

Standard on Public Relations

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INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS

The assessment standards set forth herein represent a consensus in the assessing profession and have been adopted by the Executive Board of the International Association of Assessing Officers. The objective of these standards is to provide a systematic means by which concerned assessing officers can improve and standardize the operation of their offices. The standards presented here are advisory in nature and the use of or compliance with such standards is purely voluntary. If any portion of these standards is found to be in conflict with the Uniform Standards of Professional Appraisal Practice (USPAP) or state laws, USPAP and state laws shall govern.

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Standard on Public Relations

1. Scope

This standard has been designed to make assessing officers aware of the benefit of good public relations and to promote effective communications between the assessment office and the public. Defining public relations with respect to the assessment profession and using terms specific to the assessment field, this standard discusses the need for a well-planned and well-executed communications program and provides recommendations on how to implement and maintain communication with the public by using proven marketing techniques and tools.

2. Introduction

2.1 Necessity for Public Relations

A public relations program in the assessment profession provides current and useful information on assessment policies and practices, as well as a means of responding to public opinion. A proactive public relations program is essential to public awareness of the assessment process and of the importance of the property tax in funding local government services. A public relations program should be an integral part of every assessment office's work. A public relations program describes what the office does as well as how, why, and for whom its services are performed. An effective public relations program results in more accurate and thorough coverage from the media and a better-informed constituency.

2.2 Core Constituencies

The assessment office needs to be aware of a wide variety of core constituencies, including individuals or groups with special needs that require attention and focused communication. These groups include property owners, civic and professional organizations, lending institutions, developers, attorneys, real estate appraisers and brokers, governmental agencies and policymakers, tax representatives, and the media.

2.3 The Components of a Public Relations Program

A public relations program consists of research, action planning, communication, and evaluation.

- Research should determine how the public perceives the policies, programs, and operations of the assessment office.
- Research is also necessary to provide meaningful data.

- An action plan should be based on research.
- Communications with the public should be positive, courteous, and provide education on the issues.
- The most current and cost-effective means of distributing information should be used.
- All aspects of a public relations program should be tested, evaluated, and improved as required.

3. Developing a Public Relations Program

A written plan is necessary for an effective public relations program. A public relations program should be designed to give special attention to current social, economic, and political conditions. The program should also be tailored to meet the specific needs of core constituencies and address the role of the assessment office.

3.1 Public Relations Officer

The assessment office should have a spokesperson to develop and coordinate its public relations program. Depending on circumstances, assessing officers can appoint a full-time public relations officer, assume the duties themselves, or assign them to another senior staff person. A primary spokesperson should be identified to coordinate interviews, and to write and distribute news releases, newsletters, reports, and correspondence; coordinate special events such as open houses and public appearances; and edit special publications and annual reports.

3.2 Listening

The initial task of public relations is to understand the public's current image of the assessment office. This can be accomplished by listening to what the public is saying and observing its actions and reactions. Listening involves observing the economic, social, and political environments, identifying possible problems or opportunities, interpreting public opinion, and evaluating the program. All issues that affect assessment functions must be clearly defined and given full attention. Assessment offices should consider researching, testing, and implementing a public feedback mechanism. When effectively executed, these systems can provide assessment offices with a wealth of qualitative and quantitative data on operational effectiveness and areas demanding greater public emphasis. Effective feedback can be obtained from focus groups, citizen advisory committees, surveys, comment cards, Web site guest books, public

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speaking engagements, and "secret shoppers" (i.e., persons who pose as customers and report on the treatment they receive).

3.3 Issues Management and Action Planning

Emerging issues and appropriate responses should be anticipated and appropriate responses should be prepared in advance to minimize adverse public reaction. For example, the impact of a future reassessment program can be predicted by statistical analysis, and a plan can be developed to deal with reactions. External influences can often dictate which issues demand priority status. With proper planning, many problems can be avoided. For any plan to be effective, an action timetable must be developed that defines tasks and establishes priorities for resolving the issues. Planning must be well coordinated and supported by upper-level management. The assessing officer's approval of a course of action is critical to the staff's acceptance and effective implementation of any plan.

3.3.1 Crisis Plan

The assessment office should have a written plan for handling crises and coordinating with other governmental agencies. The plan should define roles within the assessment office and all personnel should know their roles. Guidelines to be followed need to be specific. A single spokesperson should coordinate interaction with the news media in a crisis and be certain that all information released is accurate and precise.

3.3.2 Criticism

When faced with criticism, the following actions are recommended:

- Respond quickly, honestly, and openly
- Identify key constituencies and pay special attention to their views
- Involve all staff from top management down
- Prepare and preserve complete written documentation of the criticism and the solutions proposed or adopted.

3.4 Communications

Direct communication with constituents should be used to explain the role of the assessment office and the services it provides. Assessment office services should be explained in detail and misconceptions or vague issues should be clarified. Possible communication topics are special tax exemption programs, the assessment process, the appeal process, the distribution of tax revenue, the relationship between the tax rate and the reassessment process. The assessing officer should make use of available media to communicate with constituents:

- Newspapers traditionally have been popular because of their large readership and low cost.

- Professional publications disseminate specialized information to targeted audiences.
- Brochures can be designed to provide general information or to address specific issues.
- Slide presentations and videos can be developed to present information to local organizations and other public outlets.
- Local public access channels can be used to provide information.
- Radio is useful for information that can be conveyed orally (such as brief announcements and discussion forums).
- Web sites provide convenient access to information and records.
- Dedicated computers in assessment offices, other government offices, public libraries, and shopping malls also provide convenient access to information and records.
- Community centers and community-sponsored events, such as fairs and festivals, provide places to display exhibits, hand out materials, and answer questions.

A product placed before the public should be carefully edited and proofed before it is distributed to the media. The office 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 or oral, should be in plain language and should avoid professional jargon and acronyms.

3.5 Review and Evaluation

The public relations program should be reviewed and evaluated to determine its results and effectiveness. Adjustments should be made as necessary; segments that have outlived their usefulness or are ineffective can be discontinued. Press clippings from newspapers, magazines, and trade publications provide evidence for reviewing and evaluating the public relations program. Feedback mechanisms such as suggestion boxes and online surveys should also be considered.

4. Developing a Procedural Manual

Employee demeanor in serving the public is important to maintaining good public relations. Every public contact should be viewed as an opportunity to improve the organization's image. Procedural manuals that include a section detailing how staff should communicate with the public are critical for an effective public relations program. Because assessment offices differ in size, location, and nature, the procedural manual should be designed with the particular office in mind. Informa-

tion on the following subjects should be included in the section on public relations:

- Professional standards adopted
- Important dates and deadlines
- Rules for disclosure of different types of information and confidentiality of data
- Guidelines for daily interactions with the public
- Suggestions for responding to irate taxpayers
- Guidelines for assessment hearings and appeals
- Staff appearance and attire
- Identification badges, nameplates, and vehicle identification
- Telephone and e-mail etiquette
- Guidelines for the style and structure of letters and e-mail
- Methods for recording actions.

5. Public Records

All records should be made available for public review unless confidential information is involved. Public access to assessment records is crucial to good public relations, and measures should be taken to ensure a climate of openness and transparency. Assessment office personnel must understand policies pertaining to disclosure and confidentiality. The assessing officer should establish guidelines for the dissemination of real estate records or taxpayer information and should be sensitive to privacy concerns. A standard operating procedure for information requests must be developed. A program for providing information via paper reports or other electronic media should be developed. Commonly available file formats for data files should be provided.

6. Printed Information and Correspondence

In preparing printed materials and correspondence for the public, special attention should be paid to form, content, length, and language.

6.1 Correspondence

Written correspondence should follow specific guidelines:

- Answer letters and e-mail promptly and acknowledge those that cannot be responded to immediately
- State information clearly using common words and phrases
- Respond to all questions

- Convey a professional image.
- Add a personal touch whenever appropriate
- 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 assessment office. Responses to criticisms should be addressed promptly and be resolved in a non-judgmental way.

6.2 Assessment Notices

Assessment notices should contain:

- Name and address of the assessment jurisdiction
- Purpose of the notice
- 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
- Proposed or new assessment
- Net change in assessment
- Reason for new assessment
- Appeal rights, hearing procedures (informal and formal), and dates
- Date of notice
- Class or type of property.

In addition the notice should include a tax impact statement showing projected real estate taxes for the upcoming tax year, based on existing budgets (or proposed budgets if available). References to truth in taxation or other statutes placing limits on budget or levies may be helpful.

6.3 Special-Purpose Messages

Special-purpose messages (e.g., announcements of field inspection) should be developed and disseminated.

6.4 Forms and Questionnaires

Every assessment office should maintain a file of forms, questionnaires, and letters for recurring events. These files should include:

- Appeal forms
- Exemption applications
- Income and expense questionnaires
- Sales questionnaires
- Correspondence on policy
- Personal property forms.

Useful information can be obtained from carefully structured and designed questionnaires. Postage-paid return envelopes can increase the response rate.

6.5 Annual Reports

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

6.5.1 Local Annual Reports

Some of the information that should be included in the local annual report is:

- Total number of parcels
- Total value
- Uses of property
- Types of property
- Exemption data
- Appeal data
- Ratio study analysis
- New construction
- Legislative changes.

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.

6.5.2 State and Provincial Annual Reports

Some of the information that should be included in the state or provincial annual report is:

- Total or proportional valuation by property class

- Total value and tax consequences of exemptions
- Intergovernmental payments in-lieu-of property tax information
- Centrally assessed property data
- Distribution of tax burden by property type
- Property tax revenue distribution
- Summary of statutory, legal, or regulatory changes
- Ratio study analysis
- Summary of major accomplishments.

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.

7. Media Contacts

The assessment office should maintain a list of media contacts. The list should be reviewed annually and include contacts in all types of media. Media contacts include news releases, interviews and conferences, and public service announcements.

7.1 News 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)
- The industry-recommended format should be followed
- The length should not exceed two pages
- 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.

7.2 Interviews and Conferences

The assessing officer or spokesperson should be accurate, impartial, 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 may be helpful.

7.3 Public Service Announcements

Public service announcements should be sent to local newspapers, radio stations, and television stations. Broadcast announcements should be brief; a 25-word announcement takes about 10 seconds of airtime. The announcement dates should be specified, and the spokesperson should be identified for follow-up questions.

8. Speaking Engagements

Speaking engagements are an important opportunity for contact between the assessing officer and organized groups. Engagements can be spur-of-the-moment or scheduled. Material suitable for a variety of impromptu or formal speeches should be developed, independently reviewed, and rehearsed. Opportunities for speaking engagements are usually offered by service organizations, civic groups, neighborhood associations, boards of realtors, industry representatives, regularly scheduled public access stations or radio talk shows, legislators, and other elected officials. An opportune time to meet with groups is just before the mailing of assessment notices or a major reappraisal effort.

9. Contacts with other Public Officials

An assessing officer must deal with other agencies and officials at all levels of government. An effective working relationship with these officials is crucial. To maintain good relations with other public officials, affected policymakers should be notified before public announcements are made. Unreasonable demands and public criticism of other departments should be avoided.

10. Appeals Process

Taxpayers should be made aware of the rules and procedures for appealing assessments. Information on what constitutes a valid appeal should be made available. During this process taxpayers should be treated with courtesy and respect. New information should be evaluated thoroughly and objectively. Adequate space and facilities should be made available for waiting appellants. See the IAAO *Standard on Assessment Appeal* (IAAO 2001) for detailed considerations on appeal procedures.

11. Public Education

The public needs to know the purpose of assessments and what public services are funded by property taxes. The taxpayer should be made aware that 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. It

should be emphasized that assessments can be made at various levels of government (local, state, or provincial) and are appealable at the same levels. Taxpayers should understand that they have a voice in the local budgetary process—they elect the officials who set the tax rates, can attend public hearings, and can vote on bonding or expenditure referendums. Taxpayers need to know the tax rate, how to apply it to the assessed value, and how to arrive at the tax bill. It is the assessing officer’s responsibility to inform the taxpayer about the appraisal and assessment process, the information available for review, procedures for filing an appeal, and filing deadlines.

12. Internet Web Sites

In addition to more traditional communication methods, the Internet is an effective way of informing the public. Relevant assessment and property tax information should be available on the Web. Assessing officers must research, plan, and implement ways to deliver information on the Internet. Assessment agency Web sites should be content-driven, so information can be quickly accessed, retrieved, and reviewed.

12.1 Local Web Site Content

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

- A welcome page by the assessing officer
- Office hours, locations, and contact information
- Property information, including ownership, property characteristics, sales history, and valuation
- News releases
- Mission statement or strategic plan
- Job openings
- An explanation of the appeals process
- An assessment notice explanation
- Exemptions
- Assessment cycle timetable
- Q&A page (also known Frequently Asked Questions [FAQs])
- Maps
- A parcel’s tax history
- Taxpayer forms
- A Web site map
- Links to other relevant Web sites.

12.2 State and Provincial Web Site Content

State and provincial jurisdiction Web sites should include information found in the annual report and should include:

- Contact information for departments
- Information relevant to the public and governmental agencies that rely on property tax information at the state and provincial level
- Intergovernmental links
- Intragovernmental links at the state and provincial level
- Administrative rules and statutes
- Forms and Web-based applications
- Links to related Web sites.

12.3 Key Web Site Features

Web sites should include the following features:

- Appropriate keyword metatags (keywords that tell search engines about the page's content)
- No “orphan” Web pages
- Page revision dates
- Up to date content
- E-mail link to the Webmaster
- Search feature and site map
- Home page links for current hot issues.

Reference

International Association of Assessing Officers (IAAO). 2001. *Standard on assessment appeal*. Chicago: IAAO.

Assessment Standards of the International Association of Assessing Officers

JANUARY 2010

Standard on Ratio Studies

JANUARY 2010

Standard on Property Tax Policy

JANUARY 2010

Standard on Public Relations

JANUARY 2008

Standard on Mass Appraisal of Real Property

DECEMBER 2005

Standard on Valuation of Personal Property

AUGUST 2004

Guide to Assessment Administration Standards

AUGUST 2004

Standard on Manual Cadastral Maps and Parcel Identifiers

SEPTEMBER 2003

Standard on Automated Valuation Models

JULY 2003

Standard on Administration of Monitoring and Compliance Responsibilities

JANUARY 2009

Standard on Digital Cadastral Maps and Parcel Identifiers

JANUARY 2003

Standard on Facilities, Computers, Equipment, and Supplies

DECEMBER 2008

Standard on Contracting for Assessment Services

JULY 2001

Standard on Assessment Appeal

JULY 2001

Standard on Valuation of Property Affected by Environmental Contamination

DECEMBER 2000

Standard on Professional Development



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