



SUMMER
Weekly

Reader

Volume 151, Issue 217, May 12th, 2016

The Plano Rotary Club
www.PlanoRotary.com

UPCOMING MEETINGS

May 12

Lisa Leach
"Rotary Mission to Nicaragua"

May 19

TBD

May 26

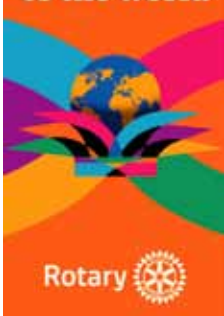
TBD



MAY BIRTHDAYS

Samuel Huffines	May 01
John Priest	May 05
Chris Parr	May 06
Jason Rice	May 09
Howard Matson	May 11
Kelly Palmer	May 20
Robert Epstein	May 21
Mary Jo Dean	May 27
Lenny Schwartz	May 27
Randy Wright	May 29

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to the world



Tar'n'Feather'im!

I GO away for only a month and you manage to lose four ads off the back page? How careless! What's a publication without ads, I ask you? I had once threatened to create mocking ads if real ones don't appear. Now I'll induce Stage II terror by threatening to actually USE the space for additional diatribe! That should shake loose some shekels.

President Paperweight threw open the Festival at 12:14, assigning **Blair Ritchey** for the Invocation and **Carrolyn Moebius** for the Pledge. **Clay Curtiss** received the nod for Greeting. **SERGEANT BARBERA** announced no **INSIDE THE ROTARIAN STUDIO** today due to the anticipated length of the program and its anticipated rancorous Q&A. Today's topic was to be **TAXES** delivered by none other than the Tax Man himself; we'll get to **DEATH** anon. Let's pray that the *Grim Reaper* isn't its featured speaker.



The sole Visiting Rotarian, **Andrea Thompson** (Metro), gave an impassioned political stump speech on behalf of the **PISD** Bond Election and herself. The Club earned beaucoup fines off her temerity.

John Caldwell introduced **Greg Mechler**. **Jamee Jolly** welcomed **Paul Hernandez**. **Sam Greif** fed wife **Rosemary** as did **Reedy Spigner** his daughter, **April**. **Kelly Palmer** earned unwelcome notoriety for bringing two attorneys, **Roy Reeves** and **Scott Klopach**. He redeemed himself with the return of **Dr. Halimur Khan**.



Kelly announced the imminent **BATTLE OF THE BADGES** for the first week in July. So we are to save up blood so Chief Greif can lord it over **Chief Rushin**. Sam also told us to look out for the **FILL THE BOOT** firefighters at popular intersections throughout the City.

Pres. Palmer hinted at a sweat equity project upcoming; an Interact has been requested by the Principal of *Frankford Middle School*, **Shurandia Holden**.

Shurandia.Holden@PISD.edu

Those interested in finding out more about Interact can click on the Interact Manual link under Resources in

www.rotary.org/myrotary/en/learning-reference/learn-topic/interact



Jason Kramer, the new **Rick Horne**, rose to call for drivers to volunteer to transport scholars to and from Camp RYLA. "Don't make me jab you in the shoulder!"

continued on page 2



Sara Akers touted a mixer on 5/11 at Plano's Mercedes dealership sponsored by the *Business Council for the Arts*. She said that donations thereto benefit children who "need the Arts" in their lives. RSVP to bca@ntbca.org



CAPTAIN KIRK again called for sponsorships for our signature event, the **STUDENT CITIZEN OF THE YEAR** banquet on 25 May at the "Old Southfork Hotel," now a *Quality Inn*, if not a quality inn. The two dozen honorees have been chosen from among 150 nominations. Tickets start at \$20, and sponsorships go up to \$2500 for which **Genie Hamel** has sprung, keeping up the tradition begun when **Dave** was still with us. **KIRK** then

read us the list of sponsors on board so far, telling us the donations are shared with the six Title I schools as "*mad money*" to purchase items like dictionaries not provided by other funds.

Jamee Jolly stumped for **LEADERSHIP PLANO**, gathering participants at present. Someone prompted her to speak about the Chamber's **GOLF TOURNAMENT** on Monday, but that has sold out.

Earnest Burke drew the **Black Jelly Bean** and had to introduce the wildly popular Chief Appraiser of Collin County CAD (Central Appraisal District), **Bo Daffin**. Earnest complained that Bo had "*a longer résumé than Howard* (Shapiro)!"

Bo received an Associate of Applied Science degree in Real Estate from *North Central Texas College* and his B.B.A. from *Northwood University*. He holds the designations of Certified Chief Appraiser (CCA), Registered Professional Appraiser (RPA), and Certified Tax Administrator (CTA).

During his 35-year property tax career, he has held position in the public and private sectors, serving as:

- Chief Appraiser, Collin CAD
- Property Tax Consultant, *Jim Schwalls & Assoc.*
- National Manager-Property Tax Software Division, *The Software Group*
- Deputy Chief Appraiser, Collin CAD
- Staff Appraiser, Collin CAD
- Tax Assessor/Collector, Wylie ISD

Bo is a member in the Texas Assoc. of Appraisal Districts, the Texas Assoc. of Assessing Officers, and the International Assoc. of Assessing Officers.

He was born in Durant, OK, <shouts of "Boo!"> on 24 Oct. 1953. He is married to the former **Linda Dennis** of Milburn, OK, and they will be celebrating their 43rd anniversary in July. They have three children, Jeremy, Robert, and Kasia. He and Linda are proud grandparents of nine grandchildren: Cade (12), Colin (9), Cody (6), Brennley (5), Cole

(4), Alexis (3), Jase (2), Easton (1), and their 9th grandchild is coming in August.

He and Linda moved their family to Collin County in 1977 when he accepted the Tax Assessor/Collector position for Wylie ISD. They now reside in Lavin.



Bo thanked Earnest for the exhaustive résumé, joking that he obviously "*can't keep a job.*" He also thanked **Olin Jaye** for the invitation; Olin is a former Chairman of his Board. And he was appreciative of the timing of this talk, viz., BEFORE the appraisal notices come in the mail! He also said he'd have only minimal remarks to make about

the **ARB** (Appraiser Review Board).

Prior to the 1981 change in the tax code, victims often received 3 or 4 tax bills with different appraisals (!) from as many taxing entities. The Peveto Bill (named for coauthor Rep. **Wayne Peveto**) created 254 tax districts, simplifying the process for victims. The tax structure is responsive to regulation by the Texas Constitution, the Property Tax Code, and various governmental agencies' codes.

There are 58 taxing districts suffered by victims in Collin County: 22 schools, 29 towns, numerous water, and five special districts. All coalesce in an unassuming structure at 250 Eldorado Parkway, McKinney, the HQ for CC CAD.

Collin County incorporates 886 square miles or 547,040 acres including five major cities, the largest of which are Plano, McKinney, and Frisco.

The website, www.collincad.org, boasts a calendar of Annual Cycles and deadlines of which victims need to be aware. E.g.,

- January 1, the Assessment Date
- April 29, assessment notices are mailed
- May 2-31, protests are accepted
- June 6-18, ARB hearings occur

With the rapid growth of Collin County, new move-ins from other parts of the U.S. are often "*uncertain how taxing works*" here. Thus, the importance of the web site. This rapid growth means new buildings and subdivisions, keeping appraisers hopping, as does the transition from agricultural to non-agricultural land use. On the increase are rollbacks, commercial activity, and **property values** which means there are over 11,000 new exemption filings are expected over the last year!

About 222,000 of the 347,000 residential properties now qualify for e-filing of formal protest, so they are now up by almost 13%. The CAD expects 40-50,000 protests to be filed in May on which it must act by June! Thus began the **Death by 1000 Statistics** aspect of the talk. We learned that, due to low supply and high demand, Collin County has only **2.2 months** of housing inventory. This

contrasts with 3.6 month for the State and a “more balanced” 6 months inventory for the Nation as a whole.

In 2015, the CAD was responsible for appraising nearly 18M sq. ft. of commercial properties including 12 new ones, six apartment complexes, plus 13K new homes. Contrast that to the mere 5M sq. ft. of commercial properties on the books in 2011. So, victims, shed a tear for the poor, overworked CAD.

Bo showed us slide after slide of proposed new properties, saying his tax rolls “will explode next year.” That’s good news for **Neil Matkin** and **Bruce Glasscock**, who must be licking their chops at the increases attendant to shares of those new revenues. But they and **Brian Bingeli** know that with those increases come pressures on their infrastructure. They are, however, good problems to have.

The 2016 tax base is expected to top \$107B and change. Also last year’s average home value of \$285K is expected to climb to \$310K! So it was now appropriate for Bo to answer the question, “Now what?” He did...in detail.

1. Mark **31 May** as the protest deadline!
2. Know that your informal chats ≠ formal protest, and only that counts.
3. Maintain good recordkeeping!
4. Verify the taxing entities listed.
5. Verify your homestead exemption.
6. Verify the tax freeze for seniors!
7. Check for e-file eligibility.
8. Verify the 10% cap on increases.
9. Verify the physical components of the assessment.
10. Put not your trust in “real estate ‘experts’ or tax attorneys.” DIY
11. Discover what the appraiser used for the physical components.
12. Understand that you have time to consider any proposed settlement. No one will pressure you to sign at the interview.

And understand that with the number of protests filed, the ARB will only devote 20 minutes to your hearing, so come prepared with printed evidence. The ARB will come to a conclusion in your presence in open session. And, no, the CAD doesn’t hire but must still pay the ARB for its service.



Yoram Solomon rose to the defense of the PISD’s taxation claiming it must pay 64% of revenues raised thereby to Robin Hood. In total, PISD has lost \$41M that way.

Patti Schwartz wanted access to Bo’s presentation, and he promised to send it to anyone who requested it at

bo.daffin@collincad.org

Jan Sullivan asked if a co-owner needs to file on the death of her spouse. Someone amended her request to “if she kills that person?” Bo assured her that with Texas a community property state, the exemption is divided for divided ownership. **Ean** was seen sweating visibly while he pondered possible consequences of past indiscretions.



Kirk asked about the efficacy of protest and was told that 15% of properties are under protest, but that represents the kneejerk response of tax attorneys. So 50% of protests are frivolous but 50% do result in amendment.

LB THE ONLY praised Collin County CAD as the best with which he’s ever dealt.

Kelly got rid of yet another paperweight, led us in the Four-Way Test, and gaveled us out at 1:08.



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Guests & Visiting Rotarians

Guest

Roy Reeves
Greg Mechler
Scott Klopak
Paul Hernandez
April Spigner
Rosemary Greif
Halimur Khan

Visiting Rotarian

Andrea Thompson

Guest of

Kelly Palmer
John Caldwell
Kelly Palmer
Jamee Jolly
Reedy Spigner
Sam Greif
Kelly Palmer

Home Club

Metro

Next Club Networking Social:

Tuesday, May 26th

Location TBD

Socials are held on the 4th Tuesday of each month at 5PM and will count as a Rotary make-up.

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