STANDARD ON COMMUNICATIONS AND OUTREACH

Released for Exposure – April 2023

International Association of Assessing Officers

IAAO assessment standards represent a consensus in the assessing profession and have been adopted by the Board of Directors of the International Association of Assessing Officers (IAAO). The objective of the IAAO standards is to provide a systematic means for assessing officers to improve and standardize the operation of their offices. IAAO standards are advisory in nature and the use of, or compliance with, such standards is voluntary. If any portion of these standards is found to be in conflict with national, state, or provincial laws, such laws shall govern. Ethical and/or professional requirements within the jurisdiction [1] may also take precedence over technical standards.

[1] For example, USPAP, CUSPAP, IVS, EVS.

About IAAO

The International Association of Assessing Officers, formerly the National Association of Assessing Officers, was founded for the purpose of establishing standards for assessment personnel. IAAO is a professional membership organization of government assessment officials and others interested in the administration of the property tax. Over the years, IAAO members have developed assessment practice and administration standards. Many of these standards have been adopted by state and international oversight agencies, and some have been incorporated into legislation.

IAAO continues at the forefront of assessment in North America and has been expanding its reach to the global community for the last five decades. Because standards form the rules by which North American assessors perform their duties, they may not be directly applicable to an overseas audience. The standards have been updated to also present the broad principles upon which the rules are based. IAAO believes those principles may be adapted to many differing statutory and regulatory scenarios worldwide.

Acknowledgments

At the time of the 2022 revision the Standard on Communications and Outreach Task Force was composed of Tyler Masterson, CEO of TrueRoll; Andy Janecek; Nereia Cormier Wilson, MBA, CFE; Ashley Tinius; Jessica McNiel, RES; and Nathan Maynes. Tammy Brown, IAAO liaison, and Carol Neihardt, Research and Technical Standards Committee member, also contributed to creation of the Standard.

The Research and Technical Standards Committee was composed of Margie Cusack, FIAAO, chair; Doug Warr, AAS; Alan Dornfest, AAS, FIAAO; Melissa Baer, CAE; Carol Neihardt; Michael Safarty; Russ Thimgan; Marco Kuijper; Carmela Quintos; Jennifer Rearich, MAS, RES; and Larry Clark, IAAO liaison.

Revision Notes

This Standard replaces the 2011 Standard on Public Relations and is a complete revision.

Published by
International Association of Assessing Officers 314 W. 10th St.
Kansas City, Missouri 64105-1616
816-701-8100
Fax: 816-701-8149
www.iaao.org
Library of Congress Catalog Card Number: ISBN 978-0-88329-260-0

Produced in the United States of America.

TABLE OF CONTENTS

STANDARD ON COMMUNICATIONS AND OUTREACH

1. Scope

In 2022, the IAAO Public Relations Task Force updated the existing IAAO Standard on Public Relations, last updated in 2011. This update serves to educate assessing officers on the benefits of good external communications and public outreach that promotes transparency, accountability, and meaningful connections between the assessment office and the public. The 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.

2. Overall Principles

- Develop a well-planned, strategic communications program that establishes clear guidelines for the internal and external communications of the assessing office.
- Designate at least one staff member from the assessing office to coordinate communications efforts and act as spokesperson for the office.
- Identify all stakeholder groups and the clearest means of communication with each.
- 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 situation.
- Ensure that all communications reported from the assessing office, both internal and external, are accurate, transparent, and based on fact(s).

3. Introduction

The Case for Strategic Communications and Outreach

Providing current, valuable information on assessment policies and practices to the public is a critical function for assessment offices and oversight agencies. 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 not only results in a receptive, informed, and engaged constituency, but it may also result in more accurate, thorough, and positive coverage from the media.

Communication's Vital Role

At its core, the assessment organization is a public service department. Beyond real property valuation and record maintenance, the office has to follow the laws of its jurisdiction regarding interactions with the public, public notice, document retention, freedom of information, disability compliance, and more. These rules should be the foundation of any communications strategy and should provide a starting point for a culture of transparency for employees at all levels. Understanding the applicable guidelines and regulations should also serve to align communications efforts with those of other departments for a cohesive approach.

Ideally, the assessment office or oversight agency should appoint a spokesperson to develop and coordinate its communications and outreach program in consultation with the larger jurisdiction's spokesperson or central communications team. Depending on circumstances, assessing officers may appoint a full-time communications and outreach officer, assume the duties themselves, or assign them to another senior staff person or small team. The identified spokesperson should be media-trained and assume ownership of externally facing content such as news articles, press releases, announcements, statements, reports, and other proactive and reactive correspondence. In larger organizations, a responsibility assignment model (i.e. RACI) can be an effective way to keep everyone on the same page regarding who is "responsible," "accountable," "consulted," and "informed" for each part of a communications plan.

The assessment officer should ensure that every outreach plan includes its internal stakeholders: the staff members of the assessment organization. In most circumstances, 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, staff meetings, or an office portal or intranet system.

As with many public departments, assessment staff are typically challenged by high expectations and limited resources. We understand that the responsibility for the overall communications strategy will likely be spread among the team, from the assessors to administrative staff. It is therefore useful to digest the following guidance within the context of your internal resources. Exactly where the responsibility should lie will depend on staffing and structure; however, carrying out the communications strategy is everyone's job.

4. Audience and Reach

4.1 Who Is Your Audience?

An assessment organization has multiple stakeholder groups to consider when evaluating communications and outreach activities. Each stakeholder group, herein referred to as "the public," has different priorities and preferred methods and channels of communication that should be considered. At a high level, some common stakeholder groups are:

- The general public[1]
- Residential homeowners and taxpayers
- Commercial property owners
- Real estate appraisers and brokers
- Lending institutions
- Oversight agencies (state level)
- Attorneys
- Developers
- Advocacy groups
- Government watchdogs
- Other elected officials
- Civic and professional organizations
- Internal assessor's office staff
- The media
- School and other taxing district officials
- Legislators and other policymakers

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

4.2 Maximize Your Reach

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:

Stakeholder Group	**Key Messages**	**Preferred Distribution/Information Channels**
Residential homeowners and taxpayers	• 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	• Physical mail or mail insert • Local media • Town newsletters • Website content

[1] Each stakeholder group can also be broken down to subgroups. Residential homeowners can be broken into seniors, veterans, or individuals with a disability, for example.

	to their assessed property 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. ● Messaging around revaluations—why they are done and what to expect—is particularly important.	

Table 1: Example model of informational needs of a stakeholder group

Other stakeholder groups may have other interests and informational needs that should be documented and addressed in this way, with clear key messages and appropriate communications channels.

4.3 Channels and Platforms

Assessment offices 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
- Social media
- Website content
- Mail inserts
- Newsletter content
- Mapping services
- Chat boxes
- Online booking platforms
- Interviews
- Community outreach opportunities and public appearances

Choosing the right channel for your message is discussed in more depth in the program details section below.

4.4 Diversity, Equity, and Inclusion

When communicating with stakeholders, the assessor'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 policies of your organization's communications and outreach department should reflect and complement your jurisdiction's diversity, equity, and inclusion (DEI) strategic plan. DEI policies within the communications and outreach department should strive to:

- Improve communications and feedback channels for underrepresented members of your community.
- Increase diverse representation within the department.
- Increase inclusivity within the community.
- Model inclusive communications for the assessment office staff.
- Regularly track and analyze data to evaluate the success of DEI efforts.

Over time, strategic DEI efforts not only reduce barriers between the assessment 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 striving to improve your department's DEI efforts, awareness of the diversity within your community is a good place to start. Familiarize yourself with the demographic groups within your jurisdiction.

When considering inclusivity relative to communications and outreach, it is necessary, as noted above, to recognize the preferred modes of communication of the demographic groups you're attempting to reach. 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.

While large media outlets tend to reach the largest number of people, they often involve a cost to the public, such as a digital paywall or subscription fee. For this reason, it is important to consider the use of media outlets that offer free access to content to increase information accessibility for members of lower socioeconomic status. Additionally, media outlets that broadcast in languages used by local minority groups can assist in expanding the reach of the assessor's message to communities that are often underserved because of lack of access to information.

It should also be noted that many governments require the assessing office 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. Examples of effective communications tools include:

- Braille and large print options (for written materials)
- Computer screen-reading or audio recording programs
- Sign language interpreters
- Real-time captioning
- Video relay service (VRS) or video remote interpreting (VRI)
- Support service providers (SSPs)

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.[2]

[2] https://www.ada.gov/effective-comm.htm

5. Key Communications and Outreach Program Components

The assessing officer 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 general public relations policies and practices.

This document considers four main pillars of an effective public relations or strategic communications and outreach program:

1. Research
2. Planning
3. Communications types and delivery
4. Evaluation and feedback

5.1 Preliminary Research

Preliminary research is the first step toward understanding the communications needs of your organization and stakeholders and will help you understand how those needs are currently being met by your office. You can think of this as a benchmark analysis of sorts.

5.1.1 Inventory Existing Processes and Communications

Preliminary research efforts should include understanding what your office currently does and is required to do; this will establish the baseline set of communications activities for evaluation and measurement.

A benchmark analysis of existing processes and communications should include a list of all scheduled and unscheduled communications that are delivered to your stakeholder groups and the associated timing, if known. An example inventory following a benchmark analysis may look something like the chart below. Some jurisdictions may have more or fewer of these communications within the assessment organization.

Communication	**Description**	**Schedule**	**Channel(s)**	**Stakeholder Groups**
Public Records Request Process	Inbound public records and Freedom of Information requests	Upon request	Email	Any requester
Annual Reports	Summaries of activities and accomplishments, including statistical information	Annually	Hard copy delivery Website Public literature tables	State and local jurisdictions and policymakers; advocacy groups

Assessment Notices	Legislatively required communications about property assessment describing how values are set and how to appeal	Dates applicable for your jurisdiction	Mail Newsletters Website Press release Social media	Parcel owners
Exemption, Homestead, Occupancy Credit, Enrollment Period	Communications about the exemption enrollment process and timeline	Dates applicable for your jurisdiction	Mail Newsletters Website Social media	Residential (or other potentially eligible) parcel owners
Appeals/Dispute Communications	Clarifications of all deadlines regarding appeals and disputes	Dates applicable to specific districts	Mail Website Social media Press release Newsletter	Parcel owners
Public Service Announcements	Communications about important dates and deadlines, office closures, and outreach events	As needed	Mail Website Social media Newsletters Press releases	Parcel owners; new homebuyers; other office stakeholders (i.e. Realtors, finance, insurance, etc.)

Table 2: Examples of communication services provided by assessment office

5.1.2 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.

The preliminary research phase should include such baseline benchmarking activities as:

- Performing a review and needs assessment of the current and/or previous program. The comparative success or failure of any previous public relations or communications and outreach efforts can provide valuable guidance when defining new objectives and designing a strategic approach to the new program.
- Surveying the current public perception of the office.
- Assessing how well-informed the general public is about the services the office provides.
- Measuring current outreach success to determine which audiences are most and least reached and which channels are most and least successful in reaching the broad constituency.

You may also want to assess the following:

- How user-friendly is the public website?
- How many visitors does the website get per day?
- What are the most frequent requests received by the office? Through what channels?
- How long does it take, on average, to respond to resident requests?

- How does the public feel about the fairness of current valuations?
- How efficiently does the office respond to public queries?
- What is the service level agreement and historical response time for public information requests?
- What is the volume and what are the sources of public information requests?
- Does the office post public data sets online and how often are they accessed?

The collection of quantitative[3] and qualitative[4] data of this nature during the preliminary research phase and on an ongoing basis will allow for baseline benchmarking and give your office the ability to measure the impacts of the new program, which will in turn create a feedback loop that allows the program to continuously improve. Understanding this information can also help benchmark against peers in other jurisdictions.

5.2 Planning the Program

A 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.

5.2.1 Identifying Goals

Planning a public relations program starts with an understanding of the priorities established by the leadership of the assessment office. Key stakeholders, including department heads and leaders of partner organizations and related government entities, may be involved in identifying organizational priorities and subsequent specific goals to ensure that a variety of perspectives are considered and that all communications emanating from the same jurisdiction are in alignment.

After identifying organizational priorities, communications and outreach goals should be established to drive them. Examples may include:

- Elevating the assessment office's message (deadlines, achievements, community involvement, public information, etc.).
- 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.
- Promoting an event to encourage attendance.
- Recruiting talent to support a workforce.
- Explaining or streamlining service offerings.
- Saving staff time by reducing public inquiries through more successful education.
- Sharing opportunities or information tailored to employees, members of the public, and related

[3] Quantitative data refers to data that can be counted or measured and expressed using numbers or percentages; for example, how many people visit the website per day.
[4] Qualitative data is more descriptive and based largely on interpretation; this might include things like how efficient or friendly the public perceives the assessor's office to be. Qualitative research can often be used to understand the reasons behind values that stand out in quantitative analyses.

stakeholders.

5.2.2 Developing a Procedural Manual

Priorities and goals are nothing without tactics. A procedural manual provides those tactics and documents processes in a clear manner so employees at every experience level know exactly what to do and when. A manual may provide any or all of the following:

- Summary of overall communications and outreach priorities, goals, and strategies
- Established professional standards
- Key contacts and delegations of authority and the identification of approved spokesperson(s)
- Rules for disclosure of different types of information and confidentiality of data
- Any established records retention policy
- Instructions for handling media inquiries received by phone, letter, email, or other electronic channels
- Process for responding to media interview requests
- Policies establishing an employee's authority or limitations on expressing their personal points of view in the media or on social media
- Guidelines and an authorization process for using intellectual property, logos, trademarks, and copyright
- A privacy statement and policy for public comment mechanisms
- Policy regarding appropriate online use of the assessing jurisdiction's name and identity
- Policy requiring appraisal staff to be easily identifiable by the public
- Policy regarding endorsements and political statements
- Suggestions for responding to unhappy taxpayers, including conflict resolution and de-escalation techniques
- Communications guidelines for assessment hearings and appeals
- Staff appearance and attire, relating to specific public appearances
- Identification badges, nameplates, and vehicle identification
- Telephone and email etiquette
- Guidelines for the style and structure of letters and email

Employee interaction with the public is important for maintaining good communications and outreach. Procedural manuals that include a section detailing how staff should communicate with the public can help provide consistency and yield more positive customer interactions.

Since assessment offices differ in size, location, and nature, the procedural manual should be designed with the specific attributes and organization of the assessment office in mind.

5.2.3 Establishing Contacts and Media Lists

The assessment office should maintain a list of media contacts. This can be in the procedural manual as well as in other easily accessible locations for staff. The list should be reviewed at least annually and include contacts in all types of media. Note which media contacts should receive which notices, from news releases to public service announcements to interview and event invitations.

5.2.4 Creating a Public Relations Calendar

In addition to establishing a manual detailing public relations procedures, assessment offices should develop a calendar of recurring or cyclical processes and deadlines, along with associated communications. Such a calendar could include:

- Upcoming events or major activities
- Exemption application deadlines
- Appeals timelines
- Revaluation dates
- Schedule of required public notices
- Upcoming trade shows, conferences, or community events
- Editorial opportunities and deadlines
- Seasonal or holiday themes
- National awareness days and months
- Additional news relevant to any or all target audiences
- Public awards or career achievements and milestones
- Taxing district timelines related to assessment information

Repeatable communications of a routine nature should be identified, as well as items that may require more extensive content creation. Your communications calendar should span 15 months for optimal planning. Documenting processes and creating templates of often-used communications for regular occurrences will save staff time and headaches.

5.2.5 Establishing a Crisis Communications Plan

Emerging issues 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. For any plan to be effective, an action timetable must be developed that defines tasks, clearly assigns ownership, and establishes priorities for issue response. Planning must be well-coordinated and supported by upper-level management.

The assessment office should have, as part of the procedural manual or as a stand-alone document, a written plan for handling crises and coordinating with other governmental agencies. The plan should clearly define roles within the assessment office. All personnel should be trained on their roles and the messaging strategy. A single spokesperson should coordinate interaction with the news media in a crisis in consultation with the jurisdiction's communications staff, as well as the 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, we recommend the following actions:

- Meet with the core communications crisis response team to develop a unified message (include legal or other stakeholders when necessary).
- Keep everyone on message by creating a simple, internal document for all internal stakeholders 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.

- Create an external talking points document for those who will be speaking with members of the public and media.
- 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.
- Save media holding statements and talking points documents so approved language is easily accessible for the next event.

5.3 Communications Types and Delivery

Choosing Communications Channels

As discussed above, communication is successful when the correct message is being delivered to the right stakeholders through the proper information and distribution channels**.** Following are some deeper dives into the types of communications channels:

<u>Traditional Media</u>

- 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.

<u>Online Media</u>

The internet should be a core part of communications with the public. Assessing officers should research, plan, and implement ways to deliver information online. Local jurisdiction websites should be the foundation of a digital communications strategy and contain the most authoritative information in a user-friendly interface. Relevant assessment and property tax information should be accessible on the web, preferably via the local jurisdiction's website. Social media sites should be evaluated to determine their effectiveness for communications and outreach purposes and used to direct visitors to authoritative sources of information, such as the local jurisdiction's website. An office website can provide convenient access to calendars, announcements, records, contact information, and data. The following are examples of ways to distribute information digitally:

- Email newsletters
- Online forms
- Online data portals

- Self-service open records requests

Distributing information outside the jurisdiction website can allow assessment offices to engage with residents where they spend time online. Digital channels should be selected with care, and official communications should be labeled as such when engaging with constituents via third-party platforms. Such third parties include:

- Online community forums
- Local neighborhood association websites
- Elected representatives and their communications channels
- Social Media Sites

A Note on Social Media

Social media is a common way for people to connect in a digital space. Each jurisdiction should develop a policy for posting that reflects local laws and customs. When developing such a policy, consider the following:

- Social media sites provide direct and timely access to constituents and are a cost-effective means of communication. It has been noted that constituents who get government information from social media actually have more information and awareness than those who rely on more traditional communications channels. This is because social media channels are accessed daily, as opposed to newsletters, for example, which may come out only monthly. This makes social media a key component of any strategy.
- Planned social posts should be a part of the 15-month communications calendar. Advance planning for social posts ensures those messages, too, will be vetted and on-point.
- Social media sites sponsored and maintained by the agency should include the following features:
    - Identification of the organization and contact information
    - Code of conduct for use of the site or service
    - A mechanism to report misconduct
    - Links to authoritative information residing on the organization’s website
    - Disclaimer for terms of use
    - A statement of purpose for the site.
- The type of content an assessment office should post on social media includes (but is not limited to):
    - Important dates (exemption deadlines, assessment notices, office closures, etc.)
    - Community engagement calendars
    - Events attended by the elected or appointed assessor
    - Media mentions and reports, news articles
    - Important exemption qualification information (if applicable)
    - Good news of the office
    - Staff member highlights
- The type of content an assessment office should be cautioned against posting includes:
    - Jokes or sarcastic posts
    - Misinformation
    - Political posts
    - Religious posts (holidays excluded, but posts should be mindful of the diversity of holidays celebrated in their communities)

- If a social media message is posted with incorrect content, the post should be updated immediately and a disclaimer added to inform users that the post has been edited (unless there is a minor grammatical error)

<u>On-Site Communications</u>

- Brochures can be designed to provide general information or to address specific issues.
- Dedicated computers in assessment offices, other government offices, public libraries, and shopping malls also provide convenient access to information and records.
- Staff can promote and provide temporary “office hours” at libraries and other community centers in underserved communities with less access to your main and/or branch offices.
- Interviews, conferences, and speaking engagements can provide important opportunities for contact between assessing officers 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 reappraisal effort.
  - The assessing officer or spokesperson should be accurate and 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.

<u>Niche Audience</u>

- Professional publications disseminate specialized information to targeted audiences.
- Community centers and community-sponsored events, such as fairs and festivals, provide places to display exhibits, hand out materials, and answer questions.
- Networking with public officials helps assessing officers establish effective working relationships with other agencies. To maintain good relations with other officials, affected policymakers should be notified before public announcements are made. Unreasonable demands and public criticism of other departments should be avoided.

Style and Tone

A product placed before the public should be carefully edited and proofread before it is distributed to the media or posted online. 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, 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 assessment office.

5.5 Ongoing Evaluation: Creating a Feedback Loop

A framework for measuring the success of each communication, both qualitative and quantitative in nature, is highly recommended.

All aspects of a communications and outreach program should be tested, evaluated, and improved as required. Coming into the program with defined key performance indicators will make the job of the community outreach personnel much easier.

Frequent reviews of impact measurements for existing processes will 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 assessor's office. This might involve surveys, social media feedback, media coverage, incoming inquiry volume, and comment cards. Periodic surveys of employees, in regard to which issues are most commonly brought to their attention by the public, can also be a valuable measure of program pitfalls or successes. It's important to note that measuring and reporting on progress are also critical for making the case for additional resources.

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

At the end of the day, enhanced stakeholder engagement through a strategic communications program is crucial. There are varying ways to engage stakeholders. Following the steps in the table below can help an assessor's office gain public trust through transparency and improve public perception.

5.5.1 Index of Communications – Examples

The following Index of Communications example for "Public Access to Assessment Records" gives an idea of how your office may consider identifying all communications it manages.

NOTE: This is just an example of how you can describe the goals, contents, and requirements of each communications type your office uses.

5.5.1.1 Public Access to Assessment Records

Public access to assessment records 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.

What should be included?

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.

What requirements need to be considered?

- Measures should be taken to ensure a climate of openness and transparency. Assessment office personnel should understand policies and statutes pertaining to open records, public disclosure, and confidentiality, including an awareness of compliance timelines.
- 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 staff member should be 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 should be developed. Commonly available file formats for data files should be provided.

What channels should be considered?

- Access to parcel records should be available online.
- Parcel records should be mass exportable in standard technical formats.
- Individual parcel questions can be received via inbound information requests (all channels).

When should this communication be delivered?

Parcel records should be available to interested parties within the legislated timeframe of response within your jurisdiction.

5.5.1.2. 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 for detailed considerations on appeal procedures.

5.5.1.3 Public service announcements:

Pertinent announcements should be sent to local newspapers, radio stations, and television stations and be posted to online media. 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.

5.5.1.4 Forms and Questionnaires

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

- Appeal forms
- Exemption and tax credit applications
- Income and expense questionnaires
- Sales questionnaires
- Correspondence on policy
- Personal property forms
- Valuation notices

5.5.1.5 Local 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 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
- Uses of property
- Types of property
- Exemption data
- Appeal data
- Ratio study analysis
- New construction or growth of the jurisdiction
- Legislative changes
- Historical total value change and change by property types
- Historical average and median values by property types
- The relationship between assessed value and market value (statutory as well as indicated in the ratio study)

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.

5.5.1.6 State and Provincial 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 a historical record of property and property tax data.

Information that should be included in the state or provincial annual report includes:

- 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 by type of taxing district
- 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.

5.5.1.7 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
- Reason for new assessment

- Appeal rights, hearing procedures (informal and formal), and dates
- Date of notice
- Class or type of property
- Any other information required by law

In addition, the notice could include a tax impact statement showing projected property 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.

5.5.1.8 Special-Purpose Messages

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

- Name and address of the assessment jurisdiction
- Purpose of the notice
- Tax year owner's or taxpayer's name
- Mailing address
- Parcel identification number
- Property address
- Date of notice
- Reason for the contact and a clear message to action needed

5.5.1.9 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).
- 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.

5.5.1.10 Local Jurisdiction 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
- Mission statement or strategic plan
- Job openings
- An explanation of the appeals process
- An assessment notice explanation
- Exemptions and reductions available to taxpayers
- Assessment cycle timetable
- Q&A page (also known as Frequently Asked Questions [FAQs])
- Interactive, searchable maps
- Taxpayer forms
- Links to other relevant websites

Key features that your jurisdictional website may include are:

- Appropriate keyword metatags (keywords that tell search engines about the page's content)
- No web pages that have broken links or no links leading to them
- Copyright statement
- Complete contact information for the website owner
- Page revision dates
- Up-to-date content
- Email link to the webmaster
- Search feature and site map
- Home page links for current hot issues
- Social media links

5.5.1.11 State and Provincial Website Content

State and provincial jurisdiction websites should provide 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 websites.
- Time series of analytical reports for longitudinal research