RUSK COUNTY APPRAISAL DISTRICT STANDARD ON COMMUNICATIONS AND OUTREACH

I. Scope

The Rusk County Appraisal District (District) provides this Standard using the IAAO Public Relations Task Force's update to educate the district staff on the benefits of good external communications and public outreach that promotes transparency, accountability, and meaningful connections between the assessment office and the public. This Standard examines the need for a well-planned, strategic communications program that provides practical recommendations for successfully implementing and maintaining information and communication with the public through proven marketing techniques and tools.

II. Overall Principles

● Maintain a strategic communications program that establishes clear guidelines for the internal and external communications of the district.
● Designate at least one staff member from the district to coordinate communications efforts and act as spokesperson for the office.
● Identify the clearest means of communication for each customer.
● Ensure that communications channels reach all members of the community, including those who may be underrepresented.
● Develop a crisis communications plan that can be put into effect immediately during a crisis.
● Ensure that all communications reported from the district, both internal and external, are accurate, transparent, and based on fact(s).

III. Introduction

Providing current, valuable information on the district's policies and practices to the public is a critical function for the district. So, too, is maintaining clear processes for accepting and responding to public inquiries and input. A solid public relations or communications and outreach approach is essential to ensuring the public trusts the assessment process and understands the importance of property taxes in funding local government. A communications and outreach program details the "how," "why," and "who" the assessment office will inform and educate.

An effective program results in a receptive, informed, and engaged constituency. At its core, the district is a public service department. Beyond real property valuation and record maintenance, the district has to follow the laws of the State regarding interactions with the public, public notice, document retention, freedom of information, disability compliance, and more.

The district should appoint a spokesperson to develop and coordinate its communications and outreach program. Duties can be assigned to a senior staff person or a small team. The identified spokesperson should assume ownership of externally facing content such as news articles, press releases, announcements, statements, reports, and other proactive and reactive correspondence.

In most circumstances, District staff members are the first point of contact with the public, as they continuously engage with the community through telephone calls, in-person visits, live chat, and field inspections. As a result, it is important to keep staff members up to date on community outreach initiatives, press releases, crisis management plans and resources, and anything else related to the communications and outreach department. This can be achieved through regular training sessions, office-wide emails, or staff meetings.

As the District staff are typically challenged by high expectations and limited resources, the responsibility for the overall communications strategy will likely be spread among the team, from administrative to staff.

IV. Audience and Reach

The district has multiple groups to consider when evaluating communications and outreach activities. Each group, herein referred to as “the public,” has different priorities and preferred methods and channels of communication that should be considered. Some groups considered are:

- The public
- Residential homeowners and taxpayers
- Commercial property owners
- Real estate appraisers and brokers
- Lending institutions
- Oversight agencies (state level)
- Attorneys
- Developers
- Elected officials
- Civic and professional organizations
- The media
- School and other taxing district officials
- Legislators and other policymakers

Each of these has a vested interest in the district's work. Effective communication with them prioritizes accessibility of the district's information and services and meets them where they are with user-friendly, intuitive experiences.

The communications and outreach planning process includes determining the methods that are most effective to reach each audience, as well as the type of messaging and content relevant to each group:

Residential Homeowners and taxpayers' key messages:
• The assessment process is designed to establish a tax base and ensure that the tax burden is equitably distributed according to the assessed value of various properties. This may include information about the valuation process.
• Taxpayers have a voice in the local budgetary process. They may elect the officials who set the tax rates and decide how the money is spent. Taxpayers can attend public hearings and can vote on budget and bonding referendums.
• Taxpayers need to know the tax rate, how to apply it to their assessed property value, and how to arrive at the tax bill.

Preferred Distribution/Information Channels:
• Physical mail or mail insert
• Town newsletters
• Website content

V. Channels and Platforms

The district should determine which means of message delivery is most appropriate for reaching each target audience. Cost, user experience, and overall effectiveness should be considered, and adequate funding allocated. Examples include:
• Press releases and media advisories for TV, radio, and print

• Email communications

• Website content

• Mail inserts

• Mapping services

• Community outreach opportunities and public appearances

VI. Diversity, Equity, and Inclusion

The district's office should make thoughtful choices regarding the inclusivity of its messaging and the accessibility of its modes of communication for various demographic groups. Offering equitable and inclusive communications further improves the public perception of the assessment office. The communications and outreach policies should reflect and complement the district's diversity, equity, and inclusion strategic plan. Policies should strive to:

• Improve communications and feedback channels for underrepresented members of the community.

• Increase diverse representation within the department.

• Increase inclusivity within the community.

• Model inclusive communications for the office staff.

● Regularly track and analyze data to evaluate the success of DEI efforts.

Strategic efforts not only reduce barriers between the district office and community but can also generate a greater sense of inclusivity within the office itself, leading to greater employee satisfaction and better retention rates.

When considering inclusivity relative to communications and outreach, it is necessary to recognize the preferred modes of communication of the demographic groups. This can vary greatly among persons from different age groups, ethnicities, genders, socioeconomic statuses, religious backgrounds, national origins, and physical abilities. For example, senior citizens and members of certain religious affiliations might be more easily reached via newspaper articles or automated telephone calls, while younger members of the public might be more easily reached via social media or the internet.

Many governments offices are required to be compliant in regard to communications options and equal accessibility to information for members of the community with vision, hearing, and/or speech disabilities.

In the United States, the Americans with Disabilities Act requires that effective communication is provided by state and local governments except in situations where the state or local entity can show that providing such alternatives would fundamentally alter the nature of the service or would result in an undue financial burden.

VII. Key Communications and Outreach Program Components

The district should appoint a communications and outreach leader or team to oversee the program. This includes development, execution, and evaluation. Any program should align with the office’s larger strategic goals and legislative responsibilities, as well as the jurisdiction’s public relations policies and practices.

Preliminary research is the first step toward understanding the communications needs of your organization and customers and will help the district understand how those needs are currently being met.

VIII. Inventory Existing Processes and Communications

Preliminary research efforts include understanding what the district currently does and is required to do; this establishes the baseline set of communications activities for evaluation and measurement. A benchmark analysis of existing processes and communications may include a list of all scheduled and unscheduled communications that are delivered to the district's customers and the associated timing, if known.

VIIII. Initial Measures and Benchmarking

Prior to the development and implementation of a program, baseline benchmarking activities should be performed to understand the office's current level of communications capability and to articulate relevant, achievable goals.

Research may include:

- Performing a review and needs assessment of the current and/or previous program.
- Surveying the current public perception of the office.
- Assessing how well-informed the public is about the services the office provides.
- Determining if the public website is user-friendly and how many visitors it gets per day.
- Noting the most frequent requests received by the office and through what channels.
- Awareness of how long it takes on average to respond to a request.
- Understanding how the public feels about the fairness of current valuations.
- Understandable data on the district's website.

X. Planning the Program

This written plan is necessary for an effective public relations or communications program. The planning process begins with identifying goals, determining audiences, and selecting strategies for each message type and audience group.

XI. Identifying Goals

A public relations program starts with an understanding of the priorities established by the leadership of the district.

Communications and outreach goals can include:

- Addressing current social, economic, or political conditions.
- Responding to incidents or requests for information in an effective manner.
- Establishing relationships with community and partner organizations.
- Recruiting talent to support a workforce.
- Explaining or streamlining service offerings.

XII. Maintaining a Public Relations Calendar

In addition to maintaining a public relations calendar, the district should have available a calendar of recurring or cyclical processes and deadlines, along with associated communications.

Repeatable communications of a routine nature are identified. Documenting processes and creating templates of often-used communications for regular occurrences saves staff time.

XIII. Crisis Communications Plan

Emerging issues and appropriate responses should be prepared in advance to minimize adverse public reactions. The impact of a future reappraisal program can be developed and published. External influences often dictate which issues demand priority status.

The district maintains a Disaster and Recovery Plan. The plan clarifies the roles within the district office. A single spokesperson should coordinate interaction with the news media in a crisis in consultation with their legal team, if applicable, and be certain that all information released is approved, accurate, and precise.

When faced with criticism or other reactive communications situations, the following is recommended:

- Meet with the District's communications crisis response team to develop a unified message (include legal team when necessary).
- Keep everyone on message by creating a simple, internal document for all personnel noting the key facts/messages, laying out internal talking points, and providing a factual timeline, if applicable. This document should make clear that only the staff members identified should speak with the public or media on the subject.
- Have an approved media holding statement ready for immediate response to media inquiries.
- Keep responses simple and honest.
- Identify key constituencies and pay special attention to their views.
- Inform all staff from top management down.
- Prepare and preserve complete written documentation of the criticism and the solutions proposed or adopted.

XIII. Communication Types and Delivery

Communications channels are successful when the correct message is being delivered through the proper information and distribution channels. Following are some types of communications channels:

• Traditional Media – Relationships with newspapers, including local journalists, remain popular because of their large readership. Radio is useful for information that can be conveyed orally (such as brief announcements and discussion forums). Local public access TV channels can tape and air announcements, meetings, or events.

• Online Media – The internet is a core part of communications with the public. Relevant assessment and property tax information should be accessible on the web along with email newsletters and online forms.

• On-Site Communications – Brochures provide general information or address specific issues. Dedicated computers in the district office. Office hours posted in clear and accessible areas. The district should be accurate and impartial during communication with customers and avoid vague answers and comments off the record. If an answer to a particular question is not known, the response should be, "I will get back to you." An advance review of the questions is advisable whenever possible. Visual aids are helpful.

XIV. Tyle and Tone of Communication

A product placed before the public should be carefully edited and proofread before it is distributed to the media or posted online. The district should consider the benefits of preparing materials in other languages, especially when the jurisdiction has large populations not fluent in the predominant language. Any communication with the public, whether written, oral, or graphic (e.g., video or images) should be simple, direct, and in plain language, avoiding professional jargon and acronyms.

Written correspondence should follow specific guidelines:

• Answer letters and email promptly and acknowledge those that cannot be answered immediately.

• State information clearly using common words and phrases.

• Respond to all relevant questions.

• Convey a professional image.

• Correspond positively.

• Retain a copy of all correspondence for future reference.

• Be consistent with the office's style. To avoid contradictory responses, correspondence addressing policy issues must cite controlling rules, statutes, or professional standards and be communicated within the district's office.

XV. Ongoing Evaluation

All aspects of a communications and outreach program should be evaluated and improved as required.
Frequent reviews of impact measurements for existing processes prevent unnecessary misuse of time and budget. This allows the program to evolve more seamlessly as environmental conditions (staff turnover, statutory requirements, etc.) change.

Ongoing evaluation involves regularly scheduled attempts to measure public opinion of the district's office. This might involve social media feedback, media coverage, incoming inquiry volume, and comment cards. Periodic surveys of employees, regarding which issues are most commonly brought to their attention by the public, can also be a valuable measure of program pitfalls or successes.

Following reviews, the team makes recommendations and adjustments to pivot away from what is not useful and to devote more resources to that which saw success.

XVI. Public Access to Records

Public access to assessment is an essential aspect of good communications and outreach. “Public record” may mean all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, or other material, regardless of physical form or characteristics, made or received pursuant to law or ordinance. The legal definition of records deemed public may vary by state and municipality.

Public records include parcel identification numbers, property uses, parcel information, legal description, acreage, sales information, taxable values, assessed values, market values, building details, and other relevant information. Information detailing property tax exemptions, assessment processes, forms, and publications should be made available to the public.

Measures should be taken to ensure a climate of openness and transparency. The district’s office personnel should understand policies and statutes pertaining to open records, public disclosure, and confidentiality, including an awareness of compliance timelines. A standard operating procedure for information requests is developed. A staff member is assigned the role of custodian of records to ensure a timely response to open records requests. A program for providing information via paper reports or electronic media is developed. Commonly available file formats for data files should be provided.

XVII. Public Service Announcements

Pertinent announcements are sent to local newspapers, radio stations, and television stations, or posted to the district’s website. Announcement dates should be specified, and the spokesperson should be identified for follow-up questions.

XVIII. Forms and Questionnaires

The district maintains a file of forms, questionnaires, and letters for recurring events. These files may include:

• Appeal forms

• Exemption applications

• Income and expense questionnaires

• Sales questionnaires

• Correspondence on policy

• Personal property forms

• Valuation notices

XIX. Local Annual Reports

The district prepares an annual report summarizing activities and accomplishments and providing statistical information. This report can be used to maintain a historical record of property and property tax data.

Information that is recommended for local annual report includes:

• Total number of parcels

• Total value and value by type of property

• Types of property

• Exemption data

• Appeal data

• Ratio study analysis

• New construction or growth

Such a report can also include information describing increased efficiencies in the operations, achievement of higher degrees of professionalism, and a listing of the standards and policies adopted in the valuation and administrative process.

XX. State and Provincial Annual Reports

Local, state, and provincial agencies prepare annual reports summarizing activities and accomplishments and providing statistical information. These reports can be used to maintain a historical record of property and property tax data.

Such a report can also include information describing increased efficiencies in the operations, achievement of higher degrees of professionalism, and a listing of the standards and policies adopted in the valuation and administrative process.

XXI. Assessment Notices

The assessment or valuation notice is a written notification from the assessment organization advising property owners of the calculated property value for a specific tax year. Examples of information that may appear on the notice are:

- Name and address of the assessment jurisdiction
- Purpose of the notice
- Tax year owner's or taxpayer's name
- Mailing address
- Parcel identification number
- Legal description
- Tax district information
- Effective date of the assessment
- Property address
- Exemptions

• Total appraised value

• Taxable value if different from appraised value

• Statutory level of assessment and applicable constraints

• Prior assessment

• New assessment

• Net change in assessment

• Appeal rights, hearing procedures (informal and formal), and dates

• Date of notice

• Any other information required by law

XXII. New Releases

The news release is a valuable device that should be used to promote activities, communicate policies, and inform the public of assessment issues. The following are recommendations for writing a news release:

• Information should be newsworthy (timely, unique, or significant). ●

• Communications and outreach industry-recommended format should be followed.

• Contact information should be provided.

• The length should not exceed two pages.

• Online media releases should be as concise as possible.

• Information should be localized.

• The release should be proofread.

• The most important facts should appear first.

• Deadlines, editing procedures, and other requirements of the media should be accommodated.

• All staff should be given copies of the release.

• Those mentioned in the release should be notified before it is sent.

XXIII. Local District Website Content

Local jurisdiction websites should include information found in the annual report and other informative data such as:

- An introductory message from the assessing officer
- Office hours, locations, and contact information
- Property information, including ownership, property characteristics, sales history, and valuation
- News releases
- An explanation of the appeals process
- Exemptions and reductions available to taxpayers
- Q&A page (also known as Frequently Asked Questions [FAQs])
- Interactive, searchable maps
- Taxpayer forms
- Links to other relevant websites