



Staff Reports for March 2023

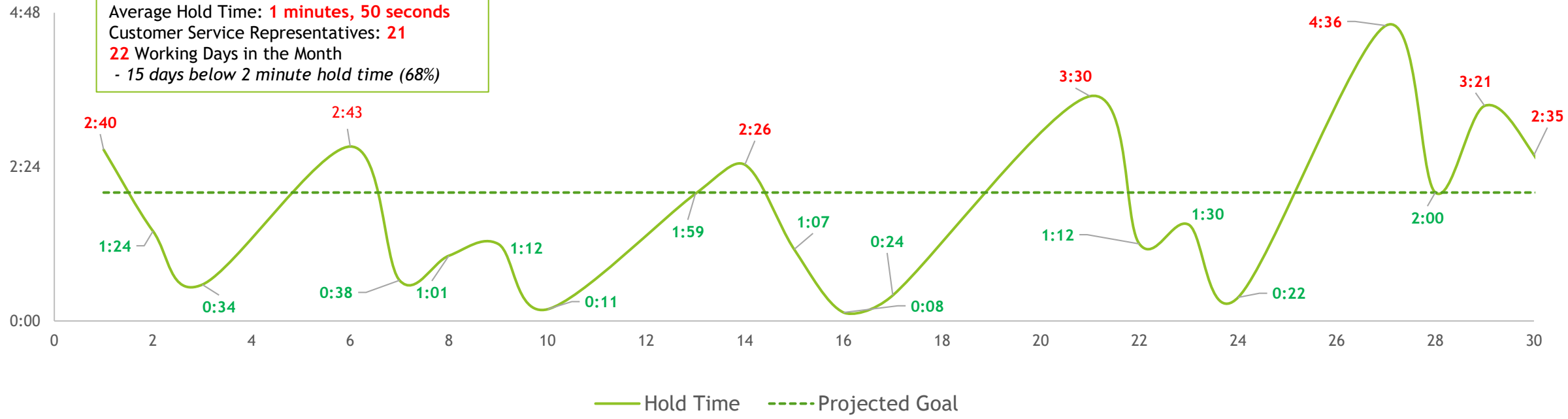
Customer Relations Division

March, 2023 Monthly Report

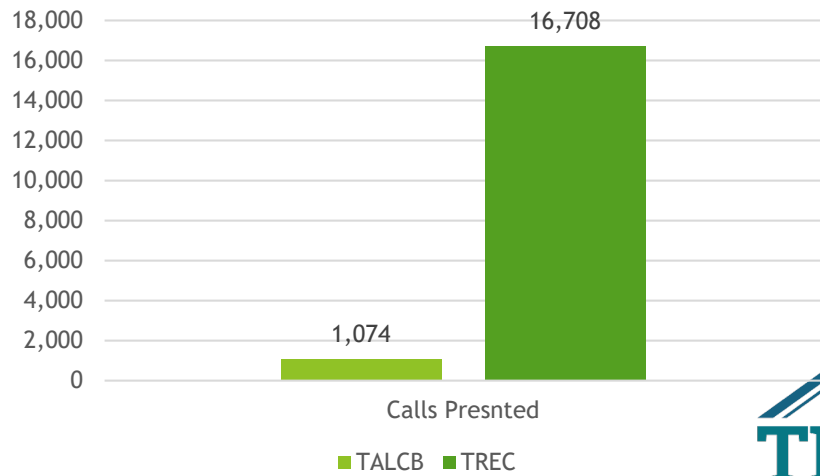


March, 2023 Hold Time per Day

Calls Presented in March: **17,782**
 Average Hold Time: **1 minutes, 50 seconds**
 Customer Service Representatives: **21**
22 Working Days in the Month
 - 15 days below 2 minute hold time (68%)



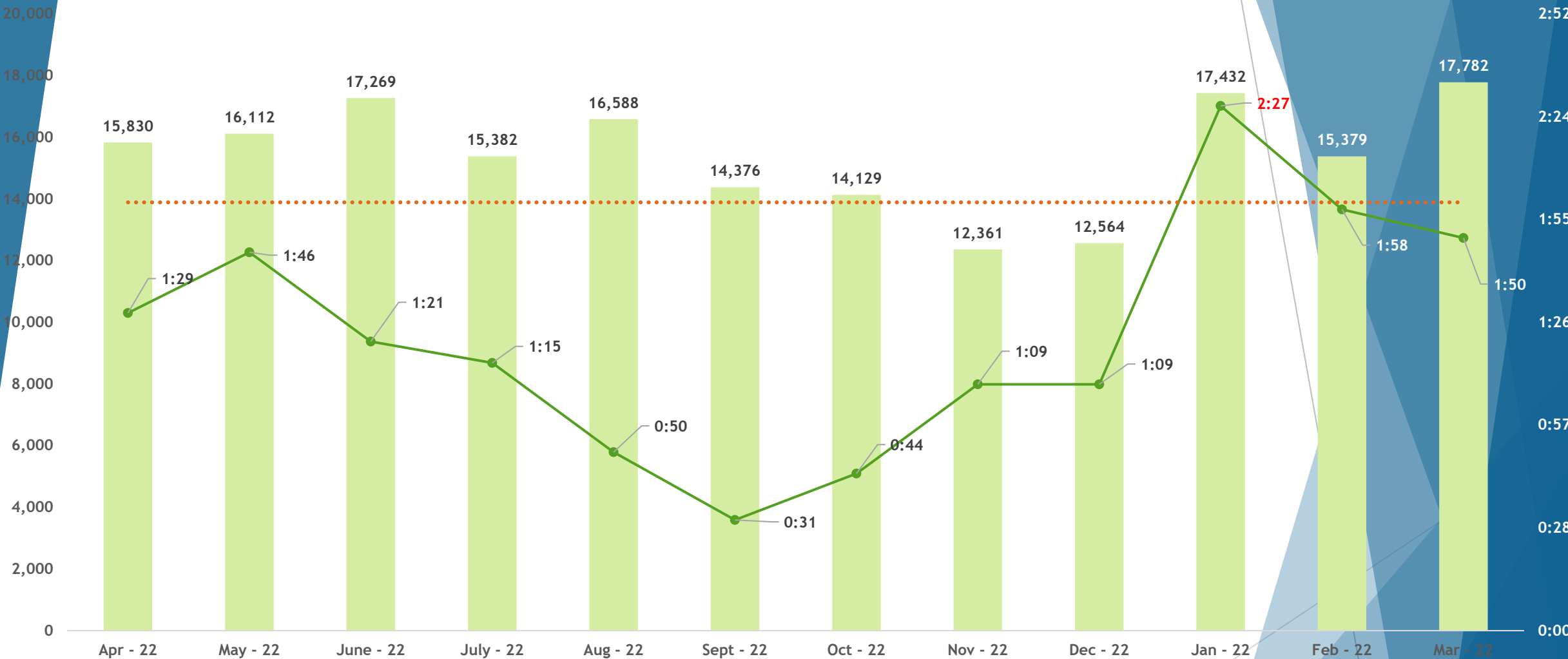
March, 2023



TALCB - 1074 Calls (6.04%) **1 minute, 14 second hold time**
 TREC - 16,708 Calls (93.96%) **1 minute, 53 second hold time**



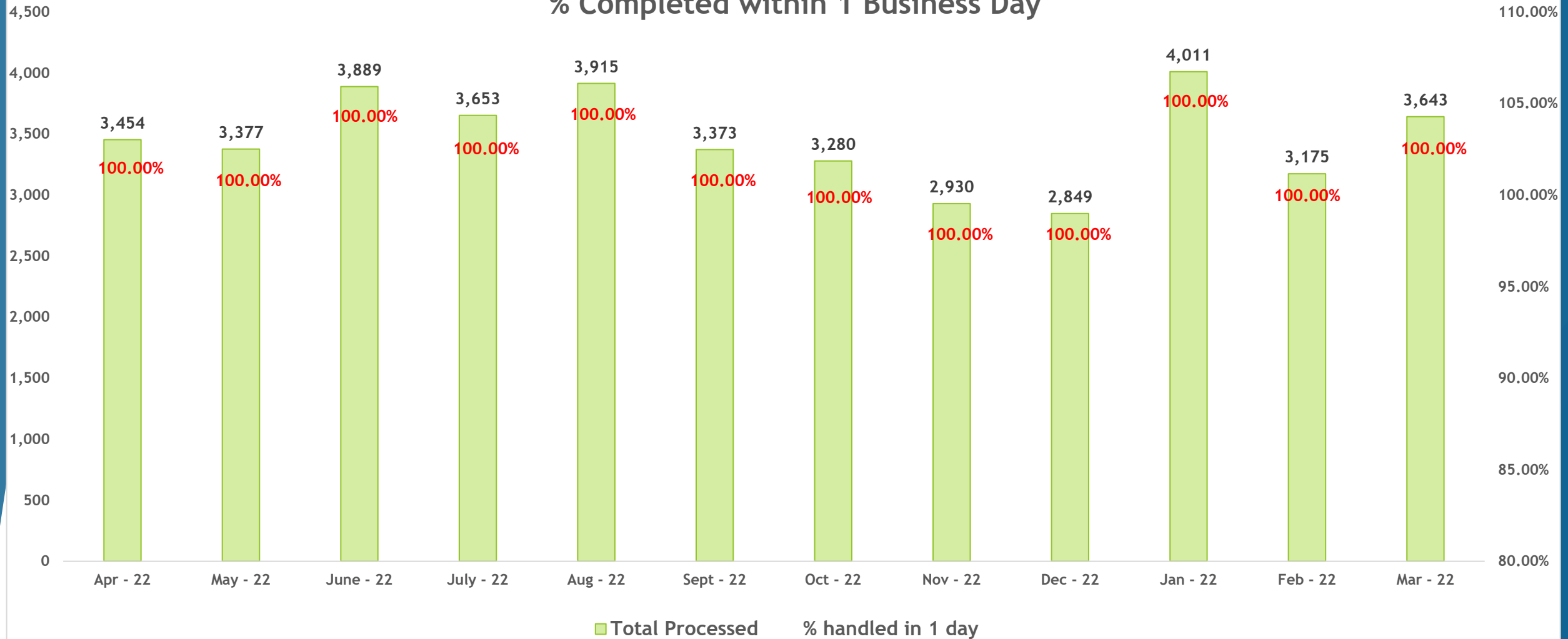
Last 12 Months: Calls Presented vs. Hold Time



Total Calls Presented
 Average Hold Time
 Hold Time Target

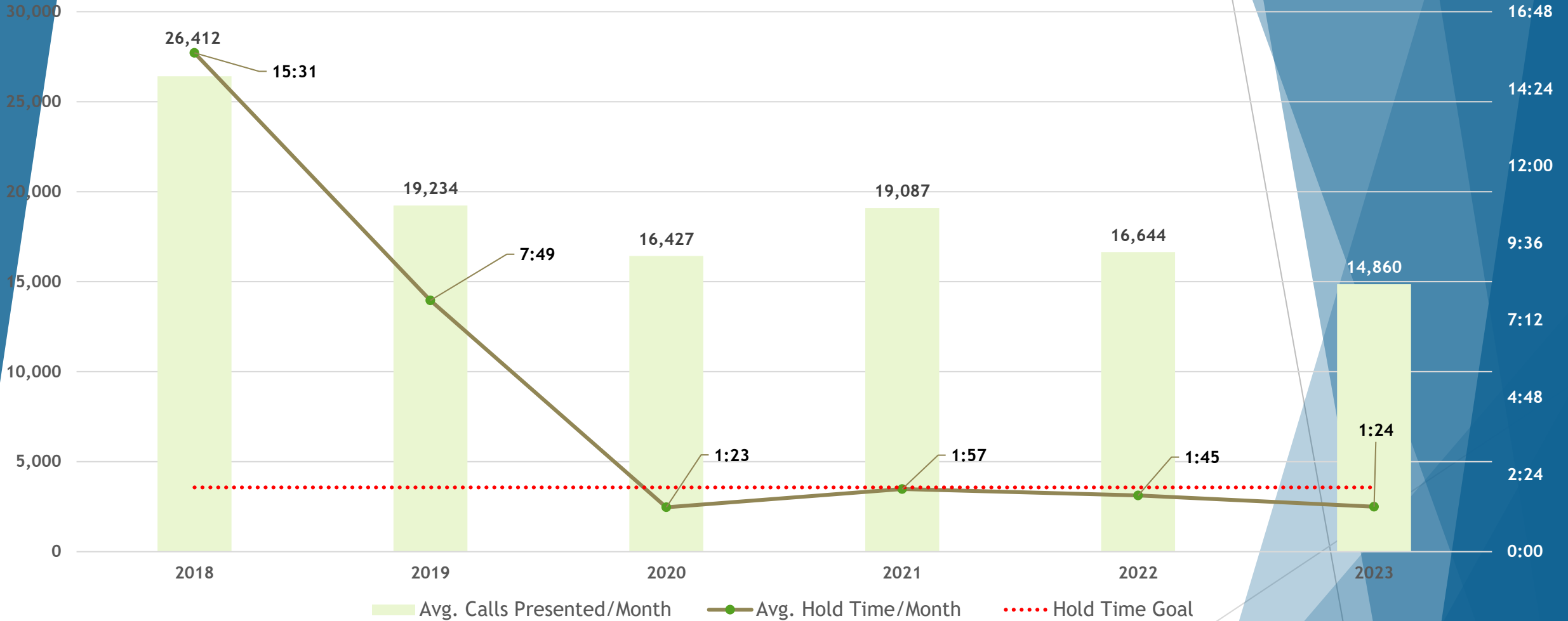


Last 12 Months: Emails Processed and % Completed within 1 Business Day



Fiscal Year Comparison

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



TALCB Education Report

March 2023



Education & Examination Services
TALCB Provider and Course Applications

FY2023

	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	YTD
Applications Received													
Initial ACE Provider	1	0	0	1	0	0	0						2
Renewal ACE Provider	0	0	0	0	0	0	0						0
Initial ACE Elective Course	15	13	14	13	12	27	17						111
Classroom Delivery	6	10	8	9	10	16	13						72
Online Delivery	9	3	6	4	2	11	4						39
Renewal ACE Elective Course	2	5	5	7	13	7	8						47
Classroom Delivery	0	2	0	3	6	4	3						18
Online Delivery	2	3	5	4	7	3	5						29
Qualifying Course Acceptance	0	2	3	5	11	2	5						28
Classroom Delivery	0	0	1	4	9	0	4						18
Online Delivery	0	2	2	1	2	2	1						10
Total Applications Received	18	20	22	26	36	36	30						188
	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	YTD
Applications Approved													
Initial ACE Provider	0	0	0	0	1	1	0						2
Renewal ACE Provider	0	0	0	0	0	0	0						0
Initial ACE Elective Course	7	12	10	13	18	17	28						105
Classroom Delivery	5	9	10	8	13	14	14						73
Online Delivery	2	3	0	5	5	3	14						32
Renewal ACE Elective Course	2	4	2	4	12	7	11						42
Classroom Delivery	0	1	1	0	5	4	5						16
Online Delivery	2	3	1	4	7	3	6						26
Qualifying Course Acceptance	0	3	7	2	14	2	3						31
Classroom Delivery	0	0	2	1	12	0	2						17
Online Delivery	0	3	5	1	2	2	1						14
Total Applications Approved	9	19	19	19	45	27	42						180

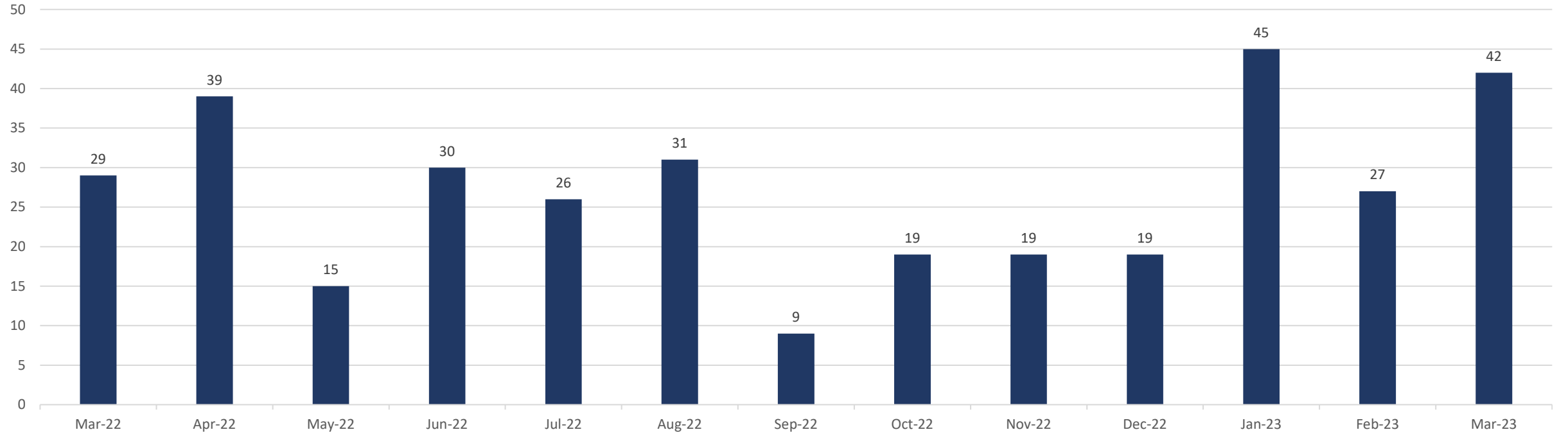
Education & Examinations Division

TALCB Applications Approved 13-Month Comparison

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

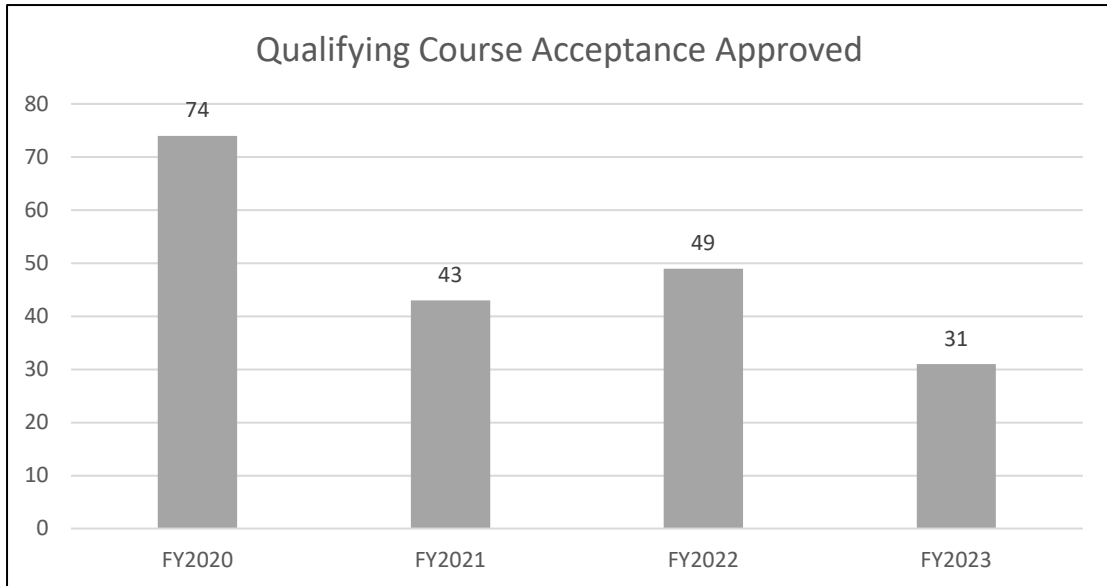
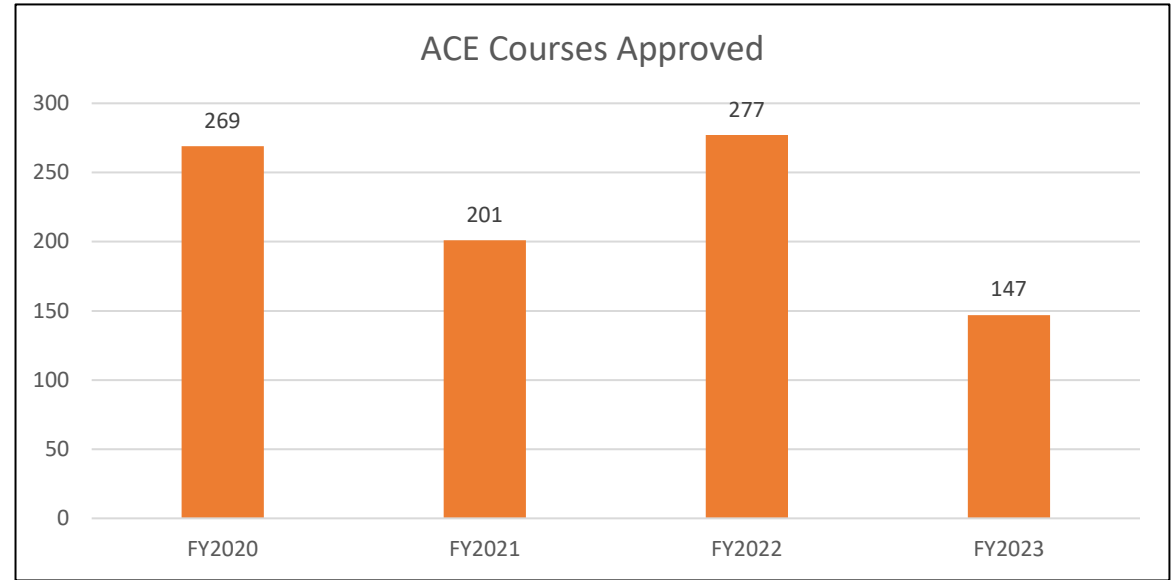
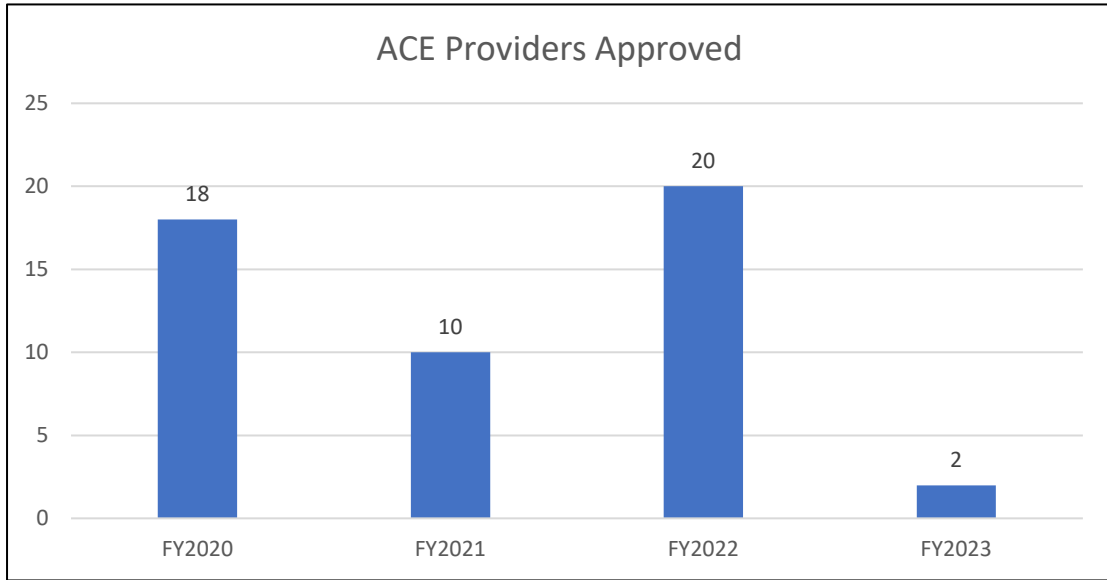
Qualifying Course Acceptance	7	5	2	8	3	3	0	3	7	2	14	2	3
ACE Courses	20	32	12	21	22	28	9	16	12	17	30	24	39
All Course Applications	27	37	14	29	25	31	9	19	19	19	44	26	42

All Applications Approved	29	39	15	30	26	31	9	19	19	19	45	27	42
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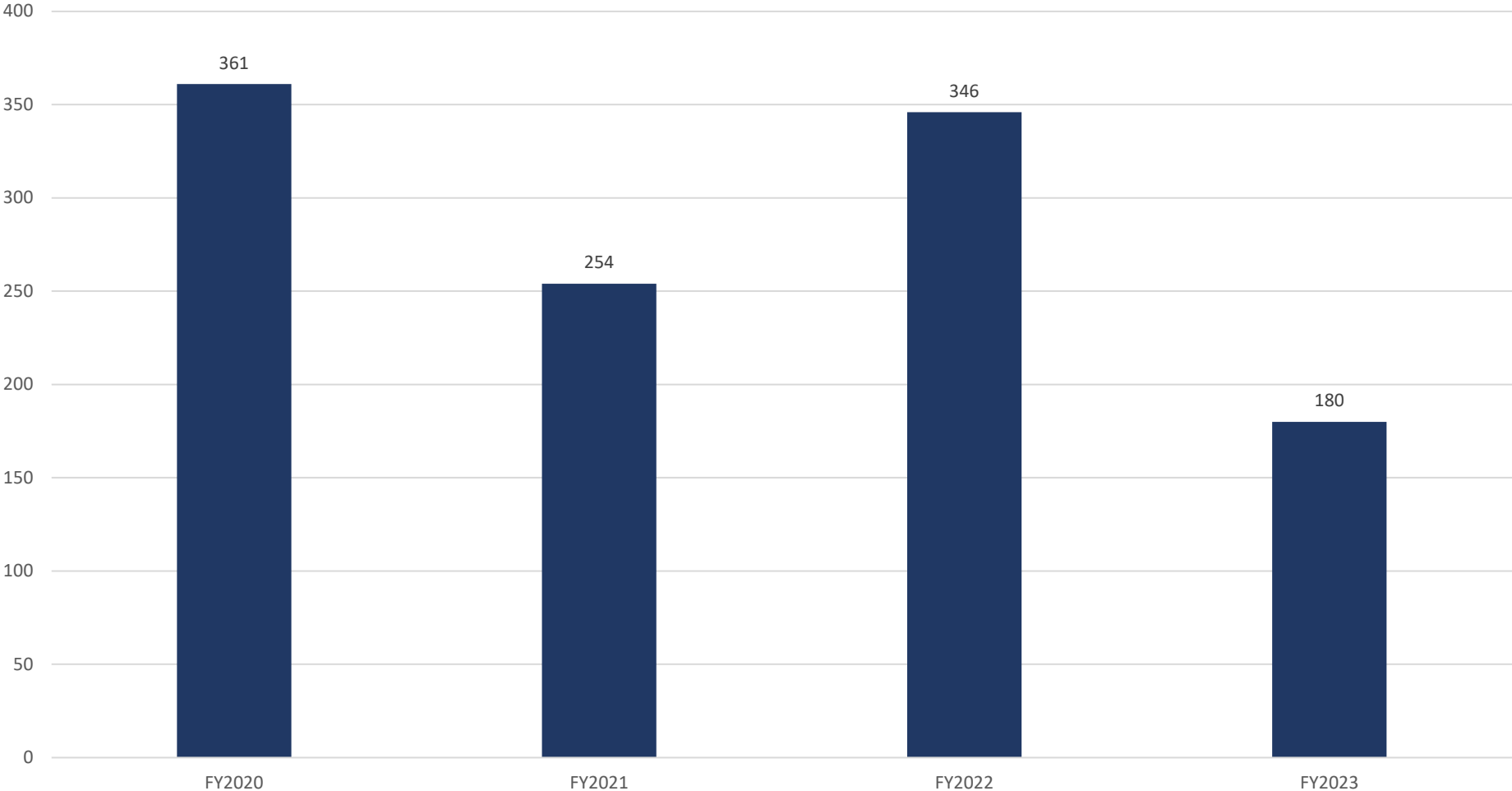
Education & Examinations Division

TALCB Total Applications Approved - Fiscal Year



Education & Examinations Division

All TALCB Applications Approved
Year-Over-Year Comparison



TALCB Licensing Report

Current as of March 31, 2023

TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD
ACTIVE CERTIFICATIONS AND LICENSES
 March 2023

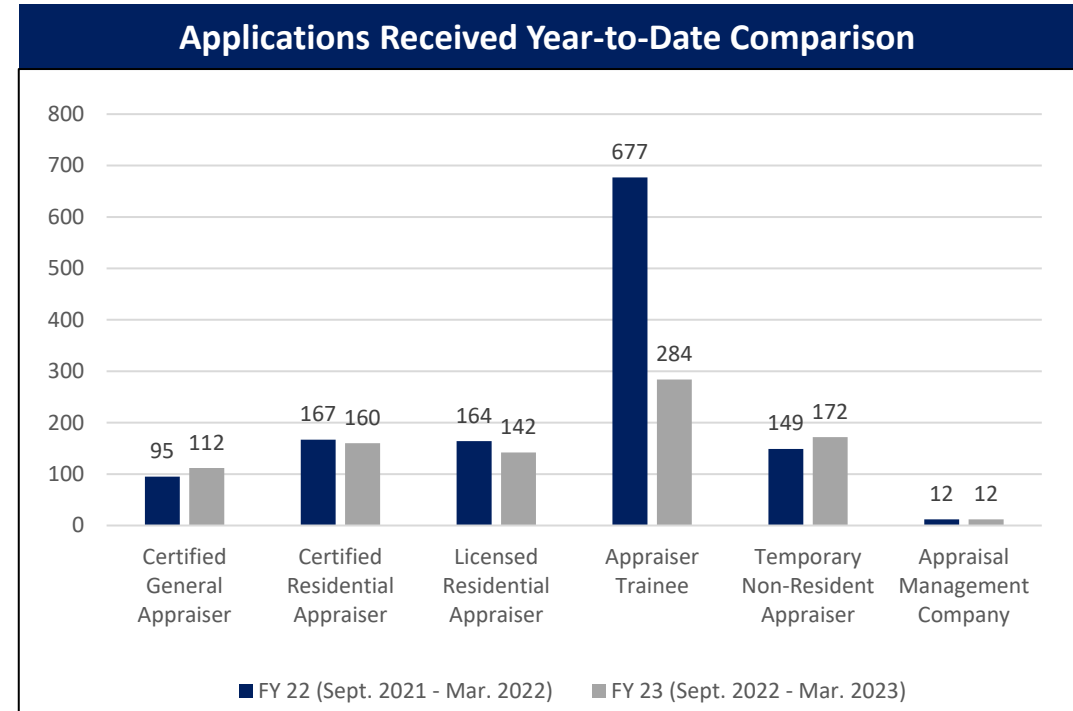
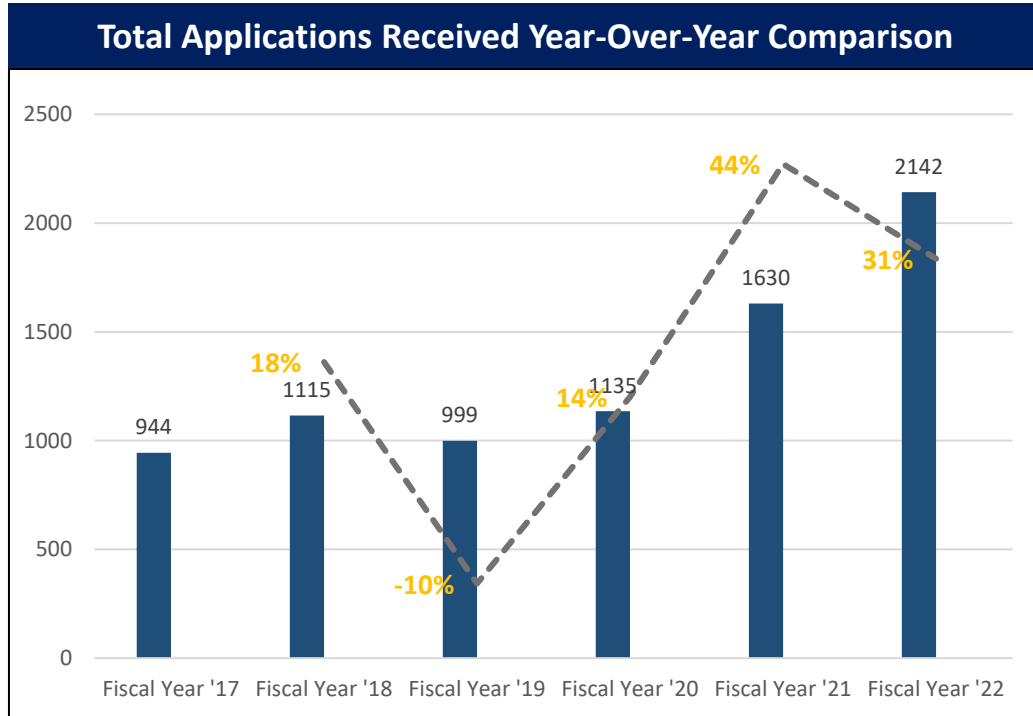
FISCAL YEAR	END OF MONTH	GENERAL	RESIDENTIAL	LICENSE	TOTAL G.R.L.	G.R.L. CHANGE	TRAINEE	TRAINEE CHANGE	TOTAL	TOTAL CHANGE
2013	Aug13	2,367	2,371	470	5,208		724		5,932	
2014	Aug14	2,386	2,405	453	5,244	36	760	36	6,004	72
2015	Aug 15	2,408	2,415	434	5,257	13	779	19	6,036	32
2016	Aug16	2,426	2,425	416	5,267	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	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
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
March 2023										
Inactive Appraisers		GENERAL 53	RESIDENTIAL 48	LICENSE 15	TOTAL 116		TRAINEE 161		TOTAL 277	
Out-of-State Temporary Registrations:									151	
Total All License Holders:									7,579	

TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD
APPRAISAL MANAGEMENT COMPANY REGISTRATIONS
 March 2023

FISCAL YEAR	MONTH	Total Apps Received	Total AMC Registrations Issued	Total AMC Renewals Issued
2015 - Total		16	15	17
2016 - Total		10	11	128
2017 - Total		16	15	21
2018 - Total		12	12	121
2019 - Total		8	9	25
2020 - Total		14	15	107
2021 - Total		14	14	34
2022	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	
2022 - Total		20	18	112
2023	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
	Feb 23	1	0	1
	Mar 23	3	2	3
Registrations issued from March 2012 to March 2023			325	
Registrations Expired > 6 months as of March 2023			-91	
Registrations Expired < 6 months as of March 2023			-1	
Registrations Surrendered			-30	
Registrations Revoked			-3	
Registrations Relinquished			-12	
Registrations Re-Issued > 6 months after expiration date			-8	
Federally Regulated AMCs			-2	
TOTAL AMC REGISTRATIONS			178	

AMC Registrations Year-Over-Year			
	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

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

Application Processing Time

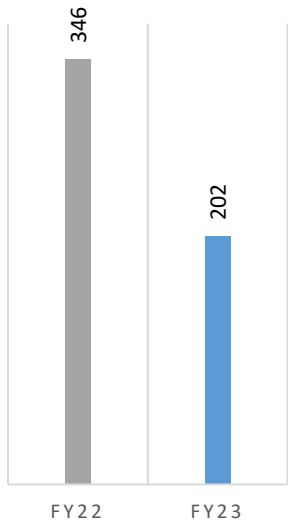
Average Number of Days to Process Applications

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

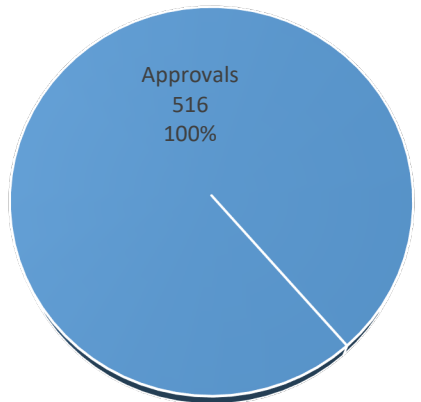
	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sept 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
Certified General Appraiser – Initial & Reinstatement (Goal: 75 days)	53	66	70	54	51	49	38	66	34	52	43	59	49
Certified General Appraiser – Reciprocity (Goal: 14 days)	1	1	1	1	1	2	3	2	1	1	1	2	2
Certified Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	59	49	56	62	49	48	48	71	63	57	57	50	56
Certified Residential Appraiser – Reciprocity (Goal: 14 days)	2	2	2	1	2	2	1	1	1	1	2	1	1
Licensed Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	48	53	60	61	44	48	36	65	47	54	45	52	47
Licensed Residential Appraiser – Reciprocity (Goal: 14 days)	2	1	1	2	2	2	3	2	NA	NA	1	1	NA
Appraiser Trainee (Goal: 14 days)	3	3	3	3	6	4	5	3	4	3	3	2	2
Temporary Non-Resident Appraiser (Goal: 5 days)	1	1	1	1	1	3	3	2	2	1	2	1	2
Appraisal Management Company (Goal: 14 days)	1	4	2	NA	4	4	3	2	1	1	2	NA	2

Certified and Licensed Residential Experience Audit Summary

Residential audits received



FY22 – 23 Residential Audit Outcome

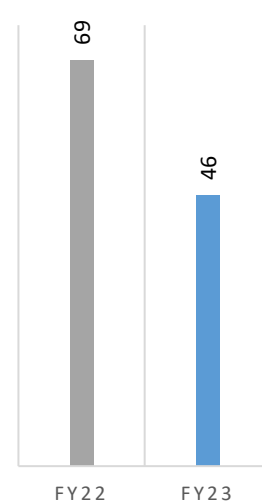


Residential Audit Processing Year-Over-Year

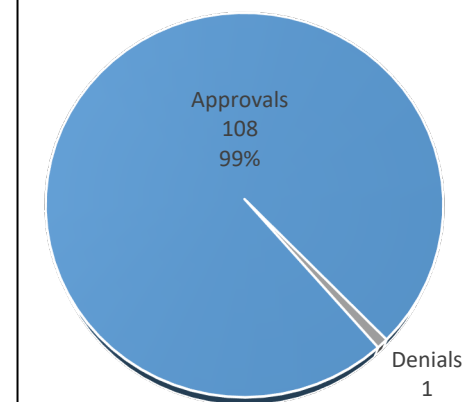
	Closed	Average Processing
Fiscal Year 2018	116	100 Days
Fiscal Year 2019	171	83 Days
Fiscal Year 2020	161	38 Days
Fiscal Year 2021	213	33 Days
Fiscal Year 2022	305	47 days
Fiscal Year 2023	224	48 days

Certified General Experience Audit Summary

Commercial audits received



FY22 - 23 Commercial Audit Outcome



Commercial Audit Processing Year-Over-Year

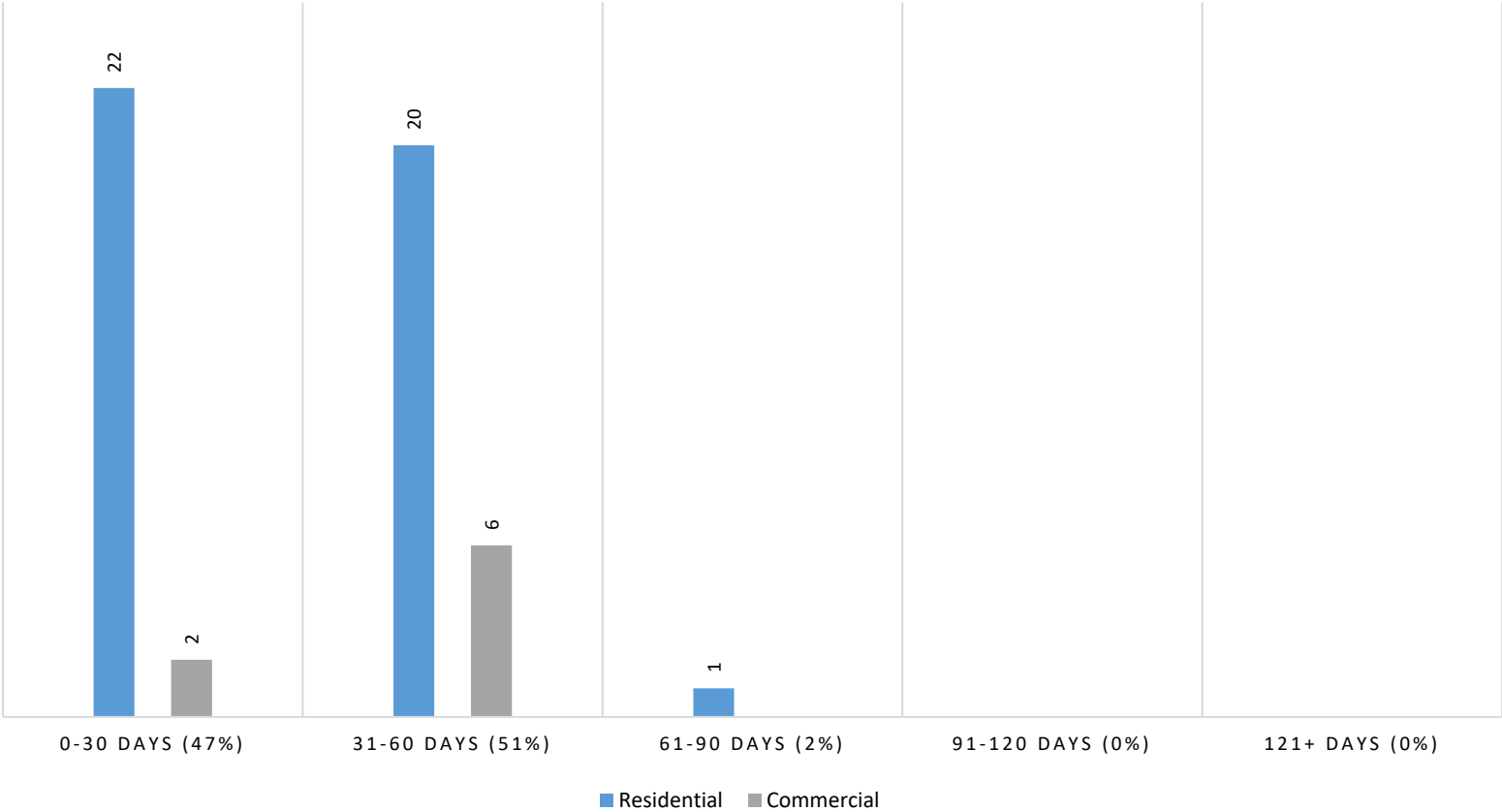
	Closed	Average Processing
Fiscal Year 2018	47	160 Days
Fiscal Year 2019	52	218 Days
Fiscal Year 2020	79	124 Days
Fiscal Year 2021	53	30 Days
Fiscal Year 2022	62	46 Days
Fiscal Year 2023	51	39 days

Renewal Activity

Year-to-Date Comparison

	FY 21 (Sept. 2020 - Mar. 2021)		FY 23 (Sept. 2022 - Mar. 2023)		Variance	Percent
	Renewed	% Renewed	Renewed	% Renewed		
Certified General Renewals	632	86.81%	628	88.45%	-4	-0.63%
Certified Residential Renewals	630	91.97%	668	91.88%	38	6.03%
Licensed Residential Renewals	129	86.92%	134	80.72%	5	3.88%
Appraiser Trainee Renewals	135	50.87%	165	62.50%	30	22.22%

Open Experience Audit Snapshot



Financial Services Division
TALCB Budget Status Report
March 2023 - Fiscal Year 2023

Expenditure Category	Beginning Balance FY2023	Expenditures	Remaining Balance	Budget % Remaining	5/12 = 41.67% 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)		
Available balance within Texas Treasury Safekeeping Trust	\$2,576,138		\$2,576,138		remaining available budget to consider to balance FY2023 budget
Salaries & Wages	\$1,433,518	\$799,680	\$633,838	44.2%	
Other Personnel Costs	504,631	261,043	\$243,588	48.3%	
Professional Services	426,859	125,755	\$301,104	70.5%	Luna Data - Computer consultant services paid with ASC grant; Have not had to use the contingency funds authorized to hire contractors.
Consumables	2,000	76	\$1,924	96.2%	lower than expected consumable supplies purchased
Utilities	109	0	\$109	100.0%	document shredding costs have not been invoiced yet, nor have there been any purchases of replacement headsets
Travel	32,000	24,038	\$7,962	24.9%	\$10,948.45 of eligible expenses moved to Educational Reserve in April, this will be reflected on the next staff report.
Rent - Building - Other	21,892	20,593	\$1,299	5.9%	Annual Lease payment processed in October
Rent - Equipment	10,464	853	\$9,611	91.9%	Copier lease has not been invoiced.
Other Operating Expense	76,038	55,844	\$20,194	26.6%	
Subtotal -Operations Expenditures	2,507,511	1,287,880	1,219,631	48.6%	
DPS Criminal History Background Checks	2,000	496	1,504	75.2%	
Statewide Cost Allocation Plan (SWCAP)	31,209	0	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	13,125	9,375	41.7%	
Subtotal - Nonoperational Expenditures	55,709	13,621	42,088	75.5%	
Total Expenditures and GR Contribution	2,563,220	1,301,501	1,261,719	49.2%	
Revenue	FY2023 Projected Revenue	Revenue Collected	Revenue Remaining to be Collected	Revenue % Remaining to be Collected	Comments
License Fees	\$1,973,845	\$1,059,270	\$914,575	46.3%	
AMCs	279,380	199,118	\$80,262	28.7%	11 new AMCs (16 projected), 24 AMC renewals (33 projected), 11,633 of panelist activities (18,229 projected)
ACE Program Revenue	15,155	10,165	\$4,990	32.9%	
Examination fees	4,340	4,320	\$20	0.5%	Pearson Vue exam fees-432 exams taken
Other Miscellaneous Revenue	40,127	37,662	\$2,465	6.1%	52 Appraiser Trainee experience reviews, 4 ACE extension requests, Interest earned
TALCB ASC grant	120,000	94,841	\$25,159	21.0%	ASC grant to develop Complaint portal
Total Revenue	\$2,432,847	\$1,405,376	\$1,027,471	42.2%	
Operating Gains/ Losses	(\$130,373)	\$103,875	(\$26,498)	20.3%	
Restricted Education Reserve Fund Carryforward	\$22,914	\$25,568			Balance in Education Reserve Fund as of report date.
Revenue Over/(Under) Expenditures & Transfers	\$2,468,679	\$129,442	\$2,341,890		

Financial Services Division

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

March 2023

Purchase Date	Par Value	Purchase Price	Beginning Market Value	Additions Changes	Ending Market Value	Accrued Interest	Description	Maturity Date
06/15/2022	825,000.00	802,376.95	814,236.33	3,738.28	817,974.61	606.28	U.S. T-Notes, .250	06/15/2023
09/15/2022	1,000,000.00	962,421.88	974,531.25	5,859.38	980,390.63	57.74	U.S. T-Notes, .125	09/15/2023
12/15/2022	643,000.00	615,270.63	618,485.63	4,772.26	623,257.89	236.27	U.S. T-Notes, .125	12/15/2023
03/15/2022	126,000.00	124,979.67	125,852.34	(125,852.34)	0.00	0.00	U.S. T-Notes, .500	03/15/2023
03/24/2023	118,000.00	117,496.90	0.00	117,110.47	117,110.47	14.09	U.S. T-Notes, .250	03/15/2024
Totals	\$ 2,712,000.00	\$ 2,622,546.03	\$ 2,533,105.55	\$ 5,628.05	\$ 2,538,733.60	\$ 914.38		

Monthly Activity

Beginning Balance	Current Month	Cumulative Totals
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Beginning Cash Available Balance	\$	883,854.87	
Current Month Receipts	\$	281,073.96	
Current Month Disbursements	\$	<u>(300,930.40)</u>	
Total Cash	\$	863,998.43	
Investment Ending Market Value		<u>2,538,733.60</u>	
Total Account Balance		<u>3,402,732.03</u>	
Operating Reserves		<u>(889,252.00)</u>	
Ending Balance Available for Operations	\$	<u>2,513,480.03</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**

March 2023

<u>Monthly Activity</u>		
Beginning Balance	Current Month	Cumulative Totals

Beginning Balance	\$	25,478.30	
Current Month Receipts			
	Admin Penalties	\$	0.00
	Interest Earned		99.97
Current Month Disbursements			
		\$	<u>(10.46)</u>
Total Cash		\$	25,567.81
Reserved for Education Development			<u>(25,567.81)</u>
Ending Balance		\$	<u>0.00</u>

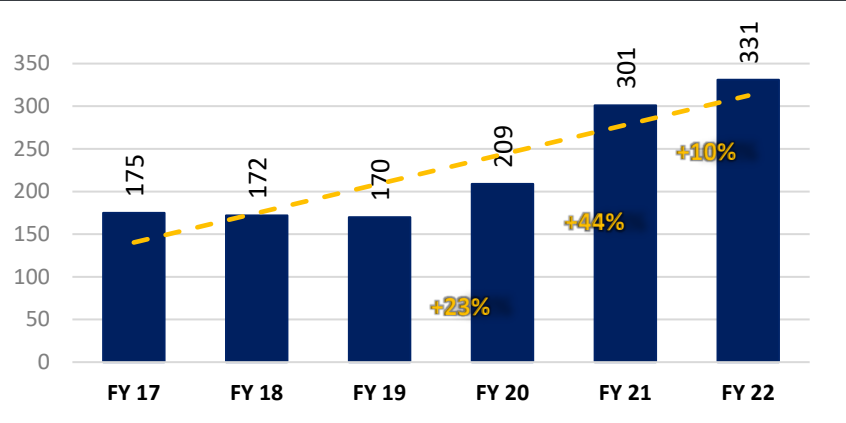
TALCB Enforcement Report

Current as of March 31, 2023

Complaints Received

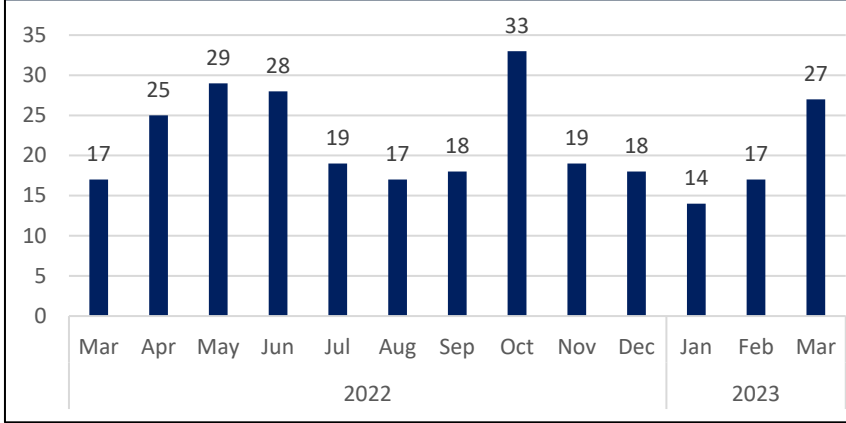
Complaints Received

Year-Over-Year



Complaints Received

Month-Over-Month

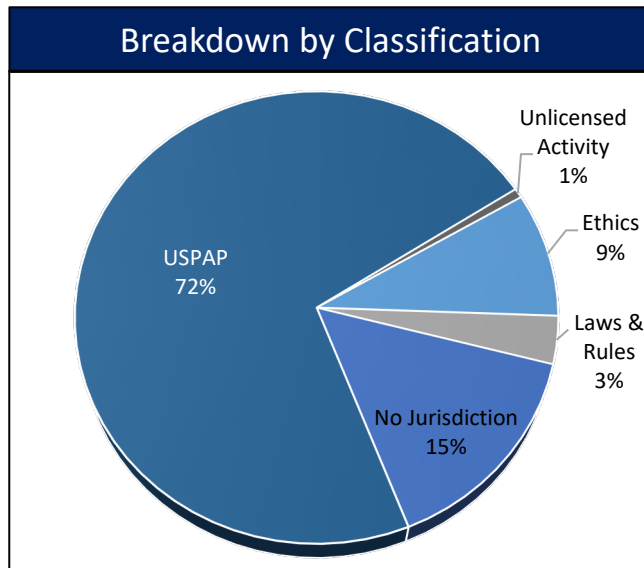


Fiscal Year 2023 Summary

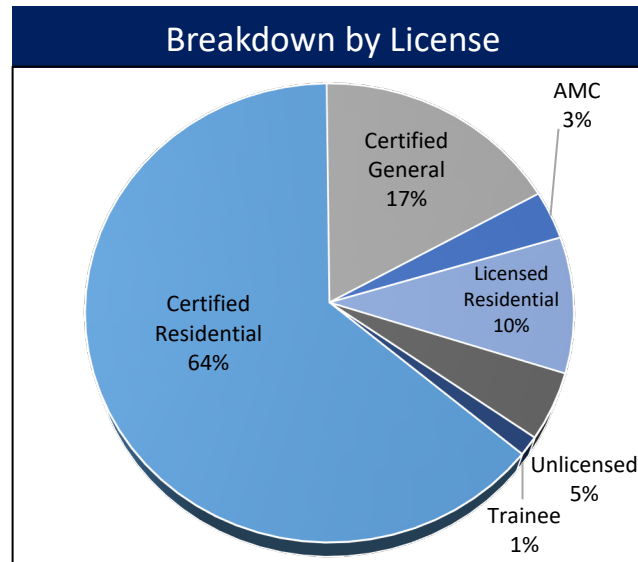
146	Complaints Received
137	Respondents
<2%	License Holders Receive a Complaint

Fiscal Year 2023 Complaints Received by Category

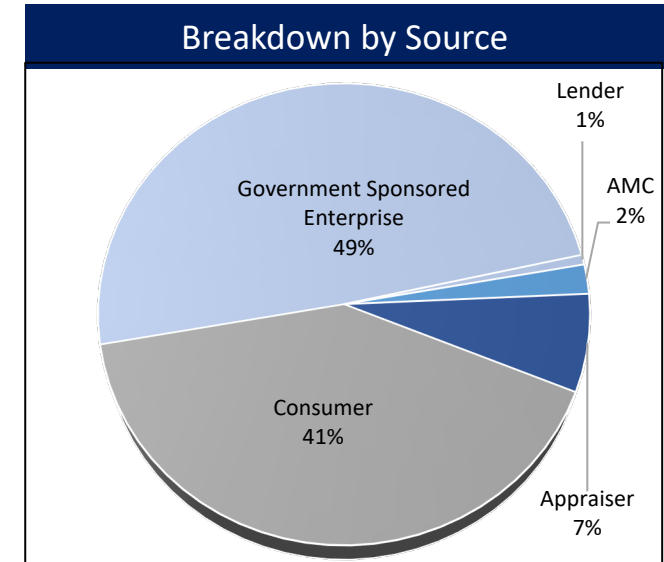
Breakdown by Classification



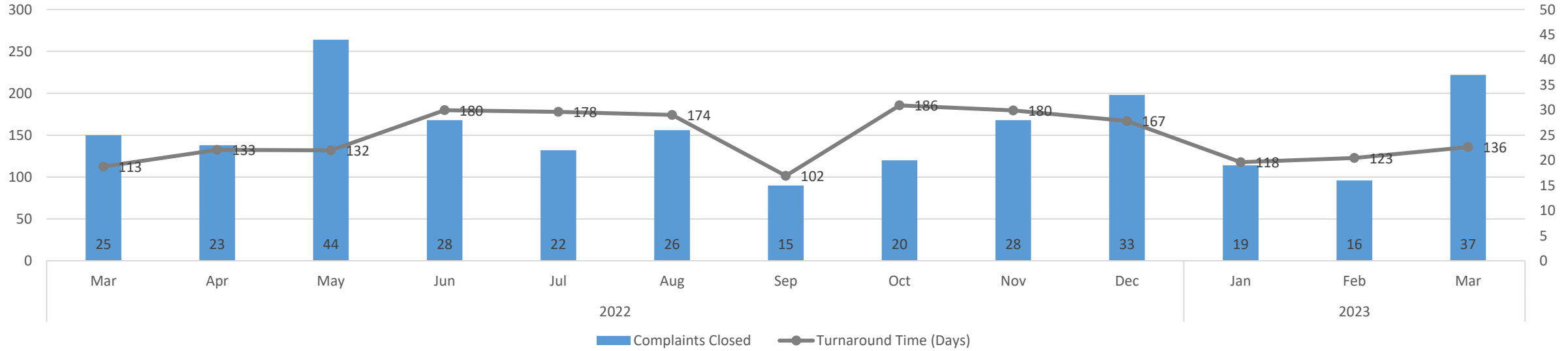
Breakdown by License



Breakdown by Source

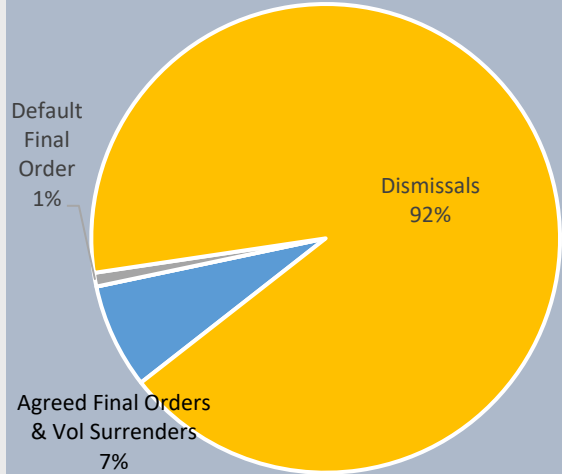


Complaint Resolution

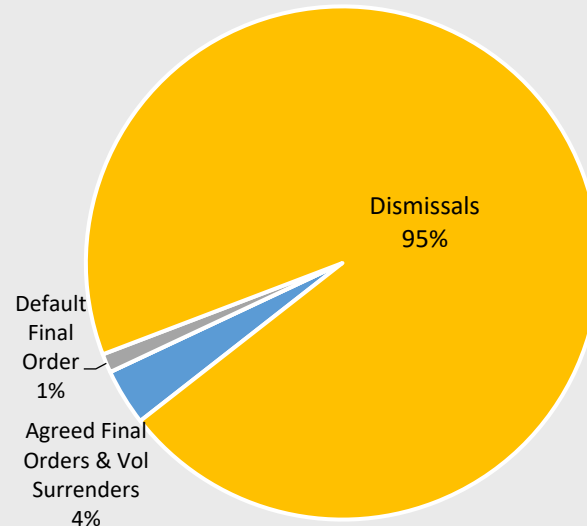


FY22 Complaint Outcome

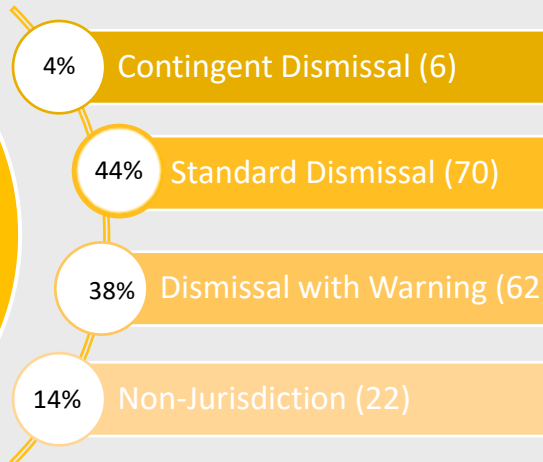
317 Complaints Resolved



FY23 Complaint Outcome



FY23 Dismissal Breakdown



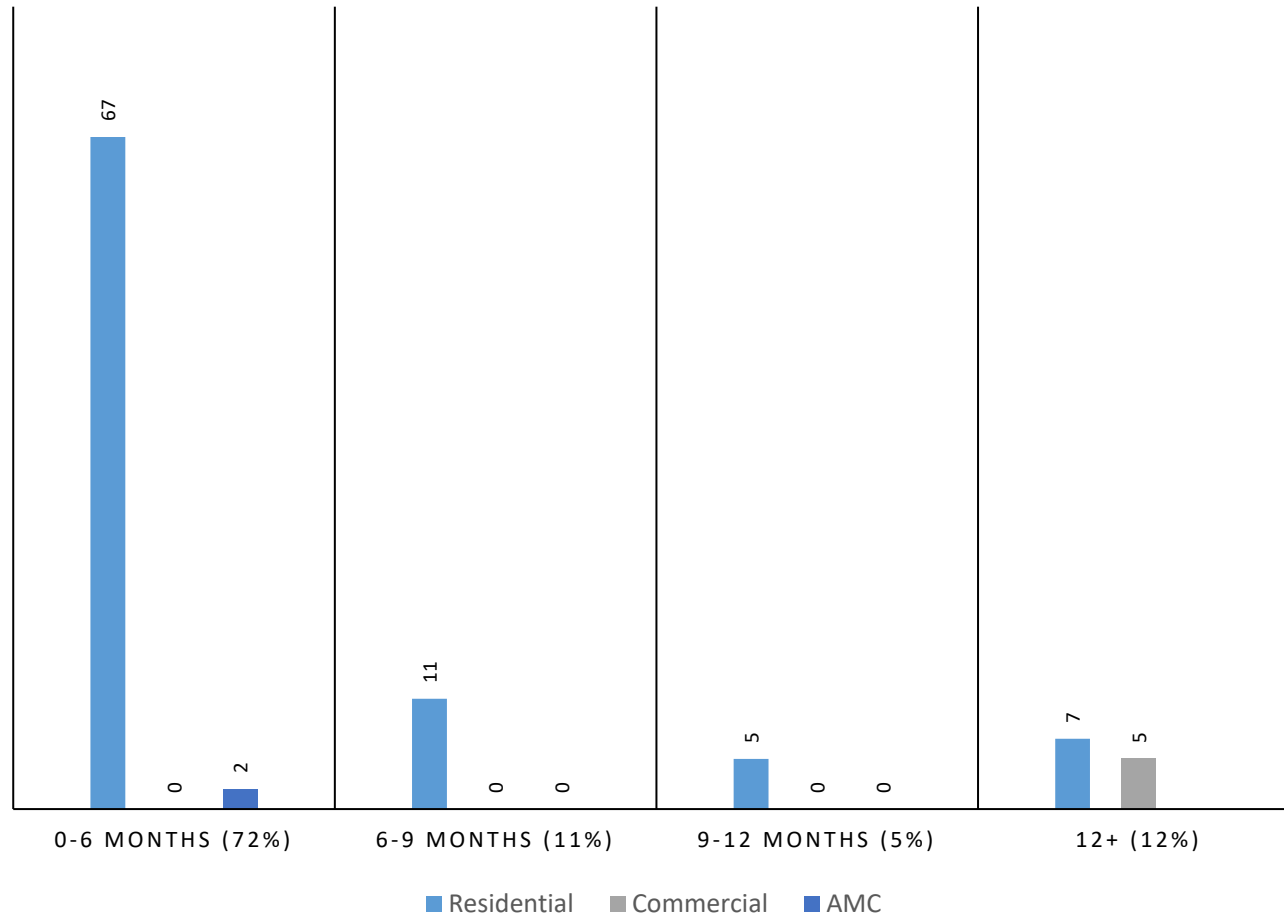
Fiscal Year 2023 Summary

168 Complaints Resolved

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

<1% License holders receive discipline

Open Complaint Snapshot



Open Complaint Data

97 Open Complaints

24 Cases Abated

- 14 pending litigation
- 10 pending Texas Workforce Commission Civil Rights Division Review

12 Cases Over 1 Year Old

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

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