

## MINERAL, ELECTRIC, GAS & UTILITY APPRAISAL SERVICES REQUEST FOR QUALIFICATIONS October 9, 2024

DUE BY OR BEFORE 2:00PM, OCTOBER 24, 2024

### REQUEST FOR QUALIFICATIONS MINERAL, ELECTRIC, GAS & UTILITY APPRAISAL SERVICES October 9, 2024

### Part 1. General

A. The Tarrant Appraisal District (TAD), pursuant to the Texas Property Tax Code and the Texas Professional Services Procurement Act, is herewith seeking the services of a licensed and experienced professional appraisal firm to perform and provide appraisals and associated services for oil, gas, and mineral interests and certain mineral-related tangible personal property located in Tarrant County, Texas. In addition, TAD is also seeking a licensed and experienced professional appraisal firm to perform and provide appraisals and associated services for the following three types of property:

Type #1 - As a separate part of Texas Tax Code category J3 electric utilities, Exelon Energy power generating plant located in Tarrant County, Texas;

Type #2 – All other Texas Tax Code category J3 electric utilities located in Tarrant County, Texas, including (but not limited to) the TXU/Oncor electrical transmission and distribution system. TAD records currently indicate 140 items under this code category; and

Type #3 – All Texas Tax Code category J2 gas and J6 pipelines located in Tarrant County, Texas, including (but not limited to) crude oil, liquid product, and gas pipelines owned by companies on attached list. Also included are selected J4 telecom companies and other multi-entity companies on the attached list. TAD records currently indicate 771 items under this code category.

The term of this contract is for three years (January 1, 2025, through December 31, 2027) and includes TAD's option to renew for (2) two additional (12) twelve-month periods.

Historically, TAD secured one contract for Mineral Appraisal Services and a separate contract for the Electric, Gas and Utility Appraisal Services.

More recently, TAD provided an option to combine these two contracts into one contract in an effort to possibly reduce overall cost to TAD.

Therefore, this RFQ will allow firms to present three options:

<u>OPTION ONE</u>: TAD will select a firm for only the Mineral Appraisal Services and cost should reflect this service as a stand-alone contract (The Electric, Gas and Utility Appraisal Services will be awarded to a different firm.);

<u>OPTION TWO:</u> TAD will select a firm for only the Electric, Gas and Utility Appraisal Services and cost should reflect this service as a stand-alone contract (The Mineral Appraisal Services will be awarded to a different firm.);

<u>OPTION THREE</u>: TAD will select one firm for all services which in effect will combine the Mineral Appraisal Services and the Electric, Gas and Utility Appraisal Services into one contract.

- B. Existing TAD account information relative to the aforementioned properties will be available for use by the selected appraisal firm.
- C. For the past five tax years, TAD has contracted with Pritchard & Abbott for fundamentally the same services. For each tax year, these are the total fees paid:

<u>2020</u> - \$274,500; <u>2021</u> - \$277,200; <u>2022</u> - \$280,000: <u>2023</u> - \$282,800; <u>2024</u> - \$285,600

D. Recent gas drilling activity as well as production has fluctuated in the Barnett Shale in Tarrant County over the past several years. The following table reflects these trends and indicates the dramatic change in mineral values:

The 2024 *estimates* presented below for minerals and from Part 1.A. above for utility accounts should be used in arriving at "not to exceed costs" in cost submissions for the 2025-2029 tax years.

Tax Year	Appraisals	TAD Min Accts	Mineral Mkt Values
2014	4,366	950,842	\$2,788,815,394
2015	4,469	969,481	\$2,724,465,340
2016	4,244	995,865	\$976,958,748
2017	4,133	1,042,583	\$882,432,600
2018	4,293	1,092,731	\$1,029,958,990
2019	4,311	1,096,172	\$1,042,718,780
2020	4,078	1,097,585	\$708,020,700
2021	4,015	1,097,924	\$594,854,500
2022	4,061	1,099,141	\$1,318,341,450
2023	4,069	1,099,973	\$2,539,199,170
2024	3,923	1,123,872	\$439,019,510

E. The selected appraisal firm will likely need to undertake some field data collection work and/or pursue other reliable avenues to locate, identify, establish ownership, and obtain other needed and required information concerning mineral-related tangible personal property (e.g., Tax Code category J8 property including, but not limited to, well-site

compressors, drilling rigs, natural gas plants, storage tanks, etc.) In this regard, it is estimated that up to twelve (12) days may be needed for these purposes. These "workday estimates" should be used as multipliers in calculating annual "not to exceed" cost submission figures for this particular aspect of the work.

- F. Existing and available TAD account information relative to minerals, mineral leases, and mineral-related tangible personal property (including, on a confidential basis, pertinent renditions and other lawfully confidential information), electric, gas and utilities will be provided for use by the selected appraisal firm.
- G. TAD reserves the right to accept or reject any or all RFQs, to waive any irregularities or informalities in any RFQs received, to negotiate with the appraisal firm or firms whose demonstrated competence and qualifications to perform the required mineral and utility appraisal and related services and provide the specified work products are deemed acceptable to TAD, and to award a purchase contract to the appraisal firm with such acceptable, demonstrated competence and qualifications and whose services will be provided at fair and reasonable prices. If one or more firm demonstrates the qualifications set out by this RFQ, TAD will look at comparisons of certain factors in making a final decision between the firms. These other factors may include the ability to coordinate with TAD's IS department, the appraisal firm's staff experience and credentials, the staff's history of disciplinary actions by regulators, the proposed staffing level committed to TAD, the firm's IT resources, information retained from references and the overall proposed cost.
- H. TAD reserves the right to cancel its contract with the selected appraisal firm based on the thoroughness, quality, and timeliness of the service and work products or other legitimate reasons without penalty or added cost.

### Part 2. Scope of Services, Required Work Products and Submission Deadlines

A. These services and work products must, at a minimum, be provided by the selected appraisal firm for the 2025- 2027 tax years, beginning January 1, 2025, and ending December 31, 2027 (<u>three-year contract</u>). The contact will also include TAD's option to renew for (2) two additional (12) twelve-month periods which could potentially extend the contract through December 31, 2029:

### 1. Minerals:

- (a) For all Texas Property Tax Code category G1 minerals, confirm existing and/or identify new working, royalty, overriding royalty, and/or other interests and associated owner names, mailing addresses, decimal ownership interests, applicable TAD account numbers (if assigned), the taxing jurisdictions within which the lease is located, and the legal and physical location of the real property;
- (b) Establish estimates of market values for all mineral interests in accord with Standard Five of the Uniform Standards of Appraisal Practice and the requirements of the Texas Property Tax Code;

### 2. Tangible Personal Property:

For all Texas Property Tax Code category J8 and L2 tangible personal property, including, but not limited to, well-site compressors, central compression facilities/stations, natural gas plants, drilling rigs, storage tanks, gathering pipelines and similar personal property, ownership (company name, mailing address, etc.) information, the physical location or taxable situs of the property, property description, and estimated market values for the personal property must be provided.

If option 1 and 2 of Part 1.A. of this RFQ are chosen, for delineation from the **Electric, Gas & Utility Appraisal Services portion**, a gathering pipeline means a pipeline that transports gas from a current production facility to a transmission line of main (these are included in the Mineral Appraisal Services portion). Transmission pipeline, other than a gathering line, that (1) Transports gas or other product from a gathering line or storage facility to a distribution center, storage facility, or large volume customer that is not down-stream from a distribution center; (2) operates at a hoop stress of 20 percent or more of SMYS; or (3) transports gas within a storage field. (These are considered a part of the **Mineral Appraisal Services portion**).

### 3. Information Processing Specifications and Requirements:

Attached are "Information Processing Specifications and Requirements" along with a current "Mineral Accounts Data Exchange" and "Tax Authority Group" documents. These materials should be thoroughly and carefully reviewed since they set forth data processing and data exchange requirements, basic schedules and deliverables, and other important information. The "2024 Mineral Accounts Data Exchange" is the current format being used from Aumentum. Note that responding appraisal firms must explain, in detail, in their proposal submissions both how they will accommodate conversion, implementation, and validation of TAD and/or Pritchard & Abbott mineral, mineral-related, electric, gas and utility account data. Any exceptions to the enumerated "Information Processing Specifications and Requirements" must be explained as well. Further, TAD will be converting to True Prodigy as their CAMA provider during 2025 and anticipates running values for 2026, at the latest, in the new system. Responses should include explanation for the conversion, implementation and validation of TAD data to True Prodigy as well.

- 4. The work and work products identified and/or required herein must, at a minimum, be provided to TAD as indicated. Any exceptions should be noted and fully explained as required under Part 6. below.
- 5. Informal Owner/Agent Sessions:
  As needed, the selected appraisal firm's qualified representative shall meet informally with property owners and/or their authorized agent(s) concerning the estimated market values established for their property and/or other related matters;
- 6. Appraisal Review Board Hearings: Pursuant to proper appeals filed by property owners or their authorized agents, the selected appraisal firm shall appear before the Tarrant Appraisal Review Board

(ARB) to support and defend established market values. TAD will work with the selected appraisal firm to arrange one or more ARB meeting dates for this; and

- 7. Litigation and Property Value Study Testimony:
  As needed and requested by the appropriate and authorized TAD representative, the selected appraisal firm shall provide evidence, deposition testimony, and/or expert court testimony in defending established market values in lawsuits or property value studies associated herewith.
- B. For the Type #1 Exelon Energy power plant in Tarrant County, Texas, these services and work products must, at a minimum, be provided:
  - 1. Confirm the ownership of the aforementioned electric generating plant as of January1st of each year;
  - 2. Establish an estimated market value for the power plant, including, but not limited to, plant facilities and improvements, pollution control equipment, and personal property (materials and supplies) in accord with Standard Six of the Uniform Standards of Appraisal Practice and the requirements of the Texas Property Tax Code;
  - 3. Provide TAD with three copies of the appraisal work product which, at a minimum, must incorporate the information and values as specified in paragraphs (1) and (2) immediately above, with that work product being submitted to TAD by or before May 30th of each year;
  - 4. As needed and requested by an authorized TAD representative, meet informally with the property owner and/or the owner's authorized agent(s) concerning the estimated market value established for the property and/or other related matters; and
  - 5. As needed and requested by an authorized TAD representative, appear before the Tarrant Appraisal Review Board to support and defend market values established hereunder;
  - 6. As needed and requested by an authorized TAD representative, provide evidence and expert court testimony in defending market values established hereunder in lawsuits associated herewith.
  - 7. As needed, provide data for and communicate with the Comptroller's Office Property Tax Division regarding the annual Property Value Study.
- C. For the Type #2 electric utilities located in Tarrant County, Texas, these services and work products must, at a minimum, be provided:
  - 1. Confirm the ownership of the electric transmission and distribution system (or any part of it not owned by TXU/Oncor) as of January 1st of each year;
  - 2. Establish estimates of market values for the electric transmission and distribution system (separating and establishing separate values for any parts which may be owned by parties other than TXU/Oncor) in accord with Standard 6 of the Uniform Standards of Appraisal Practice and the requirements of the Texas Property Tax Code;
  - 3. Provide TAD with three copies of the appraisal work product which, at a minimum, must incorporate the information and values as specified in paragraphs (1) and (2)

- immediately above, with that work product being submitted to TAD by or before May 30th of each year;
- 4. As needed and requested by an authorized TAD representative, meet informally with property owners and/or their authorized agent(s) concerning the estimated market values established for their property and/or other related matters;
- 5. As needed and requested by an authorized TAD representative, appear before the Tarrant Appraisal Review Board to support and defend market values established hereunder: and
- 6. As needed and requested by an authorized TAD representative, provide evidence and expert court testimony in defending market values established hereunder in lawsuits associated herewith.
- 7. As needed, provide data for and communicate with the Comptroller's Office Property Tax Division regarding the annual property value study.
- D. For the Type #3 gas, pipelines and telecom, these services and work products must, at a minimum, be provided:
  - 1. Confirm ownership of the gas pipelines as of January 1st of each year;
  - 2. Establish estimates of market values for the gas pipelines and any appurtenances thereto by owner in accord with Standard Five of the Uniform Standards of Appraisal Practice and the requirements of the Texas Property Tax Code:
  - 3. Provide TAD with three copies of the appraisal work products which, at a minimum, must incorporate the information and values specified in paragraphs (1) and (2) immediately above, with those work products being submitted to TAD by or before May 30th of each year;
  - 4. As needed and requested by an authorized TAD representative, meet informally with property owners and/or their authorized agent(s) concerning the estimated market values established for their property and/or other related matters;
  - 5. As needed and requested by an authorized TAD representative, appear before the Tarrant Appraisal Review Board to support and defend market values established hereunder; and
  - 6. As needed and requested by an authorized TAD representative, provide evidence and expert courtroom testimony in defending market values established hereunder in lawsuits associated herewith.
  - 7. As needed, provide data for and communicate with the Comptroller's Office Property Tax division regarding the annual property value study.

### Part 3. Minimum Credentials/Experience

- A. Appraisal firms must, at a minimum, satisfy the following:
  - 1. They must have two or more appraisers assigned to this work that are currently licensed or certified as either:
  - (a) A Registered Professional Appraiser by the Texas Department of Licensing and Regulation and/or

- (b) A state certified general real estate appraiser or a state licensed real estate appraiser by the Texas Appraiser Licensing and Certification Board, and/or
  - (c) An accredited senior appraiser as designated by the American Society of Appraisers.
- 2. The aforementioned appraisers must either personally, or as a principal contributor on an appraisal team, have successfully completed at least ten similar mineral/mineral-related/utility-related property appraisals (i.e., of similar character, complexity, and value as those to be performed herewith) within the last three years;
- 3. The appraisal firm and its assigned appraisers must be free of any disciplinary actions (past, present or pending) by state licensing and/or certification boards;
- 4. The appraisal firm must have sufficient numbers of properly qualified and experienced appraisers and support personnel to thoroughly, competently, and timely provide the required services (including properly handling and/or providing testimony during informal property owner/tax agent meetings, formal ARB sessions, and expert court testimony) and work products.
- 5. The appraisal firm must possess the computer hardware, software, and knowledgeable personnel to timely, thoroughly, and correctly process and furnish the work products, information, reports, and data in the formats and as otherwise specified herein.
- 6. Information attesting to the resources (computer hardware, software, etc.) and appraisal personnel professional credentials, experience, know-how, and capabilities *must* be provided with Qualifications Statement submissions.
- 7. Provide information about appraisal firm informational websites and copies of any informational brochures, handouts, and other materials used by the appraisal firm to inform and educate property owners as to how their mineral and related values were determined, frequently asked questions and answers to them, who they can contact for additional information. etc.
- B. All the services and work products provided herewith must be in full compliance with the Texas Property Tax Code, associated Texas Property Tax Assistance Division rules and regulations, and TAD requirements.

### **Part 4. Client References**

Appraisal firms must provide a list of at least four clients (preferably other Texas appraisal districts) for whom they have provided the same or similar mineral and mineral-related property appraisal services and work products as those described herein within the last three years. Each list must include the client's name, street/city/state/zip code mailing address, and the client key contact person's name and telephone number.

### Part 5. Terms and Conditions

A. The attached "Mineral, Electric, Gas and Utility Appraisal Services Terms and Conditions" and "Mineral, Electric, Gas and Utility Appraisal Services Cost Submission Form" are, by reference, incorporated into this Request for Qualifications and will automatically be a part of any subsequent contract awards and contracts.

B. Requests for information pursuant to the Texas Open Records Act should be promptly directed to TAD's Public Information Officer for handling. The selected appraisal firm should not respond to any such requests.

C. In compliance with Chapter 552 of the Texas Open Records Act, Section 22.27 of the Texas Property Tax Code, and other relevant statutes, judicial decisions, and Texas Attorneys General opinions, the selected appraisal firm shall maintain the confidentiality of reports, statements, renditions, and other information for which confidentiality has been promised or which is otherwise lawfully excepted from public disclosure.

D. The selected appraisal firm shall maintain, retain and preserve any and all records and information hereunder in compliance with Subtitle C., Title 6, of the Local Government Code and rules adopted under that title. Upon completion or termination of the Mineral, Electric, Gas and Utility Appraisal Services Agreement contemplated herewith, the selected appraisal firm shall timely provide all such records, data, and information, in good and usable condition and form, to TAD at no additional cost to the District.

E. Throughout the term of the Mineral, Electric, Gas and Utility Appraisal Services Agreement contemplated herewith, TAD shall have, with proper advance notice and during normal business hours, open, complete, and free access to, and the right to examine, audit, and copy, any and all records, data, and other information associated with the services and work products provided by the selected appraisal firm, exclusive of any unrelated and/or proprietary information, computer software, and similar tangible and intangible property owned and/or licensed by the selected appraisal firm.

### Part 6. Exceptions

Any exceptions to, or variances from, the Scope of Services, Required Work Products and Submission Deadlines and other provisions of this RFQ, including the Mineral, Electric, Gas and Utility Appraisal Services Terms and Conditions and the Mineral, Electric, Gas and Utility Appraisal Services Cost Submission Form, must be noted as exceptions and fully explained in writing in RFQ submissions.

### Part 7. Submissions and Submission Deadlines

A. Appraisal firms must submit *two hard* copies and one digital copy each of their Qualifications Statement and, *in a sealed envelope marked "Mineral, Electric, Gas and Utility Appraisal Services Cost Submission," two hard* copies and one digital copy of the completed Mineral, Electric, Gas and Utility Appraisal Services Cost Submission Form. The Cost Submission Form seeks the following:

- 1. "Not to exceed" overall costs for *all* the services and work products identified under Part 2 of this RFQ, should be based on not only the past history, but a complete analysis of the work effort required to comply with the RFQ. It should be noted that no matter how many appraisals might be performed and no matter how many associated Division Orders and TAD accounts might be involved in a particular tax year, the maximum cost to TAD for all mineral appraisal services for that year shall be no more than the "not to exceed" total cost for that tax year (listed as option 3);
- 2. "Not to Exceed cost" for only the Mineral Appraisal portion or only the Electric, Gas & Utility portion of Part 2 of this RFQ. As with the comments made in the preceding paragraph, no matter how many workdays may actually be used to accomplish the required work, the maximum cost to TAD for these particular appraisal services for each tax year shall be no more than the "not to exceed" total cost for that tax year listed as options 2 & 3, respectively); and
- 3. "Hourly" and "Not to Exceed" daily rates for providing evidence, depositions and/or expert court testimony in lawsuits per Part 2., paragraph A, sub-paragraph 7; and Part 2., paragraphs B., C. and D., sub-paragraph 6 above.
- B. Under separate cover, Qualifications Statements should, at a minimum, include:
  - 1. The names and credentials of the appraisers who will actually perform the work and provide the required work products and services per Part 3. above;
  - 2. Information indicating the appraisal firm's computer and other resources, capacity, and capability to correctly and timely provide the specified work products per Part 3. paragraph A., sub-paragraphs 5. and six. above;
  - 3. The four client references per Part 4. above;
  - 4. As applicable, a written explanation concerning any exceptions per Part 6. above;
  - 5. Information about the appraisal firm's informational website and materials per Part 3., paragraph A. 7. above;
  - 6. Responses to information requested under paragraph B. 2. of the "Information Processing Specifications and Requirements" attachment; and
  - 7. Any other information which the appraisal firm deems appropriate and helpful in establishing its relevant credentials may also be submitted.
- C. All submissions (including Qualifications Statements and completed Mineral, Electric, Gas and Utility Appraisal Services Cost Submission Forms) *must be received at TAD by or before* 2:00 P.M. October 24, 2024. Submissions should be addressed as follows:

Tarrant Appraisal District Attn: Brad Patrick Mineral, Electric, Gas and Utility Appraisal Services RFQ 2500 Handley-Ederville Road Fort Worth, Texas 76118-6909

### Part 8. Questions

Questions pertaining to this Request for Qualifications should be directed to Brad Patrick at <a href="mailto:bpatrick@tad.org">bpatrick@tad.org</a> or at (817) 595-6002 during normal business hours. The deadline for submitting questions is 2:00 P.M. on October 17, 2024.

If any addenda are issued to this RFQ, a good faith attempt will be made to email a copy to each of those proposers, who, according to the records of TAD, had requested a copy of this RFQ, and will be posted along with any questions received on TAD's website <a href="https://www.tad.org/about/procurement/">www.tad.org/about/procurement/</a>. It is the responsibility of the proposer to obtain such addenda before submitting a proposal.

Contact with any personnel or board members of Tarrant Appraisal District, other than the designated official listed in Part 8, regarding this RFQ may be grounds for elimination from the selection process. No employee of Tarrant Appraisal District shall have a financial interest, direct or indirect, in any contract with Tarrant Appraisal District.

### TERMS AND CONDITIONS

These terms and conditions are, by reference, incorporated into and made a part of the Tarrant Appraisal District (TAD) October 9, 2024 "Mineral, Electric, Gas and Utility Appraisal Services Request for Qualifications" (RFQ) and any and all subsequent contract awards and purchase orders.

### **Late Submissions**

RFQs received by TAD after the submission deadline will be considered void and unacceptable. TAD is not responsible for lateness or non-delivery of mail, carrier, etc.

### **Altering Submissions**

RFQs cannot be altered or amended after the submission deadline. Any interlineations, alteration, or erasure made before opening must be initialed by the signer of the RFQ, guaranteeing authenticity.

### Withdrawal of RFO

A RFQ may not be withdrawn or cancelled by the appraisal firm without TAD's permission for a period of ninety (90) days following the date designated for the receipt of RFQs, and the appraisal firm so agrees upon submittal of its RFQ.

### **Funding**

Funds for payment have been provided through the TAD budget approved by its Board of Directors for this fiscal year only. Texas state statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise after the end of the current fiscal year shall be subject to budget approval.

### **Sales Tax**

TAD is exempt from payment of Texas sales tax and federal excise tax.

### **Contract**

This RFQ, when properly accepted or approved by TAD, will constitute a contract equally binding between the successful appraisal firm and TAD. No different or additional terms will become a part of this contract except upon written changes agreed upon by the parties.

### **Independent Contractor Status**

The selected appraisal firm acknowledges that it is an independent contractor, and, as such, understands that TAD is not liable to the selected appraisal firm for any benefits or coverages as provided by the workers' compensation and/or unemployment compensation laws of the State of Texas and that anyone employed by the selected appraisal firm shall not be considered an employee of TAD for purposes of workers' compensation and/or unemployment compensation coverage. Furthermore, the selected appraisal firm declares, as an independent contractor, that it has been and will be free from any control or direction by TAD over its performance of the services and provision of the work products covered by this contract.

### **Changes**

No oral statement of any person shall modify or otherwise change or affect the terms, conditions, or requirements stated in the resulting contract. All changes to this contract shall be made in writing as agreed upon by the parties.

### **Certificate of Interested Parties (Form 1295)**

The following information regarding Form 1295 Information applies ONLY to an awarded appraisal firm.

The law states that a governmental entity may not enter into certain contracts with a non-exempt business entity unless the business entity submits a disclosure of interested parties to the governmental entity. By submitting a Bid in response to this solicitation, the appraisal firm agrees to comply with HB 1295, Government Code 2252.908. The appraisal firm agrees to provide Tarrant Appraisal Purchasing Agent, and/or requesting department, the "Certificate of Interested Parties," Form 1295 as required, within ten (10) business days from notification of pending award, renewal, amended or extended contract.

### **The Filing Process:**

1. Prior to award by TAD, the appraisal firm will be required to log in to the Texas Ethics Commission, <a href="https://www.ethics.state.tx.us/whatsnew/elf-info-form1295.htm">https://www.ethics.state.tx.us/whatsnew/elf-info-form1295.htm</a> and fill out the Electronic Filing Application.

- 2. Once submitted, the system will generate an electronic Form 1295 displaying a "Certificate Number." The appraisal firm must print and complete Form 1295.
- 3. <u>Within ten (10) business days</u> from notification of pending award by the TAD Purchasing Agent, the completed Form 1295 <u>must</u> be submitted to TAD.
- 4. The appraisal firm will need to repeat the process and obtain a separate Form 1295 each time they enter into a new contract, renew a contract or make modification, and/or amendments to a TAD contract.

### CONFLICT OF INTEREST DISCLOSURE REQUIREMENT

Pursuant to Chapter 176 of the Local Government Code, any person or agent of a person who contracts or seeks to contract for the sale or purchase of property, goods, or services with a local governmental entity (i.e. TAD) must disclose in the Questionnaire Form CIQ ("Questionnaire") the person's affiliation or business relationship that might cause a conflict of interest with the local governmental entity. By law, the Questionnaire must be filed with TAD no later than seven days after the date the person begins contract discussions or negotiations with TAD or submits an application or response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with TAD. Updated Questionnaires must be filed in conformance with Chapter 176.

A copy of the Questionnaire Form CIQ is available at

https://www.ethics.state.tx.us/forms/conflict/
https://www.ethics.state.tx.us/data/forms/conflict/CIO.pdf

If you have any questions about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirement. An offense under Chapter 176 is a Class C misdemeanor.

NOTE: If you are not aware of a Conflict of Interest in any business relationship that you might have with TAD, state Vendor name in the # 1, use N/A in each of the areas on the form. However, a signature is required in the #7 box in all cases.

TAD Board members are Vince Puente, Gloria Pena, Alan Blaylock, Rich DeOtte, Gary Losada, Matt Bryant, Callie Rigney, Eric Morris and Wendy Burgess. TAD's Chief Appraiser is Joe Don Bobbitt.

### PROHIBITION ON CONTRACTING WITH COMPANIES THAT BOYCOTT ISRAEL

The appraisal firm acknowledges that in accordance with Chapter 2270 of the Texas Government Code, TAD is prohibited from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The terms "boycott Israel" and "company" shall have the meanings ascribed to those terms in Section 808.001 of the Texas Government Code. By signing this contract, the appraisal firm certifies that the appraisal firm's authorized representative's signature provides written verification to TAD that the appraisal firm: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. Revised August 31, 2017.

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### COMPANIES ENGAGED IN BUSINESS WITH IRAN, SUDAN, OR FOREIGN TERRORIST

<u>ORGANIZATION</u>. Pursuant to Texas Government Code Chapter 2252, Subchapter F, Seller affirms that is it not identified on a list created by the Texas Comptroller of Public Accounts as a company known to have contracts with or provide supplies or services to a foreign terrorist organization.

### **Ethics**

The respondent shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of TAD.

### **Lawful Compliance**

The selected appraisal firm must comply with all relevant federal, state, county and local laws in the performance of the services and provision of the products provided herewith.

### **TAD Indemnification**

The selected appraisal firm shall defend, indemnify, and hold harmless TAD and all of its officers, agents, and employees from all suits, actions, or other claims of any character, name, or description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the selected appraisal firm, and/or any of the selected appraisal firm's agents, employees, subcontractors, or suppliers in the execution of, or performance under, any contract award and/or purchase order. The selected appraisal firm indemnifies and will indemnify and save harmless TAD from liability, claim, or demand on its part and its agents, servants, customers, and/or employees whether such liability, claim, or demand arise from event or casualty happening on or within TAD premises themselves or happening upon or in any halls, entrances, stairways, driveways, parking areas, or approaches of or to TAD property. The selected appraisal firm shall pay any judgment with costs which may be obtained against TAD growing out of any such injury or damages.

### **Wages**

The selected appraisal firm shall pay or cause to be paid, without cost or expense to TAD, all such wages and benefits to its employees as required by state and federal law.

### **Payment**

Payment to the selected appraisal firm shall be made subsequent to TAD receipt and acceptance of the specified work products and within 30 days following TAD receipt of an accurate invoice for same. Periodic progress payments may be made, subject to verifiable evidence or documentation that indicated work and progress have actually occurred and that such payment is warranted. Any such progress payments may be subject to withholding 10% retainage, with accumulated retainage amounts being paid upon TAD receipt and acceptance of all specified work products for a particular tax year. Payment for authorized as-needed lawsuit-related services shall be made within 30 days of TAD receipt of accurate invoices for same.

### **Termination of Contract**

TAD reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of TAD in the event of breach or default of this contract. In the event the selected appraisal shall fail to perform, keep, or observe any of the

requirements, terms or conditions of this contract, TAD may give the selected appraisal firm written notice of such default and, if same is not remedied to the satisfaction and approval of TAD within two (2) working days of receipt of such notice, default may be declared and all the selected appraisal firm's rights shall terminate.

### **Assignment**

The selected appraisal firm shall not assign, transfer, sell, or convey this contract, in whole or in part, without the prior written consent of TAD.

### Venue

This contract will be governed and construed according to the laws of the State of Texas and is performable in Tarrant County, Texas.

### **Silence of Specifications**

The apparent silence of the RFQ (including these terms and conditions and the cost submission form) as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the RFQ shall be made on the basis of this statement.

### INFORMATION PROCESSING SPECIFICATIONS AND REQUIREMENTS FOR 2025-2029

### A. General

The selected appraisal firm must:

- 1. Timely provide TAD's Information Services Department with data which accurately and thoroughly identifies ownership, sets forth locations, and establishes values for mineral accounts for TAD use in producing value notices and compiling reports for tax years 2025-2029.
- 2. The aforementioned work and services requirement extends to all the data elements defined and described in the accompanying data file description, including all required data maintenance, updating, and changes associated with both current and prior tax year mineral and mineral-related tangible personal property accounts.
- 3. Must assist and make ready mineral records (as described in section B) into client's new CAMA system (True Prodigy) upon conversion.

### B. Data Specifications/Requirements and Work Product Deliverables

The following specifications describe the procedures and methodologies by which the data pertinent to the mineral valuation needs to be communicated. Proposing appraisal firms must indicate their concurrence with, and ability to fully and timely comply with, these specifications and requirements or, alternatively, indicate and explain any and all exceptions.

### 1. Deliverables

A. Data files of fixed length in text format that contain one record for each mineral account. The data files must be delivered to specified TAD Information Systems staff on a scheduled basis through a TAD FTP site. Files must be compatible with standard PC-based .txt file editors, including Microsoft Notepad.

B. A complete record description of the required information (See "Mineral Accounts Data Exchange") is attached. This record description will be used for all forms of account status notification including:

- Additions of New Accounts:
- Changes to Ownership;
- Changes of Address;
- Correction of Errors;
- Changes to Value;
- Changes to Flag for Value Notice;
- Changes to Status of Account; and
- Deletion of Accounts.

C. All jurisdictions applicable to individual accounts must be recognized and identified. This includes all taxing jurisdictions such as cities, school districts, Tarrant County, special districts, public improvement districts, municipal utility districts, tax increment financing zones, management districts, and entertainment districts. The selected appraisal firm must locate each account geographically and appropriately code (by all pertinent jurisdictions) each appraisal record. TAD will provide maps depicting the

applicable jurisdictional boundaries. Attached is TAD's current Tax District Codes (TDC).

### 2. Processing Requirements

A. As stated elsewhere in this RFP, Pritchard & Abbott has provided TAD with mineral appraisal services for each of the past three tax years and has in its possession a compendium of account related data which contributes to the support of TAD's processing needs. The selected appraisal firm must deal with this existing inventory of account data. The total number of accounts exceeded 1,100,000 during the previous contract. In its proposal submission, proposing appraisal firms must explain in detail how they will accommodate the conversion, implementation, and validation (including the timetable for accomplishing all of this) of the existing inventory of mineral accounts, whether in TAD's Information System's inventory or in Pritchard & Abbott's pending inventory of accounts.

B. As deemed necessary by TAD, selected appraisal firms may be asked to submit a comprehensive set of test data, including all of the status conditions and change notification processes (with the appropriate and accurate coding as described in the data description) and pertinent TAD jurisdictional codes. The test data will be processed by TAD to determine accuracy and processability before a final appraisal firm selection is made.

### 3. On-Going Production Requirements

A. On an ongoing basis, all data submitted to TAD by the selected appraisal firm for processing will be subjected to a comprehensive set of validation and editing processes to determine accuracy and validity prior to being accepted for processing. All data which fails to be in compliance with those processes will be rejected and returned to the appraisal firm for correction. Notification of the types of errors detected will be provided.

### 4. Duplicate or Missing Account Detection and Prevention Processing

A. TAD will pre-process appraisal firm files, identify any duplicated and/or missing accounts, and notify the appraisal firm. If any duplications, omissions, or errors exist, the appraisal firm must make needed corrections and resend the .txt file to TAD.

- 5. Value notices will not be produced by TAD until TAD has determined that all accounts in the appraisal firm's file have a valid TAD account number assigned.
- 6. All mailing addresses must be U.S. Postal Service acceptable and accurate. TAD will process and evaluate all addresses against current U.S. Postal Service validation data. All errors will be returned to the appraisal firm for timely correction. The appraisal firm must correct its mailing addresses to conform to USPS standards for optimal bulk mailing discounts and return the corrected file to TAD before value notices are scheduled to be mailed.
- 7. Data Exchange Schedule The following sequence of events must be adhered to by the selected appraisal firm:
  - A. By the beginning of March of each year, TAD will run live data tests and return Account-Key Cross Reference file to the selected appraisal firm.
  - B. On or about March 5<sup>th</sup> of each year, the selected appraisal firm must update its data with TAD account numbers and send the updated file to TAD.

- C. Beginning April of each year, data exchanges due no later than the fifth day of the month of full data files and resolution PDFs for that week must occur, followed by TAD Account-Key Cross Reference file data exchanges.
- D. Appraisal firm account information must be available to begin value notice production and mailing to property owners around May 15th time frame. Multiple production runs normally occur periodically thereafter as account information availability justifies. Each value notice production run has to be identified with a unique protest deadline filing date for that particular production run.
- 8. Questions about data content and/or intent will need to be discussed, documented and agreed upon by TAD Information Services Department management and the selected appraisal firm prior to the initial data exchange. Sample sets of data will need to be exchanged before the first real data exchange occurs so that both parties can adequately test their processing facilities.

### **C. Value Notice Production**

The Tarrant Appraisal District Information Services Department will produce all mineral and mineral related value notices utilizing data provided by the selected appraisal firm. All valuation appeals, protests, and litigation testimony, as required, will be the responsibility of the selected appraisal firm.

### **MINERAL ACCOUNTS DATA EXCHANGE (2024)**

### Record Description Fixed Length Text File Record Length: 390 Characters

	Beginning		A – Alpha	
Field Name	Position	Length	N - Numeric	Description
2 2 3 3 4 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	1	4	A	The Tax Year for which this Account Data is
Tax Year				applicable.
	5	20	A	The Number assigned by the Texas Railroad
Railroad Commission Number				Commission on the Division Order.
		20		Format: RRC # nnnnnn
T. N.	25	30	A	The Name assigned to the entire lease coverage
Lease Name	5.5	20		area.
Lease Operator's Name	55	20	A	The Name of the Operating Company.
Lease Operator's Ivame	75	15	A	Data in each record that Uniquely Identifies the
Proposing Vendor's Unique Key to the	/3	13	A	Proposing Vendor's Record for this TAD
Account (Currently: Vendor ID-7; Lease-				account. The size of this field could change to
7; Interest Type-1)				meet Vendor's unique requirements.
,,,	90	8	A	A Unique Key to a single TAD Account. TAD
				assigns one to each New Account. The
TAD Account Number				Proposing Vendor must Update their Data to
				Store the TAD Account Numbers for all future
				Data exchanges.
* Below: Begin Mailing Address Fields *				
Owner Name	98	30	A	Owner's Name
In Care of Name	128	30	A	In Care of Name or blanks
Business Name	158	30	A	Name of Business or blanks
	188	30	A	Block Number, Street Name, Suite, Apartment,
Street Address				P.O. Box Number etc.
City	218	17	A	City Name
State	235	13	A	2-Character State Abbreviation
ZIP5	248	5	A	5 Digit Zip Code
ZIP+4	253	4	A	4 Digit Zip Code
* End of Mailing Address Fields *		I		
	257	7	N	Percentage of Ownership according to the Texas
Owner Decimal Interest of Ownership		·		Railroad Commission Division Orders. Numeric
1				1 Digit and 6 Decimal Places.
	264	2	A	'OP' Oil Payment
				'OR' Overriding Royalty Interest
Owner Interest Type				'PP' Production Payment
				'RI' Royalty Interest
				'WI' Working Interest
* TDC C 1 Tl T L ' 1' 4'	С. 1 * ТА	D '11	1. 1 64	1.1 1 1.4
* TDC Coverts:	266			
TDC County			A	3 digits numeric with leading zeros in the data.
TDC ISD	269		A	3 digits numeric with leading zeros in the data.
TDC City	272	3	A	3 digits numeric with leading zeros in the data.
TDC Special District	275		A	3 digits numeric with leading zeros in the data.
	278	2	A	State designated two-character code, with code
State Use Code				'G1' designating Mineral Leases.
Approised Volume of this Assessed	200	12	NT	Numaria 12 Digita Assayut V-1 f 4-:-
Appraised Value of this Account	280	12	N	Numeric 12 Digits. Account Value for this year. Format is in Whole Dollars and no cents.
Account Status of Completion	292	1	A	'I' – Incomplete - Has not been worked for this
Completion	232	1	A	appraisal year. TAD will not send a Value
				Notice. At the beginning of the year the
		l		1 totice. It the beginning of the year the

### MINERAL ACCOUNTS DATA EXCHANGE (2024)

	Beginning		A – Alpha	
Field Name	Position	Length	N - Numeric	Description
Tiera i vanie	1 OSITION	Length	1 valuette	Proposing Vendor will set all accounts to 'I'.
				'N' – Notify -Account has been worked and is
Account Status of Completion (Continued)				Ready to Notify. TAD will send a Value Notice.
D Code Public Improvement District  ailing Address Flag  bsolute Exempt Account  UD Code Municipal Utility District F Contract Tax Increment Finance Zone MD Code Management District Code act Pct				'C' - Complete - Account was Notified by
				TAD. This code is returned to the Proposing
				Vendor who will update their records to 'C'
				status.
				'D' – Deleted - The Account is Deleted no
				Value Notices will be sent and it will not be on the Rolls. The Account will not be carried
				forward to the next Appraisal Year.
Legal Description 1	293	30	A	This field contains the Abstract and Survey.
Legar Description 1	273	30	7.	information.
	323	30	A	This field contains the Year of the Division
Legal Description 2				Order, the RRC Number and if less than 100%
				of the property is represented by this account
				then the percentage is shown here.
	353	8	A	TAD updates this field with the date of the last
Value Notice Date				Value Notice sent to the property owner or
NID C. I. D. II'. I.	261	2		agent of record. Format: MMDDYYYY.
PID Code Public Improvement District	361	3	A	See separate list for Codes.
	364	1	A	This code indicates whether the mailing address
Mailing Address Flag				is Good, Bad, or Foreign Address. G – Good the USPS approves the address and
Ivianing Address Flag				it's CASS certifiable for postage discounts.
				B - Bad the address is not USPS approved.
				F – The address is in a Foreign country.
	365	1	A	Field will contain either a blank or the letter 'E'
				to indicate that the account should be absolutely
Absolute Exempt Account				exempt from taxation because of an exemption.
				Vendor will identify accounts that should be
				exempt and TAD will set up exemptions as needed.
				Vendor will remove the letter 'E' if the account
				should no longer be absolutely exempt.
MUD Code Municipal Utility District	366	3	A	See separate list for Codes.
	369	6	A	See separate list for Codes.
MMD Code Management District Code	375	3	A	See separate list for Codes.
Tract Pct	378	7	N6	Tract Percentage
Filler Blank Space for Expansion	385	3	A	This area is for expansion non-exchanged data
Vendor Status	388	1	A	Vendor's status code
	389	1	A	TAD will update this field for reference only.
TAD Roll Code aka RTYP				Vendor should not need to use it.
End of Record Indicator	390	1	A	An Asterisk to indicate end of record '*'.

### TARRANT APPRAISAL DISTRICT

# 2025-2029 MINERAL, ELECTRIC, GAS & UTILITY APPRAISAL SERVICES COST SUBMISSION FORM

In completing and submitting this form, the appraisal firm's authorized representative is certifying that: **DUE BY 2:00PM, OCTOBER 24, 2024** 

- 1. He/she has read and fully understands and accepts the scope of services, the terms and conditions, this cost submission form, and the other requirements and provisions of this Mineral, Electric, Gas & Utility Appraisal Services Request for Qualifications (RFQ);
- identified appraisal services and work products, and TAD will not be "surprised" with additional or unanticipated charges in conjunction therewith; & The unit costs, rates, and not-to-exceed costs indicated below constitute the full and complete "not to exceed" costs and rates for each year for the 7
  - provide the specified work products are deemed acceptable to TAD, and to award a purchase contract to the appraisal firm with such acceptable, appraisal firm or firms whose demonstrated competence and qualifications to perform the required mineral appraisal and related services and TAD reserves the right to accept or reject any or all RFQs, to waive any irregularities or informalities in any RFQs received, to negotiate with the demonstrated competence and qualifications and whose services will be provided at fair and reasonable prices. <del>ب</del>

	* - TAD Option	
"Not to Exceed" (Electric, Gas & Utility Only) - Option 2	Hourly rates for Testimony, Etc.	E-Mail Address
"Not to Exceed" (Minerals Only) - Option 1.	"Not to Exceed" (Combined) - Option 3	Date Telephone Number Fax Number
Tax Year 2025 2026 2027 2028*	Tax Year 2025 2026 2027 2027 2028*	Authorized appraisal firm representative:  Signature  Printed/Typed Name  Firm Name

Zip Code

State

### Tarrant Appraisal District 2023 Tax Rates per \$100 Valuation for Tarrant County Cities, County & Special Districts

	Jurisdiction Name		State Mandated		Local Option														
			HS O65 DP		HS	O65	DP	M&O *										Aircraft	
TDC		Tax Rate	State Mandated HS	State Mandated O65	State Mandated DP	Local Option HS Percentage	Local Option O65	Local Option DP	Rate	I&S ** Rate	Vet1	Vet2	Vet3	Vet4	Fpt	AB	Ceil	GIT	Part Fpt
001	City of Azle	0.568874					15000		0.522203	0.046671	5000	7500	10000	12000	Yes			Yes	
002	City of Bedford	0.495726					50000		0.351831	0.143895	5000	7500	10000	12000			Yes	Yes	
003	City of Benbrook	0.565000				1%	30000	5000	0.526000	0.039000	5000	7500	10000	12000			Yes		
004	City of Blue Mound	0.681745					12000	12000	0.631098	0.050647	5000	7500	10000	12000			Yes	Yes	
005	City of Colleyville	0.260991					65000	65000	0.251399	0.009592	5000	7500	10000	12000			Yes	Yes	
006	City of Crowley	0.594890					40000	40000	0.459734	0.135156	5000	7500	10000	12000			Yes	Yes	
007	Dalworthington Gardens	0.611854					60000	60000	0.528423	0.083431	5000	7500	10000	12000	Yes		Yes	Yes	
008	City of Edgecliff Village	0.251846							0.251846	0.000000	5000	7500	10000	12000				Yes	
009	City of Everman	1.036080					35000	35000	0.771717	0.264363	5000	7500	10000	12000	Yes			Yes	
010	City of Forest Hill	0.724094					40000		0.724094	0.000000	5000	7500	10000	12000					
011	City of Grapevine	0.250560				20%	75000	10000	0.136328	0.114232	5000	7500	10000	12000	Yes		Yes		
013	City of Keller	0.312000				20%	40000	10000	0.260403	0.051597	5000	7500	10000	12000			Yes		
014	City of Kennedale	0.706190					60000	60000	0.509273	0.196917	5000	7500	10000	12000	Yes	Yes		Yes	
015	Town of Lakeside	0.493500					50000	50000	0.493500	0.000000	5000	7500	10000	12000	Yes			Yes	
016	City of Lake Worth	0.380557					50000		0.186221	0.194336	5000	7500	10000	12000				Yes	
017	City of Mansfield	0.659293				14%	50000	10000	0.436164	0.223129	5000	7500	10000	12000	Yes	Yes	Yes		
018	City of N Richland Hills	0.489389				20%	36000	36000	0.313583	0.175806	5000	7500	10000	12000	Yes	Yes	Yes		
019	Town of Pantego	0.570000				20%	50000	10000	0.417934	0.152066	5000	7500	10000	12000				Yes	
020	City of Richland Hills	0.522689					30000		0.361700	0.160989	5000	7500	10000	12000	Yes		Yes	Yes	
021	City of Saginaw	0.498769					100000	30000	0.263959	0.234810	5000	7500	10000	12000	Yes	Yes		Yes	
022	City of Southlake	0.319000				20%	75000	75000	0.264000	0.055000	5000	7500	10000	12000	Yes		Yes		
023	Town of Westover Hills	0.476311							0.367500	0.108811	5000	7500	10000	12000	Yes			Yes	
024	City of Arlington	0.589800				20%	60000	60000	0.408000	0.181800	5000	7500	10000	12000	Yes	Yes	Yes		
025	City of Euless	0.457500				20%	35000		0.362697	0.094803	5000	7500	10000	12000	Yes		Yes		
026	City of Fort Worth	0.672500				20%	60000	60000	0.525000	0.147500	5000	7500	10000	12000	Yes	Yes	Yes		Yes
027	Haltom City	0.567283				10%	50000	40000	0.371831	0.195452	5000	7500	10000	12000	Yes	Yes	Yes		
028	City of Hurst	0.581150				20%	35000	35000	0.495572	0.085578	5000	7500	10000	12000			Yes		
029	City of River Oaks	0.660210					15000		0.582433	0.077777	5000	7500	10000	12000			Yes		
030	City of White Settlement	0.667233				20%	37000	10000	0.547855	0.119378	5000	7500	10000	12000	Yes	Yes		Yes	
031	City of Watauga	0.570200					40000		0.359710	0.210490	5000	7500	10000	12000			Yes		
032	City of Westworth Village	0.475000				20%	50000	30000	0.339549	0.135451	5000	7500	10000	12000				Yes	
033	City of Burleson	0.632500				2%			0.440200	0.192300	5000	7500	10000	12000	Yes		Yes		
034	City of Haslet	0.342638				20%	50000		0.297294	0.045344	5000	7500	10000	12000	Yes	Yes	Yes		
036	City of Pelican Bay	0.596891					9000		0.596891	0.000000	5000	7500	10000	12000	Yes	Yes		Yes	
_	City of Westlake	0.167880				20%	10000	10000	0.091170	0.076710	5000	7500	10000	12000	Yes		Yes		
038	City of Grand Prairie	0.660000				15%	45000	30000	0.428769	0.231231	5000	7500	10000	12000	Yes		Yes		
039	City of Sansom Park	0.667886				1%	20000	10000	0.527725	0.140161	5000	7500	10000	12000	Yes		Yes		
041	City of Reno	0.366173				15%	10000	10000	0.287401	0.078772	5000	7500	10000	12000			Yes		
042	City of Flower Mound	0.387300				12.50%	150000	150000	0.348344	0.038956	5000	7500	10000	12000	Yes				
043	City of Roanoke	0.308039				20%	40000	4500	0.169665	0.138374	5000	7500	10000	12000	Yes		Yes		
	Town Of Trophy Club	0.415469				1%	35000		0.315670	0.099799	5000	7500		12000	Yes		Yes	Yes	
-	Tarrant County	0.194500				10%	50000	10000	0.178836	0.015664	5000	7500		12000		Yes	Yes		Yes
	Emergency Services Dist	0.073330							0.073330	0.000000	5000	7500		12000					
	Tarrant Regional Water District	0.026700					50000	10000	0.026700	0.000000	5000	7500		12000					
-	Tarrant County Hospital	0.194500				10%	50000	10000	0.183872	0.010628	5000	7500		12000		Yes			Yes
$\vdash$	Tarrant County College	0.112170				1%	50000	3000	0.096170	0.016000	5000	7500		12000			Ves		100
	Trophy Club Mud #1	0.063810				1/0	25000	3000	0.055220	0.010000	5000	7500		12000		103	103		
	Live Oak Creek MUD	0.942000					5000	5000	0.352000	0.590000	5000	7500		12000	, , , ,				
-	Far North Fort Worth MUD #1	1.000000					3000	3000	0.180000	0.820000	5000	7500		12000					
	Viridian Mgmt District	0.448100							0.180000	0.820000	5000	7500		12000					
	-	0.460000							0.460000		5000		10000						
421	Karis Mgmt District	0.460000	1		l .				0.400000	0.000000	2000	/ 300	10000	12000	<u> </u>	İ		لـــــا	1

<sup>\*</sup> Maintenance and Operations rate

HS: Homestead exemption value

**DP:** Disabled Person exemption value

 GIT: Goods In Transit

O65: Over 65 exemption value

Ceil: Grant Ceilings

 $<sup>\</sup>red{**}$  Interest and Sinking fund rate

### Tarrant Appraisal District 2023 Tax Rates per \$100 Valuation for Tarrant County School Districts

			S	tate Mandate	ed	Lo	cal Option			I&S ** Rate	Vet1	Vet2	Vet3						
	Jurisdiction Name		HS	O65	DP	HS	O65	DP	M&O *										Aircraft
TDC		Tax Rate	State Mandated HS	State Mandated O65	State Mandated DP	Local Option HS Percentage	Local Option O65	Local Option DP	Rate					Vet4	Fpt	AB	Ceil	GIT	Part Fpt
901	Arlington ISD	1.115600	100000	10000	10000				0.824900	0.290700	5000	7500	10000	12000	Yes	Yes	Yes		
902	Birdville ISD	1.203100	100000	10000	10000				0.789200	0.413900	5000	7500	10000	12000	Yes		Yes		
904	Everman ISD	1.094146	100000	10000	10000				0.766600	0.327546	5000	7500	10000	12000	Yes		Yes		
905	Fort Worth ISD	1.062400	100000	10000	10000				0.790400	0.272000	5000	7500	10000	12000	Yes	Yes	Yes		
906	Grapevine-Colleyville ISD	0.924700	100000	10000	10000		29600		0.729000	0.195700	5000	7500	10000	12000	Yes		Yes		Yes
907	Keller ISD	1.087500	100000	10000	10000		10000		0.757500	0.330000	5000	7500	10000	12000	Yes		Yes	Yes	
908	Mansfield ISD	1.149200	100000	10000	10000				0.789200	0.360000	5000	7500	10000	12000	Yes		Yes		
910	Lake Worth ISD	1.257500	100000	10000	10000		50000	50000	0.757500	0.500000	5000	7500	10000	12000			Yes		
911	Northwest ISD	1.090200	100000	10000	10000				0.669200	0.421000	5000	7500	10000	12000	Yes		Yes		Yes
912	Crowley ISD	1.257500	100000	10000	10000	10%			0.757500	0.500000	5000	7500	10000	12000	Yes		Yes		
914	Kennedale ISD	1.137500	100000	10000	10000		25000	25000	0.757500	0.380000	5000	7500	10000	12000		Yes	Yes		
915	Azle ISD	1.025000	100000	10000	10000				0.751000	0.274000	5000	7500	10000	12000	Yes		Yes		
916	H-E-B ISD	0.921100	100000	10000	10000	1%	5000	5000	0.685500	0.235600	5000	7500	10000	12000	Yes		Yes		
917	Castleberry ISD	1.199200	100000	10000	10000				0.749200	0.450000	5000	7500	10000	12000			Yes		
918	Eagle Mtn-Saginaw ISD	1.247200	100000	10000	10000		15000	15000	0.749200	0.498000	5000	7500	10000	12000	Yes		Yes		
919	Carroll ISD	1.002500	100000	10000	10000		35000		0.672500	0.330000	5000	7500	10000	12000			Yes		
920	White Settlement ISD	1.209200	100000	10000	10000		20000		0.749200	0.460000	5000	7500	10000	12000			Yes		
921	Aledo ISD	1.207500	100000	10000	10000				0.757500	0.450000	5000	7500	10000	12000	Yes		Yes		
922	Burleson ISD	1.257500	100000	10000	10000		25000	25000	0.757500	0.500000	5000	7500	10000	12000	Yes		Yes	Yes	
923	Godley ISD	1.289200	100000	10000	10000				0.789200	0.500000	5000	7500	10000	12000			Yes	Yes	
924	Lewisville ISD	1.130100	100000	10000	10000				0.749200	0.380900	5000	7500	10000	12000	Yes		Yes		

<sup>\*</sup> Maintenance and Operations rate

\*\* Interest and Sinking fund rate

HS: Homestead exemption value

Ceil: Grant Ceilings

GIT: Goods In Transit

**DP:** Disabled Person exemption value

**AB:** Abatements in effect

065

**O65:** Over 65 exemption value

Fpt: Freeport exemption recognized

Texas Property Tax Code Sec. 11.252 Motor Vehicles Leased for Personal Use Exemption - is allowed by all taxing units except for the Cities of: Lake Worth, Forest Hill and Hurst.