



## **Staff Reports for January 2023**

# Customer Relations Division

January, 2023 Monthly Report

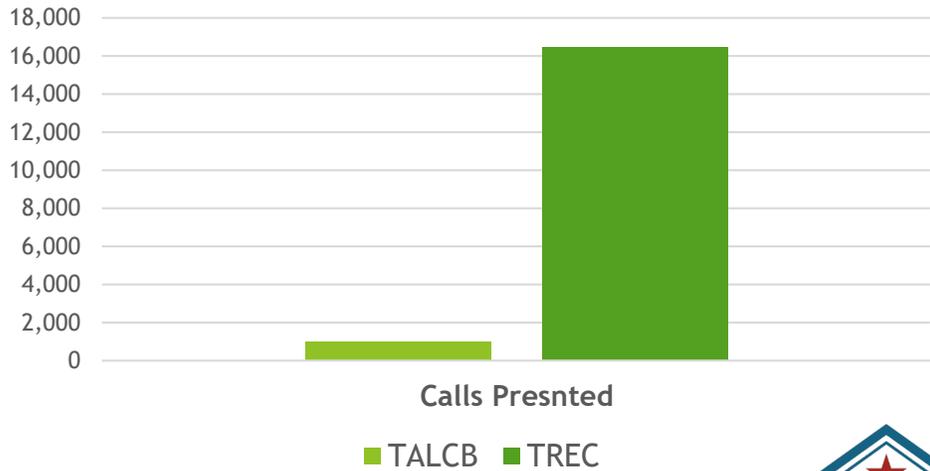


# January, 2022 Hold Time per Day



**Calls Presented in January: 17,432**  
**Average Hold Time: 2 minutes, 27 seconds**  
**Customer Service Representatives: 19**  
**20 Working Days in the Month**  
 - 13 days below 2 minute hold time (65%)

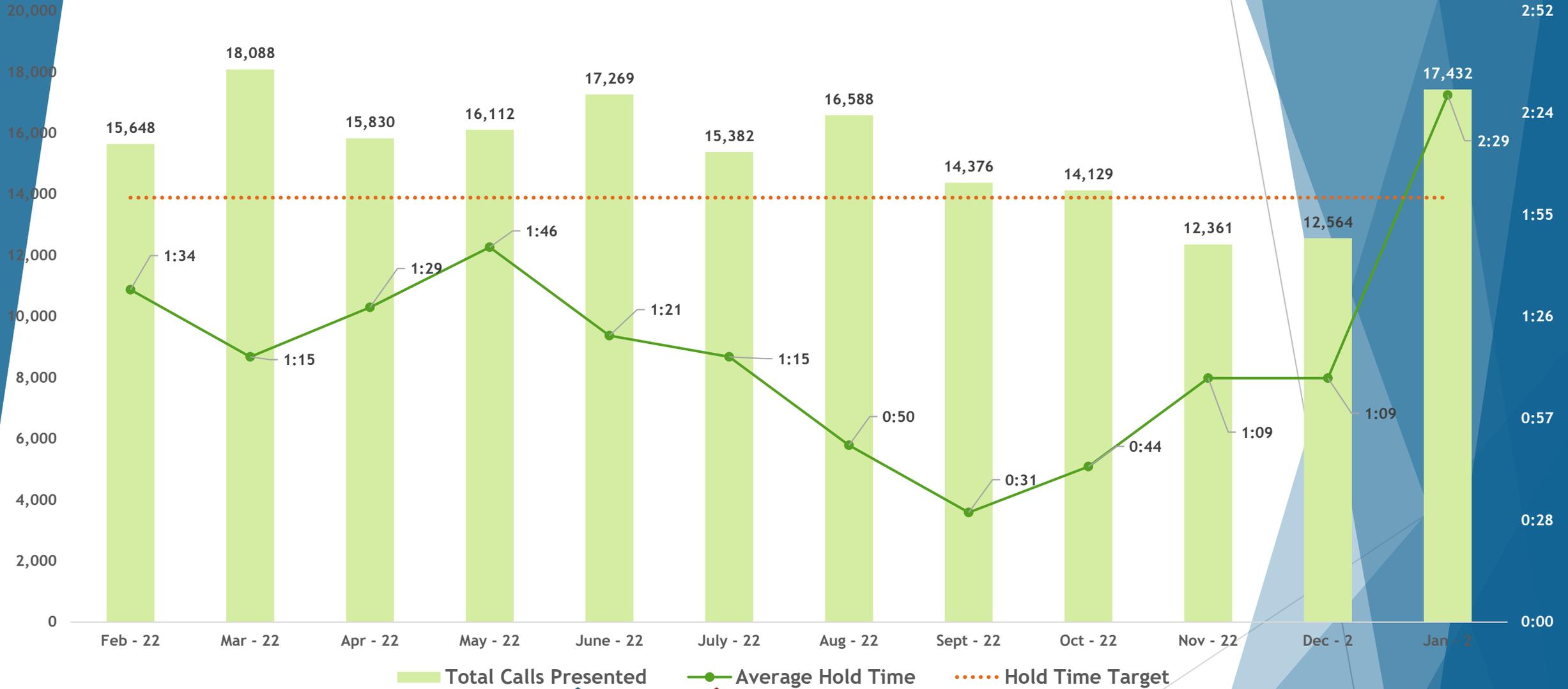
## TREC and TALCB Call Comparison



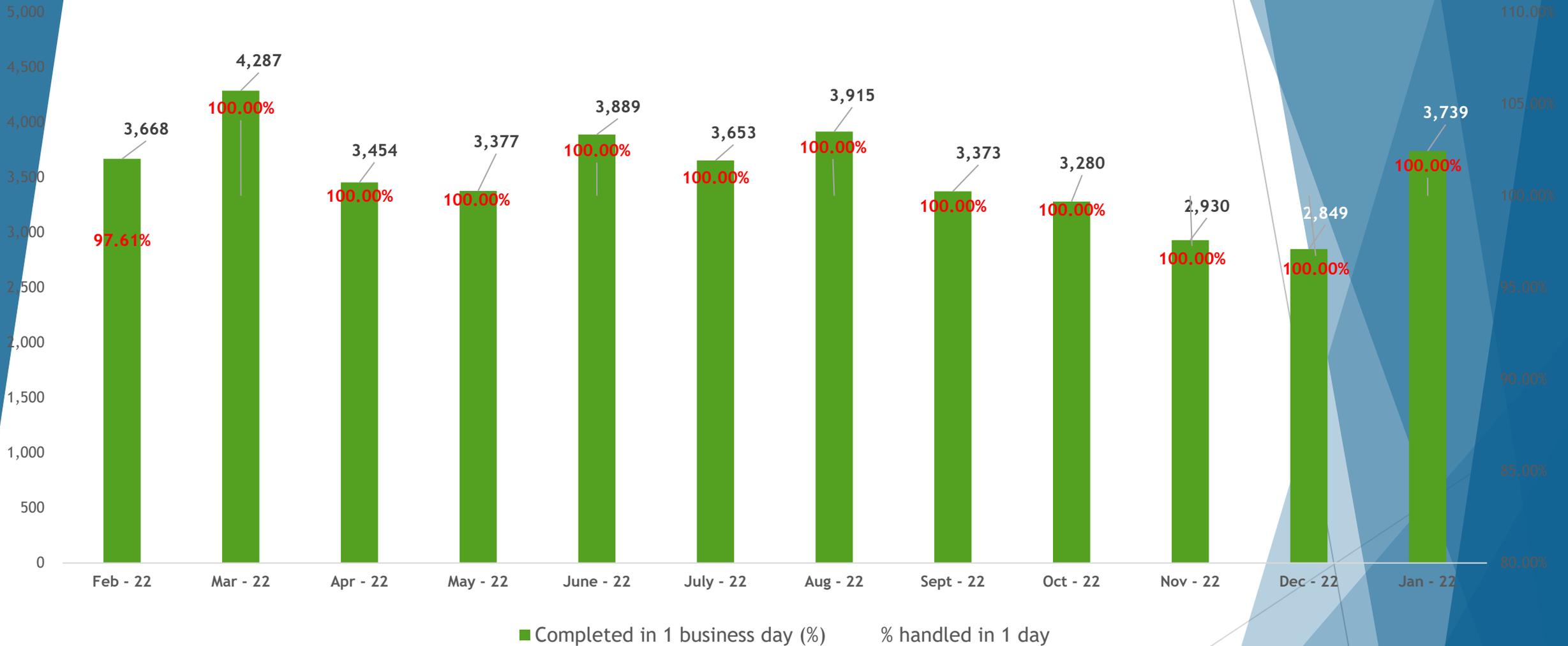
**TALCB - 990 Calls (5.68%) 1 minute, 59 second hold time**  
**TREC - 16,442 Calls (94.32%) 2 minutes, 29 second hold time**



# Last 12 Months Calls Presented vs. Hold Time



# Last 12 Months Emails Processed and % Completed within 1 Business Day

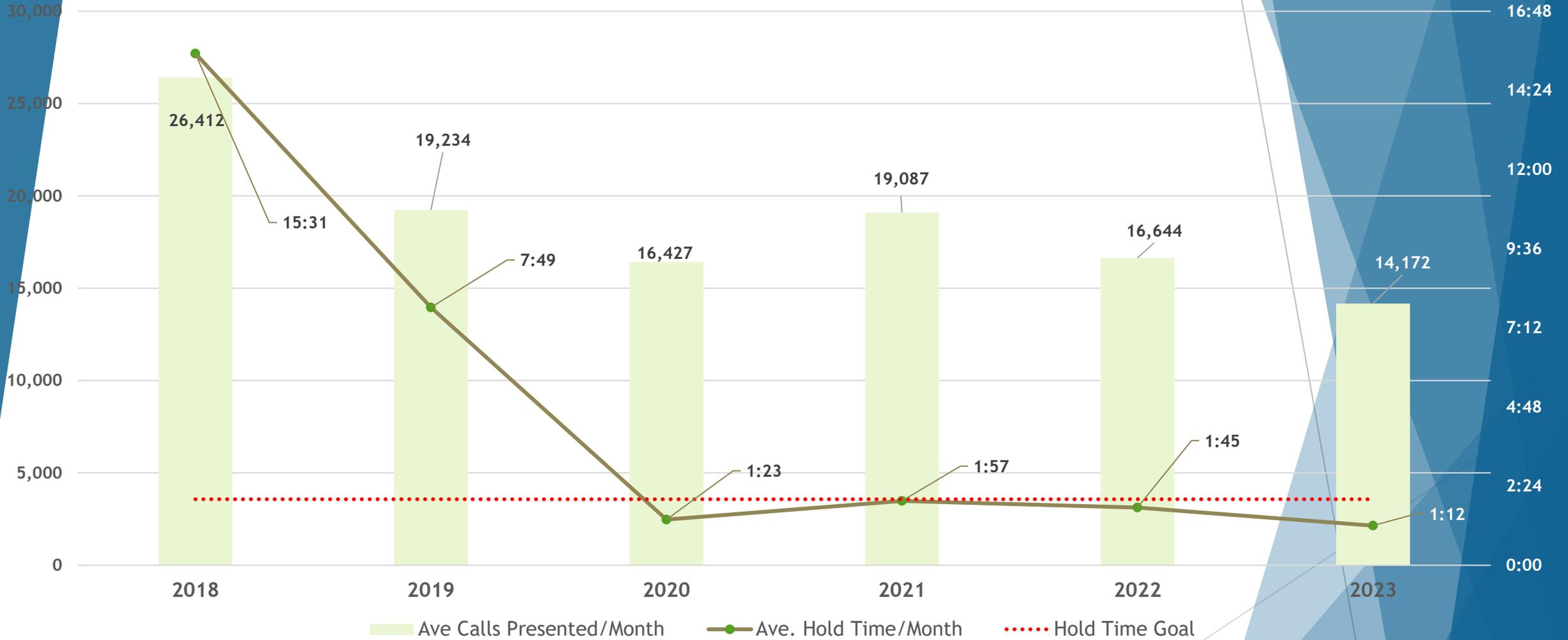


■ Completed in 1 business day (%)    % handled in 1 day



# Fiscal Year Comparison

## Ave. Calls Presented/Month vs. Ave. Hold Time/Month



# TALCB Education Report

January 2023





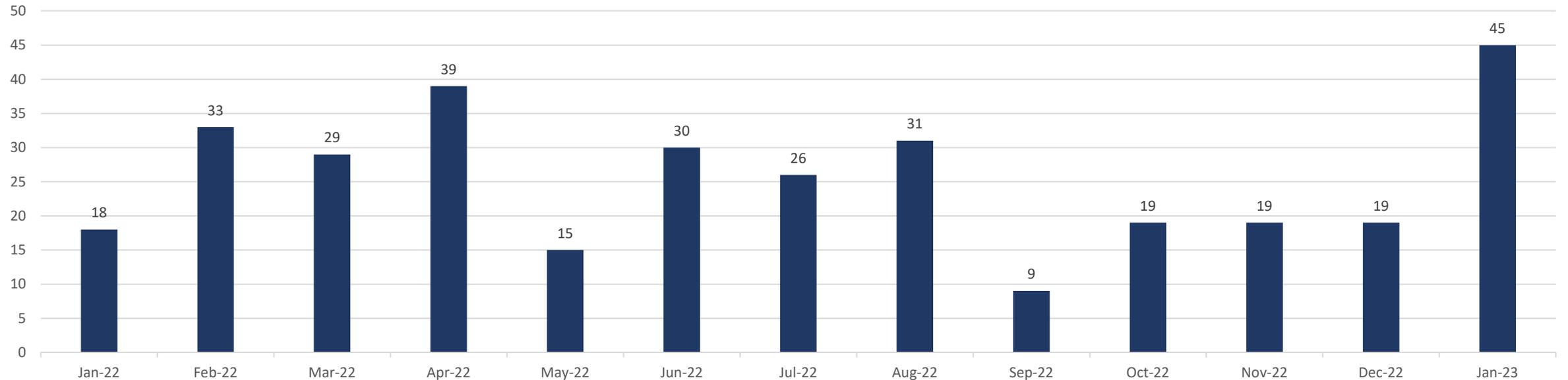
## Education & Examinations Division

### TALCB Applications Approved 13-Month Comparison

|                                      | Jan-22   | Feb-22   | Mar-22   | Apr-22   | May-22   | Jun-22   | Jul-22   | Aug-22   | Sep-22   | Oct-22   | Nov-22   | Dec-22   | Jan-23   |
|--------------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Initial ACE Provider                 | 0        | 0        | 0        | 0        | 1        | 1        | 0        | 0        | 0        | 0        | 0        | 0        | 1        |
| Renewal ACE Provider                 | 2        | 1        | 2        | 2        | 0        | 0        | 1        | 0        | 0        | 0        | 0        | 0        | 0        |
| <b>All ACE Provider Applications</b> | <b>2</b> | <b>1</b> | <b>2</b> | <b>2</b> | <b>1</b> | <b>1</b> | <b>1</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>1</b> |

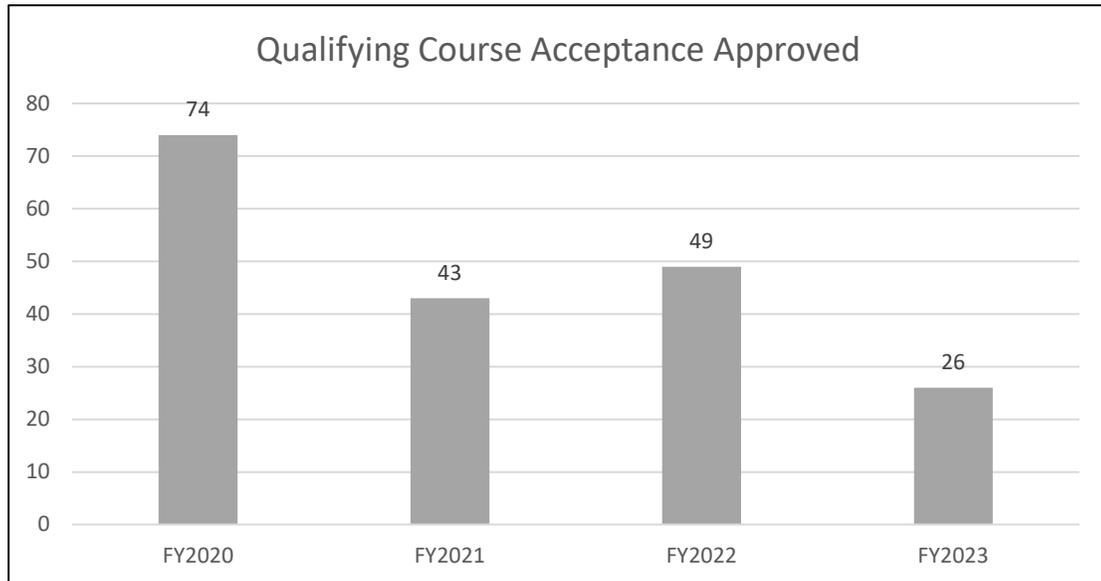
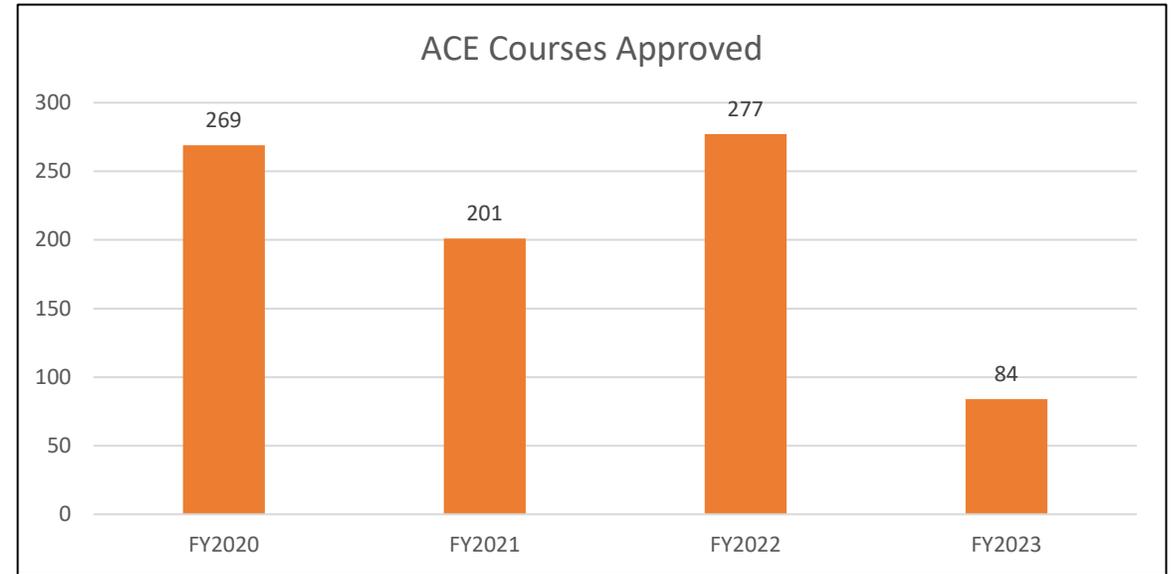
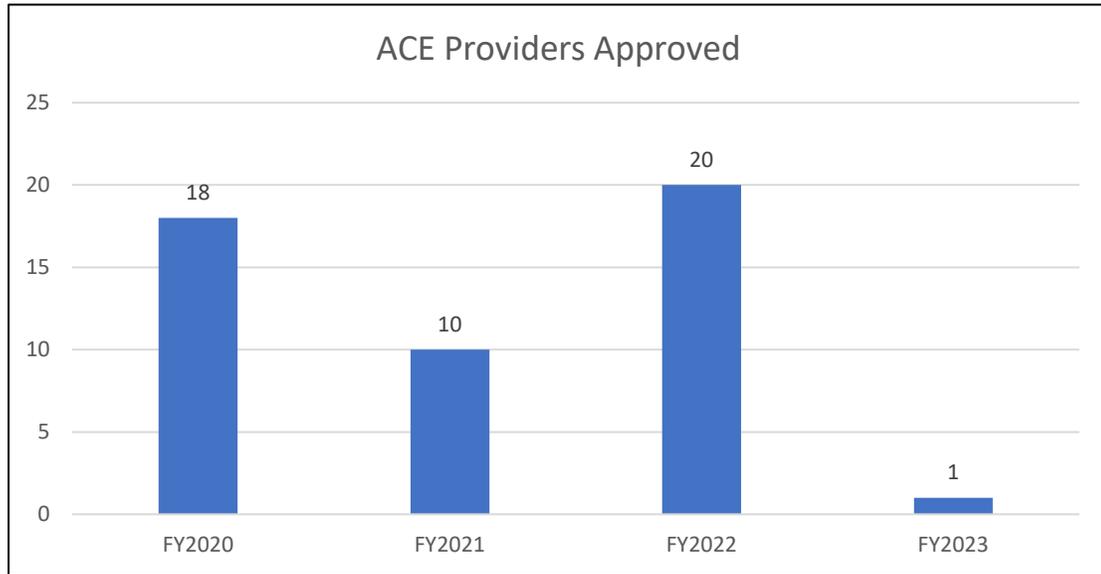
|                                |           |           |           |           |           |           |           |           |          |           |           |           |           |
|--------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|-----------|
| Qualifying Course Acceptance   | 3         | 8         | 7         | 5         | 2         | 8         | 3         | 3         | 0        | 3         | 7         | 2         | 14        |
| ACE Courses                    | 13        | 24        | 20        | 32        | 12        | 21        | 22        | 28        | 9        | 16        | 12        | 17        | 30        |
| <b>All Course Applications</b> | <b>16</b> | <b>32</b> | <b>27</b> | <b>37</b> | <b>14</b> | <b>29</b> | <b>25</b> | <b>31</b> | <b>9</b> | <b>19</b> | <b>19</b> | <b>19</b> | <b>44</b> |

|                                  |           |           |           |           |           |           |           |           |          |           |           |           |           |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|-----------|
| <b>All Applications Approved</b> | <b>18</b> | <b>33</b> | <b>29</b> | <b>39</b> | <b>15</b> | <b>30</b> | <b>26</b> | <b>31</b> | <b>9</b> | <b>19</b> | <b>19</b> | <b>19</b> | <b>45</b> |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|-----------|



# Education & Examinations Division

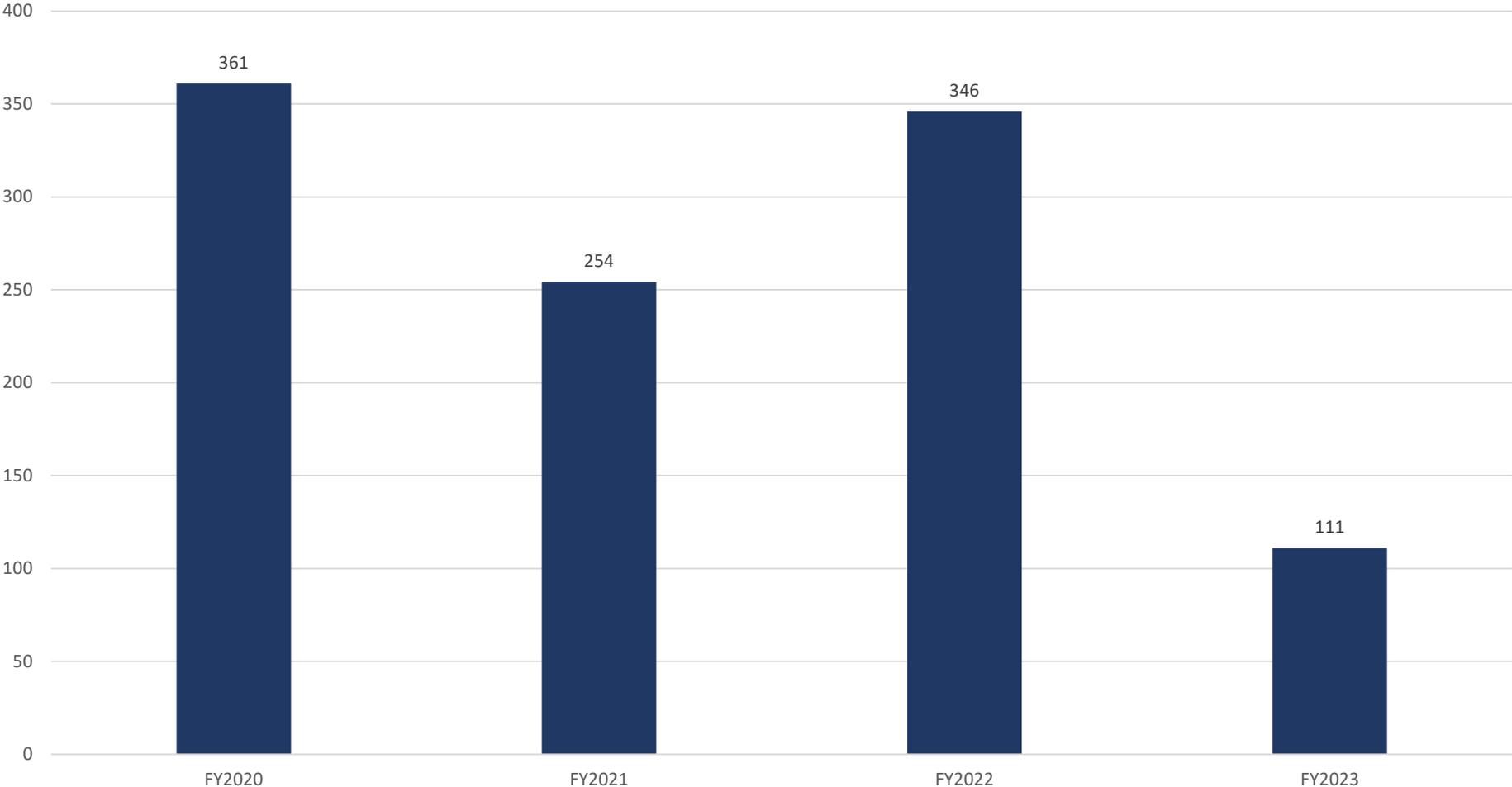
## TALCB Total Applications Approved - Fiscal Year



# Education & Examinations Division

All TALCB Applications Approved

Year-Over-Year Comparison



# TALCB Licensing Report

Current as of January 31, 2023

**TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD**  
**ACTIVE CERTIFICATIONS AND LICENSES**  
 January 2023

| FISCAL YEAR                                  | END OF MONTH | GENERAL | RESIDENTIAL | LICENSE | TOTAL G.R.L. | G.R.L. CHANGE | TRAINEE | TRAINEE CHANGE | TOTAL        | TOTAL CHANGE |
|--|--------------|---------|-------------|---------|--------------|---------------|---------|----------------|--------------|--------------|
| <b>2013</b>                                  | Aug13        | 2,367   | 2,371       | 470     | 5,208        |               | 724     |                | 5,932        |              |
| <b>2014</b>                                  | Aug14        | 2,386   | 2,405       | 453     | 5,244        | 36            | 760     | 36             | 6,004        | 72           |
| <b>2015</b>                                  | Aug 15       | 2,408   | 2,415       | 434     | 5,257        | 13            | 779     | 19             | 6,036        | 32           |
| <b>2016</b>                                  | Aug16        | 2,426   | 2,425       | 416     | 5,267        | 10            | 789     | 10             | 6,056        | 20           |
| <b>2017</b>                                  | Aug17        | 2,398   | 2,407       | 423     | 5,228        | -39           | 868     | 79             | 6,096        | 40           |
| <b>2018</b>                                  | Aug18        | 2,384   | 2,394       | 435     | 5,213        | -15           | 938     | 70             | 6,151        | 55           |
| <b>2019</b>                                  | Aug19        | 2,366   | 2,412       | 430     | 5,208        | -5            | 1,029   | 91             | 6,237        | 86           |
| <b>2020</b>                                  | Aug20        | 2,371   | 2,426       | 421     | 5,218        | 10            | 1,081   | 52             | 6,299        | 62           |
| <b>2021</b>                                  | Sep20        | 2,370   | 2,443       | 424     | 5,237        | 19            | 1,090   | 9              | 6,327        | 28           |
|  | Oct20        | 2,371   | 2,452       | 424     | 5,247        | 10            | 1,017   | -73            | 6,264        | -63          |
|  | Nov20        | 2,375   | 2,459       | 428     | 5,262        | 15            | 1,022   | 5              | 6,284        | 20           |
|  | Dec20        | 2,360   | 2,470       | 431     | 5,261        | -1            | 1,051   | 29             | 6,312        | 28           |
|  | Jan21        | 2,353   | 2,467       | 434     | 5,254        | -7            | 1,074   | 23             | 6,328        | 16           |
|  | Feb21        | 2,364   | 2,477       | 435     | 5,276        | 22            | 1,085   | 11             | 6,361        | 33           |
|  | Mar21        | 2,368   | 2,483       | 438     | 5,289        | 13            | 1,101   | 16             | 6,390        | 29           |
|  | Apr21        | 2,354   | 2,489       | 443     | 5,286        | -3            | 1,110   | 9              | 6,396        | 6            |
|  | May21        | 2,339   | 2,494       | 448     | 5,281        | -5            | 1,134   | 24             | 6,415        | 19           |
|  | Jun21        | 2,336   | 2,493       | 462     | 5,291        | 10            | 1,129   | -5             | 6,420        | 5            |
| Jul21  | 2,329        | 2,500   | 464         | 5,293   | 2            | 1,152         | 23      | 6,445          | 25           |              |
| Aug21  | 2,324        | 2,510   | 470         | 5,304   | 11           | 1,166         | 14      | 6,470          | 25           |              |
| <b>2022</b>                                  | Sept21       | 2,324   | 2,515       | 477     | 5,316        | 12            | 1,194   | 28             | 6,510        | 40           |
|  | Oct 21       | 2,335   | 2,521       | 484     | 5,340        | 24            | 1,233   | 39             | 6,573        | 63           |
|  | Nov 21       | 2,332   | 2,529       | 491     | 5,352        | 12            | 1,245   | 12             | 6,597        | 24           |
|  | Dec 21       | 2,331   | 2,549       | 492     | 5,372        | 20            | 1,285   | 40             | 6,657        | 60           |
|  | Jan 22       | 2,331   | 2,550       | 497     | 5,378        | 6             | 1,318   | 33             | 6,696        | 39           |
|  | Feb 22       | 2,327   | 2,557       | 504     | 5,388        | 10            | 1,368   | 50             | 6,756        | 60           |
|  | Mar 22       | 2,329   | 2,567       | 507     | 5,403        | 15            | 1,415   | 47             | 6,818        | 62           |
|  | Apr22        | 2,325   | 2,576       | 518     | 5,419        | 16            | 1,442   | 27             | 6,861        | 43           |
|  | May22        | 2,335   | 2,592       | 534     | 5,461        | 42            | 1,482   | 40             | 6,943        | 82           |
|  | Jun22        | 2,344   | 2,600       | 560     | 5,504        | 43            | 1,493   | 11             | 6,997        | 54           |
| Jul22  | 2,349        | 2,615   | 573         | 5,537   | 33           | 1,509         | 16      | 7,046          | 49           |              |
| Aug22  | 2,357        | 2,636   | 592         | 5,585   | 48           | 1,498         | -11     | 7,083          | 37           |              |
| <b>2023</b>                                  | Sept 22      | 2,362   | 2,659       | 603     | 5,624        | 39            | 1,483   | -15            | 7,107        | 24           |
|  | Oct 22       | 2,367   | 2,669       | 616     | 5,652        | 28            | 1,489   | 6              | 7,141        | 34           |
|  | Nov 22       | 2,361   | 2,680       | 619     | 5,660        | 8             | 1,475   | -14            | 7,135        | -6           |
|  | Dec 22       | 2,368   | 2,680       | 626     | 5,674        | 14            | 1,465   | -10            | 7,139        | 4            |
|  | Jan 23       | 2,365   | 2,695       | 635     | 5,695        | 21            | 1,458   | -7             | 7,153        | 14           |
| <b>January 2023</b>                          |              |         |             |         |              |               |         |                |              |              |
| <b>Inactive Appraisers</b>                   |              | GENERAL | RESIDENTIAL | LICENSE | TOTAL        |               | TRAINEE |                | TOTAL        |              |
|  |              | 51      | 47          | 15      | 113          |               | 153     |                | 266          |              |
| <b>Out-of-State Temporary Registrations:</b> |              |         |             |         |              |               |         |                | <b>145</b>   |              |
| <b>Total All License Holders:</b>            |              |         |             |         |              |               |         |                | <b>7,564</b> |              |

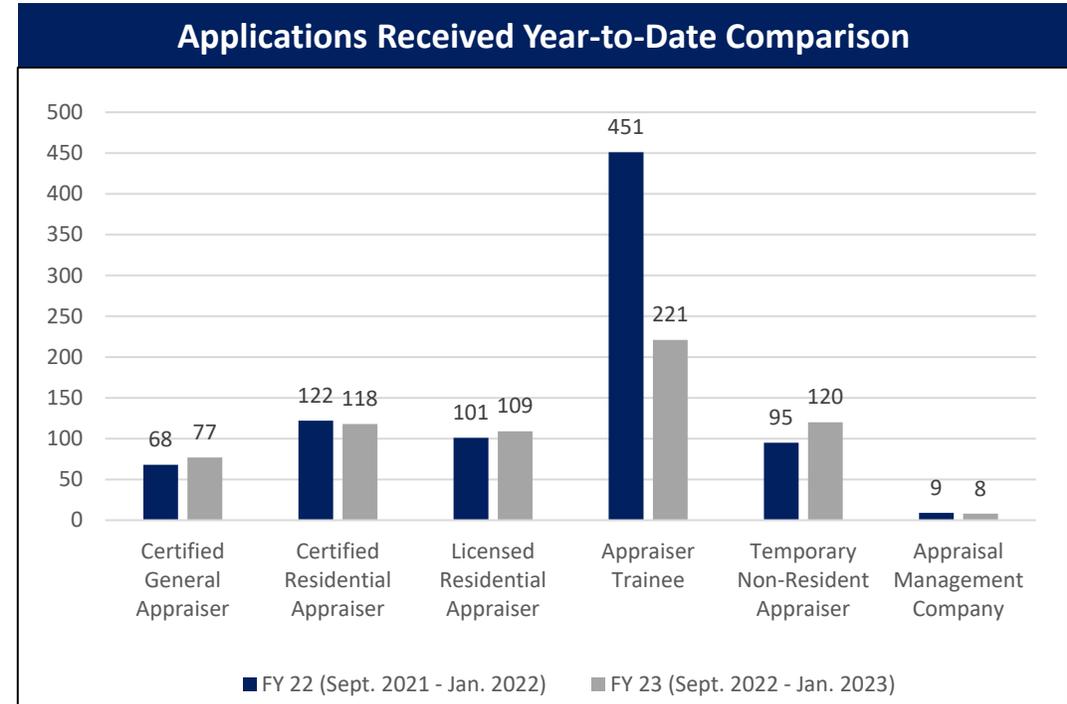
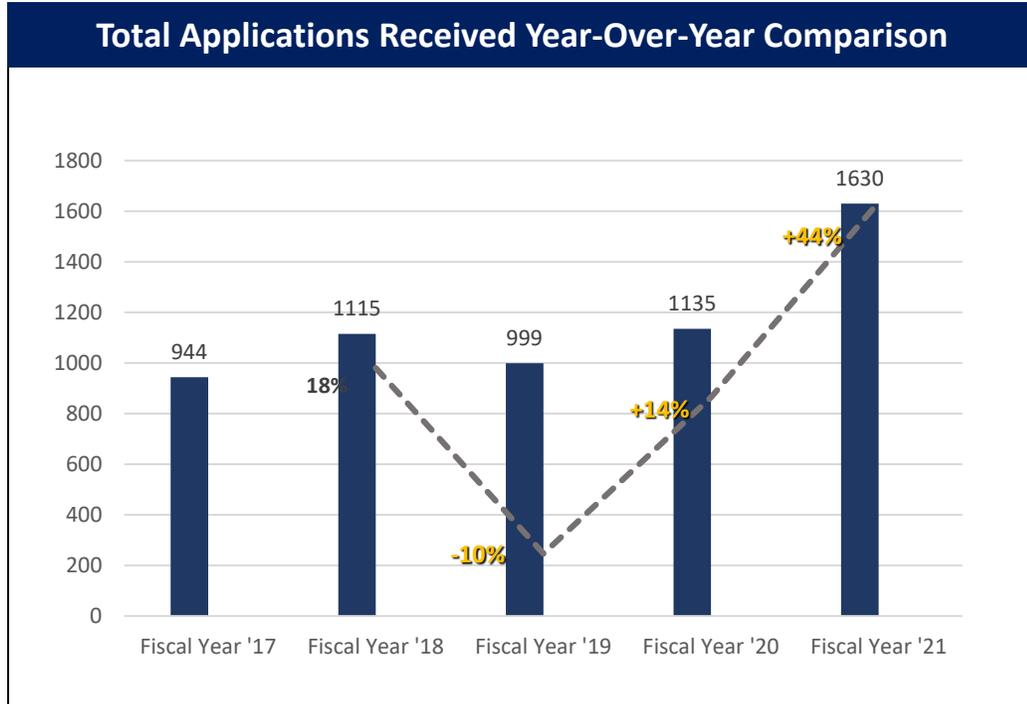
**TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD  
APPRAISAL MANAGEMENT COMPANY REGISTRATIONS**

January 2023

| FISCAL YEAR  | MONTH   | Total Apps Received | Total AMC Registrations Issued | Total AMC Renewals Issued |
|--|---------|---------------------|--------------------------------|---------------------------|
| <b>2015 - Total</b>  |         | 16                  | 15                             | 17                        |
| <b>2016 - Total</b>  |         | 10                  | 11                             | 128                       |
| <b>2017 - Total</b>  |         | 16                  | 15                             | 21                        |
| <b>2018 - Total</b>  |         | 12                  | 12                             | 121                       |
| <b>2019 - Total</b>  |         | 8                   | 9                              | 25                        |
| <b>2020 - Total</b>  |         | 14                  | 15                             | 107                       |
| <b>2021 - Total</b>  |         | 14                  | 14                             | 34                        |
| <b>2022</b>  | Sep 21  | 2                   | 2                              | 2                         |
|  | Oct 21  | 2                   | 2                              | 8                         |
|  | Nov 21  | 2                   | 2                              | 4                         |
|  | Dec 21  | 3                   | 3                              | 2                         |
|  | Jan 22  | 0                   | 0                              | 3                         |
|  | Feb 22  | 2                   | 2                              | 4                         |
|  | Mar 22  | 1                   | 1                              | 12                        |
|  | Apr 22  | 1                   | 1                              | 10                        |
|  | May 22  | 3                   | 1                              | 24                        |
|  | Jun 22  | 1                   | 1                              | 27                        |
|  | July 22 | 3                   | 0                              | 11                        |
| Aug 22   | 0       | 3                   | 5                              |                           |
| <b>2022 - Total</b>  |         | 20                  | 18                             | 112                       |
| <b>2023</b>  | Sept 22 | 2                   | 3                              | 3                         |
|  | Oct 22  | 3                   | 2                              | 5                         |
|  | Nov 22  | 1                   | 1                              | 9                         |
|  | Dec 22  | 0                   | 2                              | 0                         |
|  | Jan 23  | 1                   | 1                              | 3                         |
| <b>Registrations issued from March 2012 to January 2023</b>        |         |                     | <b>323</b>                     |                           |
| <b>Registrations Expired &gt; 6 months as of January 2023</b>      |         |                     | <b>-89</b>                     |                           |
| <b>Registrations Expired &lt; 6 months as of January 2023</b>      |         |                     | <b>-3</b>                      |                           |
| <b>Registrations Surrendered</b>                                   |         |                     | <b>-30</b>                     |                           |
| <b>Registrations Revoked</b>                                       |         |                     | <b>-3</b>                      |                           |
| <b>Registrations Relinquished</b>                                  |         |                     | <b>-11</b>                     |                           |
| <b>Registrations Re-Issued &gt; 6 months after expiration date</b> |         |                     | <b>-8</b>                      |                           |
| <b>Federally Regulated AMCs</b>                                    |         |                     | <b>-2</b>                      |                           |
| <b>TOTAL AMC REGISTRATIONS</b>                                     |         |                     | <b>177</b>                     |                           |

| <b>AMC Registrations Year-Over-Year</b> |                         |          |          |
|---|-------------------------|----------|----------|
|   | Total AMC Registrations | Variance | % Change |
| Fiscal Year 17                          | 172                     |          |          |
| Fiscal Year 18                          | 168                     | -4       | -2%      |
| Fiscal Year 19                          | 162                     | -6       | -4%      |
| Fiscal Year 20                          | 163                     | 1        | 1%       |
| Fiscal Year 21                          | 175                     | 12       | 7%       |
| Fiscal Year 22                          | 174                     | -1       | -1%      |

# Applications Received



### Applications Received Month-Over-Month Comparison

|                                  | Jan 22 | Feb 22 | Mar 22 | Apr 22 | May 22 | Jun 22 | Jul 22 | Aug 22 | Sept 22 | Oct 22 | Nov 22 | Dec 22 | Jan 23 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|
| Certified General Appraiser      | 21     | 13     | 14     | 20     | 19     | 14     | 13     | 24     | 17      | 12     | 17     | 13     | 17     |
| Certified Residential Appraiser  | 32     | 25     | 20     | 29     | 25     | 23     | 30     | 40     | 21      | 28     | 22     | 26     | 23     |
| Licensed Residential Appraiser   | 26     | 33     | 30     | 28     | 22     | 30     | 26     | 34     | 21      | 32     | 25     | 16     | 18     |
| Appraiser Trainee                | 116    | 125    | 109    | 85     | 89     | 83     | 62     | 89     | 61      | 50     | 32     | 38     | 46     |
| Temporary Non-Resident Appraiser | 18     | 19     | 34     | 16     | 24     | 24     | 23     | 28     | 20      | 30     | 23     | 27     | 16     |
| Appraisal Management Company     | 0      | 2      | 1      | 1      | 3      | 1      | 3      | 0      | 2       | 3      | 2      | 0      | 1      |

# Application Processing Time

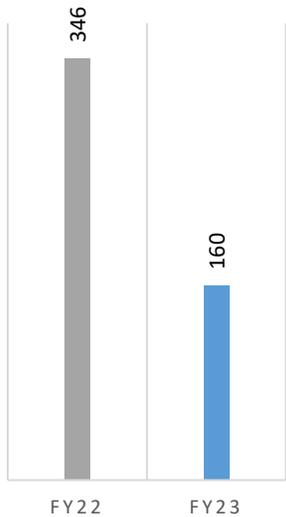
Average Number of Days to Process Applications

**Average Number of Calendar Days to Process a License (Application Review & Experience Audit)**

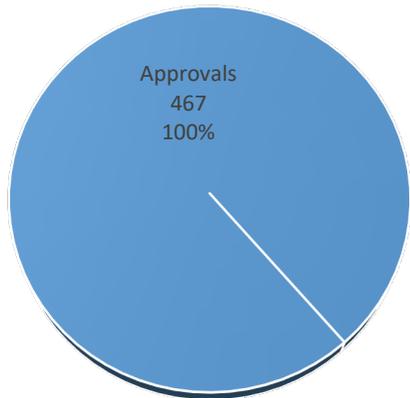
|   | Jan 22 | Feb 22 | Mar 22 | Apr 22 | May 22 | Jun 22 | Jul 22 | Aug 22 | Sept 22 | Oct 22 | Nov 22 | Dec 22 | Jan 23 |
|---|--------|--------|--------|--------|--------|--------|--------|--------|---------|--------|--------|--------|--------|
| Certified General Appraiser – Initial & Reinstatement (Goal: 75 days)     | 57     | 40     | 53     | 66     | 70     | 54     | 51     | 49     | 38      | 66     | 34     | 52     | 43     |
| Certified General Appraiser – Reciprocity (Goal: 14 days)                 | 1      | 1      | 1      | 1      | 1      | 1      | 1      | 2      | 3       | 2      | 1      | 1      | 1      |
| Certified Residential Appraiser – Initial & Reinstatement (Goal: 75 days) | 61     | 56     | 59     | 49     | 56     | 62     | 49     | 48     | 48      | 71     | 63     | 57     | 57     |
| Certified Residential Appraiser – Reciprocity (Goal: 14 days)             | 1      | 1      | 2      | 2      | 2      | 1      | 2      | 2      | 1       | 1      | 1      | 1      | 2      |
| Licensed Residential Appraiser – Initial & Reinstatement (Goal: 75 days)  | 57     | 59     | 48     | 53     | 60     | 61     | 44     | 48     | 36      | 65     | 47     | 54     | 45     |
| Licensed Residential Appraiser – Reciprocity (Goal: 14 days)              | 1      | 1      | 2      | 1      | 1      | 2      | 2      | 2      | 3       | 2      | NA     | NA     | 1      |
| Appraiser Trainee (Goal: 14 days)   | 3      | 3      | 3      | 3      | 3      | 3      | 6      | 4      | 5       | 3      | 4      | 3      | 3      |
| Temporary Non-Resident Appraiser (Goal: 5 days)                           | 1      | 1      | 1      | 1      | 1      | 1      | 1      | 3      | 3       | 2      | 2      | 1      | 2      |
| Appraisal Management Company (Goal: 14 days)                              | NA     | 2      | 1      | 4      | 2      | NA     | 4      | 4      | 3       | 2      | 1      | 1      | 2      |

## Certified and Licensed Residential Experience Audit Summary

Residential audits received



FY22 – 23 Residential Audit Outcome

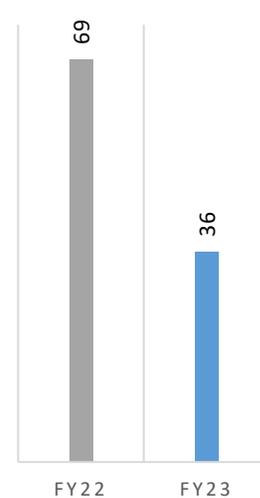


Residential Audit Processing Year-Over-Year

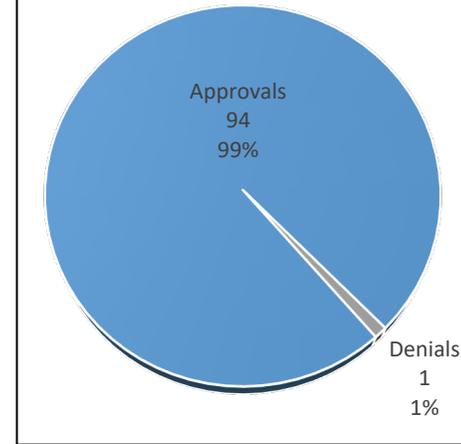
|                         | Closed     | Average Processing |
|-------------------------|------------|--------------------|
| Fiscal Year 2018        | 116        | 100 Days           |
| Fiscal Year 2019        | 171        | 83 Days            |
| Fiscal Year 2020        | 161        | 38 Days            |
| Fiscal Year 2021        | 213        | 33 Days            |
| Fiscal Year 2022        | 305        | 47 days            |
| <b>Fiscal Year 2023</b> | <b>173</b> | <b>48 days</b>     |

## Certified General Experience Audit Summary

Commercial audits received



FY22 - 23 Commercial Audit Outcome



Commercial Audit Processing Year-Over-Year

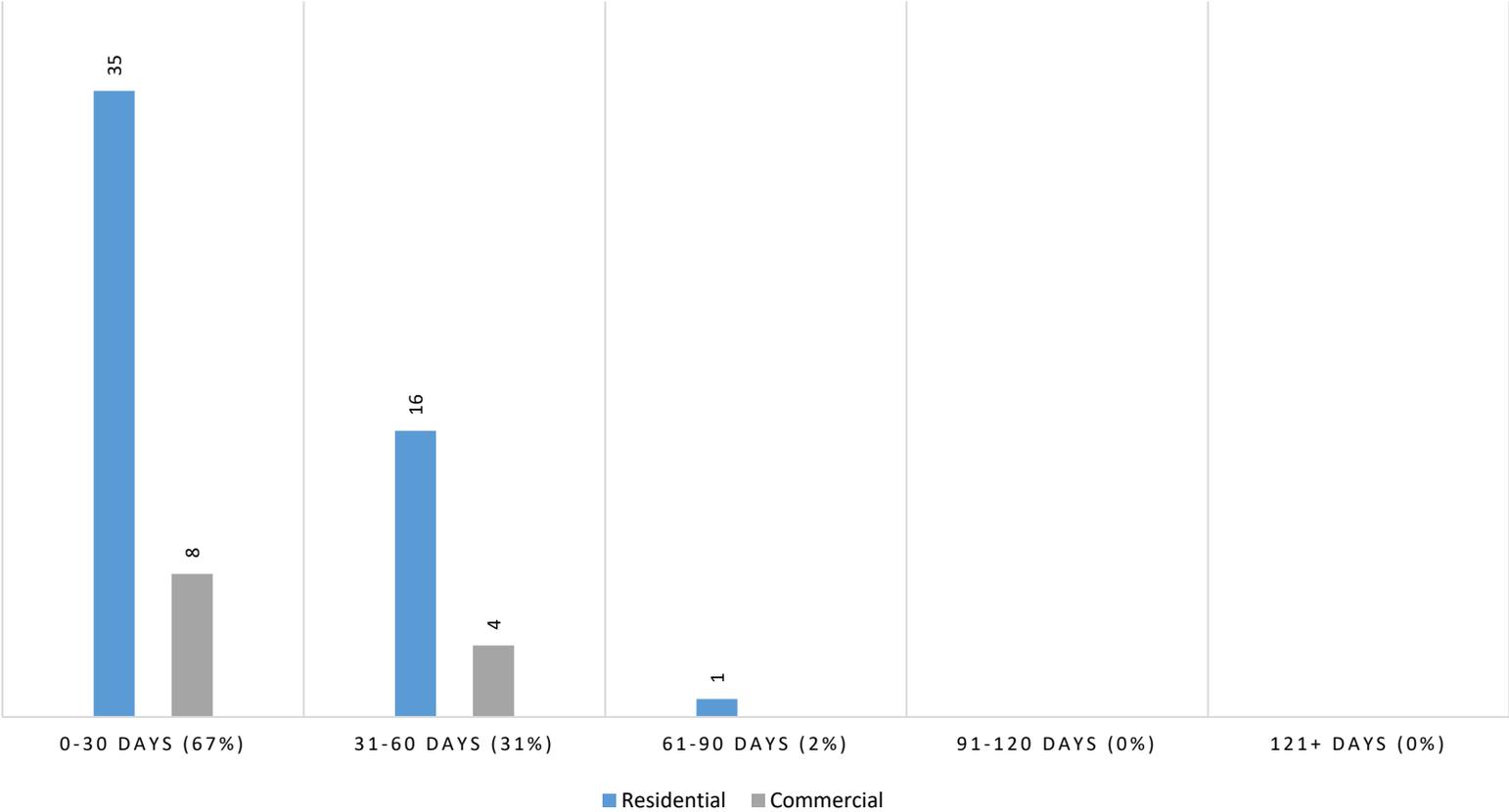
|                         | Closed    | Average Processing |
|-------------------------|-----------|--------------------|
| Fiscal Year 2018        | 47        | 160 Days           |
| Fiscal Year 2019        | 52        | 218 Days           |
| Fiscal Year 2020        | 79        | 124 Days           |
| Fiscal Year 2021        | 53        | 30 Days            |
| Fiscal Year 2022        | 62        | 46 Days            |
| <b>Fiscal Year 2023</b> | <b>37</b> | <b>37 days</b>     |

# Renewal Activity

## Year-to-Date Comparison

|                                | FY 21 (Sept. 2020 - Jan. 2021) |           | FY 23 (Sept. 2022 - Jan. 2023) |           | Variance | Percent |
|--------------------------------|--------------------------------|-----------|--------------------------------|-----------|----------|---------|
|                                | Renewed                        | % Renewed | Renewed                        | % Renewed |          |         |
| Certified General Renewals     | 430                            | 85.15%    | 435                            | 88.24%    | 5        | 1.16%   |
| Certified Residential Renewals | 455                            | 92.29%    | 484                            | 92.19%    | 29       | 6.37%   |
| Licensed Residential Renewals  | 98                             | 85.22%    | 101                            | 78.91%    | 3        | 3.06%   |
| Appraiser Trainee Renewals     | 99                             | 50.77%    | 119                            | 56.40%    | 20       | 20.20%  |

# Open Experience Audit Snapshot



**Financial Services Division**  
**TALCB Budget Status Report**  
**January 2023 - Fiscal Year 2023**

| Expenditure Category   | Beginning Balance<br>FY2023 | Expenditures       | Remaining<br>Balance                    | Budget %<br>Remaining                     | 7/12 = 58.33%<br>Comments  |
|--|-----------------------------|--------------------|---|---|--|
| Actual Beginning Balance   | \$3,465,390                 |                    | \$3,465,390                             |   | includes Trust cash balances as of 8/31/2022   |
| Operating Reserves   | (\$889,252)                 |                    | (\$889,252)                             |   |  |
| <b>Available balance within Texas Treasury Safekeeping Trust</b> | <b>\$2,576,138</b>          |                    | <b>\$2,576,138</b>                      |   | remaining available budget to consider to balance FY2023 budget  |
| Salaries & Wages   | \$1,433,518                 | \$560,661          | \$872,857                               | 60.9%                                     |  |
| Other Personnel Costs  | 504,631                     | 179,642            | \$324,989                               | 64.4%                                     |  |
| Professional Services  | 426,859                     | 83,326             | \$343,533                               | 80.5%                                     | Luna Data - Computer consultant services paid with ASC grant; Versa replacement not expended as of report date   |
| Consumables  | 2,000                       | 0                  | \$2,000                                 | 100.0%                                    |  |
| Utilities  | 109                         | 0                  | \$109                                   | 100.0%                                    |  |
| Travel   | 32,000                      | 18,566             | \$13,434                                | 42.0%                                     | Agency sent 5 people (2 board & 3 staff), to the AARO Conference in October. The average expense was \$1700 each or approximately \$8,500. TALCB all hands training in September, where all remote staff were required to come into the office. Flights purchased in advance for the December 2nd Board meeting. |
| Rent - Building - Other  | 21,892                      | 20,574             | \$1,318                                 | 6.0%                                      | Annual Lease payment processed in October  |
| Rent - Equipment   | 10,464                      | 622                | \$9,842                                 | 94.1%                                     |  |
| Other Operating Expense  | 76,038                      | 30,615             | \$45,423                                | 59.7%                                     |  |
| <b>Subtotal -Operations Expenditures</b>                         | <b>2,507,511</b>            | <b>894,006</b>     | <b>1,613,505</b>                        | <b>64.3%</b>                              |  |
| DPS Criminal History Background Checks                           | 2,000                       | 373                | 1,627                                   | 81.4%                                     |  |
| Statewide Cost Allocation Plan (SWCAP)                           | 31,209                      |                    | 31,209                                  | 100.0%                                    | SWCAP allocation has not been posted by the Comptroller's office as of report date.  |
| Contribution to General Revenue                                  | 22,500                      | 9,375              | 13,125                                  | 58.3%                                     |  |
| <b>Subtotal - Nonoperational Expenditures</b>                    | <b>55,709</b>               | <b>9,748</b>       | <b>45,961</b>                           | <b>82.5%</b>                              |  |
| <b>Total Expenditures and GR Contribution</b>                    | <b>2,563,220</b>            | <b>903,754</b>     | <b>1,659,466</b>                        | <b>64.7%</b>                              |  |
| Revenue  | FY2023 Projected<br>Revenue | Revenue Collected  | Revenue<br>Remaining to be<br>Collected | Revenue %<br>Remaining to be<br>Collected | Comments   |
| License Fees   | \$1,973,845                 | \$745,004          | \$1,228,841                             | 62.3%                                     |  |
| AMCs   | 279,380                     | 161,728            | \$117,652                               | 42.1%                                     | 8 new AMCs (16 projected), 20 AMC renewals (33 projected), 9,394 of panelist activities (18,229 projected)   |
| ACE Program Revenue  | 15,155                      | 6,360              | \$8,795                                 | 58.0%                                     |  |
| Examination fees   | 4,340                       | 2,880              | \$1,460                                 | 33.6%                                     | Pearson Vue exam fees-288 exams taken  |
| Other Miscellaneous Revenue                                      | 40,127                      | 22,312             | \$17,815                                | 44.4%                                     | 40 Appraiser Trainee experience reviews, 0 ACE extension requests, Interest earned   |
| TALCB ASC grant  | 120,000                     | 94,841             | \$25,159                                | 21.0%                                     | ASC grant to develop Complaint portal  |
| <b>Total Revenue</b>   | <b>\$2,432,847</b>          | <b>\$1,033,125</b> | <b>\$1,399,722</b>                      | <b>57.5%</b>                              |  |
| <b>Operating Gains/ Losses</b>                                   | <b>(\$130,373)</b>          | <b>\$129,371</b>   | <b>(\$1,002)</b>                        | <b>0.8%</b>                               |  |
| <b>Restricted Education Reserve Fund Carryforward</b>            | <b>\$22,914</b>             | <b>\$23,255</b>    |   |   | Balance in Education Reserve Fund as of report date.   |
| <b>Revenue Over/(Under) Expenditures &amp; Transfers</b>         | <b>\$2,468,679</b>          | <b>\$152,626</b>   | <b>\$2,316,394</b>                      |   |  |

## Financial Services Division

# TX Appraiser Licensing & Certification Board Operating Account No. 3056 Investments Holdings Report

**January 2023**

| Purchase Date | Par Value              | Purchase Price         | Beginning Market Value | Additions Changes  | Ending Market Value    | Accrued Interest   | Description         | Maturity Date |
|---------------|------------------------|------------------------|------------------------|--------------------|------------------------|--------------------|---------------------|---------------|
| 12/15/2021    | 394,700.00             | 399,898.06             | 0.00                   | 0.00               |                        |                    | U.S. T-Notes, 1.625 | 12/15/2022    |
| 06/15/2022    | 825,000.00             | 802,376.95             | 809,692.38             | 2,062.50           | 811,754.88             | 271.98             | U.S. T-Notes, .250  | 06/15/2023    |
| 09/15/2022    | 1,000,000.00           | 962,421.88             | 969,179.69             | 3,437.50           | 972,617.19             | 479.97             | U.S. T-Notes, .125  | 09/15/2023    |
| 12/15/2022    | 643,000.00             | 615,270.63             | 616,174.84             | 1,883.79           | 618,058.63             | 105.99             | U.S. T-Notes, .125  | 12/15/2023    |
| 03/15/2022    | 126,000.00             | 124,979.67             | 125,109.14             | 354.38             | 125,463.52             | 241.91             | U.S. T-Notes, .500  | 03/15/2023    |
| <b>Totals</b> | <b>\$ 2,988,700.00</b> | <b>\$ 2,904,947.19</b> | <b>\$ 2,520,156.05</b> | <b>\$ 7,738.17</b> | <b>\$ 2,527,894.22</b> | <b>\$ 1,099.85</b> |                     |               |

### Monthly Activity

| Beginning Balance | Current Month | Cumulative Totals |
|-------------------|---------------|-------------------|
|-------------------|---------------|-------------------|

|  |    |                            |  |
|--|----|----------------------------|--|
| <b>Beginning Cash Available Balance</b>        | \$ | 865,840.31                 |  |
| <b>Current Month Receipts</b>                  | \$ | 231,514.32                 |  |
| <b>Current Month Disbursements</b>             | \$ | <u>(174,180.12)</u>        |  |
| <b>Total Cash</b>                              | \$ | <b>923,174.51</b>          |  |
| <b>Investment Ending Market Value</b>          |    | <u><b>2,527,894.22</b></u> |  |
| <b>Total Account Balance</b>                   |    | <b>3,451,068.73</b>        |  |
| <b>Operating Reserves</b>                      |    | <b>(889,252.00)</b>        |  |
| <b>Ending Balance Available for Operations</b> | \$ | <u><b>2,561,816.73</b></u> |  |

Investment Compliance: These investments have been made in compliance with the Board's Investment Policy.

Ranada O. Williams

Ranada Williams, Investment Officer

Melissa Huerta

Melissa Huerta, Alternate Investment Officer

Kemya Dean

Kemya Dean, Alternate Investment Officer

**Financial Services Division**

**Tx Appraiser Licensing & Certification Board Administrative Penalties Account  
No. 3193**

**January 2023**

| <b><u>Monthly Activity</u></b> |                  |                      |
|--------------------------------|------------------|----------------------|
| Beginning<br>Balance           | Current<br>Month | Cumulative<br>Totals |

|                                    |                 |           |                           |
|------------------------------------|-----------------|-----------|---------------------------|
| <b>Beginning Balance</b>           | \$              | 23,180.87 |                           |
| <b>Current Month Receipts</b>      |                 |           |                           |
|                                    | Admin Penalties | \$        | 0.00                      |
|                                    | Interest Earned |           | 84.59                     |
| <b>Current Month Disbursements</b> |                 | \$        | <u>(10.49)</u>            |
| <b>Total Cash</b>                  |                 | \$        | <b><u>23,254.97</u></b>   |
| Reserved for Education Development |                 |           | <b><u>(23,254.97)</u></b> |
| <b>Balance</b>                     |                 | \$        | <b><u><u>0.00</u></u></b> |

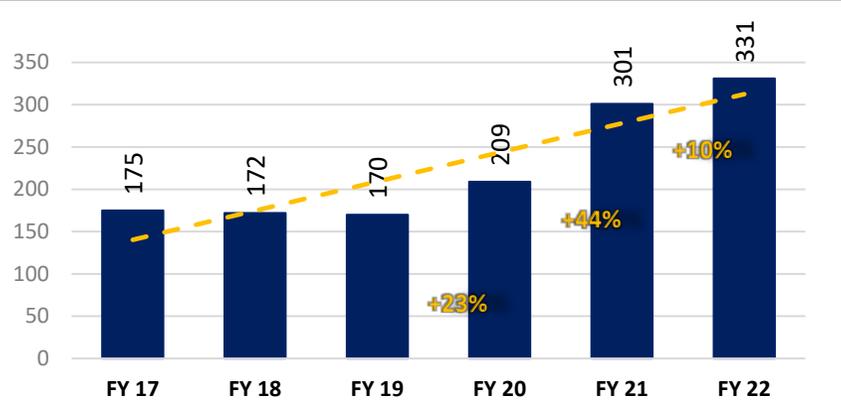
# TALCB Enforcement Report

Current as of January 31, 2023

# Complaints Received

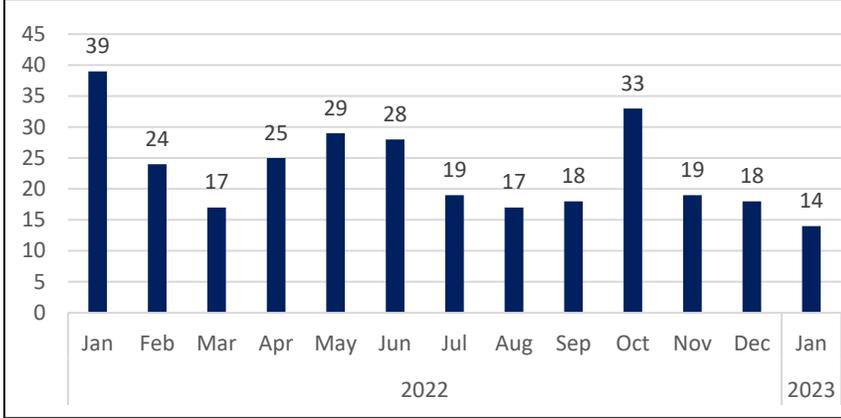
## Complaints Received

Year-Over-Year



## Complaints Received

Month-Over-Month

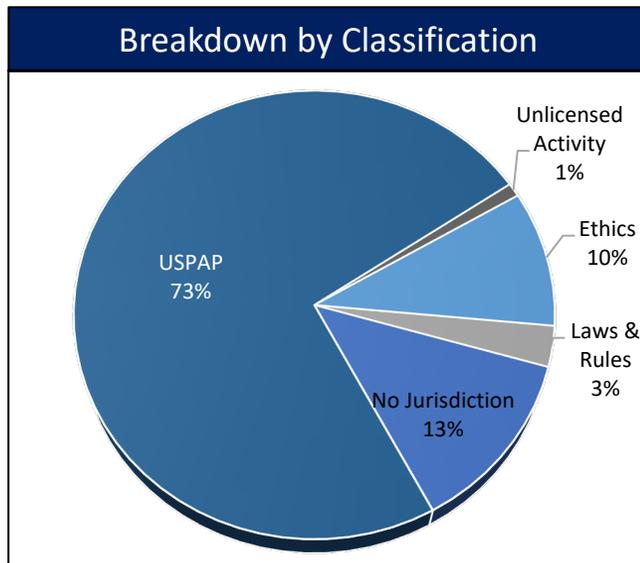


## Fiscal Year 2023 Summary

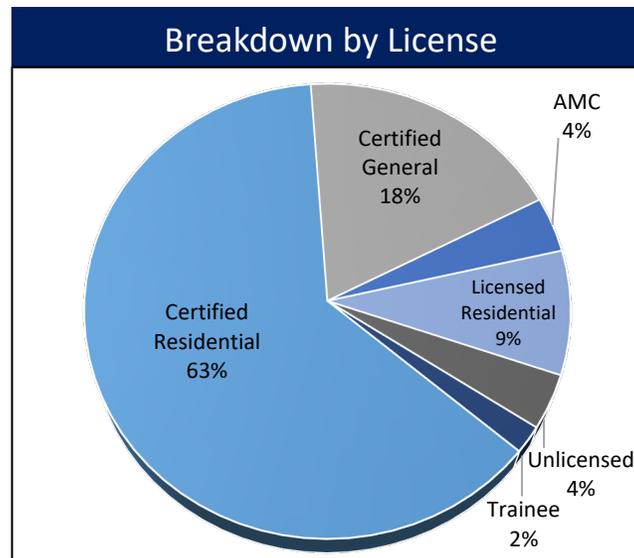
|     |                                     |
|-----|-------------------------------------|
| 102 | Complaints Received                 |
| 97  | Respondents                         |
| <2% | License Holders Receive a Complaint |

## Fiscal Year 2023 Complaints Received by Category

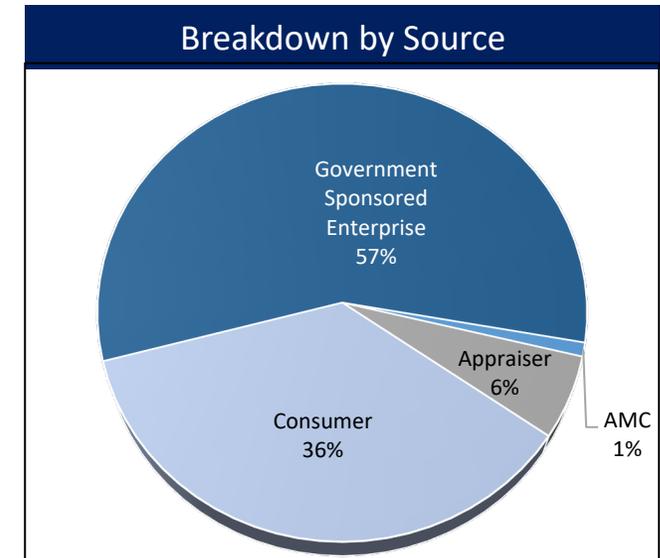
### Breakdown by Classification



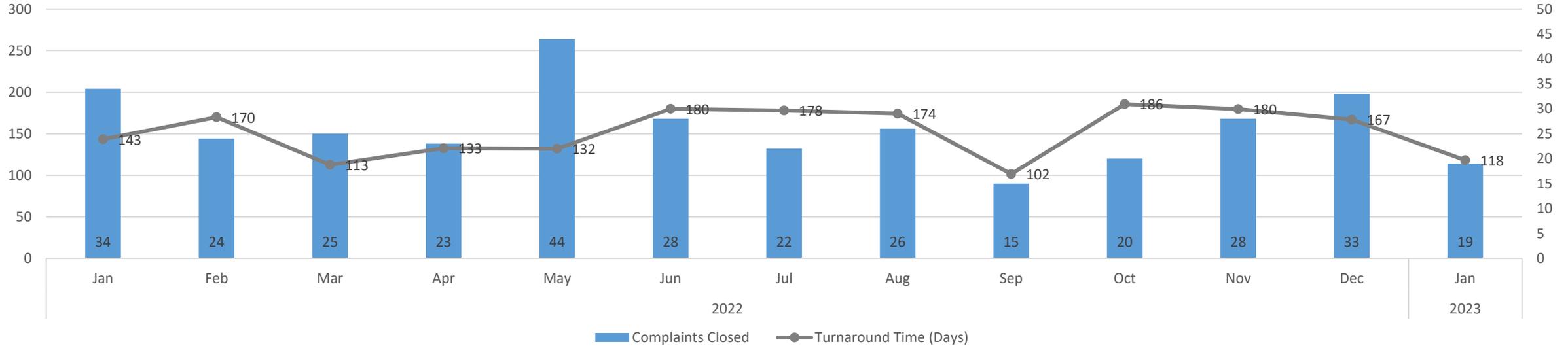
### Breakdown by License



### Breakdown by Source

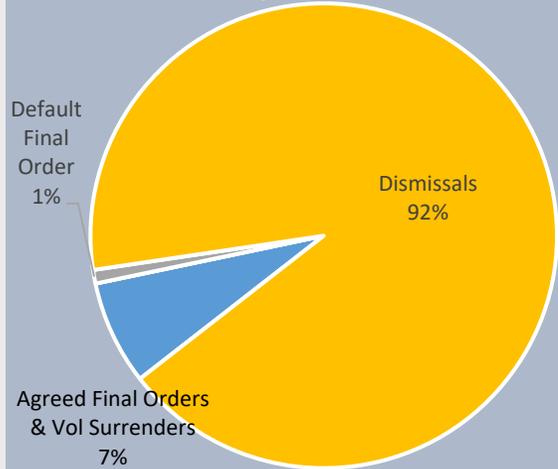


# Complaint Resolution

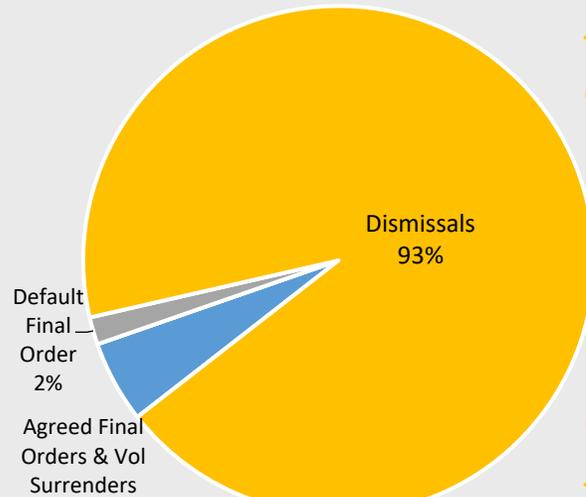


## FY22 Complaint Outcome

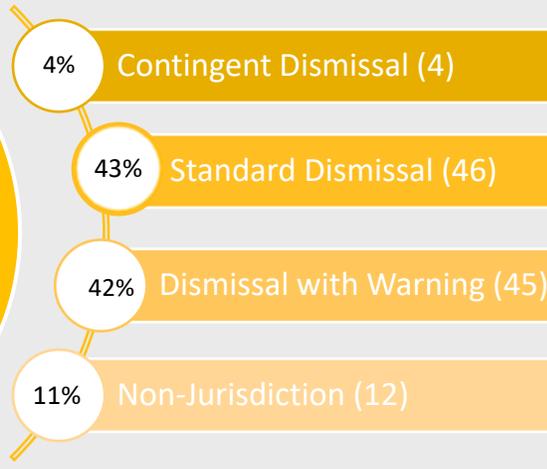
317 Complaints Resolved



## FY23 Complaint Outcome



## FY23 Dismissal Breakdown



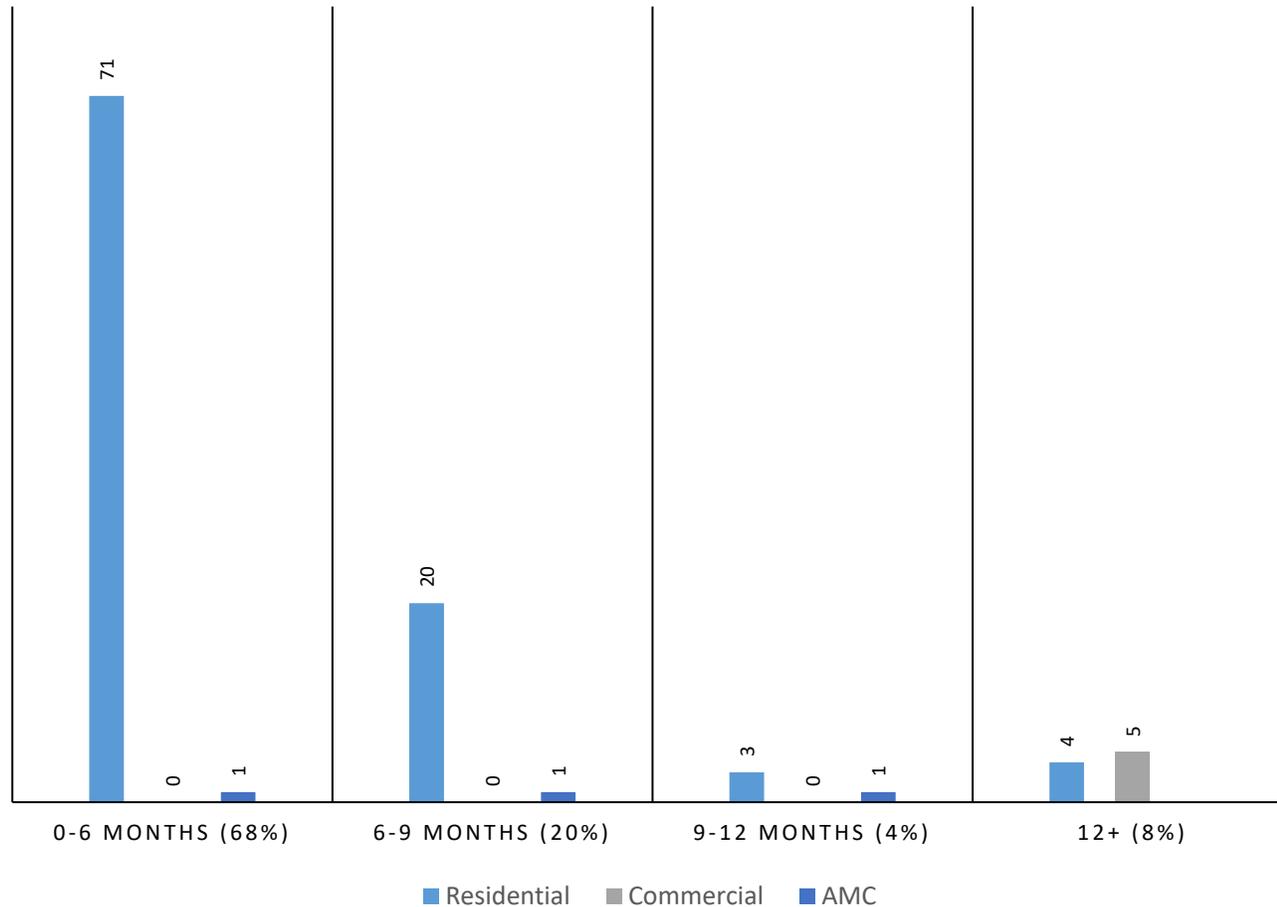
## Fiscal Year 2023 Summary

115 Complaints Resolved

157 Days Average turnaround time  
Sunset Goal: Resolve complaints within 180-day on average

<1% License holders receive discipline

# Open Complaint Snapshot



## Open Complaint Data

**106 Open Complaints**

**19 Cases Abated**

- 11 pending litigation
- 8 pending Texas Workforce Commission Civil Rights Division Review

**9 Cases Over 1 Year Old**

ASC Policy Statement: Resolve cases within 1 year absent special documented circumstances.

- 2 cases abatement lifted 12/14/22
- 7 cases abated