advised the board that he will begin posting agendas on the TACA website. He stated a majority of the transition is complete concerning the secretary-treasurer position and that he will share with the board new contact information for the position.
- VI. Adjourn – Bruce Stidham made a motion to adjourn the conference call. Donna Willis seconded. The motion passed unanimously.



## **TACA Board Meeting Minutes**

**Wednesday, August 14<sup>TH</sup>, 9:00 a.m.**

### **Strategic Planning Retreat**

**Vista Villas, Austin, TX**

- I. Call to Order – Cathy Talcot called the meeting to order at 8:45 a.m.
- II. Roll Call – Larry Gaddes confirmed that all board members were present
- III. Old Business
  - a. Approve Minutes - Tammy McRae made a motion to approve the minutes of the previously special-called conference call board meeting. Michelle French seconded. The motion passed unanimously.
  - b. Approve Financial Reports - Board members had not adequately reviewed the financial reports. Approval of June/July financial reports was tabled for the next called meeting.
- IV. New Business
  - a. Budget amendment to accommodate board retreat expense – Randy Riggs made a motion to decrease line 825 – TACA Legislative Consultant by \$5,000 and to increase line 801 – Board Meeting Travel and Expense by \$5,000. Kevin Kieschnick seconded. The motion passed unanimously.
- V. Other Business – no other business was discussed.
- VI. Adjourn – Kevin Kieschnick made a motion to adjourn the meeting. Bruce Stidham seconded. The motion passed unanimously.

**TAX ASSESSOR-COLLECTORS ASSN OF TEXAS**

The period of June 1, 2019 to May 31, 2020

Acct No.	Cash Receipts (Income)	3/31/2019 ADOPTED BUDGET	6/30/2019	Year To Date	Remaining Budget
202	Regular Memberships	\$ 31,250.00		\$ -	\$ 31,250.00
203	Associate Memberships	32,500.00		-	32,500.00
204	Affiliate Memberships	1,250.00		-	1,250.00
205	Miscellaneous-Gift Sales	5,000.00	4,068.00	4,068.00	932.00
206	Contributions/Sponsors 2018**				-
	Contributions/Sponsors 2019**	40,000.00	34,325.00	34,325.00	5,675.00
	Contributions/Sponsors 2020**	20,000.00			
2066	Exhibition Booth Sales-CountyProgress**	15,000.00	4,750.00	4,750.00	10,250.00
207	Late Conference Revenue	40,000.00		-	40,000.00
208	Interest Income			-	-
2081 a.	Money market checking			-	-
	Interest Income	2,000.00	410.99	410.99	1,589.01
209	Educational Courses	20,000.00	3,325.00	3,325.00	16,675.00
210	2020 (Austin) Conference Registration	74,700.00		-	74,700.00
215	Other Income			-	-
49900	Uncategorized Income			-	-
	Receipts (income)	<b>\$ 281,700.00</b>	<b>\$ 46,878.99</b>	<b>\$ 46,878.99</b>	<b>\$ 214,821.01</b>
2082 b.	Funds Management Acct			\$ -	\$ 1,200.00
	<b>Total Receipts (income) Month &amp; YTD</b>	<b>\$ 281,700.00</b>	<b>\$ 46,878.99</b>	<b>\$ 46,878.99</b>	<b>\$ 216,021.01</b>
	<b>Cash Disbursements (Expenses)</b>				
801	Board Meeting Travel & Expense	\$ 2,200.00		\$ -	\$ 2,200.00
802	Cost of Merchandise	5,000.00	\$ 1,134.63	1,134.63	3,865.37
805	Banking Expense	550.00	50.57	50.57	499.43
808	President's Expense				
8081 a.	Current President - Cathy	2,500.00		-	2,500.00
8082 b.	Past President - Michelle	250.00		-	250.00
809	Secretary/Treasurer	250.00		-	250.00
810	By-Laws Committee	200.00		-	200.00
811	Membership Committee	200.00		-	200.00
812	Education Committee	20,000.00	192.86	192.86	19,807.14
813	Regional Coordinating Committee	250.00		-	250.00
814	Historical Committee	250.00		-	250.00
815	Site Committee	1,000.00	120.64	120.64	879.36
816	TxDMV Committee	250.00		-	250.00
817	Legislative Committee	3,000.00	434.69	434.69	2,565.31
818	Other General Committee	500.00		-	500.00
819	Postage	1,000.00		-	1,000.00
820	Legal Consultant-D. Brooks	1,800.00	150.00	150.00	1,650.00
821	Accounting Services	1,000.00		-	1,000.00
822	Newsletter Printing			-	-
823	Equipment			-	-
824	Stationary/Supplies	500.00		-	500.00
825	TACA Legislative Consultant	54,000.00		-	54,000.00
826	Telephone/Credit Cards			-	-
829	V. G. Young Seminar-moved to 812 subcomm			-	-
830	Flowers & Memorials	200.00		-	200.00
831	Refunds	385.00		-	385.00
833	Website	2,415.00		-	2,415.00
836	Education Foundation			-	-
837	Bonds & D&O Liability	1,500.00		-	1,500.00
920	2016 Annual Conference-Waco			-	-
930	2019 Annual Conference - Galveston	160,000.00	10,063.55	10,063.55	149,936.45
	2020 Annual Conference - Austin	14,000.00		-	14,000.00
	2021 Annual Conference - Corpus Christi			-	-
5555	The County Progress	8,500.00		-	8,500.00
	99999-Miscellaneous			-	-
	<b>Total Expenses</b>	<b>\$ 281,700.00</b>	<b>\$ 12,146.94</b>	<b>\$ 12,146.94</b>	<b>\$ 269,553.06</b>
66900	Reconciliation Discrepancies				
	<b>Total Expenses</b>	<b>\$ 281,700.00</b>	<b>\$ 12,146.94</b>	<b>\$ 12,146.94</b>	<b>\$ 269,553.06</b>
	Net Income	\$ -	\$ 34,732.05	\$ 34,732.05	\$ (53,532.05)
	<b>Checkbook Balance</b>		<b>\$ 262,906.16</b>		
	<b>Outside Revenue Account</b>		<b>81,940.00</b>		
	<b>Funds Management Acct Balance YTD</b>		<b>219,194.26</b>		
			<b>\$ 564,040.42</b>		

**TAX ASSESSOR-COLLECTORS ASSN OF TEXAS**

The period of June 1, 2019 to May 31, 2020

Printed: 8/13/2019 12:46

**JULY BUDGET STATEMENT**

Acct No.	Cash Receipts (Income)	3/31/2019	AMENDED	7/31/2019	Year To Date	Remaining Budget
		ADOPTED BUDGET	BUDGET			
202	Regular Memberships	\$ 31,250.00	\$ 31,250.00	\$ 1,945.00	\$ 1,945.00	\$ 29,305.00
203	Associate Memberships	32,500.00	32,500.00		-	32,500.00
204	Affiliate Memberships	1,250.00	1,250.00		-	1,250.00
205	Miscellaneous-Gift Sales	5,000.00	5,000.00		4,068.00	932.00
206	Contributions/Sponsors 2018**				-	-
	Contributions/Sponsors 2019**	40,000.00	40,000.00		34,325.00	5,675.00
	Contributions/Sponsors 2020**	20,000.00	20,000.00		-	-
2066	Exhibition Booth Sales-CountyProgress**	15,000.00	15,000.00	\$ 19,290.00	24,040.00	(9,040.00)
207	Late Conference Revenue	40,000.00	40,000.00	\$ 17,385.00	17,385.00	22,615.00
208	Interest Income				-	-
2081 a.	Money market checking				-	-
	Interest Income	2,000.00	2,000.00	\$ 430.05	841.04	1,158.96
209	Educational Courses	20,000.00	20,000.00	\$ 5,240.00	8,565.00	11,435.00
210	2020 (Austin) Conference Registration	74,700.00	74,700.00		-	74,700.00
215	Other Income				-	-
<b>Total Receipts (income) Month &amp; YTD</b>		<b>\$ 281,700.00</b>	<b>\$ 281,700.00</b>	<b>\$ 44,290.05</b>	<b>\$ 91,169.04</b>	<b>\$ 170,530.96</b>
<b>Cash Disbursements (Expenses)</b>						
801	Board Meeting Travel & Expense	\$ 2,200.00	\$ 2,200.00	\$ 2,194.42	\$ 2,194.42	\$ 5.58
802	Cost of Merchandise	5,000.00	5,000.00	\$ 298.43	1,433.06	3,566.94
805	Banking Expense	550.00	550.00	\$ 50.62	101.19	448.81
808	President's Expense					
8081 a.	Current President - Cathy	2,500.00	2,500.00	\$ 79.57	79.57	2,420.43
8082 b.	Past President - Michelle	250.00	250.00	\$ 72.53	72.53	177.47
809	Secretary/Treasurer	250.00	250.00	\$ 204.00	204.00	46.00
810	By-Laws Committee	200.00	200.00		-	200.00
811	Membership Committee	200.00	200.00		-	200.00
812	Education Committee	20,000.00	20,000.00	\$ 2,152.16	2,345.02	17,654.98
813	Regional Coordinating Committee	250.00	250.00		-	250.00
814	Historical Committee	250.00	250.00	\$ 61.66	61.66	188.34
815	Site Committee	1,000.00	1,000.00		120.64	879.36
816	TxDMV Committee	250.00	250.00		-	250.00
817	Legislative Committee	3,000.00	3,000.00	\$ 746.42	1,181.11	1,818.89
818	Other General Committee	500.00	500.00	\$ 182.69	182.69	317.31
819	Postage	1,000.00	1,000.00		-	1,000.00
820	Legal Consultant-D. Brooks	1,800.00	1,800.00	\$ 150.00	300.00	1,500.00
821	Accounting Services	1,000.00	1,000.00		-	1,000.00
822	Newsletter Printing				-	-
823	Equipment				-	-
824	Stationary/Supplies	500.00	500.00		-	500.00
825	TACA Legislative Consultant	54,000.00	54,000.00	\$ 7,461.60	7,461.60	46,538.40
826	Telephone/Credit Cards				-	-
829	V. G. Young Seminar-moved to 812 subcomm				-	-
830	Flowers & Memorials	200.00	200.00		-	200.00
831	Refunds	385.00	385.00		-	385.00
833	Website	2,415.00	2,415.00		-	2,415.00
836	Education Foundation				-	-
837	Bonds & D&O Liability	1,500.00	1,500.00		-	1,500.00
920	2016 Annual Conference-Waco				-	-
930	2019 Annual Conference - Galveston	160,000.00	160,000.00	\$ 11,830.91	21,894.46	138,105.54
	2020 Annual Conference - Austin	14,000.00	14,000.00		-	14,000.00
	2021 Annual Conference - Corpus Christi				-	-
5555	The County Progress	8,500.00	8,500.00		-	8,500.00
	99999-Miscellaneous				-	-
<b>Total Expenses</b>		<b>\$ 281,700.00</b>	<b>\$ 281,700.00</b>	<b>\$ 25,485.01</b>	<b>\$ 37,631.95</b>	<b>\$ 244,068.05</b>
66900-Reconciliation Discrepancies						
<b>Total Expenses</b>		<b>\$ 281,700.00</b>	<b>\$ 281,700.00</b>	<b>\$ 25,485.01</b>	<b>\$ 37,631.95</b>	<b>\$ 244,068.05</b>
Net Income		\$ -	\$ -	\$ 18,805.04	\$ 53,537.09	\$ (73,537.09)
<b>Checkbook Balance</b>				<b>\$ 288,768.37</b>		
<b>Outside Revenue Account</b>				<b>74,478.40</b>		
<b>Funds Management Acct Balance YTD</b>				<b>219,624.31</b>		
				<b>\$ 582,871.08</b>		

**TAX ASSESSOR-COLLECTORS ASSN OF TEXAS**

**Proposed Budget**

The period of June 1, 2019 to May 31, 2020

	<u>Amended</u> <u>Budget 2018</u>	<u>Amended</u> <u>Budget 2019</u>	<u>Approved</u> <u>3/31/19 Budget</u> <u>2020</u>	<u>Amended</u> <u>8/14/19 Budget</u> <u>2020</u>
<b>Acct I Cash Receipts (Income)</b>				
202 Regular Memberships (250 @ \$125)	\$ 21,590.00	\$ 31,250.00	\$ 31,250.00	\$ 31,250.00
203 Associate Memberships (650 @ \$50)	24,000.00	32,500.00	32,500.00	32,500.00
204 Affiliate Memberships (5 @ \$125)	1,200.00	625.00	1,250.00	1,250.00
205 Miscellaneous-Gift Sales	8,300.00	5,500.00	5,000.00	5,000.00
206 Contributions/Sponsors 2018	60,000.00	40,000.00		
Contributions/Sponsors 2019		20,000.00	40,000.00	40,000.00
Contributions/Sponsors 2020			20,000.00	20,000.00
2066 Exhibition Booth Sales-CountyProgress	14,200.00	20,000.00	15,000.00	15,000.00
207 Late Conference Revenue	41,830.00	55,000.00	40,000.00	40,000.00
Interest Income	1,630.00	1,200.00	2,000.00	2,000.00
209 Educational Courses	35,160.00	20,000.00	20,000.00	20,000.00
210 2019 (Galveston) Conference Registration	74,700.00	74,700.00		
2020 (Austin) Conference Registration			74,700.00	74,700.00
215 Other Income to balance conference	23,084.00			
	<hr/>			
Receipts (income)	<b>\$ 305,694.00</b>	<b>\$ 300,775.00</b>	<b>\$ 281,700.00</b>	<b>\$ 281,700.00</b>
<b>Cash Disbursements (Expenses)</b>				
801 Board Meeting Travel & Expense	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 7,200.00
802 Cost of Merchandise	6,000.00	5,000.00	5,000.00	5,000.00
805 Banking Expense	500.00	500.00	550.00	550.00
808 President's Expense				
8081 a. Current President	2,500.00	2,500.00	2,500.00	2,500.00
8082 b. Past President	150.00	250.00	250.00	250.00
809 Secretary/Treasurer	250.00	250.00	250.00	250.00
810 By-Laws Committee	200.00	200.00	200.00	200.00
811 Membership Committee	200.00	200.00	200.00	200.00
812 Education Committee	21,000.00	20,000.00	20,000.00	20,000.00
813 Regional Coordinating Committee	250.00	250.00	250.00	250.00
814 Historical Committee	800.00	250.00	250.00	250.00
815 Site Committee	1,000.00	1,000.00	1,000.00	1,000.00
816 TxDMV Committee	500.00	250.00	250.00	250.00
817 Legislative Committee	2,000.00	11,990.00	3,000.00	3,000.00
818 Other General Committee	500.00	500.00	500.00	500.00
819 Postage	1,500.00	1,000.00	1,000.00	1,000.00
820 Legal Consultant-D. Brooks	1,800.00	1,800.00	1,800.00	1,800.00
821 Accounting Services	1,000.00	1,000.00	1,000.00	1,000.00
823 Equipment	800.00	-	-	-
824 Stationary/Supplies	300.00	500.00	500.00	500.00
825 TACA Legislative Consultant	30,000.00	60,000.00	54,000.00	49,000.00
830 Flowers & Memorials	200.00	200.00	200.00	200.00
831 Refunds	385.00	385.00	385.00	385.00
833 Website	1,500.00	1,500.00	2,415.00	2,415.00
837 Bonds & D&O Liability	1,500.00	1,500.00	1,500.00	1,500.00
2018 Annual Conference - Frisco	14,000.00	160,550.00		
2019 Annual Conference - Galveston		14,000.00	160,000.00	160,000.00
2020 Annual Conference - Austin			14,000.00	14,000.00
2021 Annual Conference - Corpus Christi		5,000.00		
5555 The County Progress	7,624.00	8,000.00	8,500.00	8,500.00
99999-Miscellaneous	175.00	-	-	-
	<hr/>			
<b>Total Expenses</b>	<b>\$ 305,694.00</b>	<b>\$ 300,775.00</b>	<b>\$ 281,700.00</b>	<b>\$ 281,700.00</b>
<b>Net Income</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

June 10, 2019

TACA Site Recommendation for 2022

President Michelle French called a meeting of the Board to order at 12:36 pm to consider the recommendation of the site committee for the 2022 TACA Conference. Board members in attendance were Michelle French, Cathy Talcott, Randy Riggs, Tammy McRae, Bruce Stidham, Kevin Kieschnick, Larry Gaddes, Donna Willis and Teri Garvey Hanks.

A report from Ronnie Keister, Site Committee Chairman, stated that the site committee heard from 2 cities on June 8th: Amarillo and Lubbock. Upon hearing from all respondents, the site committee recommended that TACA accept Amarillo as the 2022 TACA Conference site.

Cathy Talcott moved that the Board accept the site committee's recommendation of Amarillo. Kevin Kieschnick seconded the motion. All approved, motion carried.

Meeting was adjourned at 12:42 pm.

Respectfully submitted,

Randy Riggs

Secretary/Treasurer



# THE TAX ASSESSOR-COLLECTORS ASSOCIATION OF TEXAS

An Association to secure the benefits of organized ideas and discussion of mutual problems that will advance and maintain proper efficiency and dignity of the County Tax Office.

[www.tacaoftexas.org](http://www.tacaoftexas.org)

## “2020 VISION: PLANNING FOR THE FUTURE”

### COMPTROLLER LIAISON REPORT

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### PROPERTY TAX ASSISTANCE DIVISION

PTAD is excited to be experimenting with a new “help desk” possibility for our 2020 Conference. This will entail having staff at a table throughout the conference with Subject Matter Experts scheduled at various times so that our members can stop by and ask specific questions throughout the week. They will soon be experimenting with this concept in their own office with their staff, and if successful, would like to offer this new concept in Austin. This would be in lieu of participating in a round table.

### MOTOR VEHICLE SALES TAX DEPARTMENT

I was contacted by John Huffman who invited our participation in a meeting at their office held on August 23. The purpose was to brainstorm ideas regarding the enforcement of the new verbiage in HB 1543 for receipts that will be required to show payment of use tax to the Comptroller’s Office for the purchase of out-of-state ATVs, UTVs, etc. I suggested that TxDMV be involved in the meeting, so they also participated. TACA members who participated in the meeting were Shay Luedeke, Tammy McRae, Michelle French, Ronnie Keister and Sharon Carlson from my office. It was a productive meeting, and more information will be coming from the Comptroller’s Office in the near future.

Submitted by Cathy Talcott, Comptroller Liaison Chair  
August 30, 2019

TACA 2019 BOARD RETREAT (1<sup>st</sup> Annual?)  
AUGUST 14, 2019  
VINTAGE VILLAS, AUSTIN  
**DRAFT** NOTES FROM SESSION WITH DR. REBEKKA DUDENSING

**SWOT STUDY**

**TACA STRENGTHS**

Members care about their county, their association, and their staff  
Diversity of county size, experience, and background  
Institutional knowledge, i.e. some members more than 30 years  
Passion of helping others, i.e. members as well as customers  
Willingness to ask and to share information & work together as a family  
Vision  
Innovative  
Understand importance of public service  
Dedicated/committed  
Management by fact, i.e. following Code and statutes  
Inclusive  
Board leadership  
Collective knowledge  
Emerging legislative successes

**TACA WEAKNESSES**

Experiencing growing pains, i.e. Education Program, lack of paid support staff  
Lack of involvement from members  
Communicating needs & goals of membership  
Building communities within TACA  
TACA governance – how we are currently defined  
Overcoming bad perceptions of our industry  
Members that go rogue  
Lack of inclusion  
Lack of training, i.e. support from outside

**TACA OPPORTUNITIES**

Education for our customers and our members  
Potential disadvantages, i.e. drivers licenses  
Build on our strengths & weaknesses  
Hire Education Director to advance education program  
Mentoring future leaders  
Positive momentum  
Hire Executive Director to handle education, etc.  
Build on strategic planning, i.e. this retreat  
Continue to strengthen relationships with other partners  
Benefitting (and promoting) our members  
Benefitting (and promoting) our profession

(Opportunities continued)

Provide resources for our members, i.e. videos, social media, etc.

Political strengths, i.e. the building Board/TACA/members

### TACA THREATS

Misperceptions in how the Legislature looks at us, i.e. tax-payer dollars and the lobbying effect

Clicks – members' perceptions of TACA, i.e. transparency, the Board, etc.

Growth factor, i.e. education opportunities as a result of membership increase

Education competition from other entities

TxDMV removing some responsibilities from tax offices

TxDMV adding new duties to tax offices

Too big for volunteers to run the association

Same people that get involved each time

Complacency

Political landscape inside membership

Members who lose focus of the organization and become self-serving

### **5 TACA GOALS**

(in alphabetical order)

#### CULTURE OF PROFESSIONALISM (Michelle French, Larry Gaddes)

What does Professional mean? Dedication, integrity & excellence

Place TACA Code of Ethics on website, inspirational quotes, etc.

Mentor professional behavior to others

Meet with partners, i.e. TABC, Parks & Wildlife, Comptroller, TxDMV, TDHCA, SOS, TAVTI, TADA, TIADA, etc. to build relationships and trust

Partners are confident that we are ethical and have integrity

TACA should publicly condemn cases of those who are *proven convicted* of crime in tax offices

Fraud, Waste Abuse Reinforcement Policy – offer sessions on how to accomplish these

Attitudes: No whining, demonstrate can-do attitude by board (no complaining)

Behaviors:

#### EXTERNAL RELATIONS - Strengthening relationships with industry partners (Tammy McRae, Shay Luedeke, Cathy Talcott)

Contact TACA membership & encourage attendance at DMV board meetings – have at least 3-5 board members attend each DMV board meeting beginning Oct. 3

Introduce yourselves to the DMV Board & Provide Public Comment

Apply to and have representation on each of the 3 TxDMV Advisory Committees that TACA requested  
Measureable goal: Do proposed rules reflect TACA's recommendations, suggestions, etc?



(External Relations continued)

Attitudes:

Behaviors:

LEGISLATIVE INITIATIVES (Kevin Kieschnick & Albert Uresti)

50% of TACs contact their legislative reps by January 2021 to encourage them to be proactive by filing bills on behalf of TACA by April 2020

Become *proactive* instead of *reactive* on legislative issues

Identify problem areas within the Tax Code

Research codes affected

Propose changes

Vet changes through the TACA Legislative Committee before going forward

Find appropriate legislator to carry the bill

File initial bill language *prior* to session

Attitudes:

Behaviors: Encourage/discourage laws, give possible solution-based testimony, help members understand possible impacts, reframe challenges, go to counties to engage (personally, not just a broad call). Have specific targets in mind.

MEMBER ENGAGEMENT (Donna Willis & Bruce Stidham)

To encourage, promote & invite active participation by all members in activities & committees

Set goal of 20% by June 1, 2020

Hold meetings to explain & invite others to participate

Committee chairs are to measure progress, Chairs/V-Chairs are responsible, and the designated Board VP Internal or External oversees.

Chair sends emails to committee members 3 times/year with "read receipt requested"

Attitudes: Involvement, i.e. committee of 90 members with low participation

Behaviors: Involvement with smaller, more effective committees

ORGANIZATIONAL GROWTH & Direction (Randy Riggs, Michelle French & Kevin Kieschnick)

Find a way to fund TACA's growth (paid position)

Contact Finance Chair (Gary Barber) via email/phone by next Board meeting (Sept. 6) – Randy

Finance Committee meet by October 31 – Gary Barber set date

Determine cost of employee – Larry work with Search Committee by October 31

Propose Budget on an agenda item by the Finance Committee at the March board meeting

Attitudes: Involvement, do not allow whining, embrace technology

Behaviors: Proactive, motivate, adopt technology

Submitted by Cathy Talcott, President

(R)Registration Training Modules:

- R-101 – Introduction to Registration
- R-102 – Registration Basics
- R-103 – What you need to Register
- R-104 – Renewals
- R-105 – Miscellaneous Registration Transactions
- R-106 – Permits
- R-107 – Disabled Placards
- R-108 – RTS Overview and Security
- R-109 – RTS Closeout and Reports

**Proposed Additions:**

- *R-110 – Voiding, Setting Aside, and Reprinting in RTS*
- *R-117 – Introduction to Single Sticker*

(T)Title Training Modules:

- T-101 – Texas Title and the TxDMV
- T-102 – Sales Tax and Presumptive Value (SPV)
- T-103 – Title Transaction
- T-104 – Texas Title for new Resident
- T-105 – Title Only and Registration Purposes Only
- T-106 – Odometer
- T-107 – Title Errors
- T-108 – Trailers and Semitrailers

**Proposed Additions:**

- *T-110 – Introduction to NMVTIS*
- *T-205 – Licensed Vehicle Storage Facility Lien Foreclosure*
- *T-210 – NMVTIS II*

Value Added – C.S.I. - Customer Service Modules



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## Class Policies & Procedures for PTEC Courses

### **Registration & Payment**

Pre-registration is required for all classes. Registration is an online process using the course link at the TACA website. Once a registration is processed, confirmation will be sent to the e-mail provided. Course fees are due prior to class.

### **Cancellation Policy**

All cancellations must be received at least one week prior to the start date of the class. A full refund for the course will be issued if cancelled timely. In the event that TACA cancels a class, the association will refund the entire registration fee.

### **Time & Attendance**

Classes begin at 8:30 AM with sign-in beginning at 8:00 AM each day. Course materials will be provided during sign-in on the first day of class. Students must attend the course from start to finish in order to receive designation credit or continuing education credit. Students who leave early or who are absent for more than one hour outside of the regularly scheduled breaks (without pre-approval by the instructor) will not receive credit.

### **No-Shows**

If you have not notified TACA at least one week prior to class starting, that you will not be attending the class for which you have registered, you will be marked as a “no-show”. No refund will be given for “no-shows”.

### **What to bring to Class**

You will need a silent calculator with a 12-digit display, material for note taking including pens, pencils, highlighter and notepaper. Meeting room temperatures may vary; a light jacket might be needed.

### **Exams**

Up to two hours to complete the end of course exam is provided. The exam is taken directly from the written course material and class lectures. Students are not allowed to use cell phones or electronic notebooks, including the calculator function, during the exam.

### **Grades & Course Credit**

Students will receive their grades after the exam is graded and before leaving. All students are required to take the exam. Students who successfully complete and pass the course will receive a certificate of completion.

### **Failing a Course**

A student making a grade below 70 in a course may retake the exam. Instructors may provide additional review prior to retake. Student must retake the entire exam. If the student's grade is still below the 70 after the retake, the student will be required to retake the course and no refund will be issued.

### **Insufficient Enrollment**

At least ten (10) students must register for a class in order for it to be held. Should registration fall short of that number, TACA will notify students approximately one week prior to the first day of class. In the event that TACA cancels a class, the association will refund the entire registration fee.

### **Location of classes**

Check the TACA website Education Resources page for course locations and hotel recommendations. If any TACA member is interested in hosting future classes, please notify the Education Committee Chair or the Education Director. The facility used must be able to accommodate up to 20 people. Courses can also be held with closed enrollment, please contact the Education Committee Chair or Education Director for further details.

### **Emergencies**

If a student must leave due to an illness or emergency, notify the instructor immediately. The instructor will notify the TACA Education Director so that arrangements can be made for the student to attend the course at a later time.

## Tax Assessor-Collectors Association of Texas Records Retention/Document Destruction Policy

Type of Document	Minimum Requirement
<b>Accounting and Finance</b>	
Accounts receivable and payable	7 years
Bank Statements, Reconciliations	7 years
Bank Deposit Slips	7 years
Cancelled Checks	7 years
External Audit Reports	Permanent
Expense Requests	7 years
Internal Audit Reports	7 years
Inventories of products, materials, and supplies	3 years
Invoices (to customers, from vendors)	3 years
Year-end financial statements	Permanent
<b>Corporate Records</b>	
Bylaws and Amendments	Permanent
Employer Identification (EIN) Designation	Permanent
IRS Exemption Application and Determination Letters	Permanent
Minutes and Agendas, including Board and Committee minutes	Permanent
State Exemption application and determination letter	Permanent
Tax returns and worksheets	Permanent
<b>Correspondence and Email</b>	
Correspondence (general)	2 years
Correspondence (legal and important matters)	Permanent
Correspondence (with customers and vendors)	2 years
General notes and routine documents	Until administratively useful
<b>Employment, Personnel, Pension</b>	
Employment applications	3 years
Payroll records and summaries	7 years
Personnel records	10 years after employment ends
Retirement and pension records	Permanent
Timesheets	7 years
<b>Miscellaneous</b>	
Strategic Plans	7 years after expiration
Contracts (leases, professional services, etc.)	7 years after expiration
<b>Conference and Education</b>	
Annual conference registration forms	3 years
Continuing education requests	3 years
Continuing education registration forms	3 years
Certification course registration forms, grades, certificates	5 years