

PLAN FOR SUCCESS

MAINTAIN YOUR CAD'S SUCCESSION PLAN

Dave Gannon - Board Chairman Bexar Appraisal District

Lisa Stephens-Musick - Retired Chief Appraiser Wichita Appraisal District

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SUCCESSION PLANNING - WHO

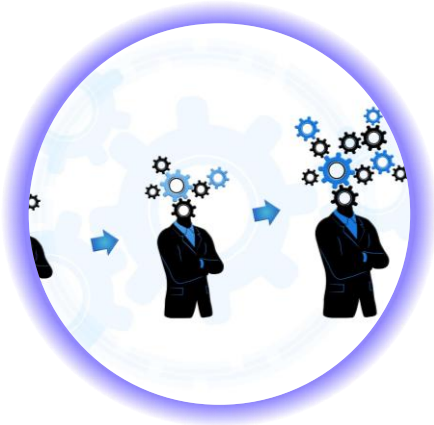
**Board of Directors will likely hire
a new chief appraiser at some
time during their tenure**

Statutory Duties

**Regardless of the size of the
appraisal district a plan of action
to make this important decision
should be developed**

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KEY BENEFITS FOR ORGANIZATIONS



Leadership Readiness

Succession planning ensures leaders are prepared to take on key roles without disruption.

Cost Reduction

Reduces recruitment and training expenses by promoting internal talent efficiently.

Employee Retention

Boosts employee loyalty by providing clear career development opportunities.

Organizational Resilience

Strengthens the organization's ability to adapt and maintain competitive advantage.

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SUCCESSION PLANNING - WHAT

Credentials required for Chief Appraiser:

Registered Professional Appraiser (RPA) – TDLR

Member of the Appraisal Institute (MAI) – Appraisal Institute

Certified Assessment Evaluator (CAE) - IAAO

Residential Evaluation Specialist (RES) – IAAO

Assessment Administration Specialist (AAS) - IAAO



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SUCCESSION PLANNING - WHAT

A person cannot perform any action authorized or required by law to be performed by a chief appraiser to include the preparation, certification or submission of any part of the appraisal roll.



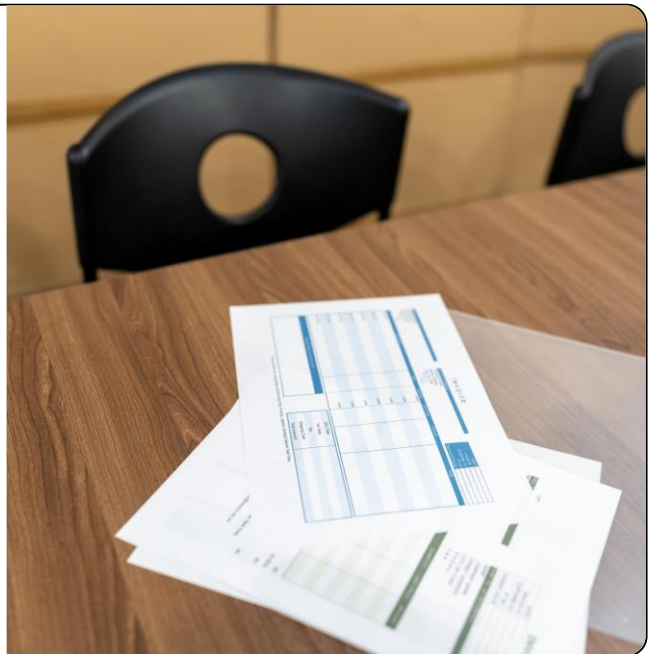
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SUCCESSION PLANNING - WHERE

Current Chief Appraiser should develop leaders within the current staff.

Education (Chief Appraiser Institute, conferences, continuing education opportunities).

Encourage active participation with approved appraisal organizations (TAAD (state & local), IAAO and others).



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SUCCESSION PLANNING WHY

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SUCCESSION PLANNING - WHY

Existing relationship with the BOD

Input/Recommendation from current chief appraiser. You know what you are getting!

Leadership continuity ensuring continued success for the appraisal district

Return on Investment of Getting it Right:

Retain top performers as they see a path to advancement; Enables smoother transitions and Strengthens culture



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Renew a License

Apply for a License

Manage Your License

Regulated Industries ▾

Continuing Education

Contact Us

Laws and Rules

Open Meetings

Employment

Commission

Complaints and Enforcement

Email Updates

Property Tax Professionals

Property Tax Professionals are property tax appraisers, assessor/collectors, and collectors in the state of Texas, with the exception of elected county tax assessor-collectors and their employees.



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Manage Your License

- Update Contact Info
- Order a Duplicate License
- Duplicate Renewal Receipt
- Pay Penalties Online

Find a Licensee

- Search Licenses
- Chief Appraiser MAP/SDPVS Reports

- File a Complaint
- Search Disciplinary Actions
- Complaint Statistics
- Enforcement Plan
- Penalties and Sanctions
- Pay Penalties Online
- Criminal History Evaluation Letter
- Guidelines for License Applicants with Criminal Convictions

Advisory Board

- Texas Tax Professional Advisory Board

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Chief Property Tax Appraiser Information

Find Appraisers

Search by Name: Search by License No.:

Search Appraisal Districts: 2023 ▼

Showing 1 to 1 of 1 entry (filtered from 2,023 total entries)

| Year | Appraisal District | Chief Appraiser | License No. | MAP Report | SDPVS Findings |
|------|--------------------|-----------------------|-----------------------|--------------------|----------------------------|
| 2023 | Wichita | Stephens-Musick, Lisa | 69813 | non-reporting year | 2023 SDPVS |

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SUCCESSION PLANNING - WHEN

Current chief appraiser hopefully is confident in giving ample notification of retirement.

Appoint as Chief Appraiser Designee.

One year allows the designee to develop relationships with jurisdictions, vendors, experience budget adoption and make plans for staff changes/promotions,

Staff is comfortable with the transition.

