

# **HALL COUNTY APPRAISAL DISTRICT**

---

**Board of Directors Policies and Procedures**

## TABLE OF CONTENTS

<b>BOARD OF DIRECTORS</b>	<b>6</b>
<i>Section 1. Qualifications</i>	<b>6</b>
<i>Section 2. Organization</i>	<b>6</b>
<i>The board will follow Roberts Rules of Order</i>	<b>6</b>
<i>Section 3. Responsibilities</i>	<b>6</b>
<i>Section 4. Meetings</i>	<b>7</b>
<i>Section 5. Access to the Board</i>	<b>7</b>
<b>METHODS OF FILLING VACANCIES</b>	<b>9</b>
<i>Section 1. Announcement of Vacancies</i>	<b>9</b>
<i>Section 2. Promotion Policy</i>	<b>9</b>
<i>Section 3. Temporary Promotions</i>	<b>9</b>
<i>Section 4. Transfers</i>	<b>9</b>
<i>Section 5. Non disciplinary Demotions</i>	<b>9</b>
<i>Section 6. Applications</i>	<b>10</b>
<i>Section 7. Evaluation</i>	<b>10</b>
<i>Section 8. Disqualification</i>	<b>10</b>
<i>Section 9. Re-employment</i>	<b>10</b>
<i>Section 10. Training</i>	<b>10</b>
<i>Section 11. Americans Disability Act</i>	<b>11</b>
<i>Appointment</i>	<b>12</b>
<i>Section 1. Basis</i>	<b>12</b>
<i>Sections 2. Type</i>	<b>12</b>
<i>Section 3. Emergency Temporary Appointments</i>	<b>12</b>
<i>Section 4 Nepotism</i>	<b>12</b>
<i>Chart of Kinship</i>	<b>13</b>
<i>Section 5. Residence</i>	<b>14</b>
<i>Section 6. Medical Examinations</i>	<b>14</b>
<i>Section 7. Completion of Forms</i>	<b>14</b>
<b>PERFORMANCE EVALUATION</b>	<b>15</b>
<i>Section 1. Performance Evaluation</i>	<b>15</b>
<i>Section 2. Purpose</i>	<b>15</b>

<i>Section 3. Counseling</i>	15
<i>Section 4. Reconsideration</i>	15
<b>CLASSIFICATION</b>	16
<i>Section 1. Plan Preparation and Maintenance</i>	16
<i>Section 2. Effect and Reallocation</i>	16
<i>Section 3. Official Titles</i>	16
<b>COMPENSATION</b>	17
<i>Section 1. Basis</i>	17
<i>Section 2. Payday</i>	17
<i>Section 3. Overtime/Compensatory Time</i>	17
<i>Section 4. Pay Raises</i>	17
<i>Section 5. Insurance and Retirement</i>	17
<i>Section 6. Travel Allowance</i>	17
<i>Section 7. Travel – Within District</i>	18
<i>Section 8. Auto Allowance</i>	18
<i>Section 8. Fees and Dues</i>	18
<i>Section 10. Final Paycheck</i>	18
<b>ABSENCE</b>	19
<i>Section 1. Holidays</i>	19
<i>Section 2. Vacation</i>	19
<i>Section 3. Sick Leave</i>	20
<i>Section 4. Military Leave</i>	20
<i>Section 5. Emergency Leave</i>	20
<i>Section 6. Administrative Absence with Pay</i>	20
<i>Section 7. Authorized Leave without Pay</i>	20
<i>Section 8. Absence without Leave</i>	20
<i>Section 9. Pregnancy and Maternity</i>	20
<i>Section 10. Injury on the Job</i>	20
<b>CONDUCT</b>	21
<i>Section 1. Working Hours</i>	22
<i>Section 2. Attendance</i>	22
<i>Section 3. Work Standards</i>	22
<i>Section 4. Employee Safety</i>	23

<i>Section 5. Political Activity</i>	23
<i>Section 6. Solicitation</i>	24
<i>Section 7. Outside Employment</i>	24
<i>Section 8. Physical Fitness</i>	24
<i>Section 9. Personal Appearance</i>	24
<i>Section 10. Financial Obligation</i>	25
<i>Section 11. Telephones</i>	25
<i>Section 12. Unfair Treatment, Discrimination</i>	26
<i>Section 13. Abuse of Powers</i>	27
<i>Section 14. Sexual Harassment</i>	27
<b>DISCIPLINARY ACTION</b>	29
<i>Section 1. Grounds</i>	29
<i>Section 2. Types</i>	29
<i>Section 3. Future Effect</i>	30
<i>Section 4. Administrative Suspension</i>	30
<i>Section 5. Notice</i>	30
<i>Section 6. Working Relationships</i>	30
<b>GRIEVANCES</b>	30
<i>Section 1. Grounds</i>	31
<i>Section 2. Procedures</i>	31
<b>NO DISCIPLINARY SEPARATION</b>	31
<i>Section 1. Resignation</i>	32
<i>Section 2. Layoff</i>	32
<i>Section 3. Incapacity</i>	32
<i>Section 4. Retirement</i>	32
<b>REINSTATEMENT</b>	32
<i>Section 1. Following Resignation</i>	33
<i>Section 2. Layoff</i>	33
<i>Section 3. Following Separation for Incapacity</i>	33
<i>Section 4. Veterans</i>	33
<i>Section 5. Restoration of Credits</i>	33
<i>Section 6. Re-employment</i>	33
<b>PERSONNEL FILES AND REPORTS</b>	34

<i>Section 1. Personnel Files</i>	<b>34</b>
<i>Section 2. Completion of Forms</i>	<b>34</b>
<b>SALARY AND COMPENSATION</b>	<b>35</b>
<i>Section 1. Salary and Compensation Methods</i>	<b>35</b>
<i>Section 2. Insurance Protection</i>	<b>35</b>
<i>Section 3. Credit Union</i>	<b>35</b>
<i>Section 4. Worker's Compensation</i>	<b>35</b>
<i>Section 5. Retirement</i>	<b>36</b>
<i>Section 6. Education Policy</i>	<b>36</b>
<b>CHIEF APPRAISERS DUTIES &amp; RESPONSIBILITIES</b>	<b>37</b>
<b>JOB DESCRIPTIONS</b>	<b>40</b>
<i>Chief Appraiser</i>	<b>40</b>
<i>Deputy Chief Appraiser</i>	<b>41</b>
<i>Bookkeeper - Clerk</i>	<b>42</b>
<b>NEPOTISM CHARTS</b>	<b>44</b>
<b>THE PROPERTY TAX CALENDAR</b>	<b>47</b>
<b>EVALUATION AND DEVELOPMENT PROGRAM for CHIEF APPRAISER</b>	<b>50</b>
<b>HALL COUNTY APPRAISAL DISTRICT PERFORMANCE</b>	
<b>REVIEW AND EVALUATION</b>	<b>55</b>
<b>ACTION PLAN - COMMENTS</b>	<b>56</b>
<b>HALL COUNTY APPRAISAL DISTRICT EMPLOYEE</b>	
<b>DISCIPLINARY REPORT</b>	<b>57</b>

## **BOARD OF DIRECTORS**

Governance of the Appraisal District is given to a board of directors. The members may not receive compensation for service on the board, but are entitled to reimbursement for actual and necessary expenses. It is the policy of the board of directors of the Hall County Appraisal District that the board of directors and the chief appraiser shall abide by all provisions of the Texas Property Tax Code as much as possible.

### **Section 1. Qualifications**

To be eligible to serve on the board, a person must have resided in the Hall County Appraisal District for a least two years immediately preceding the date of taking office.

Appraisal district directors serve two-year terms. Each term begins on January 1 of an even-numbered year. All directors serve the same two year terms.

The voting taxing units elect the members of the board. The same units nominate by resolution candidates to fill a vacancy on the board.

A taxing unit may ask for the recall of any director the unit voted for in the appointment process.

### **Section 2. Organization**

The board will follow Roberts Rules of Order

The board must be properly sworn into office, select officers and assign them responsibilities, schedule, and publicize meetings.

### **Section 3. Responsibilities**

The board of directors shall be appointed and serve as a five member board as set forth in Texas Statute Senate Bill 621.

Specific responsibilities of the board of directors are:

- A. Appoint a Chief Appraiser to serve as the chief administrative officer of the Hall County Appraisal District;
- B. Contracting with other appraisal offices taxing units, or private firms to perform appraisal functions;
- C. Adopt annual budgets for the operation of the appraisal office;
- D. Determine a method of financing the annual budgets cost allocation among taxing units;
- E. Purchase or lease real property, as well as, construction;
- F. Ensure preparation of annual audits by a certified public account;
- G. Select a financial institution to deposit funds through bid process;

- H. Entering contracts for appraisal functions and for certain expenses in excess of \$5,000 complying with the competitive bidding requirements established by law;
- I. Being a necessary party to lawsuits brought by property owners concerning appraisals;
- J. Approve the appointment of the Agricultural Advisory Board;
- K. Appoint the members of the Appraisal Review Board and increase the size when necessary; and
- L. Administer the district office in any other manner required by law and represent the public interest in all matters concerning the taxpayers of the district.

The board of directors has no responsibility for setting tax rates, appraising property, adjusting appraisals, granting or denying exemptions, or any other matter directly affecting the value of property.

#### **Section 4. Meetings**

- A. “Regular Meetings”. The board shall meet regularly once each quarter, or at such other time as the board deems necessary. The board Chairman along with the Chief Appraiser will set the date and time of the meeting.
- B. “Special Meetings”. Special meetings may be called by the secretary of the board at request of the chairman or on written request of any two board members.
- C. “Open Meetings”. Both the regular and special meeting of the board of directors shall be open to the public and to representatives of the press.
- D. “Order of Business”. The regular order of business shall be the reading of the minutes, hear from anyone desiring to appear before the board for any reason, approval of financial reports, approval of bills paid, report of Chief Appraiser, unfinished business, and new business.
- E. “Quorum”. A quorum of a majority of members must be present before the board takes any official action.
- F. “Regulation”. The board of directors may by a majority vote, make rules of procedure from time to time for the administration of these policies.
- G. “Persons Appearing Before the Board”. Individuals wishing to appear before the board must request in writing to appear before the board and give the subject upon which they wish to speak five days prior to the meeting date of the board. Persons then appearing before the board will be given a reasonable time to present their subject.

#### **Section 5. Access to the Board**

- A. “Handling Complaints”. The board of directors has no responsibility for setting tax rates, appraising property, adjusting appraisal, granting, or denying exemptions, or any other matter directly affecting the value of property. If any member of the public wishes to file a complaint, submit comments or recommendations with the board of directors concerning the operation of the appraisal office or any other function over which the board has responsibility, he or she may do so. Written correspondence to the chairman of the board outlining any complaint or concern

should be delivered to the Chief Appraiser of the district at the appraisal district office.

The Chief Appraiser will transmit copies of all such correspondence to members of the board of directors. The issues raised in such complaints or commentary will be discussed by the board at the next scheduled public meeting, and public testimony will be invited. Pursuant to Section 6.04 (g), Texas Tax Code the board of directors shall notify the parties to any complaint concerning its status on a quarterly basis until final disposition of the matter, unless notice would jeopardize an undercover investigation.

- B. "Access for Disabled Persons". All public facilities constructed or substantially renovated with public funds after 1969 must be accessible to the physically handicapped. However, cities, counties, and other public entities that lease facilities are not required to lease accessible facilities unless federal funds are used in the program-taking place at the facilities. Even though this applies to Hall CAD, every effort will be made to provide any person access to the office, board of directors, and appraisal review board, on a case-by-case basis.
- C. "Access to Non-English Speaking Person". The board of directors for Hall County Appraisal District will provide a translator to help non-English speaking members of the community as the need arises.



## **METHODS OF FILLING VACANCIES**

### **Section 1. Announcement of Vacancies**

The Chief Appraiser shall publicly announce by appropriate means all vacancies to be filled in the district service by other than administrative transfer, promotion, or reinstatement and shall maintain a list of announced vacancies for public inspection. Each announcement, insofar as practicable, shall specify the title, nature of the job, the required qualifications, and the deadline for and method of application. Each announcement shall contain a statement affirming the district's commitment to a policy of equal employment opportunity.

### **Section 2. Promotion Policy**

A promotion is the assignment of an employee from a position in one class to a position in another class having a higher maximum salary. It shall be district policy to provide promotional opportunities whenever possible. A selection process may be limited to qualified district employees or such employees may be given preference in application and/or consideration.

### **Section 3. Temporary Promotions**

The Chief Appraiser may authorize a temporary promotion to ensure the proper performance of district functions if a position is vacant or its regular incumbent is absent. Employees so promoted may be additionally compensated for the duration of their temporary assignments in amounts to be determined by the Chief Appraiser. Nothing herein shall be construed to prevent the assignment of higher-level duties to an employee without additional compensation. Authorized additional compensation shall be paid only in cases of formal temporary promotion effected in accordance with these rules.

### **Section 4. Transfers**

A transfer is the assignment of an employee from one position to another, not involving promotion or demotion. A transfer may be for administrative convenience or upon request of the employee. Transfers may be made administratively or in conjunction with an announced selection process.

### **Section 5. Non disciplinary Demotions**

A demotion is the assignment of an employee from a position in one class to a position in another class having a lower maximum salary.

With the approval of the Chief Appraiser and if qualified to perform the duties of the lower level position, an employee may be administratively demoted at his or her own request or as an alternative to layoff. Such demotions shall not be consideration for later advancement. Demotions affected as alternatives to layoffs may be fully or partially rescinded at any time.

## **Section 6. Applications**

Applications for initial employment, promotion or other type of transfer, and reinstatement shall be submitted as prescribed by the Chief Appraiser. Only applications officially received in the prescribed manner shall be considered.

All information submitted in connection with applying for district positions is subject to verification.

## **Section 7. Evaluation**

The Chief Appraiser shall determine the most appropriate means of evaluating applicants against job requirements to identify the best-qualified reference checks, interviews, medical examinations, background checks, performance tests, written tests, and/or screening procedures may be used as appropriate.

Applicants shall be required to provide any information and undergo any examinations necessary to demonstrate compliance with prescribed qualifications for the position involved.

## **Section 8. Disqualification**

An applicant shall be disqualified from consideration if he or she:

- A. Does not meet the qualifications necessary for performance of the duties of the position involved;
- B. Has made a false statement of material fact on the application form or supplements thereto;
- C. Has committed or attempted to commit a fraudulent act at any stage of the selection process;
- D. Is an alien not legally permitted to work;

An applicant may be disqualified from consideration upon other reasonable grounds relating to job requirements.

## **Section 9. Re-employment**

Request for re-employment of former employees will be accepted by the Chief Appraiser in the same manner as new applicants, if they were in good standing upon termination and gave the Hall CAD two weeks' notice of intention to resign.

A discharged employee seeking re-employment will be made on the person's total employment record and reasons for the discharge.

## **Section 10. Training**

The Hall CAD fosters and promotes employee development and training programs. The Chief Appraiser shall assist supervisors in training to meet the specific needs for employee efficiency. Also, information shall be available concerning job requirements

and training opportunities to assist employees in increasing their efficiency for present and future positions with the Hall CAD.

### **Section 11. Americans Disability Act**

Hall County Appraisal District will not discriminate against a “qualified individual with a disability” because of the disability of such individual in regard to job application procedures, the hiring, advancement, or discharge of employees, employee compensation, job training and other terms, conditions, and privileges of employment.

The definition of ‘disability’ is impairment that substantially limits one or more of the major life activities [including performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, or working] of such individual.

The American with Disability Act prohibits employment discrimination not against an individual with a disability but against a “qualified” individual with a disability and the Hall CAD policy will adhere to the Americans with Disabilities Act PL 101-336 effective January 26, 1992.

The following guidelines will be used as a determination factor concerning applicants or employees with disabilities:

- (1.) Examine each position to determine what employees currently do in that position;
- (2.) Determine the approximate percentage of time per week or month current employees perform their functions;
- (3.) Determine what licenses, educational background, and experience is required for each position;
- (4.) Define, as objectively as possible, what production standards are required for performance of the job (such as speed requirements, number of completion of tasks per day) ; and
- (5.) Examine all existing job descriptions, personnel policies, guidelines, supervisory manuals, and work rules and employee handbooks to determine which rules or provisions have adverse effects on disabled individuals. Consider whether these rules are necessary to assure that an employee can perform the essential functions of the positions. Eliminate those that are not necessary that may have an adverse impact upon the disabled.
- (6.) Examine job descriptions to make sure that all job criteria are related requires “ability to lift 50 pounds”, the employer must be able to demonstrate that this ability is essential to perform the job –e.g., that employees commonly do lift 50 pounds. Even if not commonly performed, some functions may be “essential”. For example, a person in charge of administering corporate safety may need to be able to administer first aid on an emergency basis. Although not commonly performed, the function is still essential.

## **Appointment**

### **Section 1. Basis**

Appointments shall be made based on the qualifications of applicants as ascertained through fair and practical selection methods.

### **Sections 2. Type**

Appointments shall be designated either regular or temporary. Regular appointments shall ordinarily be of indefinite duration and may be made to full-time or part-time positions. Limited term regular appointments may be made in unusual circumstances. All regular appointments are subject to the rules governing probation.

Temporary appointments shall ordinarily be limited to six months and may be made to full-time or part-time positions requiring continuous, seasonal, or intermittent performance.

### **Section 3. Emergency Temporary Appointments**

Whenever an emergency exists, which requires the services of personnel who are not otherwise available, such personnel may be immediately appointed for a period not to exceed 30 working days without regard to normal recruitment and selection requirements. Emergency temporary appointments shall not be renewable.

### **Section 4 Nepotism**

No employee may directly or indirectly supervise or be supervised by a member of his or her immediate family. For purpose of these rules, an immediate family includes spouse, parent, stepparent, parent-in-law, child, stepchild, brother, sister, stepbrother, stepsister, brother-in-law, sister-in-law, grandparent, grandchild, and any relative living in the same household as the employee.

No person related within the second degree of affinity or consanguinity (blood relationship) to any member of the board of directors or Chief Appraiser shall be appointed to any office, position, clerkship, or other service of the Hall CAD.

A Chief Appraiser may not refer a person to another person for an appraisal, even if the appraisal is not for property tax purposes. Also, any appraisal performed by the Chief Appraiser privately or by a relative of the Chief Appraiser within the second degree of affinity or consanguinity is inadmissible in any appraisal review board or judicial hearing on any property taxable within the Hall CAD.

No two members of an immediate family living in the same household shall be employed by the Hall CAD. No employee shall work under the supervision (directly or indirectly) of a relative.

No individual may serve, or be appointed to serve on the board of directors if either he or she has a business in which he or she has a substantial interest has a contract with (a) the appraisal district or (b) a taxing unit within the district (if the contract with the taxing unit relates to a property tax activity). The appraisal district and taxing unit are likewise prohibited from entering into such a contract. A person has a prohibited substantial interest in a business if: he and his spouse together own at least 10% of the voting stock; or he or his spouse is a partner, limited partner, or officer of the business.

The Chief Appraiser may apply the nepotism prohibition in the case of other organizational (contractual services) and/or personal relationships when failure to do so would be detrimental to the district.

### Chart of Kinship

#### First Degree

**By Consanguinity**

- Parents
- Children

**By Affinity**

- Spouses of relatives listed under consanguinity
- Spouse
- Spouse's parents
- Spouse's children
- Stepparents
- Stepchildren

#### Second Degree

**By Consanguinity**

- Grandparents
- Grandchildren
- Brothers & Sisters

**By Affinity**

- Spouses of relatives listed under consanguinity
- Spouse
- Spouse's grandparents
- Spouse's grandchildren
- Spouse's brothers & sisters

#### Third Degree

**By Consanguinity**

- Great grandparents
- Great grandchildren
- Nieces & nephews
- Aunts & uncles

**By Affinity**

No PROHIBITATIONS

### **Section 5. Residence**

There shall be no absolute residence requirement for district employment except as may be provided by law. Employees likely to be called to work in cases of emergency may be required to reside within a reasonable commuting range of their places of work.

### **Section 6. Medical Examinations**

A person selected for initial appointment or reinstatement to certain classifications as designated by the Chief Appraiser shall undergo a thorough medical examination at districts expense in a manner prescribed by the Chief Appraiser. Employment shall be contingent upon successful completion of the medical examination in relation to the standards of fitness required for the position involved. The Chief Appraiser, acting on information provided by the medical personnel, shall be the final authority in determining medial suitability for employment.

The Chief Appraiser may waive or modify the medical examination requirement for any - or all part-time positions or for reinstatements following short breaks in service

### **Section 7. Completion of Forms**

Upon successfully passing the physical examination, the new employee will be required to complete the following forms:

1. Withholding tax forms (W-4)
2. Application for insurance, if applicable
3. Application for retirement membership, if applicable
4. Payroll maintenance form, if applicable

# PERFORMANCE EVALUATION

## **Section 1. Performance Evaluation**

The work performance of each regular employee shall be evaluated in accordance with procedures developed by the Chief Appraiser. An employee shall be evaluated annually. Special evaluations may be made if authorized by the Chief Appraiser. Probationary employees shall be evaluated at the midpoint of their probationary periods and again immediately prior to the completion thereof.

## **Section 2. Purpose**

Performance evaluations are designed to help supervisors and employees measure how well work is being performed and to provide a tool for management decisions regarding training, assignment, promotion, and retention of employees.

## **Section 3. Counseling**

Employees shall be provided copies of their own performance evaluation reports. Evaluators shall individually discuss the reports with employees and shall counsel them regarding their careers and any improvements in performance, which appear desirable or necessary.

## **Section 4. Reconsideration**

Employees dissatisfied with their performance evaluation may seek reconsideration by using established grievance procedures.

# CLASSIFICATION

## **Section 1. Plan Preparation and Maintenance**

The Chief Appraiser shall prepare and administer a classification plan for the district service based on analysis of the duties and responsibilities of positions. Positions shall be allocated to appropriate classes based on objective factors. The Chief Appraiser shall continually review the duties and responsibilities of district positions and make any necessary adjustments to the classification plan.

An employee may request that his or her position be reviewed for proper classification by using established grievance procedures.

## **Section 2. Effect and Reallocation**

An employee in a position, which is reallocated from one class to another, shall be entitled to continue to serve therein with unimpaired status if the duties and responsibilities of the position are not significantly changed or if the employee substantially meets the qualifications prescribed for the new class

## **Section 3. Official Titles**

Official class titles shall be used in all personnel matters.  
Working or functional titles may be otherwise used as appropriate.



# COMPENSATION

## **Section 1. Basis**

The Chief Appraiser shall prepare and administer a comprehensive compensation plan for district employees subject to required budgetary restrictions. Employees shall be paid salaries or wages in accordance with the compensation plan, which shall include one or more salary schedules, consideration shall be given to prevailing rates of pay among public and private employers; the duties, responsibilities, and qualifications required of employees in the classes; and other relevant factors.

## **Section 2. Payday**

All employees are paid on the 15<sup>th</sup> and the last day of each month. Paychecks will be written on the 16<sup>th</sup> and first day of the month, or as the Chief Appraiser determines. Employee paychecks should be in the amount of one twenty-fourth of the annual salary, less deductions for withholding tax and retirement. Also, an employee may authorize certain other deductions, such as insurance premiums, credit union, etc.

## **Section 3. Overtime/Compensatory Time**

Occasionally employees may be asked to work overtime. Employees will be paid time and one-half for hours worked in excess of the normal 40-hour week. In cases where the Chief Appraiser allows compensatory time to be taken at a later date, a record will be kept by the office supervisor the time earned and the time taken. Compensatory time must be taken in the same pay period in which it is earned.

## **Section 4. Pay Raises**

All employees are eligible for merit increases annually. The increments within established salary ranges are to reward employees for excellent work and consistent performance above and beyond that required for the position. Increases must be earned by the employee and requested recommended, and justified by the supervisor ..... subject to approval of the Chief Appraiser. All pay raises not approved in the current budget must be approved by the board of directors. Raises are not automatic and will be subject to the condition of the economy, skill level, market place, and performance at the time of consideration.

## **Section 5. Insurance and Retirement**

Eligible employees shall receive insurance and retirement benefits as prescribed in the applicable programs.

## **Section 6. Travel Allowance**

Travel Allowance will be paid to employees under the following conditions:

- A. All out of district travel by employees of the district must be authorized by the Chief Appraiser.

- B. Transportation costs for the district officials or employees duly authorized to travel on official district business shall be paid a per diem allowance of \$75.00, or actual expenses verified by receipts, plus transportation for all employees required to stay overnight. The district shall not pay for more than 10 days of travel allowance per employee during a twelve (12) month period without prior approval by the board of directors.
- C. All authorized travel by an employee of the district shall count as attendance at work and conversely any unauthorized travel shall count as attendance at work and conversely any unauthorized travel shall count against the employee's time and attendance work record.

### **Section 7. Travel – Within District**

District related travel shall be under the following regulations:

- A. Any use of private vehicle for any authorized district travel will be reimbursed to the traveler on a per mile basis as set by U.S. Government rate when supported by detailed records and proof of automobile liability coverage.
- B. Use of district-owned vehicles (if applicable) will be limited to district related business only, unless otherwise specified written permission is granted by the Chief Appraiser. Any damage occurring to any district-owned vehicle that is due to driver negligence, in the opinion of the Chief Appraiser, will be paid for by the employee driving the vehicle.

### **Section 8. Auto Allowance**

The district may make arrangements with some employees to allow a flat monthly allowance for the employees to use their own vehicle in conducting district business rather than pay mileage or furnishing a district-owned vehicle. This auto allowance covers district travel will be reimbursed on the regular basis as long as proof of mileage and evidence of liability coverage is produced.

### **Section 8. Fees and Dues**

The district will pay registration fees for employees for courses necessary to become accredited by the Texas Board Licenses as set forth by state law.

The district shall pay registration dues for all employees to the Texas Board of Licenses, Texas Association of Assessing Officers, and district dues to the Texas Association of Appraisal District.

### **Section 10. Final Paycheck**

When employment with the Hall CAD is terminated, the final paycheck may be picked up by terminated employee... provided all exit processing has been completed and signed release from is turned into the Chief Appraiser.

## **ABSENCE**

### **Section 1. Holidays**

Hall CAD will take the same holidays as the Officers and Employees of the Hall county Courthouse set by the County Commissioners. These holidays will usually be New Years Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and the day after, Christmas Eve, Christmas Day, and the day after and such other days as may be declared by the Hall County Commissioners and the Hall CAD Board of Directors.

- A. As many employees as possible shall be given each holiday off consistent with the maintenance of essential district functions.
- B. Full-time regular employees shall be entitled to paid holidays.
- C. Part-time regular employees who would normally have worked on a day of the week observed, as a holiday shall be entitled to holidays with pay for number of hours they would have worked on that day if the holiday had not occurred.
- D. If a holiday falls on Saturday, normally the preceding Friday shall be observed, and if a holiday falls on Sunday, normally the following Monday shall be observed.
- E. An employee on leave of absence without pay status on the holiday or on the scheduled workday immediately preceding or following shall not receive pay for the holiday.
- F. Employees desiring to observe religious holidays not coinciding with official holidays may be given time off without pay or may be authorized to use accrued vacation leave.

### **Section 2. Vacation**

Full-time regular employees shall earn 1 day of vacation time for each month worked, (twelve workdays plus holidays). Employees with five years employment will receive one and one half days per year, (eighteen workdays, plus holidays). Part-time regular employees shall earn vacation leave in proportion to time worked. Vacation leave shall be administered according to the following rules.

- A. Vacation leave shall not accrue any month during which an employee is in pay status for less than half the standard number of paid days for his or her type of job.
- B. Vacation leave may be taken in one-work day increments with the Chief Appraiser's approval.
- C. Employees shall be encouraged to use a substantial portion of their vacation leave each year. No employee shall carry over 12 days vacation leave from one year to the next.
- D. The Chief Appraiser shall schedule or approve vacations giving due consideration to the needs of the district and interest of the employees. (Such as tax appraisal notice times, ARB hearings, tax bill times, the last day of the year or the last day of January).

- E. Employees being laterally transferred, promoted, or demoted shall retain vacation leave earned at the time of the transfer, promotion, or demotion.
- F. Vacation leave shall not be advanced to employees unless approved by the Chief Appraiser.
- G. Employees who are separated in good standing shall be paid for any earned vacation leave.

### **Section 3. Sick Leave**

Regular employees shall be allowed sick leave with full pay in accordance with the following rules:

- A. A full-time employee shall earn one (1) day of sick leave per month of service. Part-time employees shall not accumulate sick leave.
- B. Sick leave shall not accrue for any month during which an employee is in pay status for less than half the standard number of days for his or her type of job.
- C. A limit of 60 days of sick leave may be accumulated.
- D. Sick leave may be taken in increments equivalent to one hour of work because of personal illness, injury, legal quarantine, or routine health care appointments, which cannot reasonably be scheduled outside the working hours.
- E. Sick leave may also be taken when an employee is required to attend to a member of his immediate family who is ill or incapacitated. The “immediate family” is defined as the employee’s husband, wife, children, brother, sister, parents, mother / father-in-law, or grandparents.
- F. The Chief Appraiser may request and obtain verification of the circumstances surrounding any use of sick leave.
- G. Employees shall not be paid for unused sick leave upon separation.
- H. Employees, who consistently use their sick leave as it is earned, or who fail to accumulate it, may be subject to disciplinary action.

### **Section 4. Military Leave**

Military leave shall be granted in accordance with applicable State and Federal laws. Employees preparing to take authorized military leave shall furnish the Chief Appraiser with copies of military orders or other appropriate certifications.

### **Section 5. Emergency Leave**

The Chief Appraiser, after ascertaining the exact circumstances, may grant a regular employee up to three working days per calendar year of paid emergency leave in the event of a death within the employee’s immediate family or household. A separate but similar benefit may be granted in the event of a serious illness in the family or household. Emergency leave shall be charged against vacation or sick leave.

Temporary employees may be granted unpaid emergency leave in the above circumstances.

### **Section 6. Administrative Absence with Pay**

An employee ordered not to report or who cannot report of inclement weather or disaster may be granted administrative absence with pay by the Chief Appraiser. Employees shall be granted sufficient administrative absence with pay, when necessary in order to vote in official election. Employees called for jury service shall be granted administrative absence with pay during such service and shall retain any fees paid by the courts. Employees excused or released from jury services shall report to work.

### **Section 7. Authorized Leave without Pay**

In circumstances not falling within other provision of these rules, the Chief Appraiser may authorize an employee to take leave without pay under such terms and conditions as may be mutually agreeable.

### **Section 8. Absence without Leave**

An employee failing to report for duty or remain at work as scheduled without proper notification, authorization, or excuse shall be considered absent without leave and shall not be in pay status for the time involved.

Absence without leave constitutes abandonment of duties, which may result in dismissal.

### **Section 9. Pregnancy and Maternity**

A pregnant employee is expected to make her own decision, in consultation with her physician, as to when she will cease working. Except in emergencies, at least 10 working days written notice of cessation of work shall be required. The aforementioned notice shall include a statement of the employee's intentions concerning resumption of work.

An employee who is temporarily unable to perform her job because of a pregnancy related condition shall be treated in the same manner as the district would treat other temporarily disabled employees. Whether this is accomplished through modification of work tasks, alternative assignment, disability leave, or leave without pay.

Also, she shall have the same opportunities to return to work, accrual of seniority during medical absences (including pay increases), and vacation policies, as those under any other sick or disability leave.

The employer cannot specify any time limit during pregnancy as to when an employee must take leave; an employee is permitted to work as long as she is physically able to work. There is no specific time limit for her to return to work unless the same time limits apply to other employees taking a disability leave or returning from disability leave; she must return, however, when she is physically able to do so.

Employees with illness or disabilities arising from pregnancy or maternity shall be entitled to benefit on the same basis as employees with other types of temporary illness or disabilities.

Available sickness or disability benefits may be used for the time during which the employee herself is medically unable to work. The district may require periodic medical reports concerning the employee's status and availability to return to duty.

**Section 10. Injury on the Job**

An employee injured in the line of duty shall receive workers' compensation and injury leave benefits under terms and conditions prescribed in the applicable programs. Workers' compensation benefits shall be supplemented by the district as necessary to ensure that a disabled employee receives full salary for six months. Thereafter, any supplemental benefits shall be reduced or eliminated as prescribed in the applicable programs.

# CONDUCT

## **Section 1. Working Hours**

Working hours should be from 8:30 A.M. to 5:00 P.M., Monday through Friday, with an hour for lunch for all Hall CAD employees. Certain employees may have their hours vary in certain situations. The supervisor will explain the employee's particular schedule.

## **Section 2. Attendance**

Employees are expected to report to work each workday at the designated time and place, unless there is a valid reason for absence. An employee should notify the supervisor if he/she may be granted leave for prolonged periods of illness or hospital confinement. Following any absence employees may be required to provide a validated excuse of absence. Negligence may be cause for disciplinary action or termination.

## **Section 3. Work Standards**

It shall be the duty of each employee to maintain high standards of cooperation, efficiency, and economy in his or her work for the district.

If work habits, attitude, production, and/or personal conduct of an employee fall below appropriate standards, the Chief Appraiser should point out the deficiencies at the time they are observed. Counseling and warning the employee in sufficient time for improvement should ordinarily precede formal disciplinary action, but nothing herein shall prevent immediate formal action as provided elsewhere in these rules whenever the interest of the district requires action.

Employees should remember:

1. The citizens are the person's the district serve.
2. Employees have the responsibility of providing economical and efficient service.
3. Respect the dignity of every individual.
4. Be a good and sincere listener.
5. Try honestly and sincerely to see the other persons point of view.
6. Ask questions instead of giving orders.
7. Speak kindly to and of others.
8. Smile – and mean it.
9. Avoid arguments.
10. Be friendly.
11. Deliver on any promised you make.
12. Be punctual for appointments.
13. Be loyal to taxpayers.
14. Be loyal to Board of Directors.
15. Be loyal to supervisors.
16. Do not discuss problems with co-workers but go directly to the supervisor.

When a person accepts a job with the Hall CAD, he/she must forego some of the privileges that a person might have in private business or industry. This organization must be above suspicion. Hall CAD employees should do nothing in their private lives that may adversely affect their reputation or character.

#### **Section 4 Employee Safety**

Continued employment with the Hall CAD is based, in part on an employee's ability to follow sage practices and all safety regulations concerning your work. Responsibility for a safe work place falls on the supervisor and the employee. If an employee is in doubt about the proper procedure to follow on the job, ask the supervisor.

Safety Pointers:

1. Know the job.
2. Be alert to unsafe conditions or unsafe employees - report both to the supervisor.
3. Cooperate with the fellow employees.
4. Offer constructive suggestions on safety.
5. Practice on-the-job housekeeping.
6. Ask the supervisor if in doubt.
7. Do not forget about safety when leaving work.
8. If an employee is injured, no matter how minor, immediately report it to your supervisor.

It is the intent of the Hall CAD to make all jobs as safe as possible. All employees are required to take every precaution to prevent accidents to themselves, their fellow employees, and the public. Strict adherence to all safety rules and regulations is expected. Any employee who violates a safety rule will be subject to disciplinary action.  
**BE SAFETY CONSCIOUS!**

#### **Section 5. Political Activity**

Except as may be otherwise provided by law, the following restriction on political activity shall apply to HALL CAD employees:

- A. Employees shall refrain from publicly using their positions or influence for or against any candidate for public office in any jurisdiction.
- B. Employees shall not circulate petitions or campaign literature on behalf of candidates for any elective office or be in any way concerned with soliciting or receiving any subscription, contribution, or political service or to circulate petitions or campaign literature on behalf of such candidates.
- C. Employees shall not use working hours or district property to be in anyway concerned with soliciting or receiving any subscription, contribution, or political service or to circulate petitions or campaign literature on behalf of candidates for public office in a jurisdiction.
- D. Employees shall not in any manner contribute money, labor, time, or other valuable things to any person for local election purposes.



- E. No employee may seek or hold an appointive or elective office of public trust, partisan office in any jurisdiction, or in any other office where service would constitute a direct conflict of interest with district employment, with or without remuneration. Upon announcement of intention to seek or assume such office, an employee shall resign or be dismissed for cause upon failure to do so.

### **Section 6. Solicitation**

Employees of Hall CAD shall not:

- A. Solicit or accept money, donations, gifts, business interests, privileged information, favors, special treatment, employment, meals, trips, tickets, accommodations, political support or anything of tangible or intangible value for himself, or for a person or firm in which he has an interest, from any party who could be favorably or adversely affected in a property tax matter by performance of official duties.
- B. Accept or solicit any of the items cited above in return for favorable treatment in a decision regarding property value, exemption or property from taxation, or the award of a contract: or in return for favorable recommendations regarding employment of, or letting of contracts to, appraisers, appraisal firms, attorneys, consultants or others.
- C. Hold employment outside of the appraisal district, which could impair objectivity and independent judgment in the performance of duties in the appraisal district.

### **Section 7. Outside Employment**

An employee shall not engage in outside employment, including self-employment, where such employment would constitute a conflict of interest or would adversely affect the employee's performance in the district service. Outside employment must be reported to and approved by the Chief Appraiser.

### **Section 8. Physical Fitness**

It shall be the responsibility of each employee to maintain the standards of physical fitness required for performing his or her job.

### **Section 9. Personal Appearance**

All employees, regardless of work location and degree of public contact, are expected to dress appropriately and in good taste and are expected to maintain a good general appearance at all times.

Personal appearance is extremely important in that you represent the Hall CAD in the performance of your duties. Employees should dress in a way that is appropriate for the job; expensive clothes are not necessary, but proper clothes are important. Hair should be clean, well groomed, and a length in accordance with current styles. Additional policies and the Chief Appraiser will make rules, when strict dress codes are deemed necessary for the position. Neatness and cleanliness are essential. Ladies apparel during office hours

shall consist of dresses, skirts and blouses, pantsuits, or matching slacks and tops to create a neat appearance. No attire shall be immodest or extreme in any way.

Men shall wear clothing as befits their job assignments with no apparel being extreme. Hair length and styling shall be neat at all times.

### **Section 10. Financial Obligation**

All employees are expected to keep their personal financial affairs in good order. Failure to pay just debts, including taxes, may constitute grounds for disciplinary action if job performance is impeded.

### **Section 11. Telephones**

Telephones in the Hall CAD offices are for Hall CAD business. Employees are allowed to make personal calls, but are requested to hold these calls to a minimum.

All outgoing long distance calls must be logged in by the employee making the call if called upon to do so by Chief Appraiser. Any personal long distance calls must be handled the same way. When the monthly phone bills arrive, it is expected that all personal calls be paid for. Failure to adhere to this policy could be grounds for termination without terminal pay. Telephone tips to help employees:

1. Remember that the telephone is a substitute for face-to-face contact.
2. Answer the telephone promptly when it rings.
3. Talk directly into the transmitter at a distance of not more than one-half inch.
4. Speak clearly, distinctly and naturally.
5. When answering the telephone, an employee should identify the office and himself or herself.
6. Cultivate the "voice with a smile". Actually wearing a pleasant expression is a good start. Ending on a rising inflection will help create the sound of a smile and give the employee a pleasing telephone personality.
7. Do not keep the caller waiting while searching for information. Offer to call back.
8. Offer to be of assistance to a caller or take a message if the person being called is not in the office.
9. Deliver all telephone messages promptly.
10. When making a call, an employee should identify himself or herself. Do not let the other person have to guess identity or ask who is calling.
11. Employees should place their own telephone calls. If someone does not place his or her own calls, it gives the other person the impression that he or she is too big and the person called is too insignificant to bother with.
12. End calls courteously, Use the other person's name.

## **Section 12. Unfair Treatment, Discrimination**

Employees of the HALL CAD:

- A. Shall not provide, to any party information that is not provided to, or reasonably available to all citizens.
- B. Shall not deviate from standard exemption, appraisal methods and procedures for the purpose of giving unfair benefit or unfair disadvantage to any person or interest.
- C. Shall not give preferential treatment to any property owner or property owner's agent at any stage of the appraisal or appraisal review process by giving special or faster access to staff personnel, records or facilities; or by providing research support or other use of agency resources that is not routinely provided to all taxpayers.
- D. Shall not use dissimilar appraisal techniques in the appraisal of similar properties.
- E. Shall apply appraisal procedures and methods in such a manner as to insure fairness and uniformity in appraisals.
- F. Shall not disseminate information selectively to certain persons or groups while withholding that information from any person or group. "Information" pertains to taxpayer rights and remedies, eligibility for exemptions and any other matter that might affect taxpayer liability.
- G. Shall not predetermine that value or value range of a property or properties and then manipulate data to arrive at the predetermined conclusion; and shall use value range, percentage, and other gross techniques only as justified by commonly accepted methods and statistical analysis.
- H. Shall not use an arbitrary and non-objective factor in appraising a property or class of properties; e.g.; a factor based on political pressure to raise or lower a value or to raise or lower values in a particular class of properties.
- I. Shall not provide special access-to-information privileges to members of the press; tax agents; real estate agents; any individual or group with ownership or a particular category of property; any political, social, or economic faction or any individual or group with ownership of a particular category of property; any political, social, or economic faction or any individual or group.
- J. Shall not exempt the property of any individual, organization, or group from appraisal, assessment, or payment of property taxes because of "inability to pay", illegal mandates from governing bodies, and any official or social pressure or for any other reason that is not a basis for exemption in state law.
- K. Shall not request of, or suggest to, another property tax official that special consideration, reconsideration, or review be accorded the property tax situation of any particular person or firm. Shall not accede to request from another property tax official for special treatment of a particular taxpayer.

### **Section 13. Abuse of Powers**

Employees of Hall CAD:

- A. Shall give all notices required by law in the manner prescribed by law.
- B. Shall not use the resources of the agency to develop information for personal use, or for the personal use of persons of persons in whom he has an interest, or for use by any party for unofficial purposes.
- C. Shall not promise confidentiality of any communication unless confidentiality is authorized by law and can be reasonable assured.
- D. Shall not reveal information from property renditions, which are legally confidential.
- E. Shall not use official information which is confidential, or which can be obtained by an ordinary citizen only with great effort or expenses, as a basis for personal investment or acquisition decisions.
- F. Shall respond accurately, to any tax related question, which is properly presented by any citizen in a reasonable manner.
- G. Shall not be a party to discussion by an official body in session closed to the public when the matters being addressed should be addressed in a session open to the public.
- H. Shall not misappropriate, misuse, or misapply district property.
- I. Shall not change, or cause to be changed, any information on an appraisal roll, tax roll or tax payment receipt or other official record except as specifically authorized by state law.
- J. Shall not remove any property from or fail to record any property on the appraisal roll.
- K. Shall comply with state law and local law, regulation, policy and procedures related to official conduct, bribery, nepotism, conflict of interest, open records and open meetings.

### **Section 14. Sexual Harassment**

Hall County Appraisal District adopts the following concerning sexual harassment:

Equal Employment Opportunity Commission (EEOC) defines two types of sexual harassment; both are illegal under Title VII of the Civil Rights Act of 1964:

#### **Quid pro QUO\***

Occurs when employee is subject to unwelcome sexual advances and submission to them is made the basis for firing, hiring, and advancement.

#### **Environmental**

Occurs when any type of unwelcome sexual behavior creates a hostile work environment.

#### **EXAMPLES OF SEXUAL HARASSMENT:**

- .. Unsolicited and unwelcome flirtations, advances, or propositions
- .. Graphic or degrading comments about employee's appearance, dress, anatomy
- .. Display of sexually suggestive objects or pictures
- .. Ill received dirty jokes and offensive gestures

- .. Sexual or intrusive questions about employee's personal life
- .. Explicit descriptions of the harasser's own sexual experiences
- .. Abuse of familiarities or diminutives such as "honey", "baby", "dear"
- .. Unnecessary, unwanted physical contact such as touching, hugging, pinching, patting kissing
- .. Whistling, catcalls
- .. Leering
- .. Exposing genitalia
- .. Physical or sexual assault
- .. Rape

\*Quid pro quo: something given or received for something else.

## **DISCIPLINARY ACTION**

### **Section 1. Grounds**

Disciplinary action may be taken against an employee for just cause. Employees are expected to abide by the Hall CAD rules, regulations, and procedures. Failure to adhere may result in disciplinary action. Cause of disciplinary action includes, but is limited to the following:

1. Illegal, unethical, abusive, or unsafe acts... and violations of Hall CAD rules, regulations policies, or procedures.
2. Participation in an organized strike or work stoppage.
3. Participation in a prohibited political activity or unauthorized solicitation.
4. Tardiness or absences without notice.
5. Using or being under the influence of drugs or intoxicating beverages on the job.
6. Waste, damage, or unauthorized use of Hall CAD property.
7. Failure to pay taxes or other liabilities.
8. Unauthorized or improper use of official authority.

### **Section 2. Types**

Disciplinary action taken shall be consistent with the nature of the deficiency or infraction involved and with other relevant factors. Formal disciplinary action shall include written reprimand, denial, or delay of individual pay increase, suspension without pay for up to 15 calendar days, reduction in pay within approved grade or salary range, transfer, demotion, and dismissal.

Any of the foregoing types of formal disciplinary action may be invoked for a particular deficiency or infraction, depending upon the exact circumstances. An employee may be formally warned at any time that he or she may be dismissed or otherwise disciplined for further unsatisfactory performance and/or conduct. Nothing here shall prohibit the administration of informal disciplinary action, such as oral reprimands, for just cause. Informal disciplinary action will be documented.

#### **FORMAL DISCIPLINARY INCLUDES:**

- .. Oral reprimand,
- .. Suspension of privileges,
- .. Temporary lay-off without pay,
- .. Demotion,
- .. Dismissal.

Any of the disciplinary actions listed above may be invoked for a particular offence or deficiency, depending upon the exact circumstances. An employee may be dismissed at any time for just cause ascertained after careful and factual consideration.

### **Section 3. Future Effect**

Previous disciplinary action shall not automatically disqualify an employee from consideration for individual salary increase, promotion, or other beneficial personnel action. Each case shall be reviewed on its own merits.

### **Section 4. Administrative Suspension**

When an employee is under investigation for a crime or official misconduct or is waiting hearing or trial in a criminal matter, he or she may be suspended without pay for the duration of the investigation or proceedings when such suspension would be in the best interest of the district and public. If the investigation or proceedings clear the employee, he or she shall be eligible to resume work under such conditions as may be specified by the Chief Appraiser.

### **Section 5. Notice**

Formal action taken under provisions of this chapter shall be accompanied or preceded by a written notice to the employee involved. The notice shall describe the cause of the action, and except in cases of dismissal or administrative suspension, shall state the likely consequences of further performance and/or conduct.

### **Section 6. Working Relationships**

All employees should maintain high standards of cooperation, efficiency, and economy in their work for the Hall CAD. Supervisors will help correct any deficiencies in work habits, attitudes, productivity, or person conduct. If necessary, formal discipline may be used to correct these deficiencies.

## **GRIEVANCES**

A grievance is an employee complaint relating to the job, pay, working conditions, or treatment.

It is the Hall CAD's policy to deal promptly with grievance, which occur. The grievance procedure is designed so that employee work related complaints, when presented in good faith, will be considered fairly and without undue delay.

### **Section 1. Grounds**

Employees dissatisfied with specific working condition, the classification of their positions, or their performance evaluations or who believe they have been subject to unfair treatment or discrimination may submit grievances. Additional grounds may be established by administrative directive.

### **Section 2. Procedures**

Employees shall be encouraged to informally take any job-related complaint or problem to their immediate supervisor. Following informal discussions, an employee remaining dissatisfied with a matter subject to grievance procedures may submit a written grievance to his or immediate supervisor within five working days thereafter.

If shall be the responsibility of the immediate supervisor to study the grievance and attempt to resolve it within five working days. Further discussions with the grievant shall be encouraged. If the grievance cannot satisfactorily be resolved within the time limit, the immediate supervisor shall refer it with comments and/or recommendations to the next higher level of supervision, and so on up to the Chief Appraiser if necessary. Supervisors and employees should make every effort to resolve grievances at the lowest level possible.

Employees shall be kept informed of the status of their grievances. If a person in the supervisory chain fails to resolve or refer grievances with five working days, the employee may present the grievance directly to the next high level of supervision. No punitive action shall be taken against an employee for submitting a grievance in good faith.



## **NO DISCIPLINARY SEPARATION**

### **Section 1. Resignation**

An employee may leave the district service in good standing by submitting his or her resignation in the prescribed manner at least two weeks in advance. The Chief Appraiser may waive any portion of the notice period. An employee resigning without the required notices shall be ineligible for reinstatement.

### **Section 2. Layoff**

An employee may be laid off because of changes in duties or organization or for lack of work or funds. Whenever possible, at least two weeks' notice shall be given an employee prior to layoff.

Layoffs shall be carried out on the basis of demonstrated job performance and efficiency, with the most proficient employees being retained the longest. Seniority within the district service may be used to determine the order of layoff among employees with equivalent records of job performance and efficiency, with the most senior employees being retained the longest. Temporary employees shall be laid off before regular employee performing similar duties. Layoffs should not be considered disciplinary action.

### **Section 3. Incapacity**

An employee may be separated for incapacity for medical reasons when the employee as an individual no longer meets the standards of fitness required for the position. A finding of incapacity shall be made through individual medical determination by competent authority as prescribed by the Chief Appraiser.

Separation for incapacity shall not be considered disciplinary action and shall not operate to deny an employee the use of any accrued illness, injury, disability, or other benefits.

### **Section 4. Retirement**

Eligible employees may be separated by retirement in accordance with applicable programs.

## **REINSTATEMENT**

### **Section 1. Following Resignation**

A person who resigned in good standing may be reinstated in his or her former type of position within one year following resignation, provided the person remains qualified to perform the duties of the position and such reinstatement would be in the interest of the district.

### **Section 2. Layoff**

A person, who was laid off, including a former temporary employee separated upon completion of duties, may be routinely recalled to work any time provided the person remains qualified to perform the duties of the position.

### **Section 3. Following Separation for Incapacity**

A person who was separated for incapacity may be reinstated in his or her former type of position within one year following separation, provided the reason for the incapacity has been removed to the satisfaction of the district, the person remains otherwise qualified to perform the duties of the position, and reinstatement would be in the interest of the district.

### **Section 4. Veterans**

Employees who left the district service in good standing to enter on duty with the armed forces of the United States shall be eligible for reinstatement in accordance with applicable State and Federal laws.

### **Section 5. Restoration of Credits**

Unless otherwise provided by administrative directive, persons previously earning seniority, service, or leave credits for which they did not receive payment at the time of separation shall have their credits restored, up to any maximum permitted accumulation, following reinstatement under the above provisions of this chapter.

### **Section 6. Re-employment**

Former employees not eligible for reinstatement under specific provisions of this chapter may be considered for employment as members of the general public.

Provisions governing restoration of credits shall not apply.

## **PERSONNEL FILES AND REPORTS**

### **Section 1. Personnel Files**

The Chief Appraiser shall maintain the official personnel files for all employees. Unless otherwise provided by law, personnel files and information shall be confidential and may not be used or divulged for purposes unconnected with the district personnel management system except with permission of the employees involved. Nothing herein shall prevent the dissemination of impersonal statistical information. An employee shall have a right of reasonable inspection of his official personnel file under procedures prescribed by the Chief Appraiser.

### **Section 2. Completion of Forms**

All employees will be required to complete the following forms:

1. Withholding tax form
2. Applications for insurance, if applicable
3. Application for retirement membership, if applicable
4. Payroll maintenance forms. Upon completion, copies of all these forms will be maintained in the personnel file.

## **SALARY AND COMPENSATION**

### **Section 1. Salary and Compensation Methods**

As stated in the introduction of this manual, the personnel rules and designated to bring to the Hall County Appraisal District a high degree of understanding, cooperation, efficiency, and unity through systematic, uniform application of modern personnel management system. It is recognized by the district management that one of the key ingredients is achieving these objectives is the high quality of the employees of the district. To obtain and retain high quality personnel, the district also recognizes it must recognize it must provide salary and compensation comparable to like jobs in the public and private sectors of the community. It is a goal of the Hall County Appraisal District to provide just and equitable compensation to their employees.

Salary is based on an annual salary for a forty-hour week and a fifty-two week year. The pay periods are semi-monthly. The first pay period is the first day of the month to the 15<sup>th</sup> of the month. The second pay period is from the 16<sup>th</sup> day of the month to the last day of the month. Paychecks will be issued the 16<sup>th</sup> and the first day of each month for the preceding pay period unless the payday falls on a weekend or legal holiday. Chief Appraiser has the final determination as to when payroll checks will be released. Salary advancements and any manipulation of pay periods are strictly prohibited.

### **Section 2. Insurance Protection**

Regular full-time employees will be reimbursed for medical insurance or if in a group policy, the premiums will be paid direct to said insurance company. The Chief Appraiser must approve all insurance policy premiums. Personnel may carry dental benefits, hospital and surgical benefits with major medical coverage. The Hall CAD pays the full cost of employee coverage; however, the Hall CAD may ask the employee to carry a larger deductible. Employees may add any dependents for coverage; but the premiums for added dependents must be paid by the employee monthly or may be taken out as an employee deduction. Employees must complete the probationary period of 6 months before they are eligible for medical insurance coverage.

The employee may purchase additional supplemental life or accident insurance for himself/herself or his/her dependents through payroll deductions.

### **Section 3. Credit Union**

The Hall CAD does not participate in a credit union but if an employee belongs to one, a payroll deduction may be arranged with the district.

### **Section 4. Worker's Compensation**

The Hall CAD provides worker's compensation insurance for all its employees. This insurance provides for medical expenses and a weekly payment to the employee if he/she is absent from work for more than seven days because of an injury on the job.

During the first six months that the employee receives payment from an insurance carrier, the Hall CAD will pay that part of the salary not paid by worker's compensation.

### **Section 5. Retirement**

Employees of Hall CAD are covered as a member of the Hall CAD retirement plan. Each regular full-time employee is a member. 5% of the employee's gross monthly salary is deposited each month with 5% contributed by Hall CAD and 5% deducted from the employee's salary. Vested interest begins at entry level of full-time employment with 100% vesting at the end of five years of full-time employment.

Should an employee leave the employment of the Hall CAD before he or she becomes eligible of retirement, the vested interest of the contributions plus interest, be returned to the employee. In the event of an employee's death while still employed by the Hall CAD, the vested interest he or she is eligible to receive will be awarded to the person designated as your beneficiary.

### **Section 6. Education Policy**

In compliance with the Property Tax Code; § 5.04(c), the Hall CAD shall reimburse the employees of the district for actual and necessary expenses including tuition, lodging, and cost of materials incurred in attending a course or training program conducted, sponsored or approved by the Property Tax Division.

An employee may attend the pre-exam courses prior to the Class III and Class IV level exams upon approval by the Chief Appraiser.

## **CHIEF APPRAISERS DUTIES & RESPONSIBILITIES**

### **QUALIFICATION:**

- Understand Appraisal Process
- Be able to supervise and judge work progress.
- Understand tax office procedure.
- Understand tax record system.
- Understand tax collection process.
- Understand payroll records.
- Have working knowledge of computers.
- Be Registered Professional Appraiser or working toward R.P.A., R.T.A. and be Capable of attaining R.P.A. and R.T.A. certification.
- Be able to meet public and make decisions under pressure.
- Be able to accept critical comments and complaints gracefully.

### **ADMINISTRATIVE DUTIES & RESPONSIBILITIES:**

- Executive officer of Appraisal Board
- Prepare District Budget and allocate to jurisdictions.
- Schedule and prepare agendas.
- Post meeting notices (District in 4 or more Counties, post with Secretary of State, Austin.)
- Hire and fire all employees.
- Keep all employees educated and meet requirements of Texas State License Division...
- Schedule work; determine salary, policy, retirement, insurance, etc. of all District employees.
- Prepare valuation reports for Property Tax Division.
- Prepare records for audits. (School funding)
- Defend and explain values before Appeals Judge.
- Conduct Board of Director elections.
- Determine roll back for Ag-use.
- Pro-rate tax on exempt property.

**APPRAISAL RESPONSIBILITIES:**

- Responsible for 100% appraised value for all property in each taxing jurisdiction within the Appraisal District.
- Complete reappraisal every 3 years.
- Prepare appraisal notices.
- Prepare estimates of value of final decisions.
- Review appraisal protests.
- Process all protests and litigations.
- Notify all contested values of final decision.
- Prepare, certify, and deliver final appraisal rolls to each jurisdiction.
- Meet mandatory dates of Tax Calendar.
- Approve all exemptions.

**TAX RECORD RESPONSIBILITIES:**

- Appraisal cards with account numbers, property legal descriptions, values, and etc...
- Ag land must have market and Ag-use value on card and roll.
- Ownership maps. (Must meet P.T.D. standard).
- Appraisal rolls.
- Alpha lists.
- Coding system for type property, school, city, county, hospital district, college district and etc...
- All exempt property valued and listed.
- All changes in: Exemptions
  - Location
  - Addresses
  - Ownership
  - Splits
  - Description (Subdivisions)
  - Value
  - Other

**EXEMPTIONS:**

- Ag-use applications.
- Homesteads (Mandatory school).
  - 65 and Over.
- Veterans.
- Disability.
- Farm implements and products in hands of producer.
- Old age freeze for school tax roll.
- Intangible personal property.
- Non-income producing personal property.
- Misc. exemptions.

**MISCELLANEOUS DUTIES:**

Information program:

Taxpayers.

News media.

School Board.

City Commission.

Commissioners Court.

Tax Collections (optional).

Attorney General opinions.

P.T.D. guidelines and standards.

Legislative and Constitutional changes.

Board of Review orientation.

Agricultural Advisory Board.

Recommend and approve all professional appraisal contracts.



## **JOB DESCRIPTIONS**

The Hall County Appraisal District uses job descriptions for staffing, wage and salary administration, and training.

Job descriptions communicate job responsibilities; however, job descriptions are not fixed. They are guidelines only and can change over time.

An employee, from time to time, may be asked to perform duties and handle responsibilities that are not in his or her job description. If, over an extended period, these responsibilities remain a significant part of an employee's duties, the Chief Appraiser or his designee will change the job description, to accommodate the added responsibilities.

### **CHIEF APPRAISER**

#### **DUTIES AND RESPONSIBILITIES**

The Chief Appraiser is responsible for the employment, transfers, and terminations of all District personnel, and administration of all personnel policies, health insurance, and retirement plan. He or she is responsible for the execution of all contracts, such as industrial appraising, bank depository, legal counsel, etc.

The Chief appraiser is responsible for the Appraisal District Budget, presentation of the Board of Directors for adoption, and the notification to the taxing entities of their allocation. The Chief Appraiser is responsible for the development and maintenance of valuations for all properties, compiling information into a records management system, and preparing an appraisal roll. The Chief Appraiser prepares all records and agendas for the Appraisal Review Board, monitors all protest hearing to defend the Appraisal District values, make changes as required by the Appraisal Review Board, and certifies the approved appraisal roll to the taxing entities. He or she must work with legal counsel in all appeals regarding decision on protest hearings by the Appraisal Review Board.

The Chief Appraiser administers all tax exemptions, oversees renditions, and notices property owners of increases in property values. He or she prepares all records and agendas for the Board of Directors and carries out all orders of the Board. He or she oversees all computers and mapping operations. The Chief Appraiser establishes a close working relationship with the State Comptroller's office. The Chief Appraiser is responsible for the preparation of a biennium reappraisal plan and annual appraisal report.

The Chief Appraiser must perform all duties of an elected or appointed tax collector for all tax units contracting with the Appraisal District for collections, including the calculation of effective tax rates, supervising the preparation of tax rolls, billing of all taxpayers, collection of ad valorem taxes, issuance of tax certificates, preparation of bankruptcy claims, all matters relating to the collection of delinquent tax. He or she shall develop a plan for daily distribution of current taxes collected and monthly accounting for all funds. The Chief Appraiser shall prepare or have prepared a monthly and annual report and submit these reports to outside auditors for their annual audit.

### **TRAINING AND EXPERIENCE**

The Chief Appraiser must be proficient in the appraisal process and have management experience. An understanding of computer operations in the automation of appraisal is required. Knowledge of the principles, laws, and guidelines applying to the valuation of property for ad valorem taxes and knowledge of the Texas Property Tax Code is required. He or she must be able to establish and maintain effective relationships with the officials of the various governmental entities the Appraisal District serves, taxpayers, and the general public. The Chief Appraiser must have experience in public relations. Any combination of education and experience equivalent to graduation from college, supplemented by courses in property appraisal and real estate, and five years of increasingly responsible supervisory experience in property appraisal work is required. He or she must be certified as a Registered Professional Appraiser (RPA) and a Registered Tax Assessor/Collector (RTA) by the Texas Department of License and Regulation or be involved in the process of becoming certified.

### **SUPERVISION**

The Chief Appraiser is given guidelines and policies by the Board of Directors but has no direct supervision.

He or she is responsible for directly supervising other employees and direction contract appraisers in their obligation to the Appraisal District.

### **DEPUTY – CHIEF APPRAISER**

#### **DUTIES AND RESPONSIBILITIES**

The Deputy-Chief Appraiser performs duties to assist in establishment of policies and procedures concerning personnel, budgeting, expediting workloads, accounting and financial matters. He or she will study evaluate and interpret procedures and policy that should determine the most appropriate actions to be taken. He or she shall assist the Chief Appraiser in all of the responsibilities for the total operation of the CAD in the absence of the Chief Appraiser, assist in the preparation of district operational budget, coordinates and directs all office functions. He or she will assist the Chief Appraiser in work with the

Appraisal Review Board in the handling of formal protest and furnishing records the Appraisal Review Board. He or she shall assist the Chief Appraiser in personnel matters, such as performance evaluations, employee responsibilities and duties and work schedules. The Deputy will monitor tax calendar keeping operations of the appraisal district within deadlines set forth in the Property Tax Code and will act in the Chief Appraisers absence, taking action authorized using initiative and judgment to see that matters requiring attention are absolved. He or she will attend Hall County Appraisal District meetings and will perform other duties as assigned by the Chief Appraiser. The Deputy must perform all duties of an elected or appointed tax collector for all taxing units contracting with the Appraisal District for collections, including the calculation of effective tax rates, supervising the preparation on tax rolls, billing of all taxpayers, collections of ad valorem taxes, issuance of tax certificates, preparation of bankruptcy claims, and all matters relating to the collections of delinquent tax.

### **TRAINING AND EXPERIENCE**

The Deputy-Chief Appraiser must be proficient in the appraisal process and have management experience. Knowledge of the principles, laws, and guidelines applying to the valuation pr property for ad valorem taxes and knowledge of the Texas Property Tax Code is required. He or she must have a combination of education and experience equivalent to graduation from college, supplemented by courses in property appraisal and real estate. He or she must be certified as a Registered Professional Appraiser (RPA) a Registered Tax Assessor/Collector (RTA) by the Texas Department of License and Regulation or be involved in the process of becoming certified.

### **SUPERVISION**

The Deputy-Chief Appraiser to directly responsible to the Chief Appraiser.

### **BOOKKEEPER - CLERK**

#### **DUTIES AND RESPONSIBILITIES**

The Bookkeeper – Clerk performs all data entry functions to the General Ledger; maintains the cash disbursement journals; prepares distribution checks to the entities; prepares checks for refunds an in payment of bills; prepares bank reconciliations; posts accounts payable, partial payments, current and delinquent tax receivables; prepares statements for collection commission to tax units; process supplements and adjustments to the tax roll. The Bookkeeper-Clerk will prepare a reconciliation of the general ledger and collection reports on a monthly basis. Will prepare payroll checks for all personnel and maintain payroll records. He or she will assist the Chief Appraiser and Deputy Appraiser in matter regarding the Appraisal Review Board. The Bookkeeper-Clerk will also serve customers at counter in taking payments and assisting those in need of appraisal information. The clerk will take partial payments and set up payment contracts,

enter cause numbers and ligation information on customer tax records; enter and scan all real property returned mail, address changes, and tax certificates. Other duties include acceptance of exemption applications and renditions, providing public information in person and by telephone on all phases of ad valorem taxation. Duties may require helping other employees meet critical goals or deadlines that will benefit the entire appraisal district and demonstrate individual contribution to teamwork. Additional duties will include filling, mail handling, and other task assigned by Chief or Deputy Appraiser.

### **TRAINING AND EXPERIENCE**

He or she must have a very thorough knowledge of the Quick Books program along with payroll experience. Must be a high school graduate, supplemented by either business school or college work in the field of accounting. Actual accounting experience is a must. The bookkeeper-clerk must have the ability to deal with taxpayers in a courteous manner.

### **SUPERVISION**

The bookkeeper – Clerk is responsible to the Chief Appraiser and Deputy.

# NEPOTISM CHARTS

## APPRAISAL DISTRICT BOARD OF DIRECTORS RELATIVES

---

### Relatives

### Prohibitions

#### **1<sup>st</sup> Degree by Consanguinity:**

Parents  
Children  
Brothers & Sisters

#### **1<sup>st</sup> Degree by Affinity:**

Spouse	Spouse's Brothers & Sisters
Spouse's Parents	Stepparents
Spouse's Children	Stepchildren

May not work for the district.  
As of September 1, 1989 either they or the director must re-sign immediately.

---

#### **2<sup>nd</sup> Degree by Consanguinity:**

Grandparents	First Cousins
Grandchildren	Nieces & Nephews
Aunts & Uncles	

If one of them does business in the appraisal district as a paid property tax agent or as a fee appraiser whose work involves property taxes, the director is ineligible to serve. However, current director may complete their terms.

#### **2<sup>nd</sup> Degree Affinity:**

Spouse's Grandparents  
Spouse's Grandchildren  
Spouse's Aunts & Uncles  
Spouse's Nieces & Nephews

---

#### **3<sup>rd</sup> Degree Consanguinity:**

Great Grandparents  
Great Grandchildren  
Great Aunts & Uncles  
Great Nieces & Nephews

---

May not work for the appraisal district. As of September 1, 1989 they or the director must re-sign immediately.

---

#### **3<sup>rd</sup> Degree Affinity:**

No Prohibitions

## CHIEF APPRAISER'S RELATIVES

---

### Relatives

### Prohibitions

#### **1<sup>st</sup> Degree by Consanguinity (and their spouses):**

Parents  
Children  
Brothers & Sister

May not work for the appraisal district. As of September 1, 1989, either they or the Chief Appraiser must re-sign immediately.

#### **1<sup>st</sup> Degree by Affinity: (and their spouses):**

Spouse's  
Spouse's Parents  
Spouse's Children  
Spouse's Brothers or Sisters  
Stepparents  
Stepchildren

The Appraisal District may not contract with them.

If one of them does business in the Appraisal District as a paid property tax agent or as a fee appraiser whose work involves property Taxes the Chief Appraiser must re-sign.

---

#### **2<sup>nd</sup> Degree by Consanguinity:**

Grandparents  
Grandchildren  
Aunts & Uncles  
First Cousins  
Nieces & Nephews

May not be hired by the Appraisal District. If they began working for the Appraisal District more than 30 days before the Chief Appraiser's appointment, they may keep their jobs but the Chief Appraiser may not promote them, demote them change their salary, or take any other action which affects them individual. If they were hired less than 30 days before the Chief Appraiser appointment, either they or the Chief Appraiser must resign.

#### **2<sup>nd</sup> Degree by Affinity:**

Spouse's Grandparents  
Spouse's Grandchildren  
Spouse's Aunts & Uncles  
Spouse's First Cousins  
Spouse's Nieces or Nephews

If one of them, does business in the Appraisal District as a fee appraiser whose work involves property taxes the Chief Appraiser must re-sign.

---

#### **3<sup>rd</sup> Degree by Consanguinity:**

No prohibitions.

**APPRAISAL REVIEW BOARD MEMBER’S RELATIVES**

---

Relatives

Prohibitions

**1<sup>st</sup> Degree by Consanguinity:  
(and their Spouse’s):**

- Parents
- Children
- Brothers & Sisters

If a person with substantial interest in matters before the ARB is a 2<sup>nd</sup> degree relative, the ARB member Conflict of Interest Affidavit.

**1<sup>st</sup> Degree by Affinity:  
(and their spouse’s)**

- Spouse
- Spouse’s Parents
- Spouse’s Children
- Spouse’s Brothers & Sisters
- Stepparents
- Stepchildren

If any of the listed relatives does business in the Appraisal as a paid property tax agent or as a fee appraiser whose work involves property taxes, the ARB member is ineligible to serve. However, current members may complete their terms.

---

**2<sup>nd</sup> Degree by Consanguinity:**

- Grandparents
- Grandchildren
- Aunts & Uncles
- First Cousins
- Nieces & Nephews

**2<sup>nd</sup> Degree Affinity:**

- Spouse’s Grandparents
- Spouse’s Grandchildren
- Spouse’s Aunts & Uncles
- Spouse’s First Cousins
- Spouse’s Nieces & Nephews

---

**3<sup>rd</sup> Degree Consanguinity:**

- Great Grandparents
- Great Grandchildren
- Great Aunts & Uncles
- Second Cousins
- Great Nieces & Nephews

May not participate in the determination of a taxpayer protest in which the ARB member is related to a party protest.

---

**3<sup>rd</sup> Degree by Affinity:**

No prohibition

## **THE PROPERTY TAX CALENDAR**

- January 1** A tax lien attaches to taxable property. Appraisers make property valuations effective as of January 1 for tax purposes. January 1 used to be referred to as the “Assessment Date.”
- January 1** The rendition period begins January 1.
- January 10** If a tax bill is not mailed by this date, the delinquency date for taxes is postponed.
- January 31** Deadline for the Chief Appraiser to deliver applications for special appraisal exemptions requiring annual application, and mobile home residence homestead exemptions to last year’s recipients.
- January 31** Property Tax Division certifies preliminary school district taxable values from the annual property value study to the Texas Education Agency, and notifies superintendents and Chief Appraisers of preliminary taxable value assignments from the annual study.
- February 1** Delinquency date for tax payments if the collector mailed bills before January 10.
- March 31** Deadline for property owners to file rendition and property information reports. A taxpayer may request, in writing, an automatic 30 day extension.
- April 30** Deadline for taxpayers to file applications for exemptions and special use appraisals.
- May 1** Beginning of the period when three-fourths of voting taxing units in an Appraisal District may file resolutions to change the method of district finance. This period ends may 14.
- May 15** Deadline for the Chief Appraiser to (1) submit appraisal records to the ARB, (2) certify estimates of total taxable value to the taxing units, and (3) mail taxpayers notice of change in appraised value or notices relating To denial of exemptions or special appraisal.
- May 25** Last day for the Chief Appraiser to notify all participating taxing units of any change adopted in the method of Appraisal District finance.



- May 30** Property Tax Division notifies certain transportation businesses of their Intangible value determination, and certifies final school district taxable values to the Texas Education Agency.
- May 31** Taxing units file challenges with the ARB before June 11 or within 15 days after the date that the appraisal records are submitted to the ARB, whichever is later.
- May 31** Taxpayers file protests with the ARB before June 1 or within 30 days after receiving appraisal value notice, whichever is later.
- May 31** Last day taxing units may mail notices of delinquent taxpayers regarding additional penalty for attorney's fees that will be applied to their delinquent taxes as of July 1.
- June 15** The Chief Appraiser presents the appraisal district Board of Directors with a recommended budget for the following year (unless the taxing units have changed the fiscal year).
- June 16** Beginning of the period when Appraisal District boards may pass resolutions calling for a change in the method of Appraisal District finance by unanimous consent of the taxing units. This period ends August 14.
- June 30** Second half of split payment of taxes is due.
- July 1** Delinquent taxes incur maximum 12 percent penalty.
- July 1** Delinquent tax may start accumulating additional penalty for attorney's fees.
- July 20** The ARB must approve at least 95 percent of the district's total appraised value.
- July 25** The Chief Appraiser must certify an appraisal roll to each taxing unit's assessor.
- July 31** The Property Tax Division certifies the value of certain transportation business intangibles and railroad rolling stock to each county assessor-collector.

- August 1** The taxing unit's assessor or assessor-collector submits the appraisal roll to the unit's governing body on this date or soon after.
- August 7** The taxing unit's governing body must publish the effective tax rate, the rollback tax rate, the unencumbered fund balances, the dept schedule, and any additional sales tax revenues.
- September 1** The taxing unit must adopt a tax rate on this date or as soon afterwards as possible.
- September 1** Deadline for taxing units to file resolutions opposing change in method of Appraisal District finance proposed by district directors.
- September 14** Appraisal District Board of Directors must adopt a budget for the following year before September 15 (unless the district has changes its fiscal year).
- October 1** Collector mails tax statements on this date or as soon afterward as possible.
- November 30** The first half of split payment of current year's taxes is due before December 1.
- December 1** The Chief Appraiser may begin to verify eligibility for homestead exemptions by mail survey until December 31.

\*If a legal deadline falls on a holiday or weekend, the next possible day becomes the legal deadline.\*

## **EVALUATION AND DEVELOPMENT PROGRAM FOR CHIEF APPRAISER**

The Board of Directors has established an evaluation and development program for the Chief Appraiser. The goal of the program is to communicate the expectations of the Board and ensure that the Chief Appraiser continues to maintain and enhance knowledge of mass appraisal, management, leadership, and all skills required to be an effective administrator of the Hall County Appraisal District.

The Chief Appraiser coordinates and implements the goals and objectives established by Board policy, provisions of the Property Tax Code and other applicable laws and rules. The Chief Appraiser's responsibilities include numerous statutory responsibilities related to the development of accurate appraisal rolls and for the administration of the Appraisal Office. Additionally, the Chief Appraiser is assigned duties by the Board of Directors necessary for the conduct of Board duties and implementation of Board policy.

The Chief Appraiser shall:

1. Establish a comprehensive program for the conduct of all appraisal activities and keep the Board informed on the program of appraisal activities.
2. Develop and implement sound administrative procedures for conduct of all District functions.
3. Develop and implement an effective financial management system and provide reports to the Board to allow evaluation of the District's fiscal affairs.
4. Develop and implement an effective internal budget development system and prepare a proposed budget by June 15 of each year.
5. Serve as the District's primary spokesperson within the guidelines of the District policy presented in this manual, in providing information to the news media, taxing units, and the general public on the operations of the Appraisal District and provisions of the property tax laws.
6. Prepare the agenda for each Board meeting, attend all meetings, and provide staff recommendations for all appropriate Board actions.
7. In conjunction with Appraisal District counsel, provide recommendations for Board action on litigation.
8. Develop and implement a personnel management system for job assignments, evaluations, hiring, staff policy, and personnel related matters.
9. Employ and compensate professional, clerical and other personnel as provided by the budget.

10. Develop, implement, and update a comprehensive master plan necessary to the operations of the Appraisal District.
11. Report to the Board, prior to April 1 of each year, concerning the accuracy of District appraisal and contractor performance.
12. Provide clerical and technical support to the Appraisal Review Board and advise the Board of Directors of problems with regard to the Appraisal Review Board.

## **EVALUATION CRITERIA AND RATING**

The purpose of the evaluation review is to measure the chief appraiser’s performance. The main goal of this evaluation is to provide feedback, help an employee grow and maintain an understanding between the chief appraiser and board of directors.

Enhancing leadership effectiveness is based on the premise that all leaders can and should grow professionally. The chief appraiser evaluation should highlight leadership and organizational strengths as well as important improvement priorities.

The Board of Directors has established the following areas of importance to aid in the evaluation process.

### **RATING RANGES**

5. Outstanding
4. Exceeds job requirements
3. Meets job requirements
2. Needs improvement
1. Unsatisfactory

### **PERFORMANCE COMPETENCIES**

<b>Administration</b> ---- Leads the administration of Hall CAD; insures the vision and integrity of the District is well understood, consistently applied, effectively implemented and widely supported.	1	2	3	4	5
---	---	---	---	---	---

Assessment \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Leadership** ---- Exhibits confidence in self and others; inspires respect and trust; reacts skillfully under pressure; shows courage to take action; motivates others to perform effectively.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Conflict Resolution** ---- Encourages open communications; confronts difficult situations; maintains objectivity; keeps emotions under control; uses negotiation skills to resolve conflicts.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Staff Management** ---- Provides direction and gains confidence; develops subordinates and encourages growth; includes subordinates in planning and provides feedback; makes self available to subordinates; takes responsibility for subordinate's activities.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Human Resources** ---- Possesses necessary skills to develop, motivate and compensate a productive workforce; shows respect and sensitivity for cultural differences; builds a diverse workforce; promotes a harassment-free environment; demonstrates knowledge of EEO policy.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Project Management** ---- Develops, coordinates, and completes projects on time and within budget; manages project team activities; contributes to building a positive team.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Communications** ---- Communicates effectively with boards, entities, and public; serves as chief spokesperson for Hall CAD; selects and uses appropriate communication methods; expresses ideas and thoughts verbally and in written form.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Board Relations** ---- Works closely with the board of directors to keep them fully informed on all important aspects of the status and development of Hall CAD; facilitates the board's governance and composition; implements board policies and recommends policies for board consideration.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Financial Results** ---- Establishes appropriate annual budget and manages financial objectives; ensures that appropriate appraisal systems are maintained to effectively control operations.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Strategic Planning ----** Develops strategies to achieve Hall CAD goals in an efficient and timely manner; adapts strategy to changing conditions; understands district's strengths and weaknesses; acquires and allocates resources consistent with strategic objectives.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Customer Service ----** Displays courtesy and sensitivity; manages difficult or emotional taxpayer situations; responds promptly to taxpayer needs; establishes customer service standards and provides training in customer service.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Ethics ----** Uses authority appropriately; works ethically and with integrity; complies with statutory codes, laws, rules and Hall CAD policies; complies with district's Code of Ethic policy; upholds district's values.

1 2 3 4 5

Assessment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Summary** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Chief Appraiser Date

\_\_\_\_\_  
Chairman, Board of Directors Date

## HALL COUNTY APPRAISAL DISTRICT PERFORMANCE REVIEW AND EVALUATION

**PURPOSE:** The purpose of this evaluation is to determine if the right person is in the right job and giving efficient, effective services, and receiving fair and equitable compensation and job consideration.

**Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Date of Employment:** \_\_\_\_\_

**Jobs/Positions Held:** \_\_\_\_\_

**Type of Report:** Probationary \_\_\_\_\_ 6 months \_\_\_\_\_ Annual \_\_\_\_\_ other \_\_\_\_\_

**Last Review Date:** \_\_\_\_\_

**Rate:**  
     **1** Exceed Requirements  
     **2** Meets Requirements  
     **3** Needs Improvement

Factor	Rate			Comments
	1	2	3	
Punctuality	_____	_____	_____	_____
Meeting Public	_____	_____	_____	_____
Treatment-Taxpayer	_____	_____	_____	_____
Work Attitude	_____	_____	_____	_____
Personal Appearance	_____	_____	_____	_____
Knowledge of Work	_____	_____	_____	_____
Quantity of Work	_____	_____	_____	_____
Quality of Work	_____	_____	_____	_____
Timeliness of Work	_____	_____	_____	_____
Work Habits	_____	_____	_____	_____
Contributes To Moral of Office	_____	_____	_____	_____
Ability Valuation	_____	_____	_____	_____

**Strong Areas of Performance:** \_\_\_\_\_  
 \_\_\_\_\_

**Areas Needing Improvements:** \_\_\_\_\_  
 \_\_\_\_\_



## ACTION PLAN – COMMENTS

Employee: \_\_\_\_\_

Supervisor: \_\_\_\_\_

\_\_\_\_\_ I acknowledge that the above evaluation has been discussed with me and understand my signature does not imply agreement or disagreement.

\_\_\_\_\_  
Employee's Signature      Date

\_\_\_\_\_  
Supervisor's Signature      Date

Reviewed by Date \_\_\_\_\_

Reviewed by Date \_\_\_\_\_

**HALL COUNTY APPRAISAL DISTRICT  
EMPLOYEE DISCIPLINARY REPORT**

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
Position: \_\_\_\_\_

The following (warning) (separation) was issued today and it is to be made a part of the official record.

- 1. ( ) Unreported absence
- 2. ( ) Tardiness
- 3. ( ) Drinking on duty
- 4. ( ) Insubordination
- 5. ( ) Dishonesty
- 6. ( ) Garnishments
- 7. ( ) Failure to obey orders
- 8. ( ) Fighting on company premises
- 9. ( ) Leaving without permission
- 10. ( ) Housekeeping
- 11. ( ) Improper conduct
- 12. ( ) Reporting under the influence of alcohol / drugs
- 13. ( ) Violation of Safety Rules
- 14. ( ) Defective and improper work
- 15. ( ) Carelessness
- 16. ( ) Destructive of District property

Remarks (set forth all facts in detail)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature of Supervisor \_\_\_\_\_

I have read this report:  
Signature of Employee \_\_\_\_\_

The above offense or offenses have been noted and are made part of the above employee's record, as of this date \_\_\_\_\_.

OFFENSES NO. 1 2 3 4