



**55TH INSTITUTE ON PROPERTY TAXATION  
AND  
STATE COMPTROLLER'S  
PROPERTY TAX ASSISTANCE DIVISION'S  
35TH ANNUAL CONFERENCE**

December 3-4, 2013 · Austin, Texas

Sponsored by the Property Tax Assistance Division  
of the Texas Comptroller of Public Accounts  
and the LBJ School of Public Affairs at the University of Texas at Austin

[www.utexas.edu/lbj/profdev/candt/pti](http://www.utexas.edu/lbj/profdev/candt/pti)



# 55TH INSTITUTE ON PROPERTY TAXATION AND STATE COMPTROLLER'S PROPERTY TAX ASSISTANCE DIVISION'S 35TH ANNUAL CONFERENCE

## Day One: Tuesday, December 3

8:00 a.m.	CHECK-IN and CONTINENTAL BREAKFAST	
General Sessions Big Tex Auditorium (1.102)		
8:30 a.m.	Welcome, Overview and Logistics	
8:45-9:45 a.m.	<b>Economic Climate</b> <i>Jim Gaines, Real Estate Center, Texas A&amp;M University</i>  At the conclusion of this session, participants will be able to... <ul style="list-style-type: none"> <li>• Identify changes in major markets affecting property values</li> <li>• Relate the state's economic conditions to their county</li> <li>• Compare the state's economy to the nation's</li> </ul>	
9:45-10:45 a.m.	<b>Top Down Ethics</b> <i>Marya Crigler, Chief Appraiser, Travis Central Appraisal District</i>  At the conclusion of this session, participants will be able to... <ul style="list-style-type: none"> <li>• Identify potential ethics issues</li> <li>• Examine what behavior is ethical</li> <li>• Cultivate an ethical culture or environment in one's organization</li> </ul>	
10:45-11:00 a.m.	BREAK in Commons Atrium	
11:00 a.m.- 12:00 noon	<b>Let It Rain, Let It Rain!</b> <i>Dan Hardin, Texas Water Development Board</i>  At the conclusion of this session, participants will be able to... <ul style="list-style-type: none"> <li>• Identify water supply needs</li> <li>• Identify changes to the state water plan</li> <li>• Prepare for changes as a result of state water plan</li> </ul>	
12:00-1:00 p.m.	LUNCH	
	<b>Big Tex Auditorium (1.102)</b>	<b>Li'l Tex Auditorium (1.122)</b>
1:00-2:00 p.m.	<b>State Laws and Rules Update</b> <i>Speaker(s): Shannon Murphy and Laurie Mann, Comptroller of Public Accounts</i>  At the conclusion of this session, participants will be able to... <ul style="list-style-type: none"> <li>• Comply with registration requirements</li> <li>• Identify legislative changes resulting from the 83rd regular session</li> <li>• Prepare to implement administrative provisions in new law</li> </ul>	<b>So You Want to be a Chief Appraiser</b> <i>Speaker(s): Michelle Cardenas, Chief Appraiser, Atascosa CAD; Jill Timms, Chief Appraiser, Parmer CAD; Additional panelist TBD</i> <i>Moderator: Doris Koch, Texas Association of Appraisal Districts</i>  At the conclusion of this session, participants will be able to... <ul style="list-style-type: none"> <li>• Describe the first year of a chief appraiser's term</li> <li>• Relate events that surprised a new chief appraiser</li> <li>• List activities to undertake to prepare to become a chief appraiser</li> </ul>
2:00-2:05 p.m.	TRANSITION BREAK	

## Day One: Tuesday, December 3 (cont.)

	Big Tex Auditorium (1.102)	Li'l Tex Auditorium (1.122)
2:05-3:05 p.m.	<p><b>State Laws and Rules Update (cont.)</b>  <i>Speaker(s): Shannon Murphy and Laurie Mann, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Comply with registration requirements</li> <li>• Identify legislative changes resulting from the 83rd regular session</li> <li>• Prepare to implement administrative provisions in new law</li> </ul>	<p><b>USPAP</b>  <i>Speaker(s): Mickey Hand, Chief Appraiser, Wise CAD; Moderator: Elaine Chaney, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• obtain credit for completing part of the required USPAP training</li> <li>• obtain information about USPAP updates</li> <li>• identify changes needed in appraisal district practices to comply with USPAP</li> </ul>
3:05-3:25 p.m.	<b>REFRESHMENT BREAK</b>	
3:25-4:25 p.m.	<p><b>Arbitration Tips: What Arbitrators Are Looking For</b>  <i>Speaker(s): Thomas Bazan, registered arbitrator; Sonny Poole, registered arbitrator; Malene Howard, registered arbitrator; Larry Korkmas, registered arbitrator</i>  <i>Moderator: Jeff Van Pelt, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Identify better ways to assemble and present information in an arbitration hearing</li> <li>• Work more effectively with different arbitrators</li> <li>• Formulate a strategy for presenting information in an arbitration hearing</li> </ul>	<p><b>Fixin' to Appraise: Rural Property Appraisals Case Study</b>  <i>Speaker(s): Jim Childers, Chief Appraiser, Potter-Randall CAD; David Oehler, Chief Appraiser, Gillespie CAD; Casey Bean, Comptroller of Public Accounts</i>  <i>Moderator: Sharon Hersh, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Collect information necessary to develop values of rural lands</li> <li>• Allocate land value of qualified agricultural land to adjacent land used as residential property</li> <li>• Explain appraisal process to land owner</li> </ul>
4:25-4:30 p.m.	<b>TRANSITION BREAK</b>	
4:30-5:30 p.m.	<p><b>Assessment/Collection Update</b>  <i>Speaker(s): Scott Porter, Tax Assessor-Collector, Johnson Co.; Luanne Caraway, Tax Assessor-Collector, Hays Co.</i>  <i>Moderator: Connie Rose, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Summarize assessment/collection law changes</li> <li>• Locate assessment/collection resources</li> <li>• Apply assessment/collection law changes to current knowledge</li> </ul>	<p><b>Knee Deep in Waterfront Appraisals: Case Study</b>  <i>Speaker(s): Donna Rhoades, Chief Appraiser, Palo Pinto CAD; Chad Hill, Chief Appraiser, Polk CAD; Brett McKibben, Chief Appraiser, Brown CAD</i>  <i>Moderator: Bill Messick, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Identify market factors affecting waterfront property</li> <li>• Explain differences in value of waterfront versus non-waterfront properties</li> <li>• Defend values of waterfront properties to appraisal review board</li> </ul>

## Day Two: Wednesday, December 4

8:00 a.m.	<b>CONTINENTAL BREAKFAST</b>	
	<b>Big Tex Auditorium (1.102)</b>	<b>Li'l Tex Auditorium (1.122)</b>
8:30-9:30 a.m.	<p><b>Methods and Assistance Program Update</b>  <i>Speaker(s): Lisa Stephens-Musick, Deputy Chief Appraiser, Wichita CAD; Bo Daffin, Chief Appraiser, Collin CAD; Karen McCord, Chief Appraiser, Ector CAD</i>  <i>Moderator: Steve Atkinson, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Predict how well they will do in the 2014-15 MAP</li> <li>• Differentiate how they compare with their peer-CADs</li> <li>• Prepare for a MAP review</li> <li>• Prepare a basic public relations plan that complies with IAAO standards</li> </ul>	<p><b>Model ARB Procedures</b>  <i>Speaker(s): Glenda Lloyd, ARB liaison, Williamson CAD; Tony Delgado, ARB liaison, El Paso CAD</i>  <i>Moderator: Debbie Cartwright, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Compare current ARB procedures to model procedures</li> <li>• Assess changes needed in current ARB procedures</li> <li>• Plan for the 2014 ARB hearings</li> </ul>
9:30-9:35 a.m.	<b>TRANSITION BREAK</b>	
9:35-10:35 a.m.	<p><b>Classification Guide Implementation – So, How'd It Go?</b>  <i>Speaker(s): Jennifer Salazar, Director of Operations, Comal CAD; Kathy Rodrigue, Chief Appraiser, Ellis CAD; Steve Rothstein, Comptroller of Public Accounts</i>  <i>Moderator: Debbie Cartwright, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Clarify the changes to the classification guide</li> <li>• Address the top 5 issues as identified by PTAD</li> <li>• Locate resources for assistance</li> <li>• Describe best practices working with classification guidelines</li> </ul>	<p><b>TDLR Registration Exemption: County Tax Assessor-Collectors</b>  <i>Speaker(s): Shane Docherty, Presiding Officer, Texas Tax Professional Advisory Committee; JR Moore, Tax Assessor-Collector, Montgomery Co.; Deborah Hunt, Tax Assessor-Collector, Williamson Co.;</i>  <i>Moderator: Shannon Murphy, Comptroller of Public Accounts</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Describe changes made by SB 546</li> <li>• Prepare for fulfilling future continuing education requirements</li> </ul>
10:35-10:45 a.m.	<b>REFRESHMENT BREAK</b>	
<b>General Sessions Big Tex Auditorium (1.102)</b>		
10:45-11:45 a.m.	<p><b>Communicating with the Angry Customer</b>  <i>Speaker: Stephanie Dailey, Doctoral Candidate in Organizational Communication, University of Texas at Austin</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Assess emotional state of customer and self</li> <li>• Determine best approach to take to help customer</li> <li>• Prepare ahead of time in assisting different types of customers</li> </ul>	
11:45 a.m.- 12:25 p.m.	<p><b>A Leader's Skill in Listening</b>  <i>Speaker: Dr. Steven A. Beebe, Regents' and University Distinguished Professor Chair, Department of Communication Studies, Texas State University</i></p> <p>At the conclusion of this session, participants will be able to...</p> <ul style="list-style-type: none"> <li>• Describe traits of a good leader</li> <li>• Recognize leadership traits in others</li> <li>• Determine how they can apply these traits to their professional lives</li> </ul>	
12:25-12:30 p.m.	<b>Closing Remarks</b>	
12:30 p.m.	<b>ADJOURN</b>	



**Please REGISTER as soon as possible.** *Space is limited! Payment need not be sent with registration; an invoice will be issued after your registration has been processed. Based on availability of seats, we will welcome walk-ins; however, registered attendees will have a confirmed seat. As part of your confirmed registraton, one week prior to the program you will be provided a web-link to download the presentations and handouts. While on-site registration may be available on the day of the conference, pre-registration guarantees you a seat and participant materials.*

### **Target Audience**

Property tax professionals throughout the state of Texas.

### **Earn Credit Hours**

This program agenda has been submitted to the Comptroller of Public Accounts for credit hour approval. All participants will be notified as soon as credit hours are assigned.

### **Registration and Fee**

\$195.00 USD per participant. Please register online at: **[www.utexas.edu/lbj/profdev/candt/pti](http://www.utexas.edu/lbj/profdev/candt/pti)**

### **Payment**

Do not hesitate to register; payment is not required at the time of registration. You will be issued an invoice after your registration has been processed. Payment does not need to be received prior to the program. Walk-in registrants are welcome, but conference staff will not be able to accept payment on-site.

### **Cancellation Policy**

If cancellation is necessary, written notification is required so that we may release your spot for someone else. Cancellations received by November 15, 2013 will receive a refund, less \$65. There will be a 50% refund after November 15. Entire program fee is due in full for cancellations not received by 5:00 p.m. on December 2.

### **Attention Patrons!**

There are a limited number of support opportunities for this program. Please call 512/471-0820 for additional information.

### **Food and Beverages**

Complimentary refreshments during morning and afternoon breaks as well as a continental breakfast will be provided for attendees of the institute.

### **Conference Venue**

The conference is being held at the Commons Learning Center on the J.J. Pickle Research Campus of the University of Texas at Austin.

**10100 Burnet Road, Austin, TX 78758  
(between U.S. 183 and Braker Lane)**

All visitors must use the Burnet Road entrance and obtain a parking permit from the gate guard. The permit must be visible on your dashboard at all times.

### **Lodging Options**

There are a variety of nearby hotels for this institute. We are happy to make recommendations but as a courtesy have provided a complete list on-line for participants who may have a preferred chain or price point. <http://www.utexas.edu/commons/maps/hotels.php>

### **Special Accommodations**

If you have a disability and require special accommodations to fully participate in this event, please call the LBJ School at least three weeks prior to the start of the conference at 512/471-0820.

