



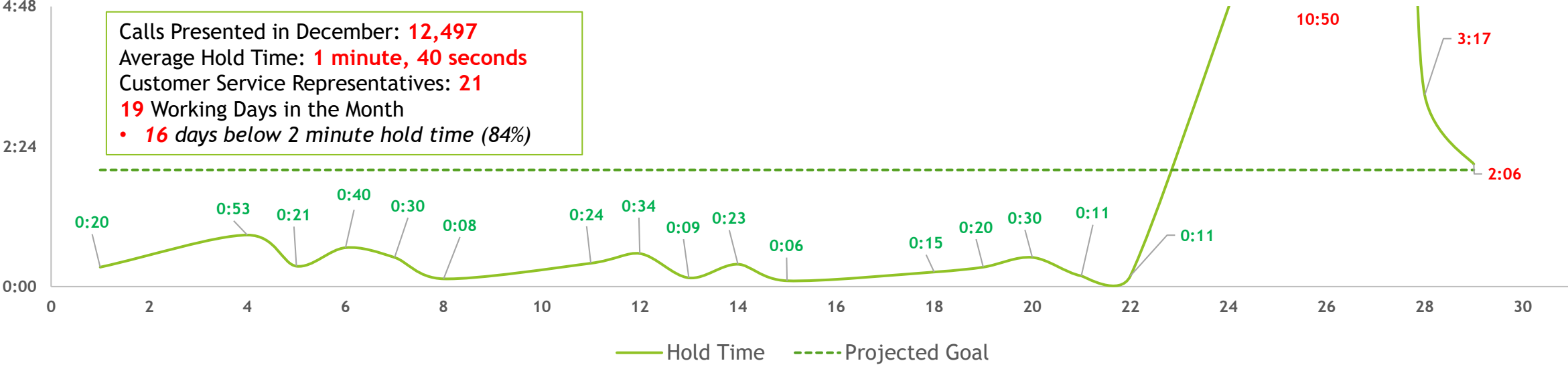
## **Staff Reports for December 2023**

# Customer Relations Division

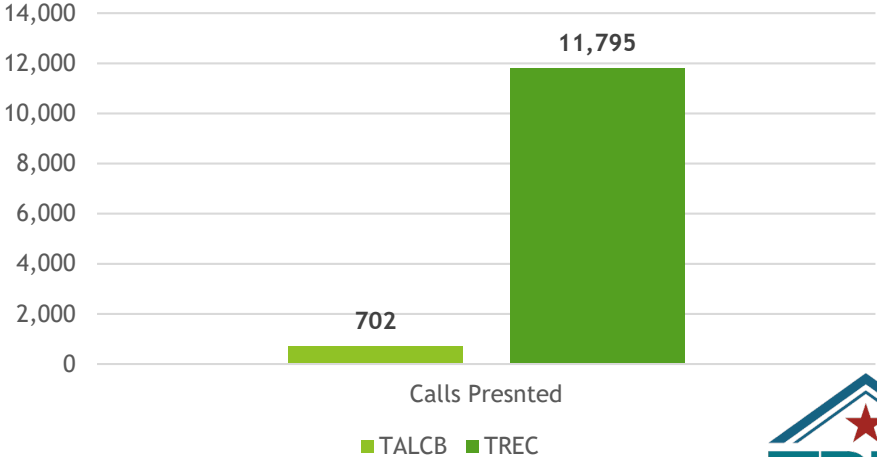
December, 2023 Monthly Report



# December, 2023 Hold Time per Day



## December, 2023 TALCB & TREC

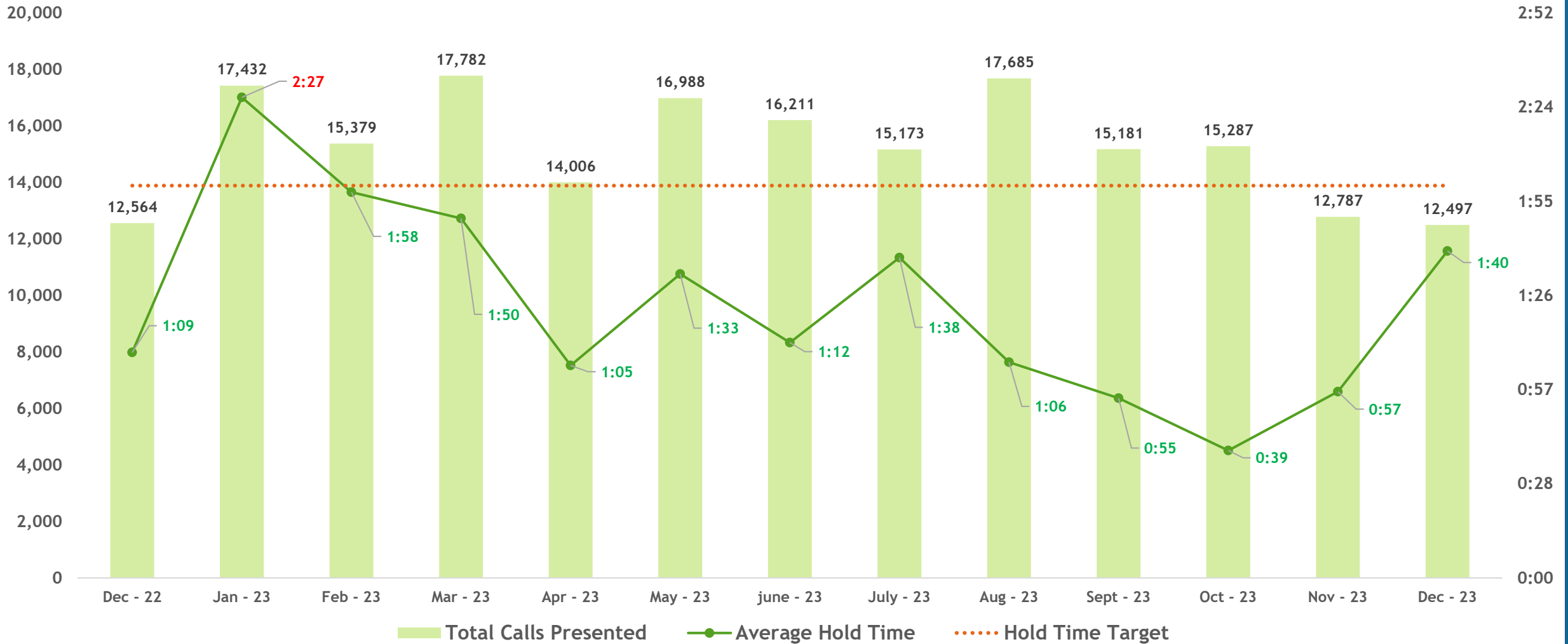


**TALCB - 702 Calls (5.62%) 1 minute, 37 second hold time**  
**TREC - 11,795 Calls (94.38%) 1 minute, 40 second hold time**



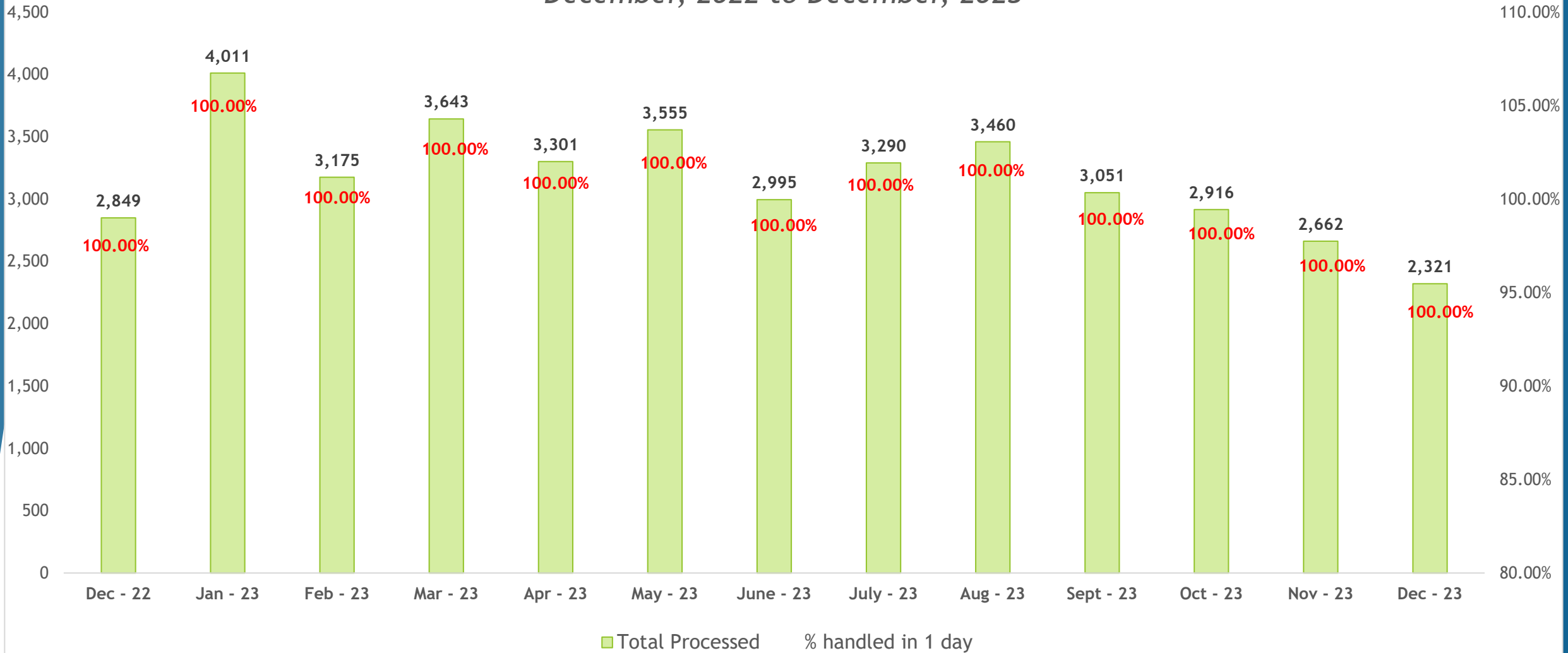
# 13 Month Comparison of Calls Presented vs. Hold Time

## December, 2022 to December, 2023



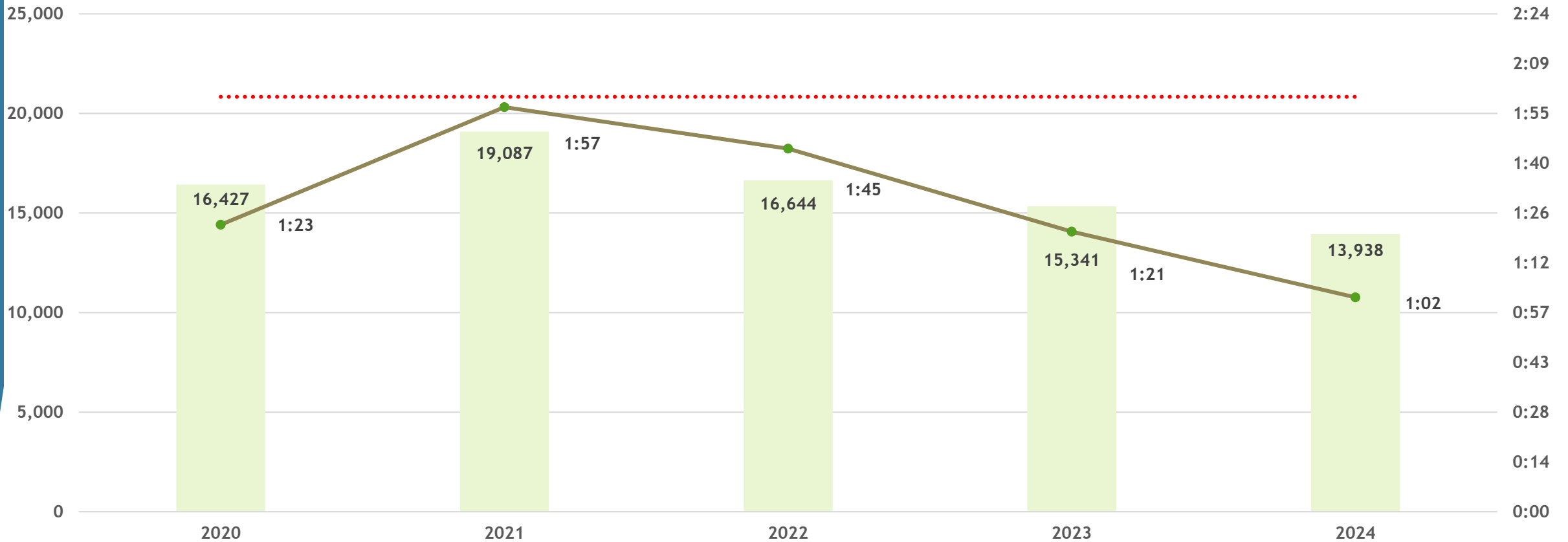
# 13 Month Comparison of Emails Processed

## December, 2022 to December, 2023



# Fiscal Year Comparison

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



■ Avg Calls Presented/Month    ● Avg. Hold Time/Month    ..... Hold Time Goal



# TALCB Education Report

December 2023







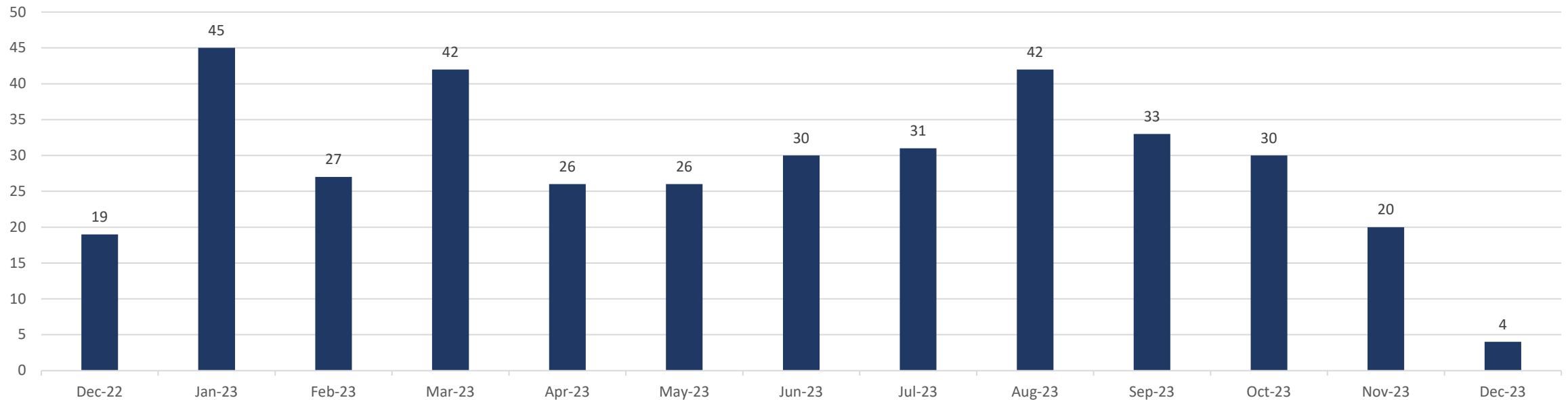
## Education & Examinations Division

### TALCB Applications Approved 13-Month Comparison

	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Initial ACE Provider	0	1	1	0	1	0	0	1	1	0	0	0	0
Renewal ACE Provider	0	0	0	0	0	0	1	1	6	3	3	2	0
<b>All ACE Provider Applications</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>7</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>0</b>

Qualifying Course Acceptance	2	14	2	3	5	3	2	5	3	6	6	3	1
ACE Courses	17	30	24	39	20	23	27	24	32	24	21	15	3
<b>All Course Applications</b>	<b>19</b>	<b>44</b>	<b>26</b>	<b>42</b>	<b>25</b>	<b>26</b>	<b>29</b>	<b>29</b>	<b>35</b>	<b>30</b>	<b>27</b>	<b>18</b>	<b>4</b>

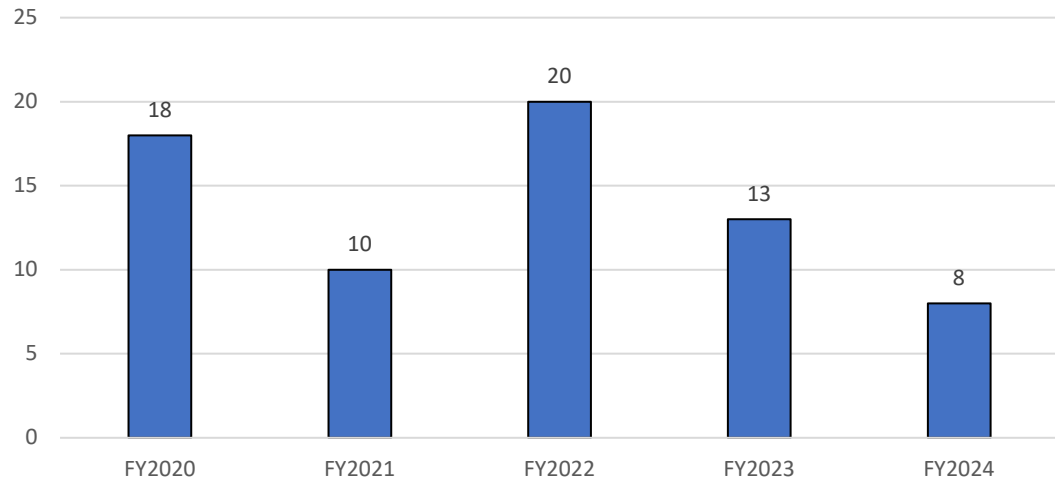
<b>All Applications Approved</b>	<b>19</b>	<b>45</b>	<b>27</b>	<b>42</b>	<b>26</b>	<b>26</b>	<b>30</b>	<b>31</b>	<b>42</b>	<b>33</b>	<b>30</b>	<b>20</b>	<b>4</b>
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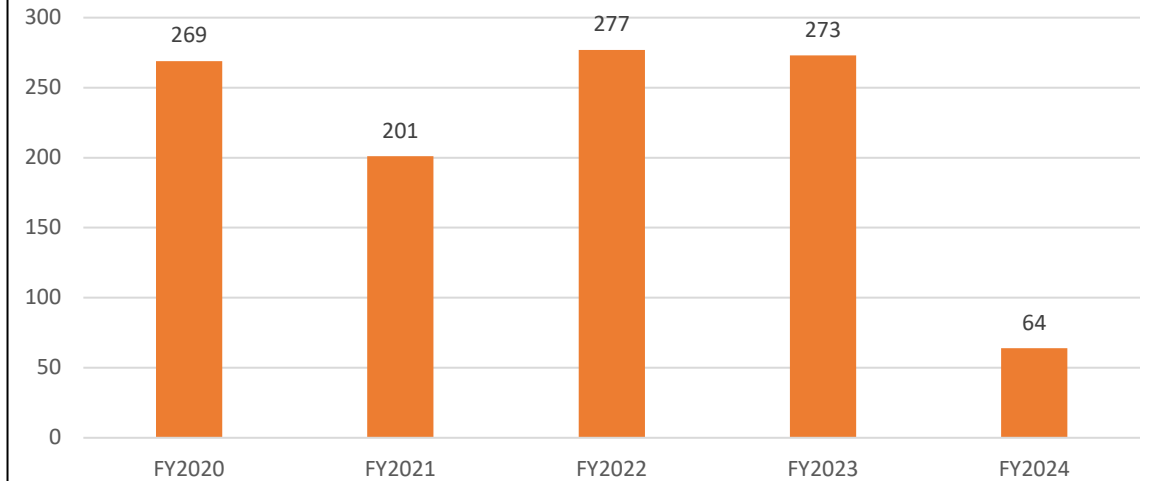
# Education & Examinations Division

## TALCB Total Applications Approved - Fiscal Year

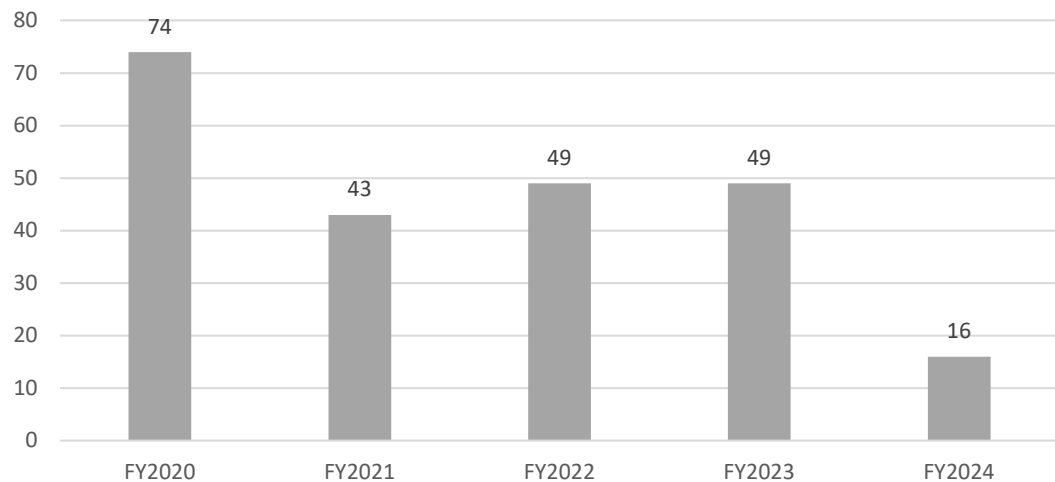
### ACE Providers Approved



### ACE Courses Approved



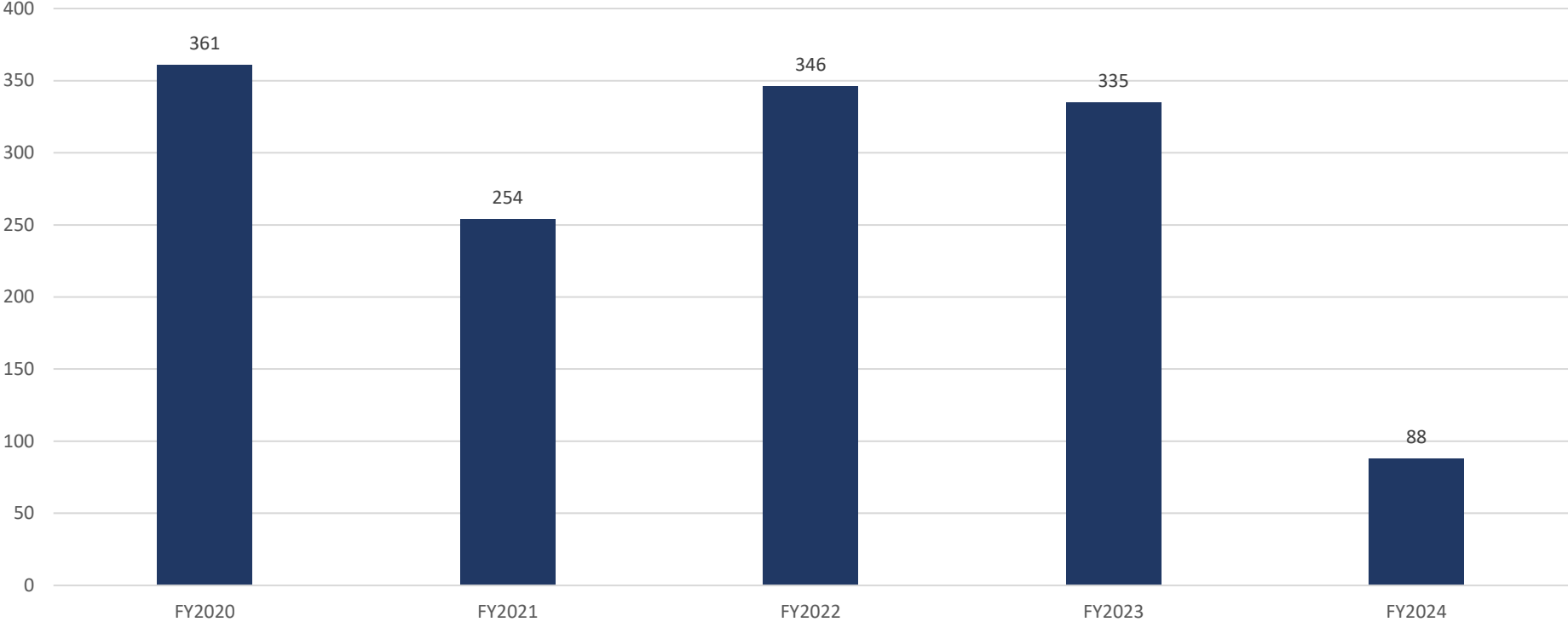
### Qualifying Course Acceptance Approved



# Education & Examinations Division

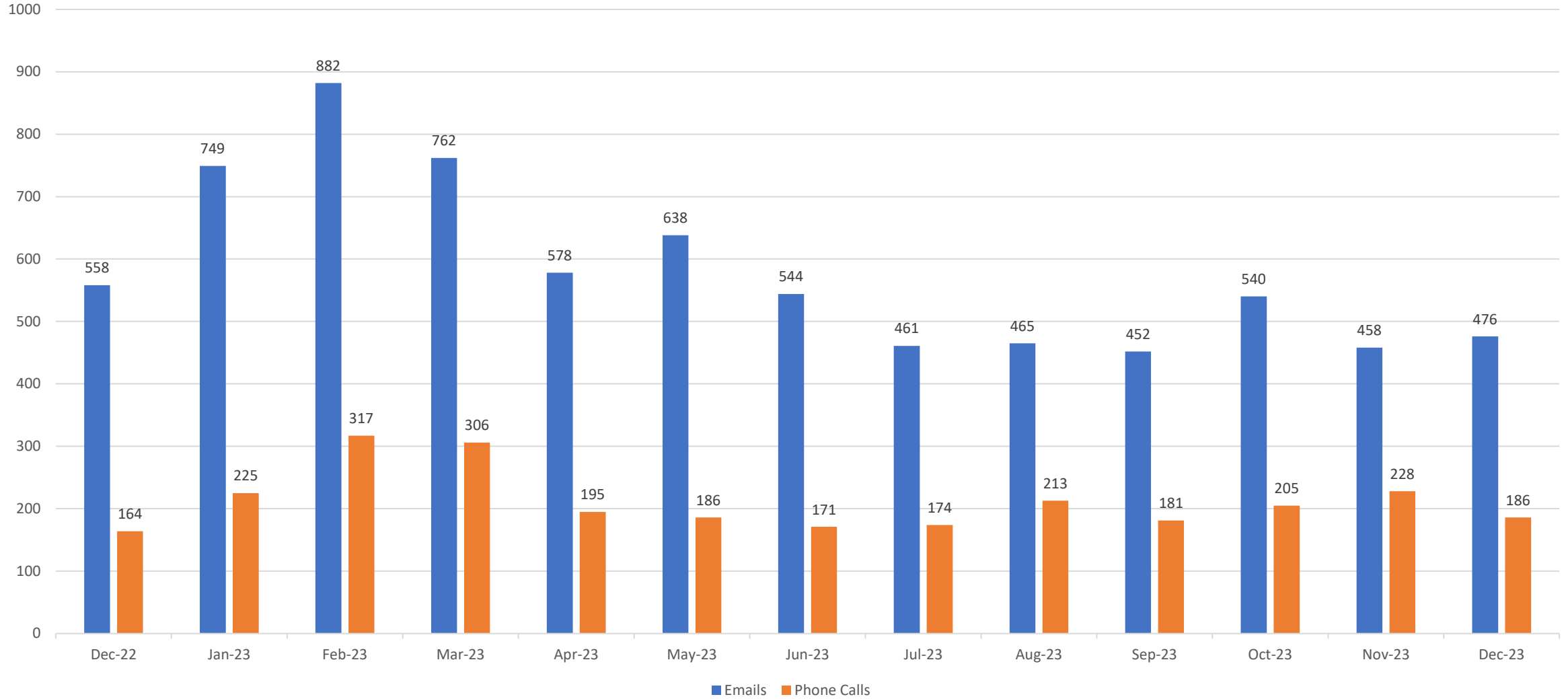
All TALCB Applications Approved

Year-Over-Year Comparison



# Education & Examinations Division

## Email and Phone Call Volume 13-Month Comparison December 2023



**Education & Examinations Division - December 2023**  
**TALCB Examination Activity - Fiscal YTD and Monthly Comparison**

Licensed Residential	First Time Test Takers				Repeat Test Takers				Exams Given <i>(includes repeats)</i>		Unique Applicants Examined	
	Passed	Failed	Total	Pass Rate	Passed	Failed	Total	Pass Rate	Count	Pass Rate	Count	Pass Rate
FYTD 2024	20	13	33	<b>61%</b>	3	21	24	13%	57	40%	40	58%
FYTD 2023	36	20	56	64%	11	18	29	38%	85	55%	64	73%
December 2023	7	3	10	70%	0	8	8	0%	18	39%	15	47%
December 2022	10	5	15	67%	2	8	10	20%	25	48%	21	57%

Certified Residential	First Time Test Takers				Repeat Test Takers				Exams Given <i>(includes repeats)</i>		Unique Applicants Examined	
	Passed	Failed	Total	Pass Rate	Passed	Failed	Total	Pass Rate	Count	Pass Rate	Count	Pass Rate
FYTD 2024	30	24	54	<b>56%</b>	32	23	55	58%	109	57%	73	85%
FYTD 2023	38	9	47	81%	13	19	32	41%	79	65%	58	88%
December 2023	5	3	8	63%	11	6	17	65%	25	64%	21	76%
December 2022	9	1	10	90%	3	6	9	33%	19	63%	17	71%

Certified General	First Time Test Takers				Repeat Test Takers				Exams Given <i>(includes repeats)</i>		Unique Applicants Examined	
	Passed	Failed	Total	Pass Rate	Passed	Failed	Total	Pass Rate	Count	Pass Rate	Count	Pass Rate
FYTD 2024	6	20	26	<b>23%</b>	13	31	44	30%	70	27%	36	53%
FYTD 2023	8	10	18	44%	10	20	30	33%	48	38%	29	62%
December 2023	1	6	7	14%	4	10	14	29%	21	24%	14	36%
December 2022	4	2	6	67%	4	7	11	36%	17	47%	16	50%

# TALCB Licensing Report

Current as of December 31, 2023

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

FISCAL YEAR	END OF MONTH	GENERAL	RESIDENTIAL	LICENSE	TOTAL G.R.L.	G.R.L. CHANGE	TRAINEE	TRAINEE CHANGE	TOTAL	TOTAL CHANGE
2013	Aug13	2,367	2,371	470	5,208		724		5,932	
2014	Aug14	2,386	2,405	453	5,244	36	760	36	6,004	72
2015	Aug 15	2,408	2,415	434	5,257	13	779	19	6,036	32
2016	Aug16	2,426	2,425	416	5,267	10	789	10	6,056	20
2017	Aug17	2,398	2,407	423	5,228	-39	868	79	6,096	40
2018	Aug18	2,384	2,394	435	5,213	-15	938	70	6,151	55
2019	Aug19	2,366	2,412	430	5,208	-5	1,029	91	6,237	86
2020	Aug20	2,371	2,426	421	5,218	10	1,081	52	6,299	62
2021	Aug21	2,324	2,510	470	5,304	86	1,166	85	6,470	171
2022	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
2023	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
	Feb 23	2,370	2,701	650	5,721	26	1,420	-38	7,141	-12
	Mar 23	2,371	2,711	662	5,744	23	1,407	-13	7,151	10
	Apr 23	2,368	2,714	669	5,751	7	1,400	-7	7,151	0
	May 23	2,363	2,719	665	5,747	-4	1,384	-16	7,131	-20
	Jun 23	2,377	2,733	674	5,784	37	1,369	-15	7,153	22
	Jul 23	2,379	2,730	673	5,782	-2	1,350	-19	7,132	-21
	Aug 23	2,388	2,742	675	5,805	23	1,327	-23	7,132	0
2024	Sept 23	2,394	2,756	673	5,823	18	1,311	-16	7,134	2
	Oct 23	2,393	2,766	671	5,830	7	1,284	-27	7,114	-20
	Nov 23	2,397	2,772	673	5,842	12	1,241	-43	7,083	-31
	Dec 23	2,394	2,784	669	5,847	5	1,213	-28	7,060	-23
<b>December 2023</b>										
<b>Inactive Appraisers</b>		GENERAL 49	RESIDENTIAL 47	LICENSE 18	TOTAL 114		TRAINEE 170		TOTAL 284	
<b>Out-of-State Temporary Registrations:</b>									<b>118</b>	
<b>Total All License Holders:</b>									<b>7,462</b>	

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

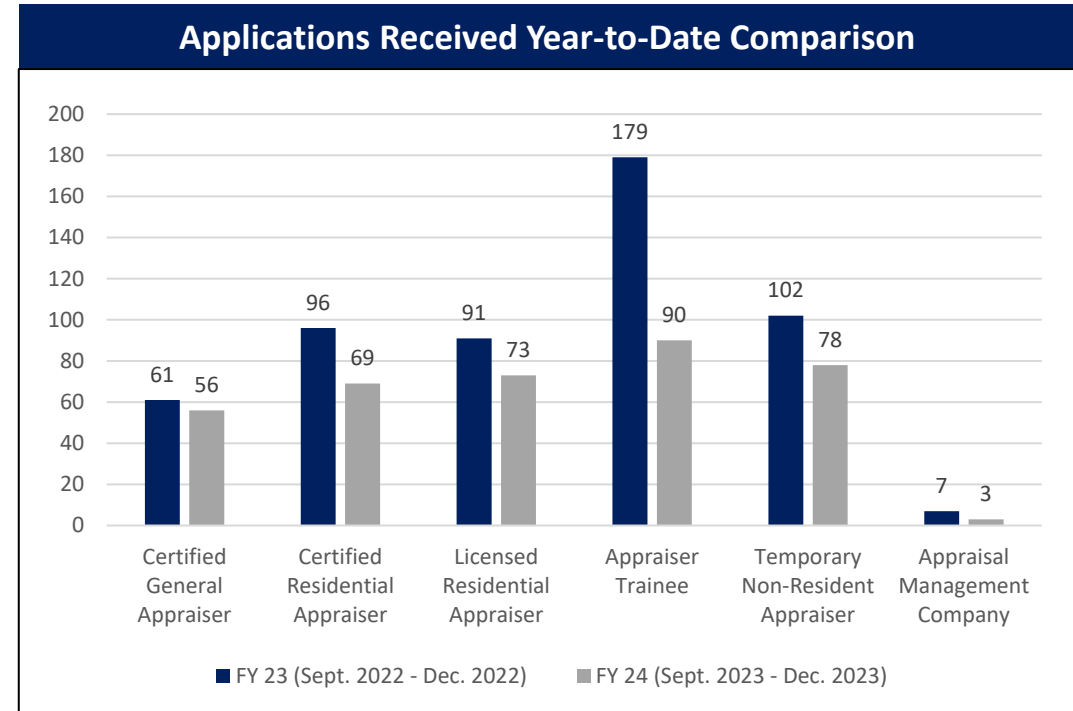
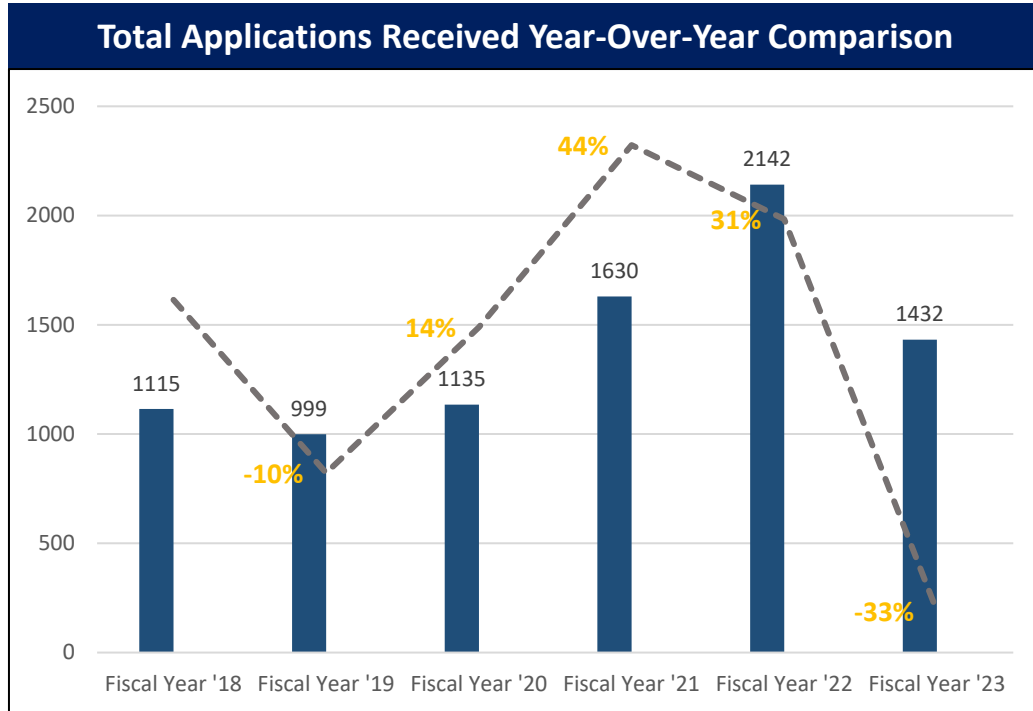
December 2023

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 - Total</b>				
		20	18	112
<b>2023</b>	Sept 22	2	3	3
	Oct 22	3	2	5
	Nov 22	2	1	9
	Dec 22	0	2	0
	Jan 23	1	1	3
	Feb 23	1	0	1
	Mar 23	3	2	3
	Apr 23	3	3	1
	May 23	1	3	7
	Jun 23	3	2	2
	Jul 23	0	1	7
	Aug 23	1	1	2
<b>2023 - Total</b>				
		20	21	43
<b>2024</b>	Sept 23	0	0	1
	Oct 23	0	0	8
	Nov 23	1	0	5
	Dec 23	2	3	2
<b>Registrations issued from March 2012 to December 2023</b>			<b>338</b>	
<b>Registrations Expired &gt; 6 months as of December 2023</b>			<b>-92</b>	
<b>Registrations Expired &lt; 6 months as of December 2023</b>			<b>-4</b>	
<b>Registrations Surrendered</b>			<b>-30</b>	
<b>Registrations Revoked</b>			<b>-3</b>	
<b>Registrations Relinquished</b>			<b>-23</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>176</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%
Fiscal Year 23	182	8	5%



# Applications Received



### Applications Received Month-Over-Month Comparison

	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sept 23	Oct 23	Nov 23	Dec 23
Certified General Appraiser	13	17	17	16	12	25	16	12	19	14	16	13	13
Certified Residential Appraiser	26	23	18	24	28	33	21	19	26	18	14	19	17
Licensed Residential Appraiser	16	18	16	17	15	21	19	18	20	26	20	13	16
Appraiser Trainee	38	46	27	38	33	31	37	32	30	26	25	19	20
Temporary Non-Resident Appraiser	27	16	25	27	13	16	22	20	24	21	17	19	20
Appraisal Management Company	0	1	1	3	3	1	2	0	1	0	0	1	2

# Application Processing Time

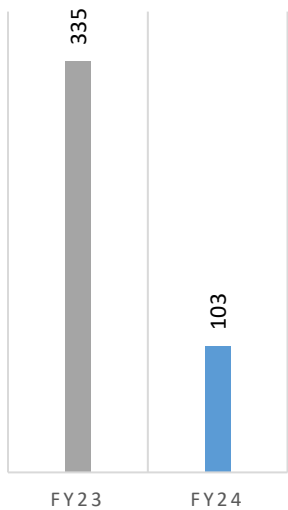
Average Number of Days to Process Applications

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

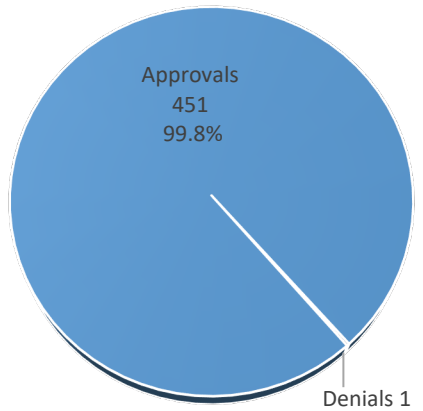
	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sept 23	Oct 23	Nov 23	Dec 23
Certified General Appraiser – Initial & Reinstatement (Goal: 75 days)	52	43	59	49	60	38	40	59	42	40	45	37	45
Certified General Appraiser – Reciprocity (Goal: 14 days)	1	1	2	2	1	2	2	2	1	1	3	1	1
Certified Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	57	57	50	56	56	39	39	52	47	37	35	51	49
Certified Residential Appraiser – Reciprocity (Goal: 14 days)	1	2	1	1	2	2	2	1	1	1	NA	1	1
Licensed Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	54	45	52	47	65	33	26	48	46	34	43	43	44
Licensed Residential Appraiser – Reciprocity (Goal: 14 days)	NA	1	1	NA	1	NA	1	NA	NA	2	1	1	NA
Appraiser Trainee (Goal: 14 days)	3	3	2	2	2	2	3	3	3	4	3	3	3
Temporary Non-Resident Appraiser (Goal: 5 days)	1	2	1	2	1	2	2	2	2	1	2	1	1
Appraisal Management Company (Goal: 14 days)	1	2	NA	2	1	3	6	7	2	NA	NA	NA	2

## Certified and Licensed Residential Experience Audit Summary

Residential audits received



FY23 – 24 Residential Audit Outcome

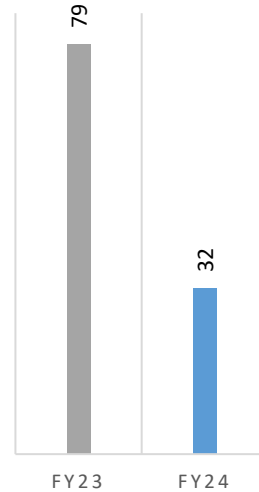


Residential Audit Processing Year-Over-Year

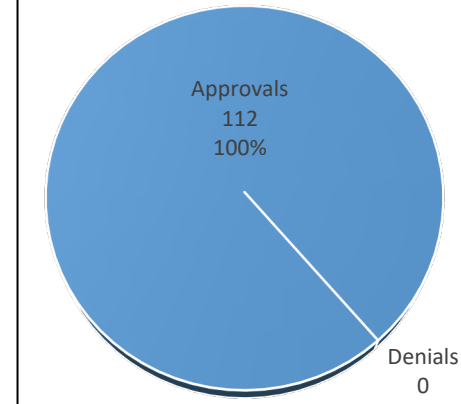
	Closed	Average Processing
Fiscal Year 2019	171	83 Days
Fiscal Year 2020	161	38 Days
Fiscal Year 2021	213	33 Days
Fiscal Year 2022	305	47 days
Fiscal Year 2023	364	45 days
Fiscal Year 2024	107	35 Days

## Certified General Experience Audit Summary

Commercial audits received



FY23 - 24 Commercial Audit Outcome



Commercial Audit Processing Year-Over-Year

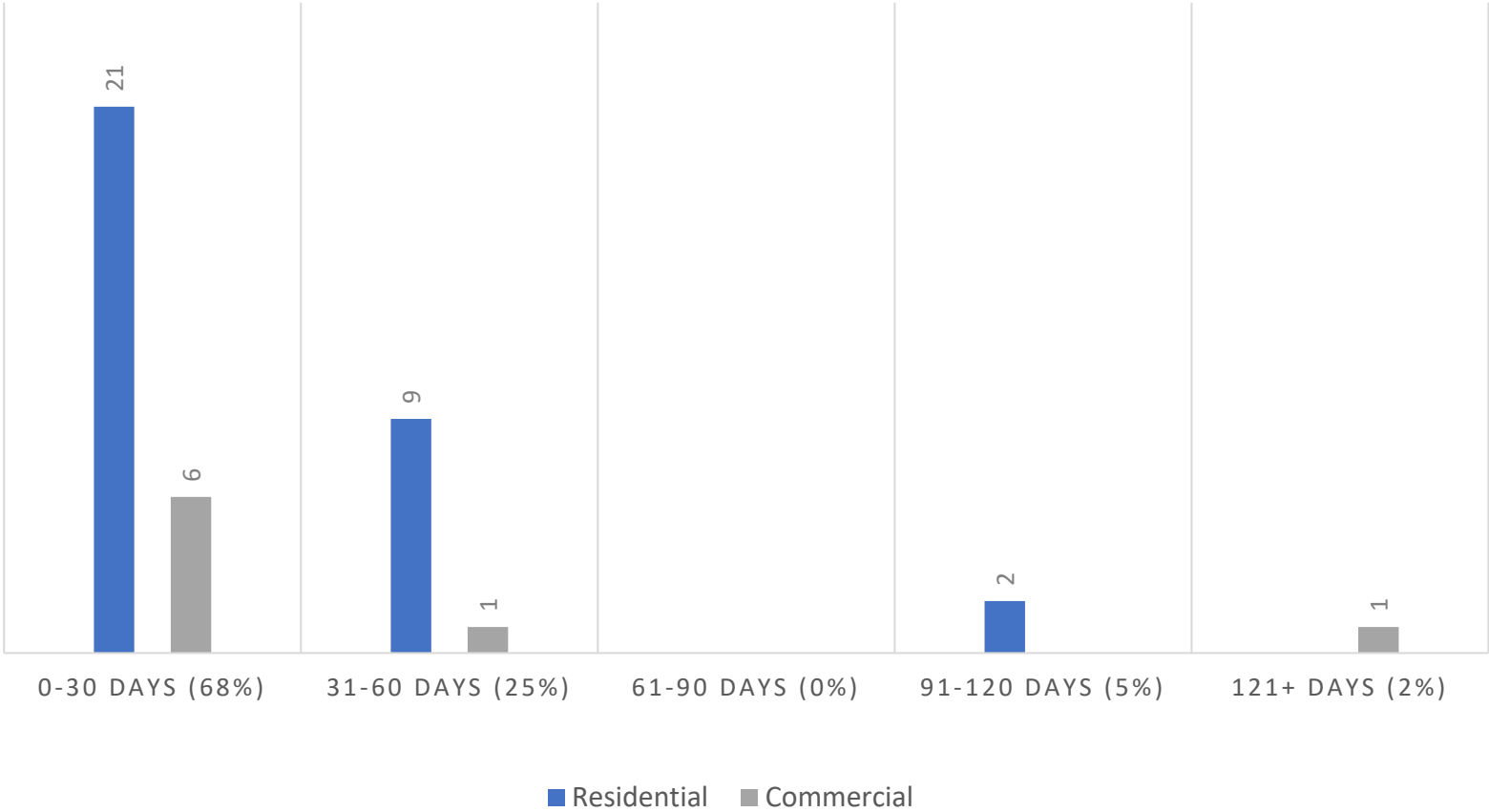
	Closed	Average Processing
Fiscal Year 2019	52	218 Days
Fiscal Year 2020	79	124 Days
Fiscal Year 2021	53	30 Days
Fiscal Year 2022	62	46 Days
Fiscal Year 2023	78	41 days
Fiscal Year 2024	38	37 Days

# Renewal Activity

## Year-to-Date Comparison

	FY 22 (Sept. 2021 - Dec. 2021)		FY 24 (Sept. 2023 - Dec. 2023)		Variance	Percent
	Renewed	% Renewed	Renewed	% Renewed		
Certified General Renewals	313	86.94%	320	85.79%	7	2.24%
Certified Residential Renewals	385	92.55%	412	90.95%	27	7.01%
Licensed Residential Renewals	65	81.25%	68	68.69%	3	4.62%
Appraiser Trainee Renewals	78	60.47%	103	46.82%	25	32.05%

# Open Experience Audit Snapshot



There are 3 audits over 60 days. Each of these are pending the applicant.

**Financial Services Division**  
**TALCB Budget Status Report**  
**December 2023 - Fiscal Year 2024**

Expenditure Category	Beginning Balance FY2024	Expenditures	Remaining Balance	Budget % Remaining	8/12 = 66.67% Comments
Actual Beginning Balance	\$3,591,965		\$3,591,965		includes Trust cash balances as of 8/31/2023
Operating Reserves	(\$830,115)		(\$830,115)		
<b>Available balance within Texas Treasury Safekeeping Trust</b>	<b>\$2,761,850</b>		<b>\$2,761,850</b>		remaining available budget to consider to balance FY2024 budget
Salaries & Wages	\$1,442,627	\$486,299	\$956,328	66.3%	
Other Personnel Costs	486,946	146,920	\$340,026	69.8%	
Professional Services	205,751	2,674	\$203,077	98.7%	Training services for staff, SOAH & OAG contracts, contractor support for contingency plan, appraiser reviewers, and O365 items not expended as of this date
Consumables	2,000	123	\$1,877	93.9%	Consumable expense not utilized due to staff working from home.
Utilities	201	0	\$201	100.0%	Shredding services not utilized due to staff working from home.
Travel	42,000	8,505	\$33,495	79.7%	
Rent - Building - Other	21,276	19,409	\$1,867	8.8%	Payment for annual office lease processed in October.
Rent - Equipment	1,643	236	\$1,407	85.6%	Lease cost for copiers not expended as of this date
Other Operating Expense	113,384	26,817	\$86,567	76.3%	
<b>Subtotal -Operations Expenditures</b>	<b>2,315,828</b>	<b>690,982</b>	<b>1,624,846</b>	<b>70.2%</b>	
DPS Criminal History Background Checks	2,500	192	2,308	92.3%	
Statewide Cost Allocation Plan (SWCAP)	30,928	0	30,928	100.0%	SWCAP Allocation has not been distributed as of report date.
Contribution to General Revenue	22,500	7,500	15,000	66.7%	
<b>Subtotal - Nonoperational Expenditures</b>	<b>55,928</b>	<b>7,692</b>	<b>48,236</b>	<b>86.2%</b>	
<b>Total Expenditures and GR Contribution</b>	<b>2,371,756</b>	<b>698,674</b>	<b>1,673,082</b>	<b>70.5%</b>	
Revenue	FY2024 Projected Revenue	Revenue Collected	Revenue Remaining to be Collected	Revenue % Remaining to be Collected	Comments
License Fees	\$1,813,645	\$552,043	\$1,261,602	69.6%	
AMCs	851,960	99,525	\$752,435	88.3%	
ACE Program Revenue	19,310	5,205	\$14,105	73.0%	
Examination fees	6,990	1,990	\$5,000	71.5%	
Other Miscellaneous Revenue	34,000	16,811	\$17,189	50.6%	
TALCB ASC grant	0		\$0	0.0%	
<b>Total Revenue</b>	<b>\$2,725,905</b>	<b>\$675,574</b>	<b>\$2,050,331</b>	<b>75.2%</b>	
<b>Operating Gains/ Losses</b>	<b>\$354,149</b>	<b>(\$23,101)</b>	<b>\$331,048</b>	<b>93.5%</b>	
<b>Restricted Education Reserve Fund Carryforward</b>	<b>\$1</b>				
<b>Revenue Over/(Under) Expenditures &amp; Transfers</b>	<b>\$3,116,000</b>	<b>(\$23,101)</b>	<b>\$3,139,100</b>		

## Financial Services Division

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

**December 2023**

Purchase Date	Par Value	Purchase Price	Beginning Market Value	Additions Changes	Ending Market Value	Accrued Interest	Description	Maturity Date
06/15/2023	1,032,000.00	982,342.05	1,004,990.63	4,756.87	1,009,747.50	119.84	U.S. T-Notes, .250	06/15/2024
12/15/2022	643,000.00	615,270.63	641,995.31	(641,995.31)	0.00	0.00	U.S. T-Notes, .125	12/15/2023
03/24/2023	122,000.00	117,496.90	120,279.61	595.70	120,875.31	90.49	U.S. T-Notes, .250	03/15/2024
09/15/2023	635,000.00	604,068.55	611,361.13	3,894.34	615,255.47	706.52	U.S. T-Notes, .375	09/15/2024
12/15/2023	635,000.00	611,013.87	0.00	612,750.20	612,750.20	294.95	U.S. T-Notes, .100	12/15/2024
<b>Totals</b>	<b>\$ 3,067,000.00</b>	<b>\$ 2,930,192.00</b>	<b>\$ 2,378,626.68</b>	<b>\$ (19,998.20)</b>	<b>\$ 2,358,628.48</b>	<b>\$ 1,211.80</b>		

### Monthly Activity

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

<b>Beginning Cash Available Balance</b>	\$	1,063,641.81			
<b>Current Month Receipts</b>	\$	812,776.47			
<b>Current Month Disbursements</b>	\$	<u>(789,549.93)</u>			
<b>Total Cash</b>	\$	<b>1,086,868.35</b>			
<b>Investment Ending Market Value</b>			\$	<b>2,358,628.48</b>	
<b>Total Account Balance</b>				<b>3,445,496.83</b>	
<b>Operating Reserves</b>				<b>(830,115.00)</b>	
<b>Ending Balance Available for Operations</b>	\$			<b>2,615,381.83</b>	

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

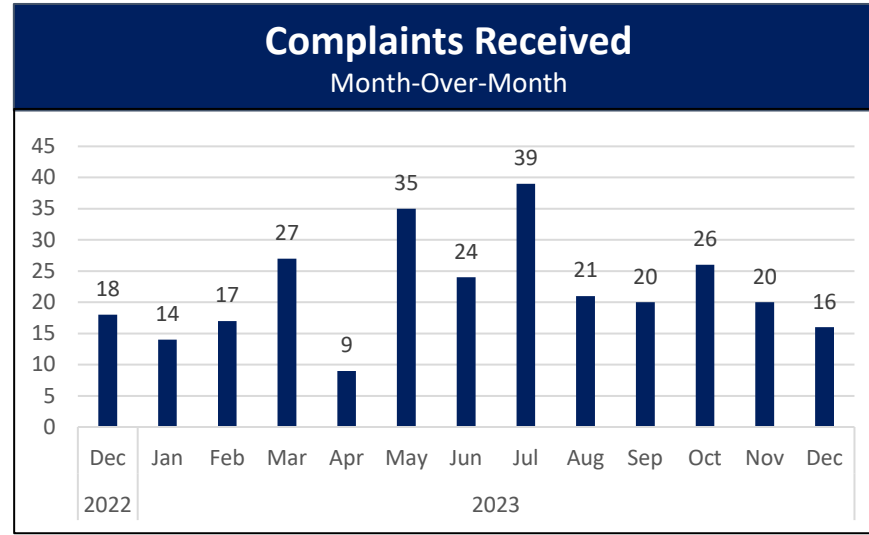
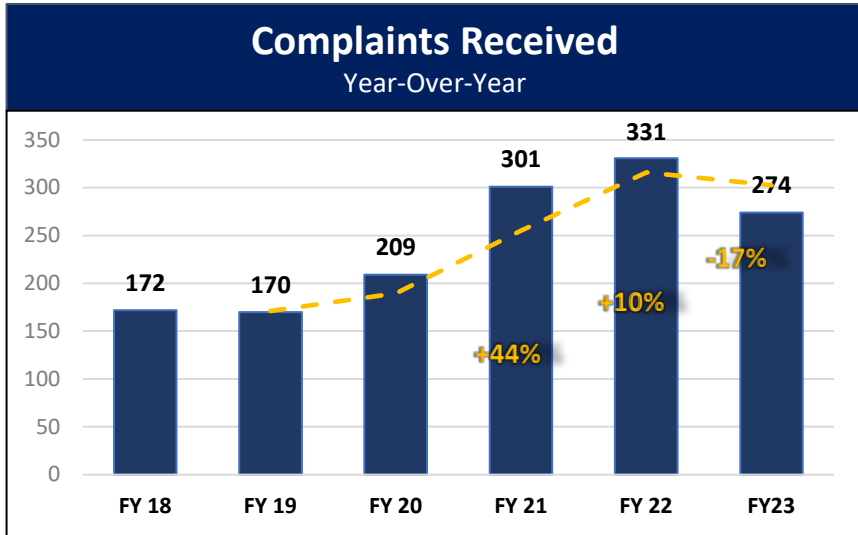
*Kemya Dean*

Kemya Dean, Alternate Investment Officer

# TALCB Enforcement Report

Current as of December 31, 2023

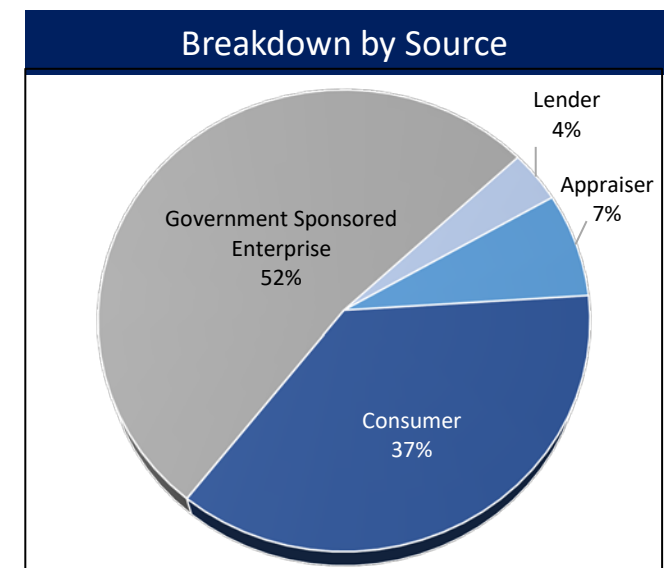
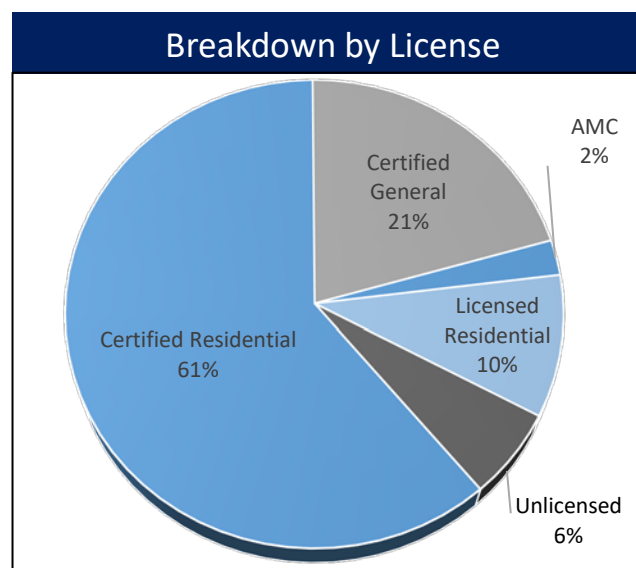
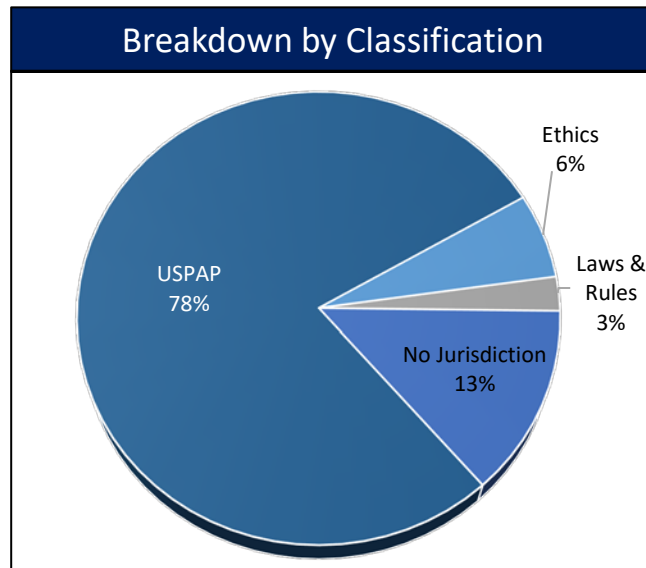
# Complaints Received



### Fiscal Year 2024 Summary

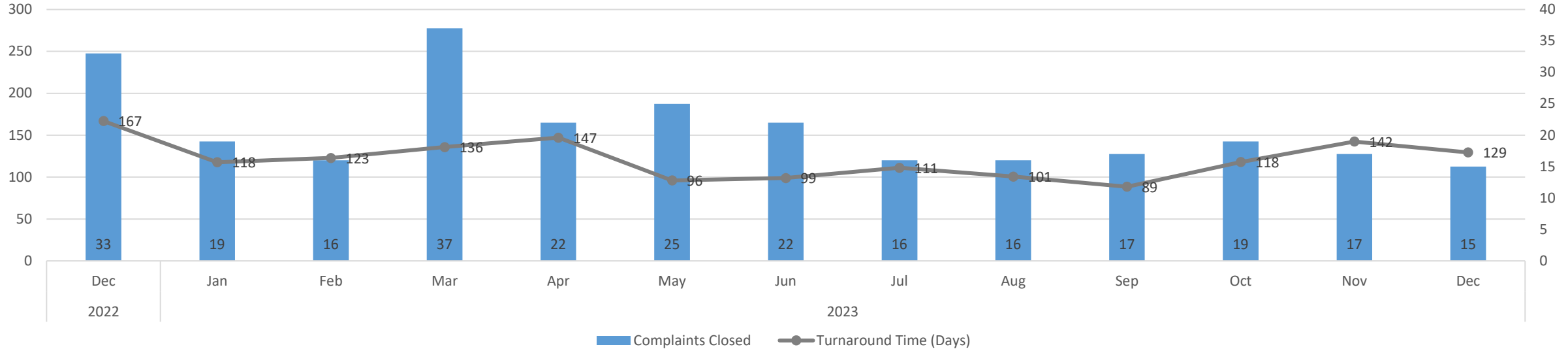
82	Complaints Received
78	Respondents
<1%	License Holders Receive a Complaint

## Fiscal Year 2024 Complaints Received by Category



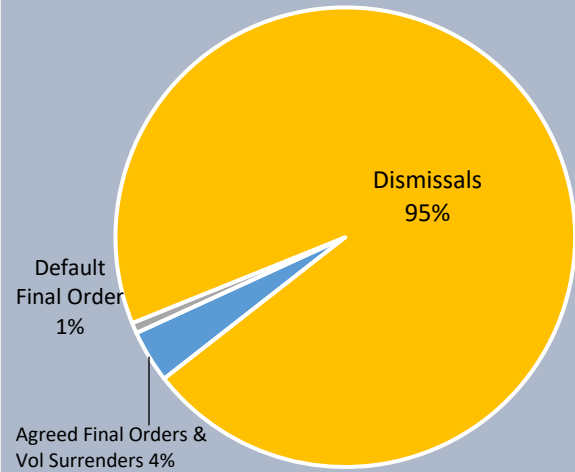


# Complaint Resolution

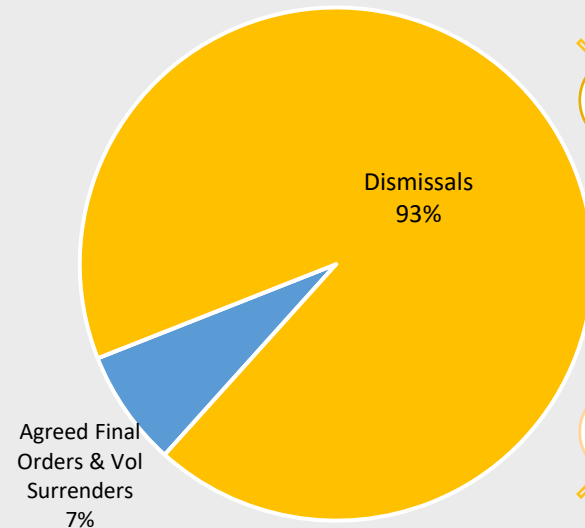


## FY23 Complaint Outcome

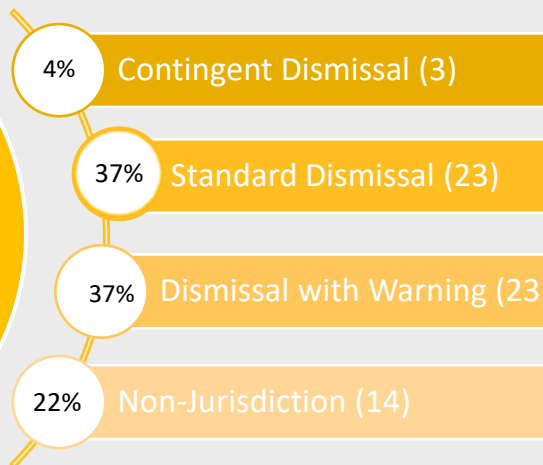
269 Complaints Resolved



## FY24 Complaint Outcome



## FY24 Dismissal Breakdown



## Fiscal Year 2024 Summary

68

Complaints Resolved

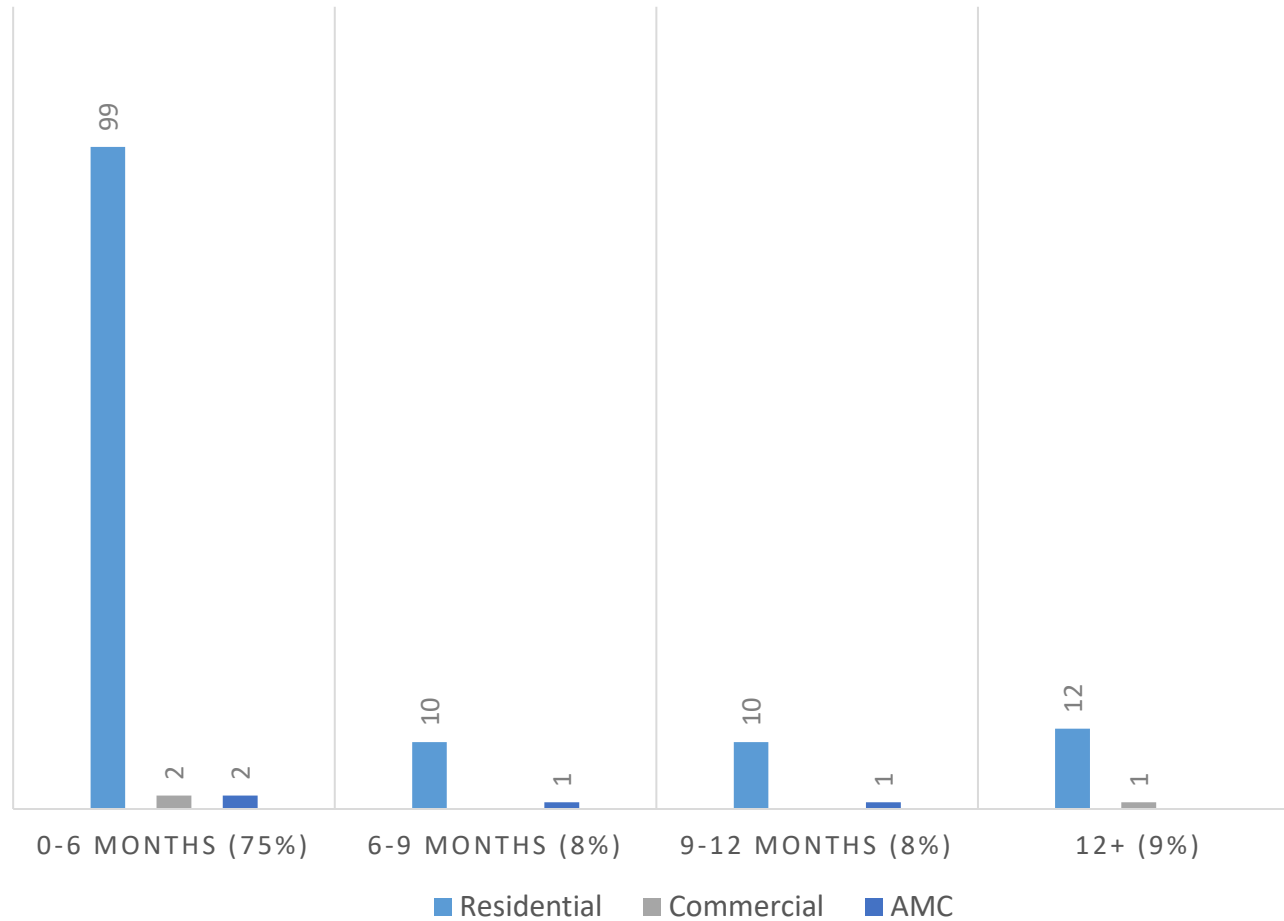
119 Days

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

<1%

License holders receive discipline

# Open Complaint Snapshot



## Open Complaint Data

**138** Open Complaints

**18** Cases Abated

- 13 pending litigation
- 5 pending Texas Workforce Commission Civil Rights Division Review

**13** Cases Over 1 Year Old

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

- 11 cases involving abatements
- 2 complex case involving multiple reports/multiple information requests