



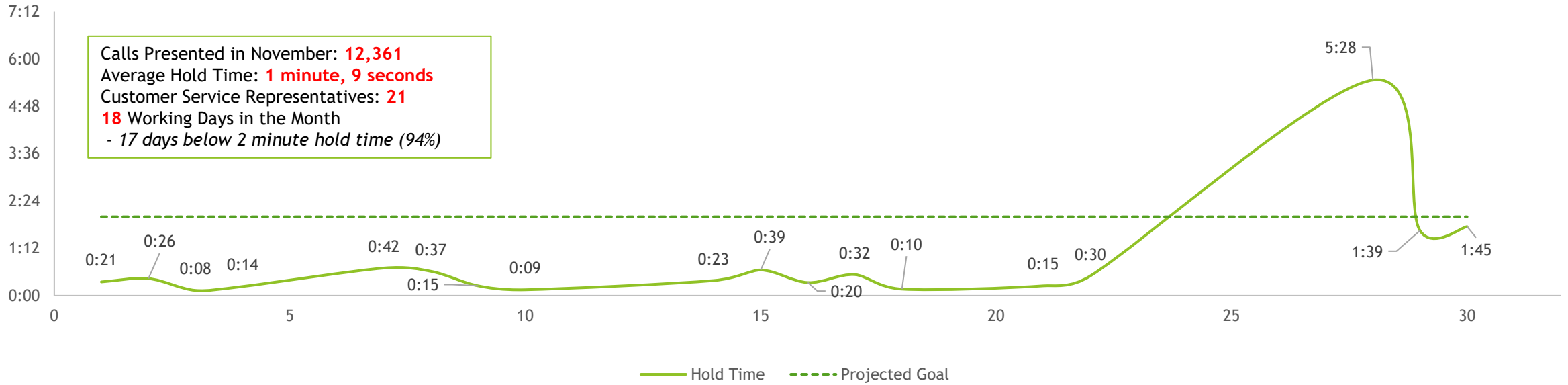
## **Staff Reports for November 2022**

# Customer Relations Division

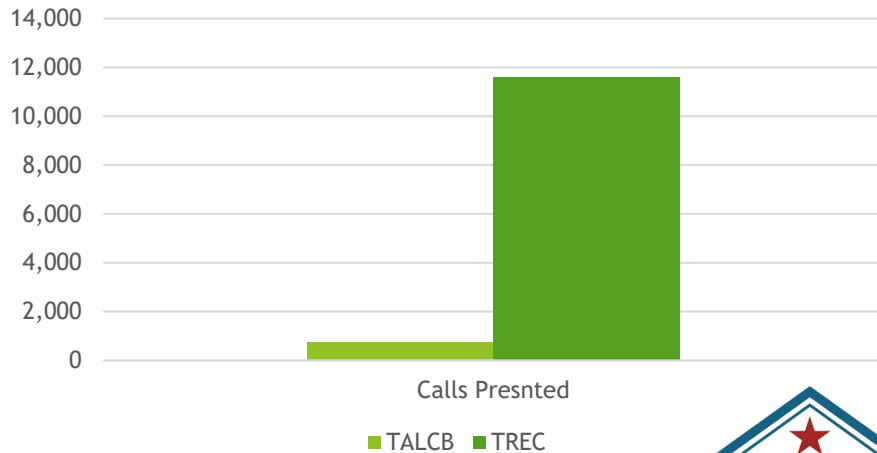
November, 2022 Monthly Report



# November, 2022 Hold Time per Day



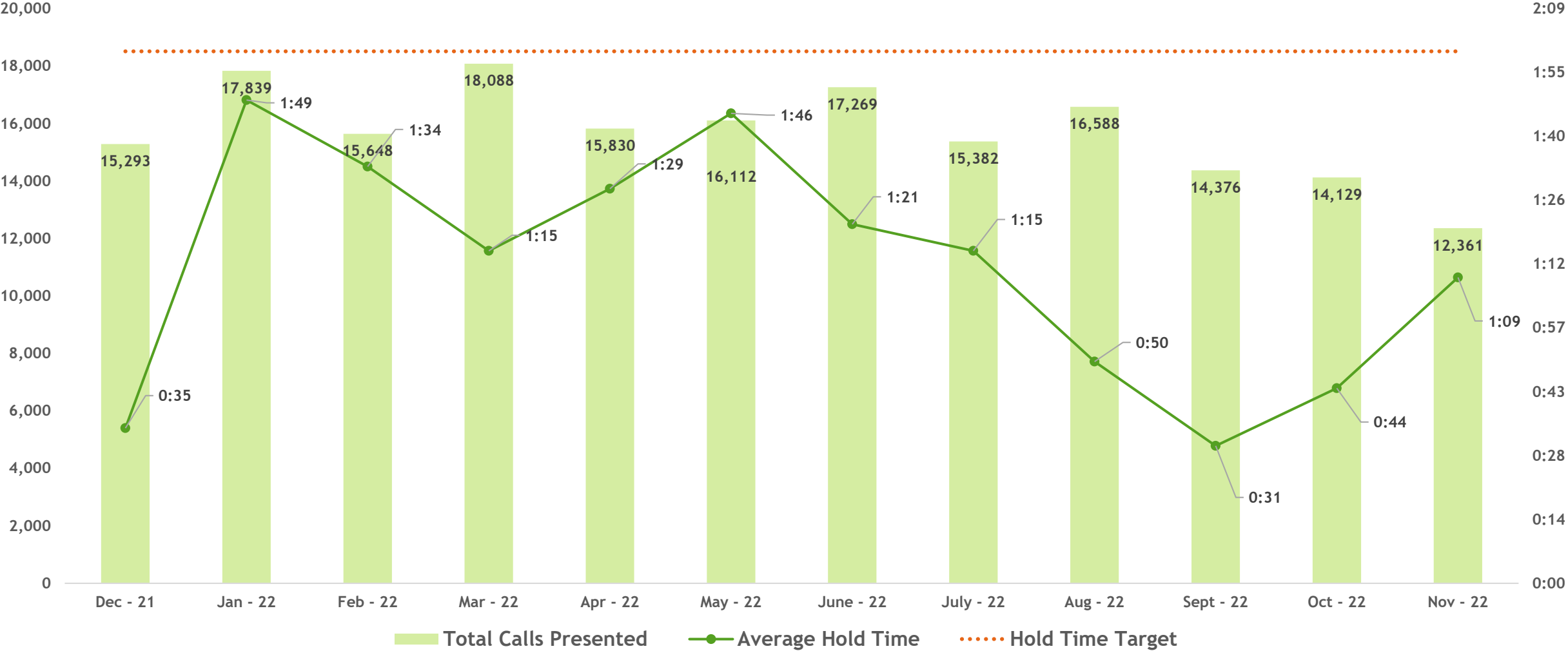
## November, 2022 TALCB/TREC Call Comparison



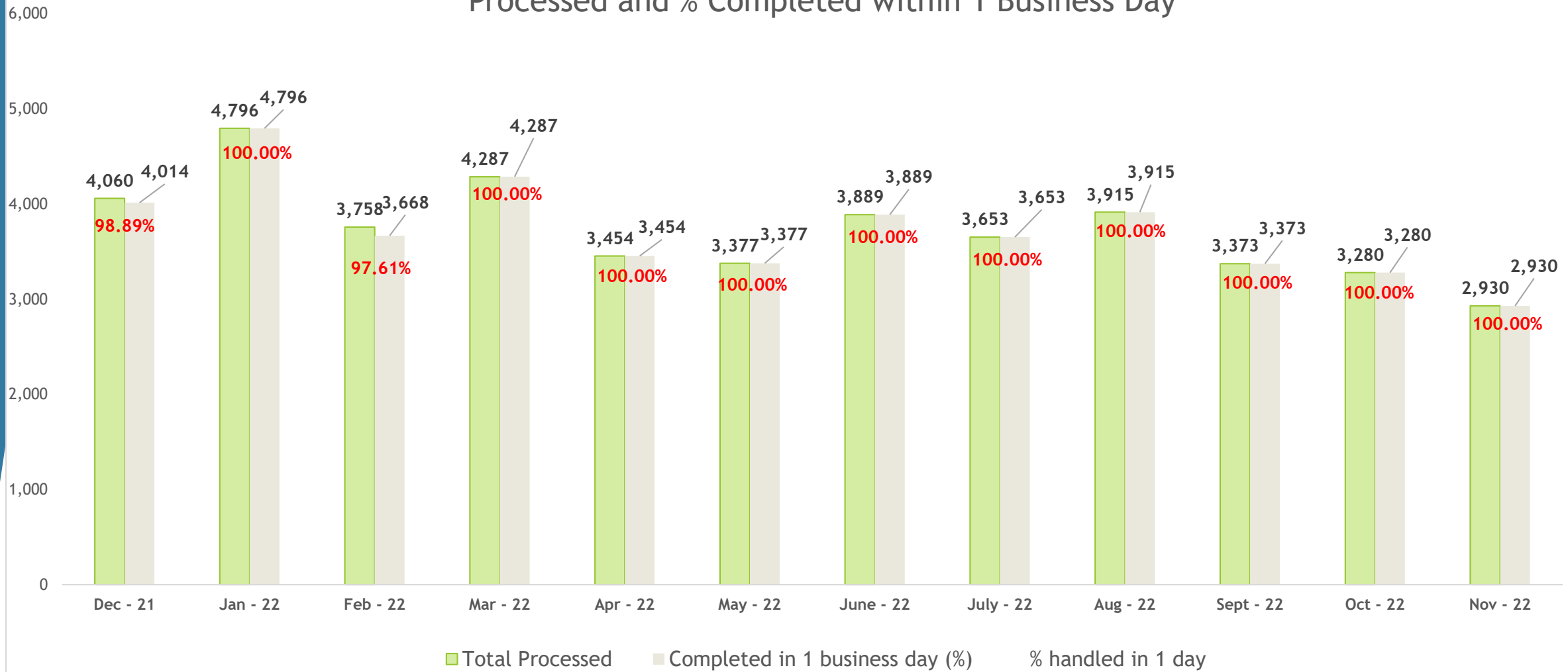
**TALCB - 746 Calls (6.04%) 50 second hold time**  
**TREC - 11,615 Calls (93.96%) 1 minute, 11 second hold time**



# Last 12 Months Calls Presented vs. Hold Time

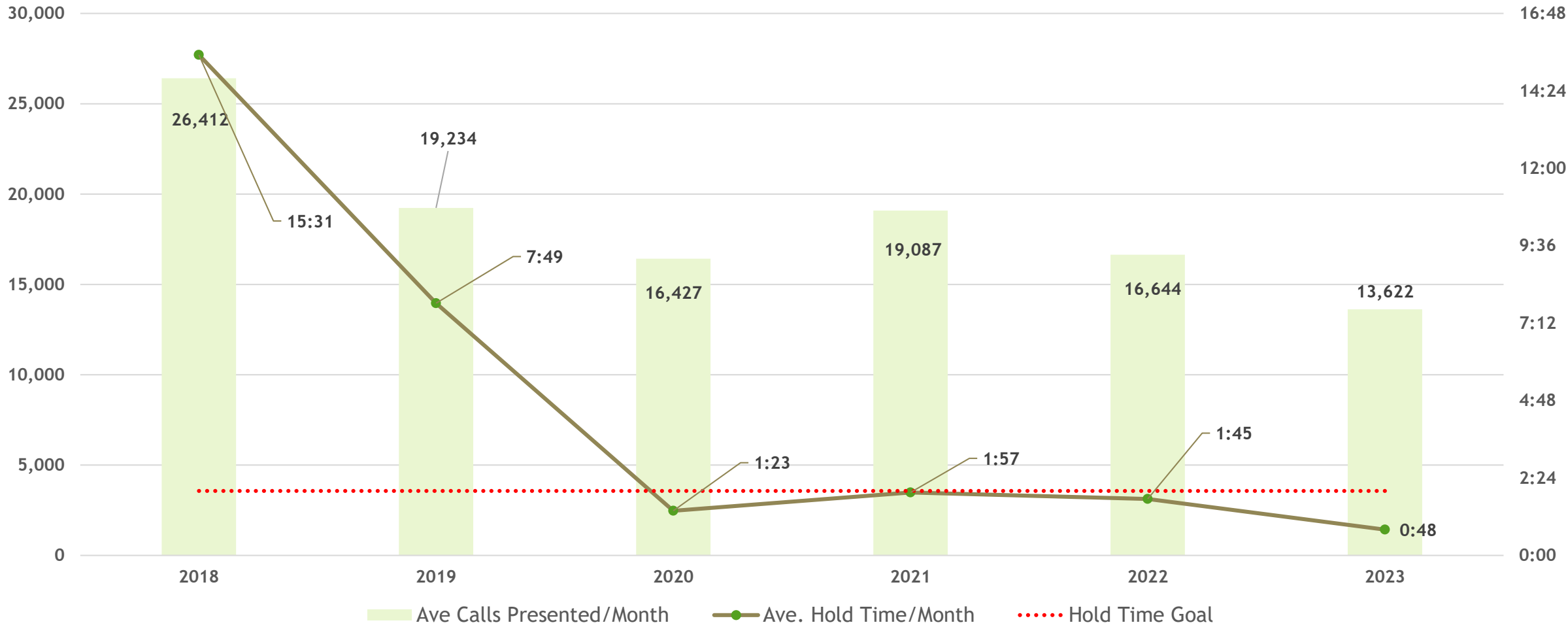


## Last 12 Months Emails Processed and % Completed within 1 Business Day



# Fiscal Year Comparison

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



# TALCB Education Report

November 2022







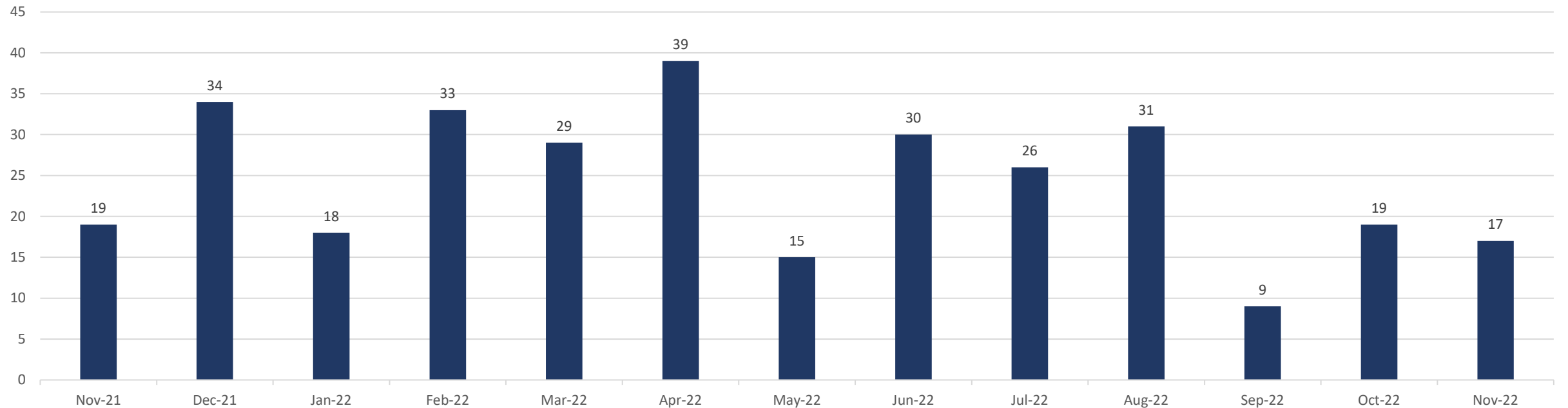
## Education & Examinations Division

### TALCB Applications Approved 13-Month Comparison

	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22
Initial ACE Provider	1	0	0	0	0	0	1	1	0	0	0	0	0
Renewal ACE Provider	2	1	2	1	2	2	0	0	1	0	0	0	0
<b>All ACE Provider Applications</b>	<b>3</b>	<b>1</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>

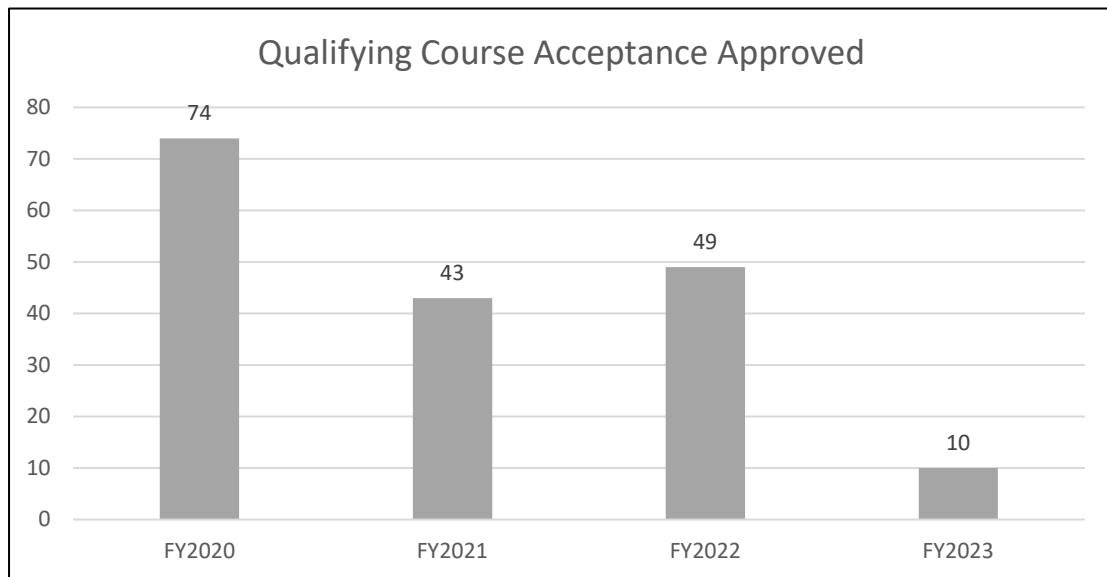
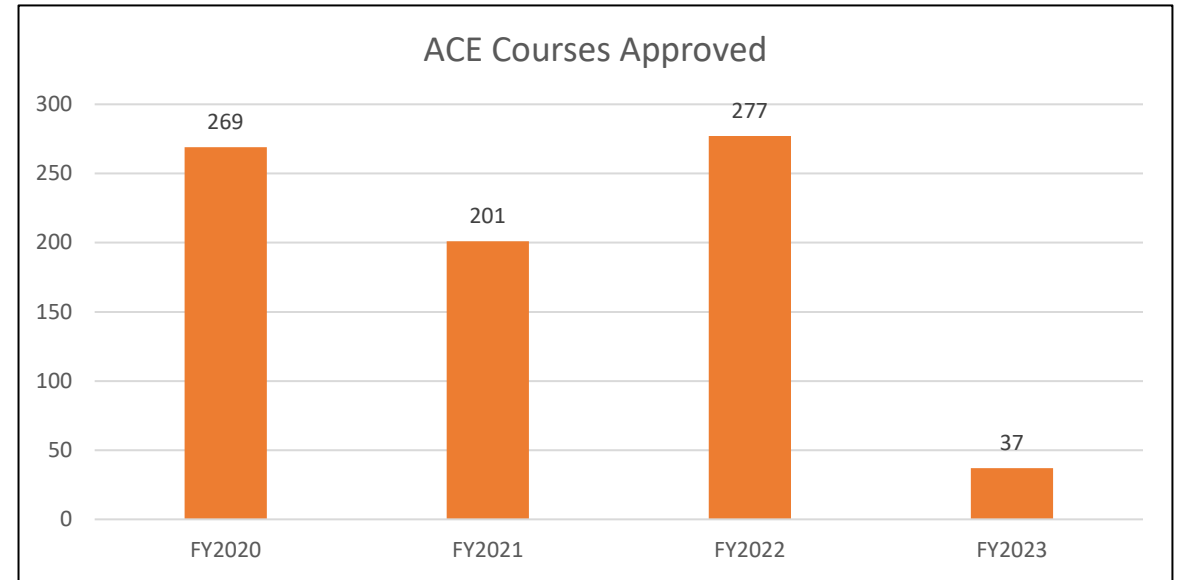
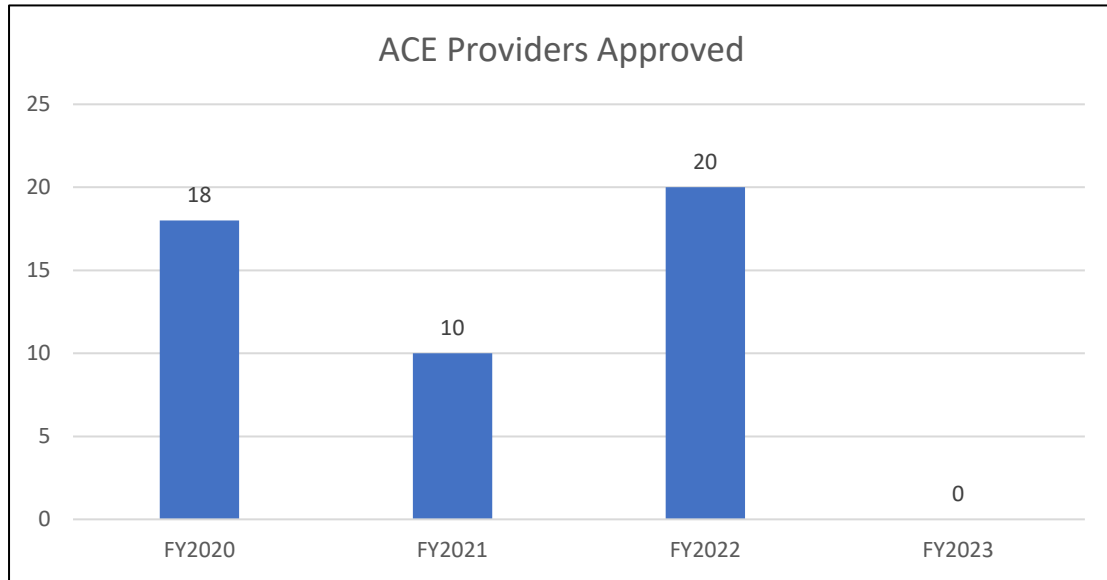
Qualifying Course Acceptance	1	4	3	8	7	5	2	8	3	3	0	3	7
ACE Courses	15	29	13	24	20	32	12	21	22	28	9	16	10
<b>All Course Applications</b>	<b>16</b>	<b>33</b>	<b>16</b>	<b>32</b>	<b>27</b>	<b>37</b>	<b>14</b>	<b>29</b>	<b>25</b>	<b>31</b>	<b>9</b>	<b>19</b>	<b>17</b>

<b>All Applications Approved</b>	<b>19</b>	<b>34</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>17</b>
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# Education & Examinations Division

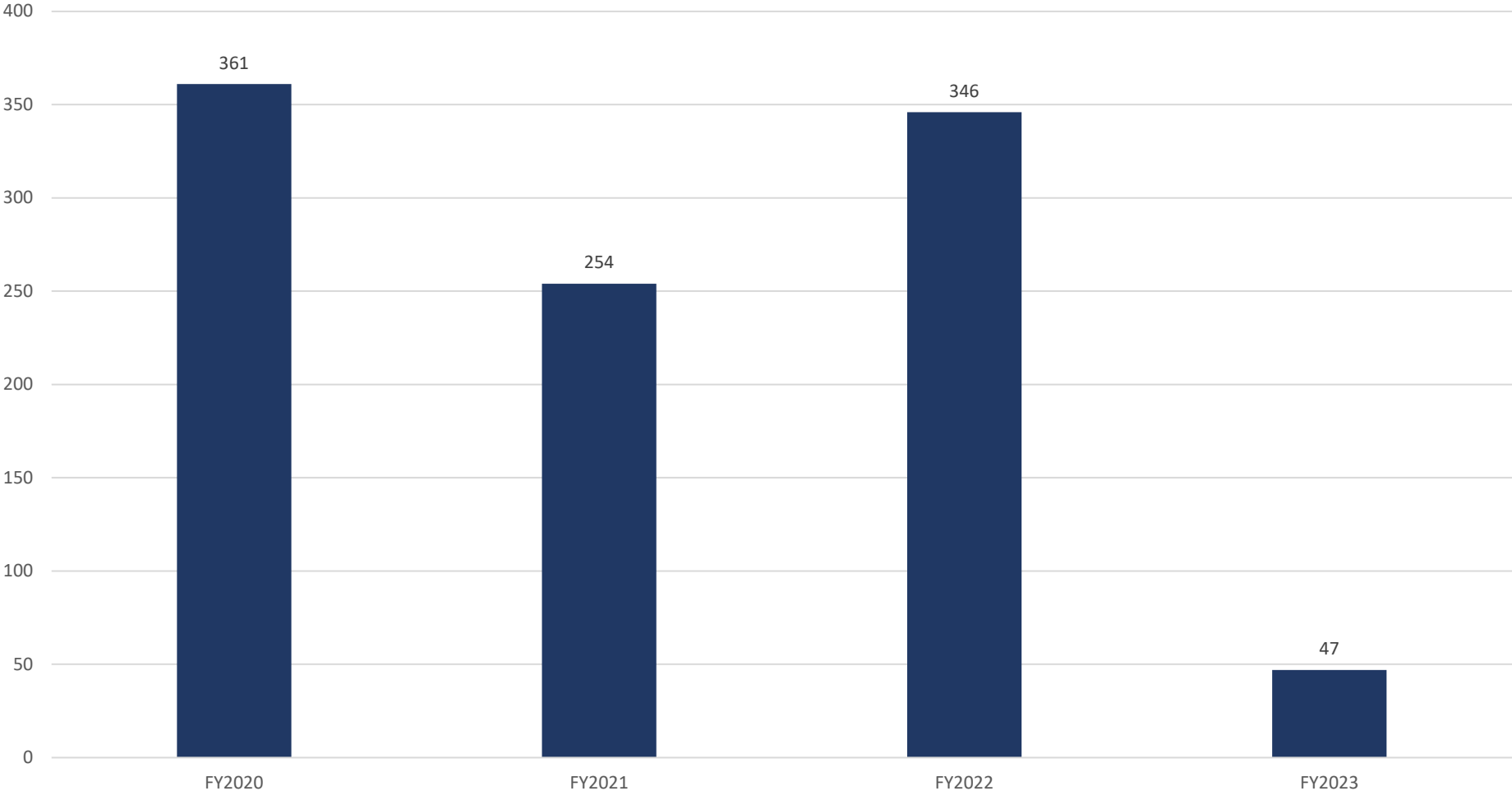
## TALCB Total Applications Approved - Fiscal Year



# Education & Examinations Division

All TALCB Applications Approved

Year-Over-Year Comparison



# TALCB Licensing Report

Current as of November 30, 2022

**TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD**  
**ACTIVE CERTIFICATIONS AND LICENSES**  
November 2022

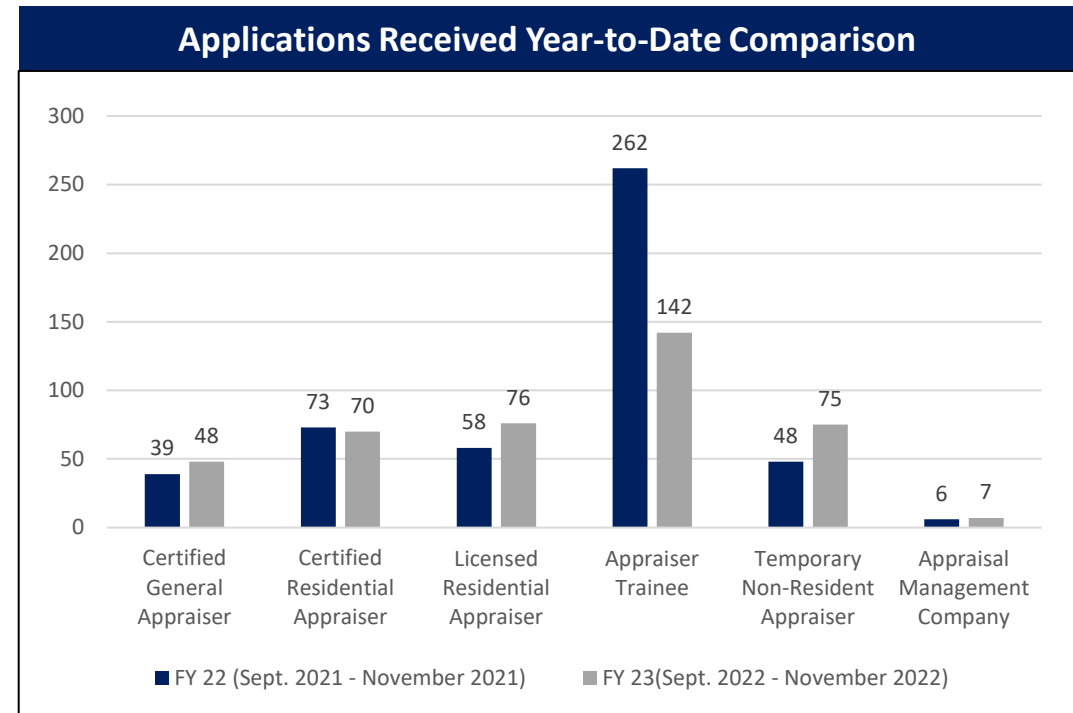
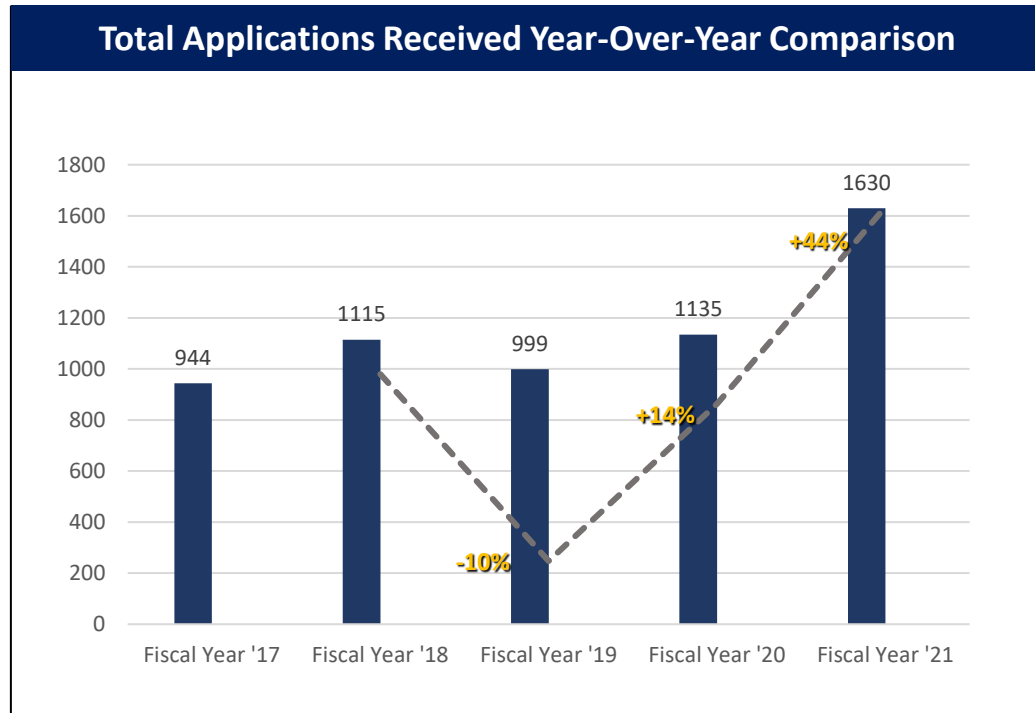
FISCAL YEAR	END OF MONTH	GENERAL	RESIDENTIAL	LICENSE	TOTAL G.R.L.	G.R.L. CHANGE	TRAINEE	TRAINEE CHANGE	TOTAL	TOTAL CHANGE
<b>2013</b>	Aug13	2,367	2,371	470	5,208		724		5,932	
<b>2014</b>	Aug14	2,386	2,405	453	5,244	36	760	36	6,004	72
<b>2015</b>	Aug 15	2,408	2,415	434	5,257	13	779	19	6,036	32
<b>2016</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
<b>November 2022</b>										
<b>Inactive Appraisers</b>		GENERAL 52	RESIDENTIAL 51	LICENSE 15	TOTAL 118		TRAINEE 145		TOTAL 263	
							<b>Out-of-State Temporary Registrations:</b>		<b>149</b>	
							<b>Total All License Holders:</b>		<b>7,547</b>	

**TEXAS APPRAISER LICENSING AND CERTIFICATION BOARD**  
**APPRAISAL MANAGEMENT COMPANY REGISTRATIONS**  
**NOVEMBER 2022**

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
<b>Registrations issued from March 2012 to November 2022</b>			<b>320</b>	
<b>Registrations Expired &gt; 6 months as of November 2022</b>			<b>-84</b>	
<b>Registrations Expired &lt; 6 months as of November 2022</b>			<b>-8</b>	
<b>Registrations Surrendered</b>			<b>-30</b>	
<b>Registrations Revoked</b>			<b>-3</b>	
<b>Registrations Relinquished</b>			<b>-9</b>	
<b>Registrations Re-Issued &gt; 6 months after expiration date</b>			<b>-7</b>	
<b>TOTAL AMC REGISTRATIONS</b>			<b>179</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

	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sept 22	Oct 22	Nov 22
Certified General Appraiser	10	8	21	13	14	20	19	14	13	24	17	12	17
Certified Residential Appraiser	19	22	32	25	20	29	25	23	30	40	21	28	22
Licensed Residential Appraiser	16	19	26	33	30	28	22	30	26	34	21	32	25
Appraiser Trainee	90	81	116	125	109	85	89	83	62	89	61	50	32
Temporary Non-Resident Appraiser	13	29	18	19	34	16	24	24	23	28	20	30	23
Appraisal Management Company	2	3	0	2	1	1	3	1	3	0	2	3	2

# Application Processing Time

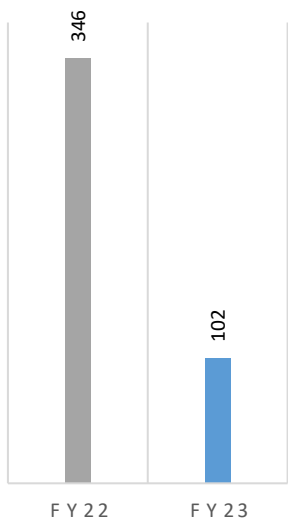
Average Number of Days to Process Applications

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

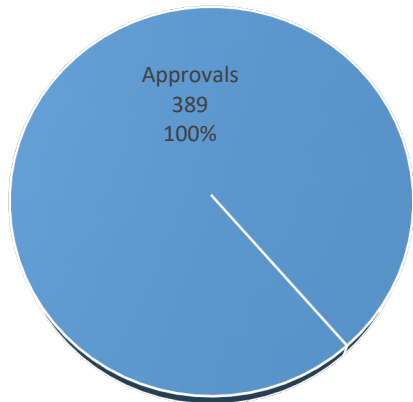
	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Aug 22	Sept 22	Oct 22	Nov 22
Certified General Appraiser – Initial & Reinstatement (Goal: 75 days)	47	52	51	57	40	53	66	70	54	49	38	66	34
Certified General Appraiser – Reciprocity (Goal: 14 days)	1	2	1	1	1	1	1	1	1	2	3	2	1
Certified Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	39	55	59	61	56	59	49	56	62	48	48	71	63
Certified Residential Appraiser – Reciprocity (Goal: 14 days)	1	1	1	1	1	2	2	2	1	2	1	1	1
Licensed Residential Appraiser – Initial & Reinstatement (Goal: 75 days)	50	51	56	57	59	48	53	60	61	48	36	65	47
Licensed Residential Appraiser – Reciprocity (Goal: 14 days)	1	1	1	1	1	2	1	1	2	2	3	2	NA
Appraiser Trainee (Goal: 14 days)	4	3	4	3	3	3	3	3	3	4	5	3	4
Temporary Non-Resident Appraiser (Goal: 5 days)	1	1	1	1	1	1	1	1	1	3	3	2	2
Appraisal Management Company (Goal: 14 days)	2	1	1	NA	2	1	4	2	NA	2	3	2	1

## Certified and Licensed Residential Experience Audit Summary

Residential audits received



FY22 – 23 Residential Audit Outcome

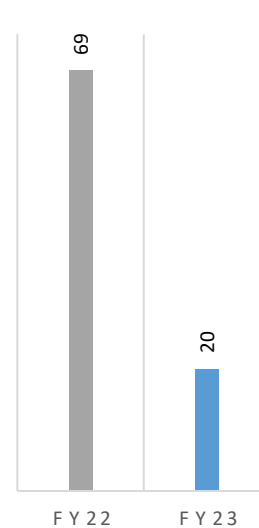


Residential Audit Processing Year-Over-Year

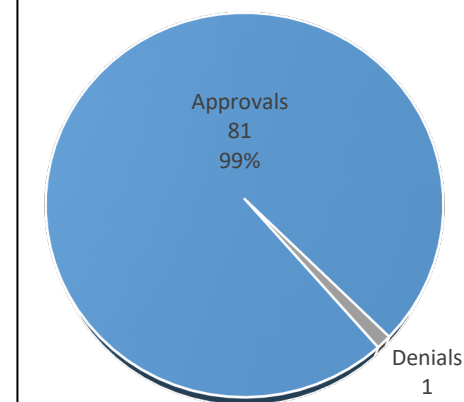
	Closed	Average Processing
Fiscal Year 2018	116	100 Days
Fiscal Year 2019	171	83 Days
Fiscal Year 2020	161	38 Days
Fiscal Year 2021	213	33 Days
Fiscal Year 2022	305	47 days
<b>Fiscal Year 2023</b>	<b>94</b>	<b>49 days</b>

## Certified General Experience Audit Summary

Commercial audits received



FY22 - 23 Commercial Audit Outcome



Commercial Audit Processing Year-Over-Year

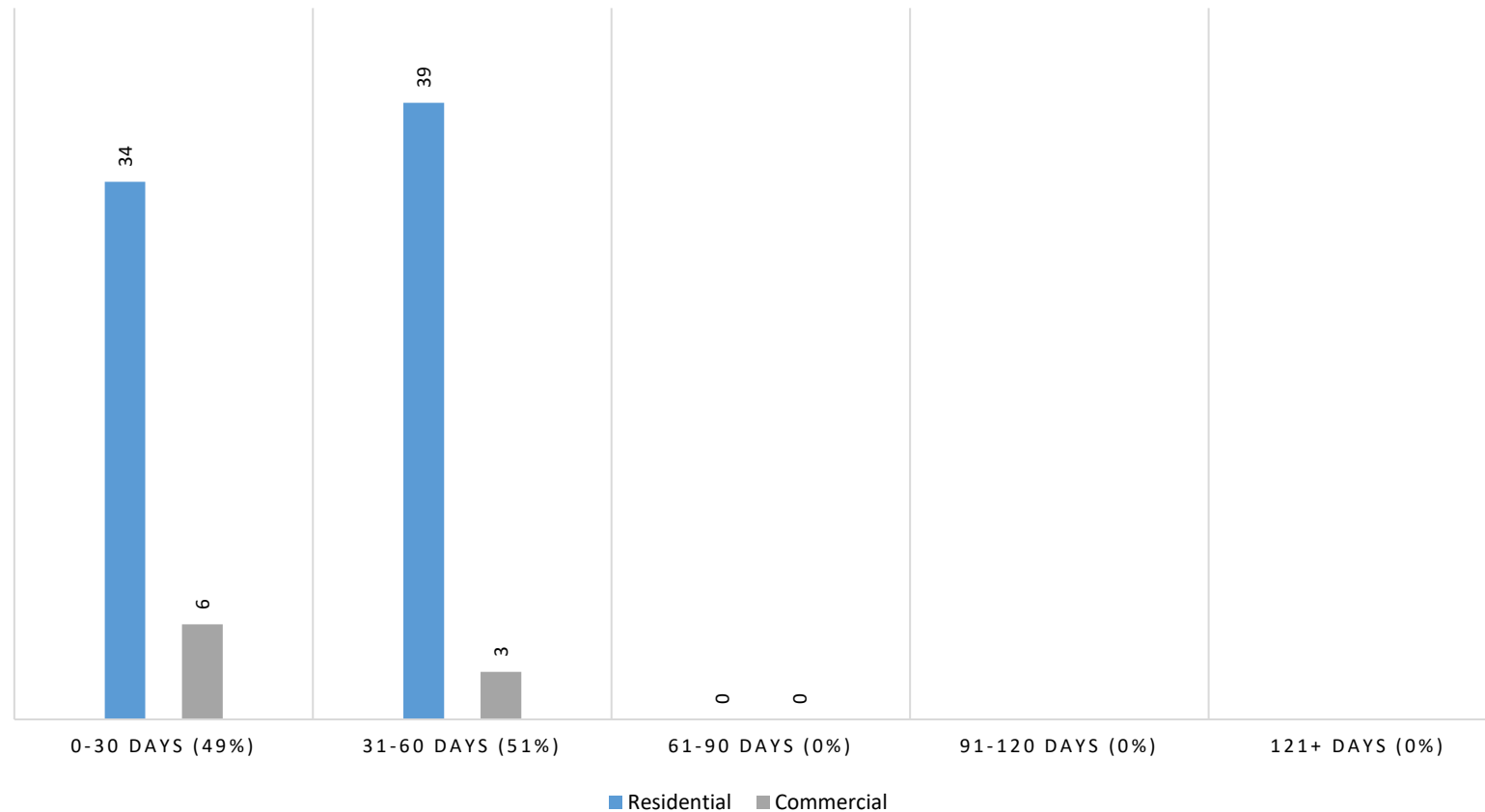
	Closed	Average Processing
Fiscal Year 2018	47	160 Days
Fiscal Year 2019	52	218 Days
Fiscal Year 2020	79	124 Days
Fiscal Year 2021	53	30 Days
Fiscal Year 2022	62	46 Days
<b>Fiscal Year 2023</b>	<b>24</b>	<b>35 days</b>



# Renewal Activity

Year-to-Date Comparison						
	FY 21 (Sept. 2020 - November 2020)		FY 23 (Sept. 2022 - November 2022)		Variance	Percent
	Renewed	% Renewed	Renewed	% Renewed		
Certified General Renewals	248	84.35%	256	89.20%	8	3.23%
Certified Residential Renewals	243	90.33%	271	91.55%	28	11.52%
Licensed Residential Renewals	47	77.05%	53	77.94%	6	12.77%
Appraiser Trainee Renewals	61	44.20%	76	56.30%	15	24.59%

# Open Experience Audit Snapshot



Financial Services Division  
TALCB Budget Status Report  
November 2022 - Fiscal Year 2023

Expenditure Category	Beginning Balance FY2023	Expenditures	Remaining Balance	Budget % Remaining	9/12 = 75% 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	\$325,852	\$1,107,666	77.3%	
Other Personnel Costs	504,631	101,617	\$403,014	79.9%	
Professional Services	426,859	39,078	\$387,781	90.8%	Luna Data - Computer consultant services paid with ASC grant
Consumables	2,000	0	\$2,000	100.0%	
Utilities	109	0	\$109	100.0%	
Travel	32,000	14,225	\$17,775	55.5%	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	20,554	\$1,338	6.1%	Annual Lease payment processed in October
Rent - Equipment	10,464	298	\$10,166	97.1%	
Other Operating Expense	76,038	17,223	\$58,815	77.3%	
<b>Subtotal - Operations Expenditures</b>	<b>2,507,511</b>	<b>518,848</b>	<b>1,988,663</b>	<b>79.3%</b>	
DPS Criminal History Background Checks	2,000	86	1,914	95.7%	
Statewide Cost Allocation Plan (SWCAP)	31,209		31,209	100.0%	
Contribution to General Revenue	22,500	5,625	16,875	75.0%	
<b>Subtotal - Nonoperational Expenditures</b>	<b>55,709</b>	<b>5,711</b>	<b>49,998</b>	<b>89.7%</b>	
<b>Total Expenditures and GR Contribution</b>	<b>2,563,220</b>	<b>524,559</b>	<b>2,038,661</b>	<b>79.5%</b>	
Revenue	FY2023 Projected Revenue	Revenue Collected	Revenue Remaining to be Collected	Revenue % Remaining to be Collected	Comments
License Fees	\$1,973,845	\$443,170	\$1,530,675	77.5%	
AMCs	279,380	132,175	\$147,205	52.7%	7 new AMCs (16 projected), 17 AMC renewals (33 projected), 7,048 of panelist activities (18,229 projected)
ACE Program Revenue	15,155	3,705	\$11,450	75.6%	
Examination fees	4,340	1,780	\$2,560	59.0%	Pearson Vue exam fees-178 exams taken
Other Miscellaneous Revenue	40,127	17,418	\$22,709	56.6%	18 Appraiser Trainee experience reviews, 0 ACE extension requests, Interest earned
TALCB ASC grant	120,000	24,801	\$95,199	79.3%	ASC grant to develop Complaint portal
<b>Total Revenue</b>	<b>\$2,432,847</b>	<b>\$623,049</b>	<b>\$1,809,798</b>	<b>74.4%</b>	
<b>Operating Gains/ Losses</b>	<b>(\$130,373)</b>	<b>\$98,490</b>	<b>(\$31,883)</b>	<b>24.5%</b>	
<b>Restricted Education Reserve Fund Carryforward</b>	<b>\$22,914</b>	<b>\$23,112</b>			Balance in Education Reserve Fund as of report date.
<b>Revenue Over/(Under) Expenditures &amp; Transfers</b>	<b>\$2,468,679</b>	<b>\$121,602</b>	<b>\$2,347,275</b>		

## Financial Services Division

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

**November 2022**

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	803,794.93	2,642.57	806,437.50	952.36	U.S. T-Notes, .250	06/15/2023
09/15/2022	1,000,000.00	962,421.88	962,148.44	3,007.81	965,156.25	265.88	U.S. T-Notes, .125	09/15/2023
12/15/2021	394,700.00	399,898.06	394,052.45	555.04	394,607.49	2,961.60	U.S. T-Notes, 1.625	12/15/2022
03/15/2022	126,000.00	124,979.67	124,321.64	305.16	124,626.80	134.01	U.S. T-Notes, .500	03/15/2023
<b>Totals</b>	<b>\$ 2,345,700.00</b>	<b>\$ 2,289,676.56</b>	<b>\$ 2,284,317.46</b>	<b>\$ 6,510.58</b>	<b>\$ 2,290,828.04</b>	<b>\$ 4,313.85</b>		

### Monthly Activity

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

<b>Beginning Cash Available Balance</b>	\$	1,035,158.93	
<b>Current Month Receipts</b>	\$	226,034.10	
<b>Current Month Disbursements</b>	\$	<u>(161,400.35)</u>	
<b>Total Cash</b>	<b>\$</b>	<b>1,099,792.68</b>	
<b>Investment Ending Market Value</b>		<b>2,290,828.04</b>	
<b>Total Account Balance</b>		<b>3,390,620.72</b>	
<b>Operating Reserves</b>		<b>(889,252.00)</b>	
<b>Ending Balance Available for Operations</b>	<b>\$</b>	<b><u>2,501,368.72</u></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

**Financial Services Division**

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

**November 2022**

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

<b>Beginning Balance</b>	\$	23,052.18	
<b>Current Month Receipts</b>			
	Admin Penalties	\$	0.00
	Interest Earned		70.17
<b>Current Month Disbursements</b>		\$	<u>(10.49)</u>
<b>Total Cash</b>		\$	<b><u>23,111.86</u></b>
Reserved for Education Development			<b><u>(23,111.86)</u></b>
<b>Balance</b>		\$	<b><u><u>0.00</u></u></b>

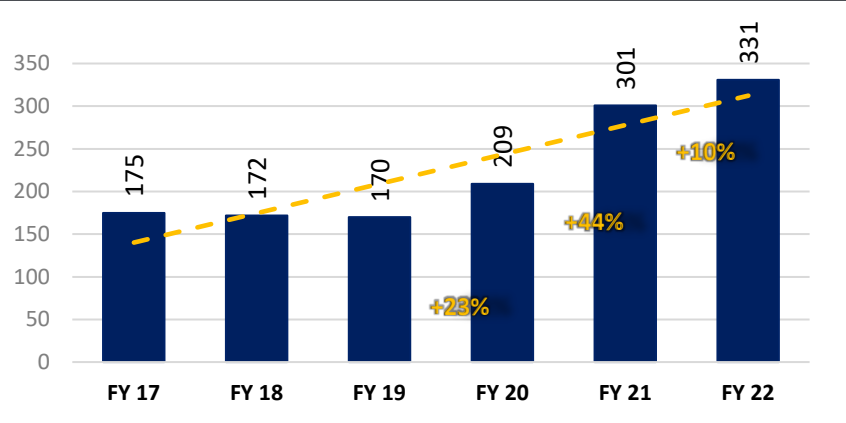
# TALCB Enforcement Report

Current as of November 30, 2022

# Complaints Received

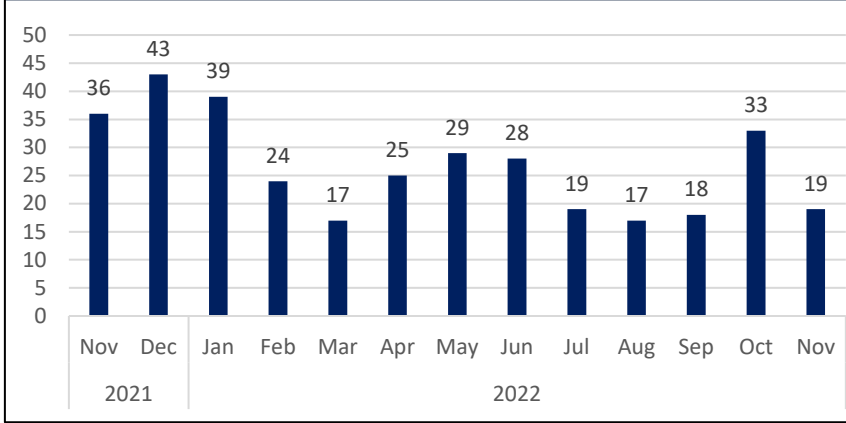
## Complaints Received

Year-Over-Year



## Complaints Received

Month-Over-Month

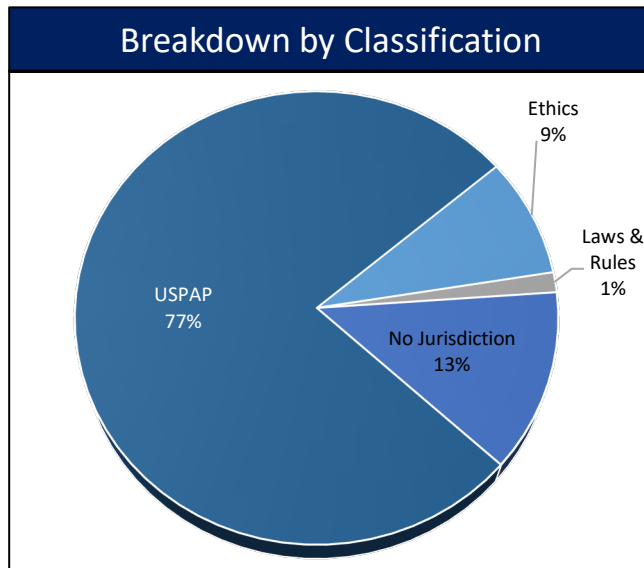


## Fiscal Year 2023 Summary

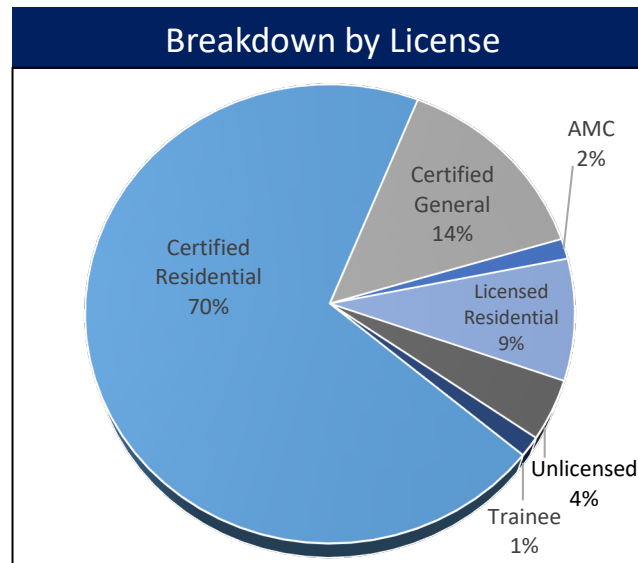
70	Complaints Received
67	Respondents
<1%	License Holders Receive a Complaint

## Fiscal Year 2023 Complaints Received by Category

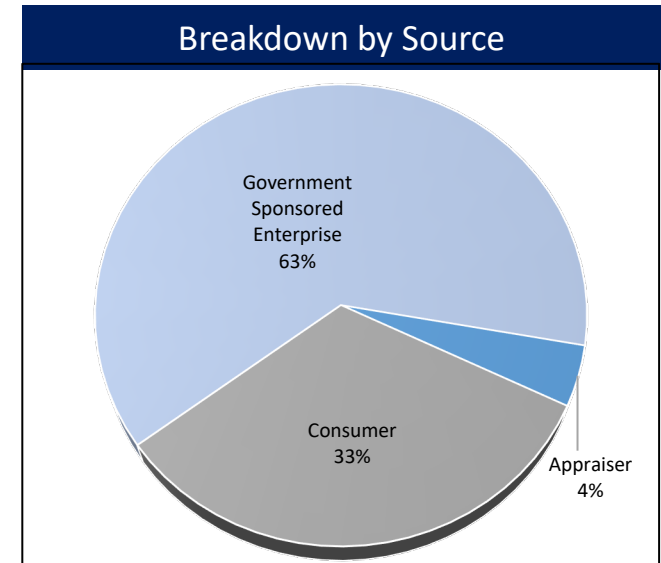
### Breakdown by Classification



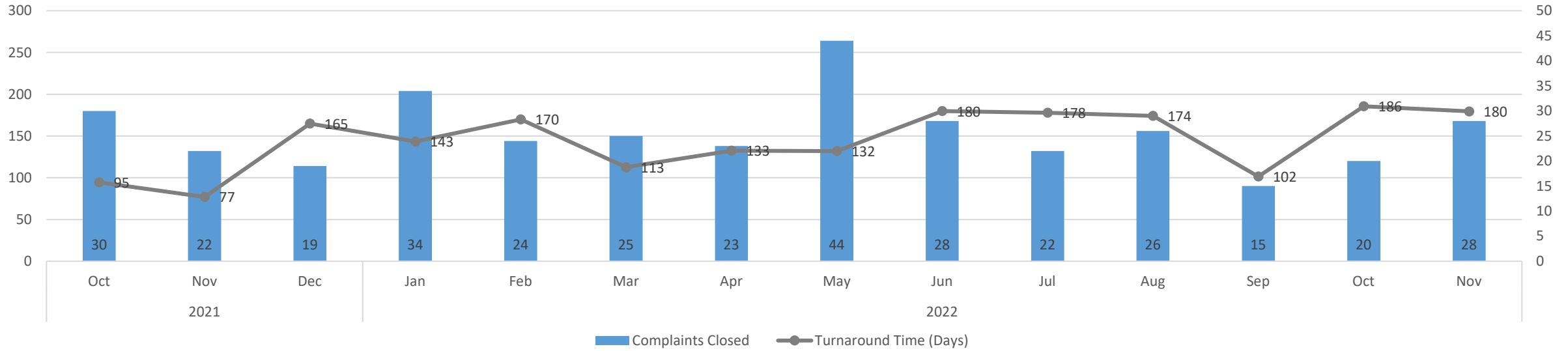
### Breakdown by License



### Breakdown by Source

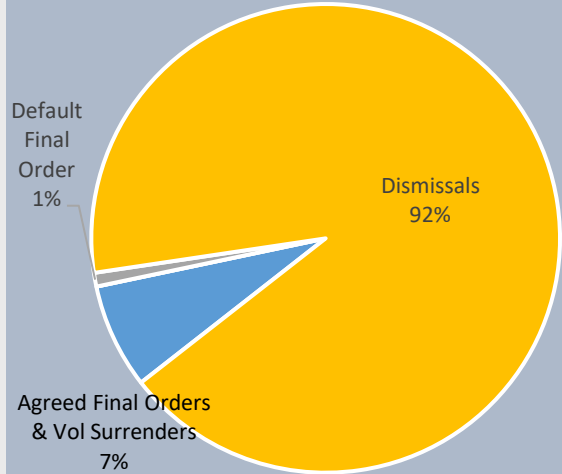


# Complaint Resolution

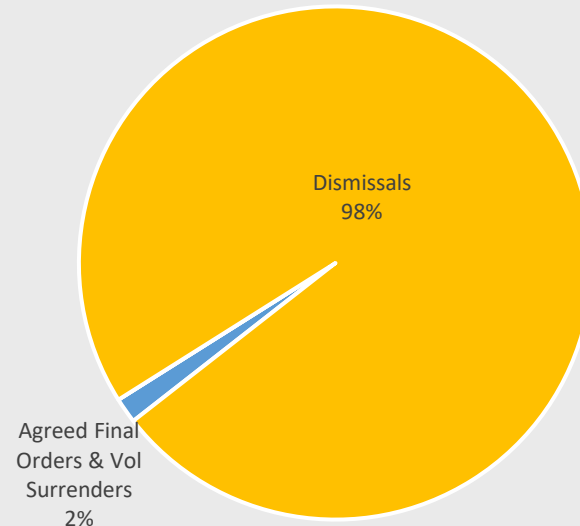


## FY22 Complaint Outcome

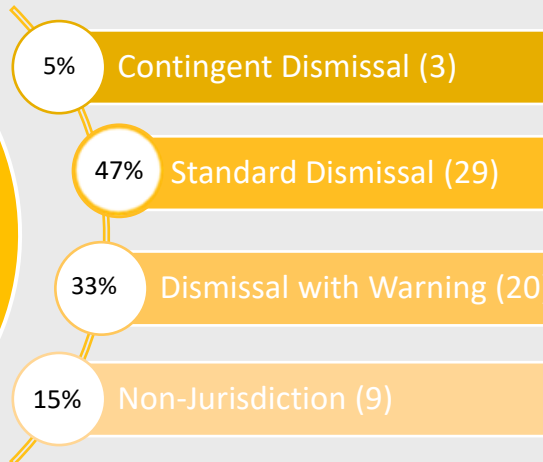
317 Complaints Resolved



## FY23 Complaint Outcome



## FY23 Dismissal Breakdown



## Fiscal Year 2023 Summary

63

Complaints Resolved

163 Days

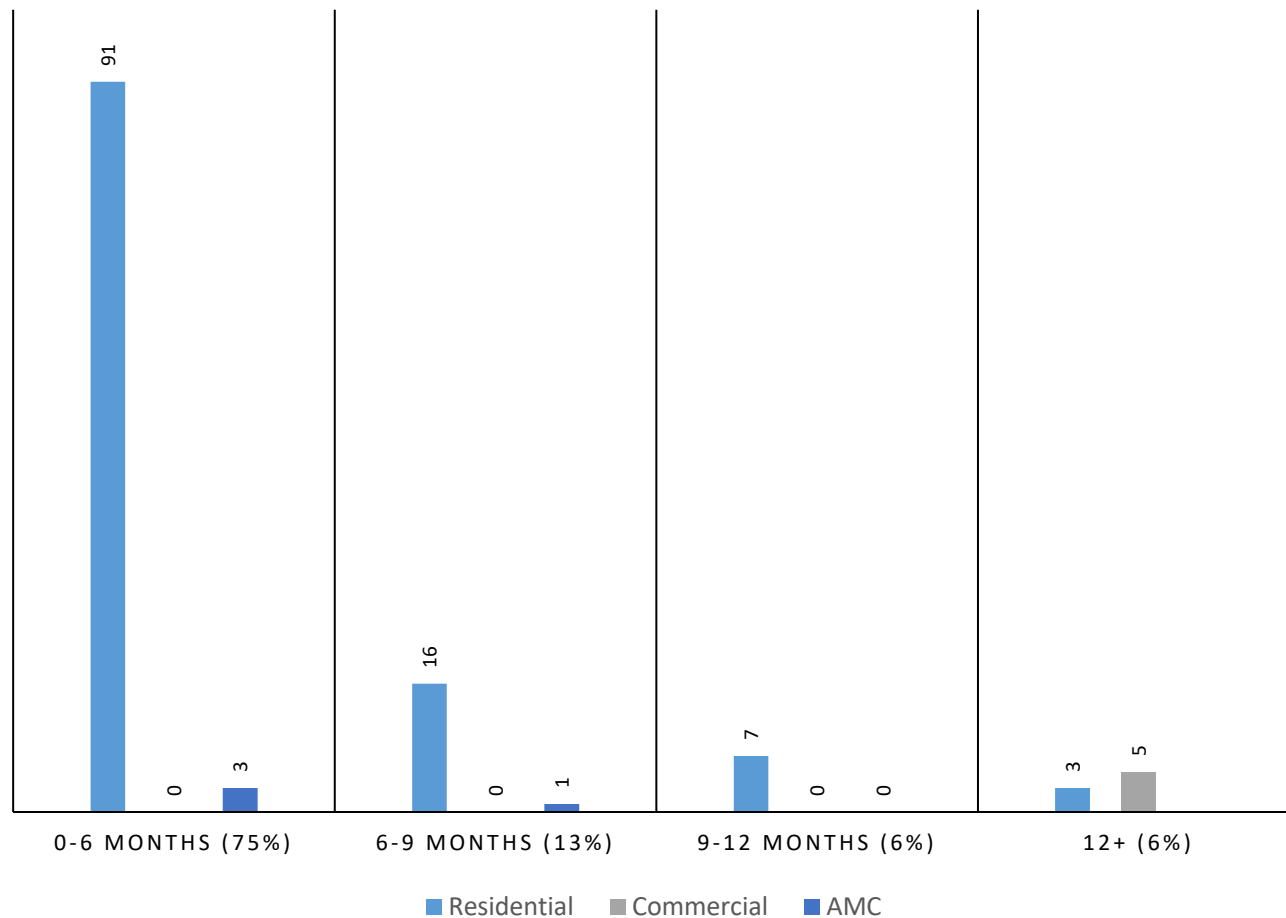
Average turnaround time  
Sunset Goal: Resolve complaints within 180-day on average

<1%

License holders receive discipline



# Open Complaint Snapshot



### Open Complaint Data

126 Open Complaints

8 Cases Over 1 Year Old

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

- 1 case with multiple complaints
- 2 cases abatement lifted 12/14
- 5 cases abated