

TEXAS BOND REVIEW BOARD

Governor Greg Abbott, Chairman

Lt. Governor Dan Patrick

Speaker Dustin Burrows

Acting Comptroller Kelly Hancock

REPORT ON CUSTOMER SERVICE

June 1, 2026

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Report on Customer Service

Section 2114, Texas Government Code, requires state agencies to develop customer service standards and implement customer satisfaction assessment plans. This process is to be completed by June 1st of each even-numbered year. This is the first step in an agency's strategic planning process.

In order to gauge how well the Bond Review Board (BRB) serves its customers, a process similar to the prior customer service survey was used. This included surveying the widest variety of customers as efficiently as possible. Customers from all three of the BRB's program areas were asked to complete the online survey that was emailed to BRB staff for compilation and analysis.

Inventory of External Customers

The BRB's mission statement includes three goals: Goal 1 is the review and approval of most state-issued debt; Goal 2 is the tracking and reporting of Texas local government debt; and Goal 3 is the administration of the state's Private Activity Bond Allocation Program (PAB). The agency has a wide variety of customers, from state and local issuers and municipal securities professionals to the general public, including concerned citizens, academic professionals, and students, all of whom seek debt data and information.

Goal 1 customers include state debt issuers, professionals employed by state debt issuers (i.e., financial advisors, bond counsels et al), state agency staff, rating agencies, legislators and their staff, media, legislative and academic researchers, and the general public. Services provided to this customer base include review and approval of most debt issues prior to being sold in the capital markets, preparation of reports on state debt and debt affordability and posting state debt information, compilation of the state's capital expenditure plan and posting guidelines on debt management and interest rate management agreements.

Goal 2 customers include rating agencies, issuers, legislators, policy makers, state agency staff, local government officials, academic researchers, and the general public. Services provided to this customer base include information on local government debt issuance, debt outstanding, related debt-ratio statistics and trends, and the preparation of a local debt annual report. The available data can be used as a tool for the general public to understand the indebtedness of their area and other areas around the state and local governments to assess their debt-management practices.

Goal 3 customers include state and local issuers, the public finance community and the professionals they employ (i.e., financial advisors, bond counsels, developers, and issuers), certain state agencies, and the general public. Services provided to this customer base include the administration and allocation of the state's PAB program and ministerial functions for certain other federal tax-exempt bond programs.

Information Gathering Methods

The BRB has had an online customer service survey available on the agency's website since December 2003. Customers can access a permanent link to the survey on the home page of the agency's website at www.brb.texas.gov.

On May 15, 2026, emails were sent out to 485 customers of the BRB requesting that they complete the survey online. Responses were received from 10 recipients for a response rate of 2.1%. The last response was received on May 24, 2026.

The survey included queries on service areas, facilities, staff, communications, the agency's website, complaint handling processes, timeliness, reports including printed information, and overall satisfaction. The survey also allows respondents to add general comments, as desired. When asked to select a service area, respondents separated the results into five areas – the three agency goals listed above, the Capital Expenditure Plan (CEP), and "Other." Each respondent was then asked to select poor, below average, average, above average, excellent, or does not apply. These scores were given the numerical representation of one through five, respectively, and the "does not apply" response received no score.

Email addresses from internal databases and staff address books were used to source Goal 1 customers.

Goal 2 surveys were distributed to members of the state and local government entities that had initiated contact or interacted with the BRB since the prior survey was taken in 2024. They were selected by reviewing contacts that had provided email addresses that were listed in the agency's performance measure database.

In addition to the customers listed for Goals 1 and 2, inquiries about Goal 3 are often received from the legislature, bond counsel firms, and the general public. Because the PAB program administrator uses email for certain required notifications, persons listed in the PAB database were included in the survey.

The BRB also administers the state's CEP in conjunction with the Texas Higher Education Coordinating Board. All state agencies and institutions of higher education that have plans to purchase land, buildings, or information systems more than \$5 million are required to file this report with the BRB. Email contacts derived from the CEP were requested to participate in the survey as well.

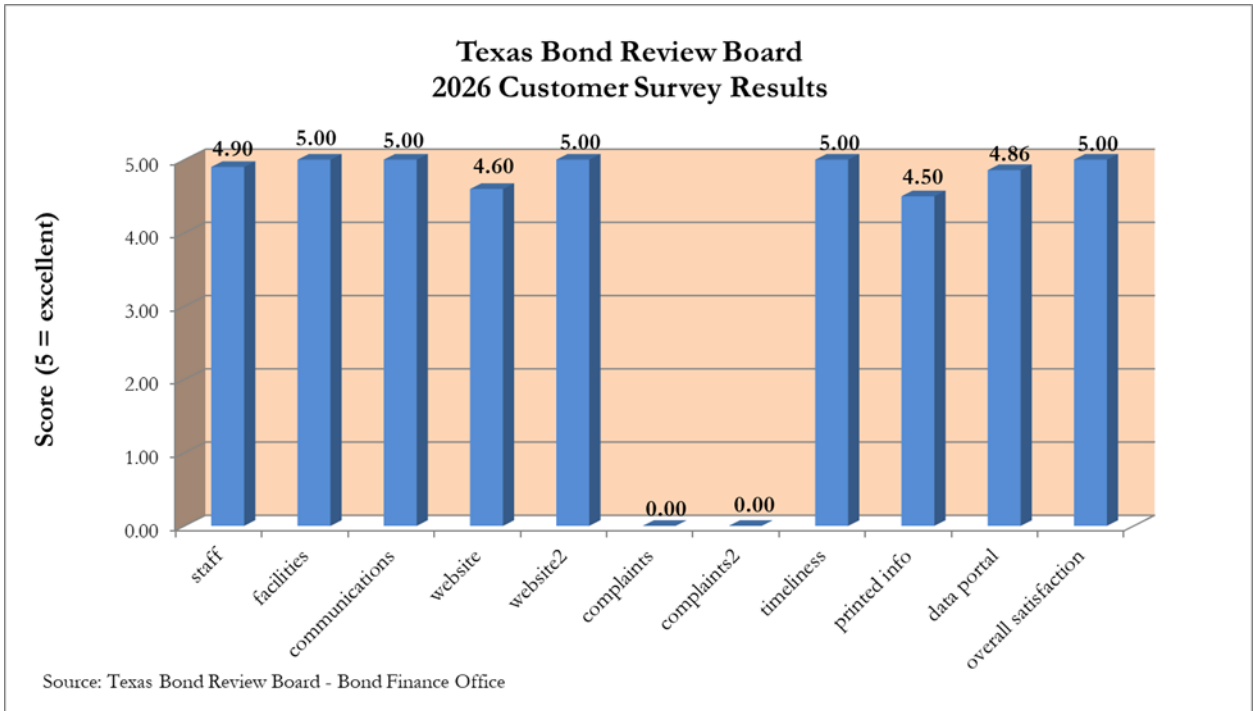
Customer Satisfaction Findings

The agency sent emails to 485 recipients requesting completion of the online survey and received 10 responses. Five was the highest rating available in a customer-service quality element, while one was the lowest rating possible, BRB staff chose a rating of three as the minimal acceptable level of customer satisfaction.

The results indicate that the highest scoring customer-service quality elements were the staff, facilities, data portal, communications, timeliness, and overall satisfaction in providing requested information. The sample size for ease of filing service complaints (shown as "complaints" in the chart) was small with 100.0% of the respondents selecting "does not apply". The sample size for a complaint being resolved in a timely manner (shown as

“complaints2” in the chart) was also small with 100.0% of the respondents selecting “does not apply”. No complaints were filed with the BRB during fiscal years 2024, 2025 and 2026. BRB staff works immediately to address any questions regarding agency operations and data available on the agency website.

The chart below shows the average of the responses for each question. Responses of “does not apply” or omissions were not counted towards the averages.



The BRB strives to be responsive to Texas taxpayers and citizens. All reports (searchable databases and agency publications) on state and local government debt are presented on the agency’s website and the Texas Open Data Portal. Visitors to the BRB website can search databases and access the Data Portal to download spreadsheets that contain debt data, detailed cost of issuance data, debt ratios, bond election information, and population data by government type at fiscal year-end. The agency website is accessible to all users and complies with the Texas Administrative Code Section 213 - Electronic and Information Resources Accessibility Standards. A total of 96,521 unique users were identified as using the BRB website from May 2025 to May 2026. BRB state and local debt data has been previously supplied to the Comptroller’s office and the Legislative Budget Board for publication on their debt website pages.

The BRB was appropriated funds for the fiscal year 2020-21 biennium to upgrade its website. With this appropriation, the BRB created a new data center website that went live in December 2020. This upgrade further increased transparency for Texas state and local debt information and consolidate the reporting of this information into one centralized location on the agency’s website, allowing the user to search for debt data via a dossier-style display. The data center website allows the user to view comparative graphs and charts integrating

fees, debt issuance, and debt outstanding information onto one page helping the user better understand the overall debt picture of each state and local debt issuer.

In May 2023, the agency launched a new website and began the use of cloud services to manage its data and website hosting using WP Engine and Amazon Web Services. This provides the agency with additional flexibility in managing its IT operations and precludes the need to maintain the agency’s web and mail servers in-house. It also eliminates service interruptions due to maintenance or agency power outages.

The BRB was appropriated funds for the fiscal year 2024-25 biennium to build a new online data entry portal for data collection that will add efficiency and improve the collection and reporting of state and local government debt information by eliminating much of the manual data entry processing of BRB staff. These online forms will allow BRB staff to review the information provided and transmit the information directly into the agency’s SQL debt database. Streamlining the collection of this information will add efficiency and save Board staff the time it takes to manually input the information. This will allow Board staff to respond more efficiently to increasingly detailed questions from the public, state leadership, and the Legislature regarding transparency for state debt issuance.

The following tables show each question and the responses received.

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Staff – Are the staff members helpful, courteous, and knowledgeable? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 1 | 9 | 0 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Facilities – Is the agency’s office accessible, clean, and adequately equipped for your needs? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 3 | 7 |

| | | | | | |
|---|----------------------|----------------|----------------------|------------------|-----------------------|
| Communications – Is communicating with the agency staff via telephone, mail, or electronic mail a trouble-free and efficient process? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 10 | 0 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Website – How satisfied are you with the usability of the agency’s website, including mobile access to the site? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 4 | 6 | 0 |

| | | | | | |
|---|----------------------|----------------|----------------------|------------------|-----------------------|
| Website (website2) – Does the website contain adequate information about the Bond Review Board and the services provided? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 10 | 0 |

| | | | | | |
|---|----------------------|----------------|----------------------|------------------|-----------------------|
| Complaints – Are service complaints easy to file? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 0 | 10 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Complaint Process (complaints2) – If you used the complaint process, was your complaint resolved in a timely manner? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 0 | 10 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Service Timeliness – Are agency staff members prompt in providing requested information? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 10 | 0 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Printed Information – Are all reports, instructions or other printed information provided by the agency accurate and easy to understand? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 1 | 3 | 6 | 0 |

| | | | | | |
|--|----------------------|----------------|----------------------|------------------|-----------------------|
| Data Portal – Is the Bond Review Board data available on the Texas Open Data Portal and Data Center easily accessible? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 1 | 6 | 3 |

| | | | | | |
|---|----------------------|----------------|----------------------|------------------|-----------------------|
| Overall Satisfaction – Please rate your overall satisfaction with the agency? | | | | | |
| <u>Poor</u> | <u>Below Average</u> | <u>Average</u> | <u>Above Average</u> | <u>Excellent</u> | <u>Does Not Apply</u> |
| 0 | 0 | 0 | 0 | 10 | 0 |

Representative Sample of Comments Received

- Executive Staff is extremely knowledgeable and responsive. I appreciate recent staff efforts to make written reports and database layout more streamlined and accessible for the user. I appreciate all the work the BRB staff puts in!
- I have worked with many members of the Texas Bond Review Board over the last ~10 years. They are always extremely helpful, responsive, and great to work with. I have worked in many other states, and would definitely state the Texas Bond Review Board is the best state agency, from the bottom to the top of the employees at the agency. We appreciate it!
- The Texas Bond Review Board staff that I work with regularly (mostly Rob Latsha and Jamie Backiel) are absolutely fantastic. They are very customer-service oriented - always willing and able to answer questions and offer guidance. They are very knowledgeable, responsive, and always a pleasure to work with. Five stars all around!
- Staff is always helpful and very responsive to questions and requests for assistance.

Estimated Performance for Fiscal Year 2024

Outcome Measures

| | |
|---|--------|
| Percentage of surveyed customer respondents expressing overall satisfaction with services received. | 100.0% |
| Percentage of surveyed customer respondents identifying ways to improve service delivery | 0.0% |

Output Measures

| | |
|---------------------------------------|--------|
| Number of customers surveyed* | 485 |
| Number of customers served (yearly)** | 96,521 |

Efficiency Measure

| | |
|-------------------------------|--------|
| Cost per customer surveyed*** | \$0.85 |
|-------------------------------|--------|

Explanatory Measures

| | |
|---|--------|
| Number of customers identified (yearly)** | 96,521 |
| Number of customer groups inventoried* | 5 |

* Estimates based on contacts, performance measures, and database results.

** Based on unique hits to the agency website between May 2025 and May 2026.

*** Estimate – Survey is done online; cost reflects staff time to compile survey data.

Customer Service Representative

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