



# Young Central Appraisal District

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## **PUBLIC RELATIONS POLICY AND PROCEDURES**

The Young Central Appraisal District is a political subdivision of the State of Texas, created and governed by the Texas Property Tax Code. The appraisal district is responsible for local property tax appraisal for all or part of the taxing units in Young County. A public relations program is essential to the appraisal process in promoting public awareness of the importance of the property tax in funding local government services.

### **GOAL:**

It is the goal of the Young Central Appraisal District to provide equitable and accurate appraisals to all property owners and to respond to the concerns and questions of those property owners in a professional and courteous manner. The most important requirement for this goal is fair, open, and efficient administration of the appraisal functions. Property owners, individuals, taxing units, media, and the general public must know what the appraisal district does and that it is done well.

### **THE PUBLIC RELATIONS PROGRAM:**

The public relations plan and policies are driven by: the IAAO Standard on Public Relations.  
<http://www.iaao.org>

The appraisal district's public relations program builds on competent administration. It is the "first line of defense". Courteous and effective implementation of the public relations program can eliminate the need for other defenses to be used. Without a sound public relations program, the appraisal district may meet the public only through complaints and appeals.

The chief appraiser is responsible for ensuring that all staff meets the public in a courteous manner. Ensuring that staff is knowledgeable about the functions of the appraisal district and capable of informing the property owners about their rights and obligations may prevent further misconceptions and ill feelings toward the appraisal district office.

The chief appraiser's "public" includes not only individual taxpayers but also such groups as appraisers, developers, title companies, real estate brokers, lending institutions, communications media, taxing units and other units of government, civic and professional associations, and public institutions that benefit from the ad valorem property tax system.

The appraisal district office must manage the information system so that these various publics have access to the large amount of useful and necessary information to be found in assessment records. These groups, in turn, can be a communications network that informs the general public about the appraisal district office.

The most important parts of a public relations program are a well-run office with well-planned records and record storage, an office layout that makes public access easy, and courteous staff trained to deal with the public and written rules of procedure.

### PLANNING A PUBLIC RELATIONS PROGRAM

A planned program of public relations includes well-thought-out responses to issues and inquiries, cooperation with other government agencies, and ways of getting information to the public through media contacts, printed information, and speaking engagements. The chief appraiser shall talk to the media and prepare printed information in advance, if possible.

### REVIEWING NEEDS

The first step in planning good public relations is a review of needs. The chief appraiser shall consider:

1. What is the appraisal district's public image?
2. How well informed is the general public?
3. What is the political environment?
4. What staff improvements are needed?
5. Are procedures that are already in place, working?
6. What issues have surfaced that need to be addressed and what are the anticipated issues?

Analysis of these questions shall be an on-going process by the chief appraiser.

### RESPONDING TO INQUIRIES AND ISSUES

Many people often need information from the appraisal office. Property information and maps are important resources. The chief appraiser shall find an efficient means of responding to inquiries via telephone, computer, printed matter, electronic media, etc. The chief appraiser may charge fees to recover the costs of providing some forms of information.

Appraisals are often controversial. Many issues will arise in response to specific events. The chief appraiser shall set out clear, well-defined responses to anticipated issues to create and increase public confidence in the appraisal process and appraisal district office. The chief appraiser shall be sure that all appraisal district employees are well versed in the responses for anticipated issues. Additionally, education of the public prior to major actions of the district shall be performed by the chief appraiser. The chief appraiser may enlist the media to cover appraisal district actions, as this will present the actions in a clear and well-written manner. The chief appraiser may choose other avenues of education for the public, such as speaking events.

Some issues that may arise for the appraisal district and that require planned responses include, but not limited to, the following:

1. Rational for implementing a reappraisal.
2. Impact of a reappraisal.

3. Maintenance of property (depreciation questions) and the impact of new improvements value to the total property value, especially on those properties, which have been designated as an over-65 homestead with a ceiling.
4. Appraisal bias.
5. Incompetence accusations against the chief appraiser, appraisal district employees, and/or the property tax system.

### COOPERATION WITH OTHER PUBLIC AGENCIES

The chief appraiser shall continually strive to establish good relationships with other agencies of government.

Some ways to establish and maintain good relationships with other public officials include, but are not limited to, the following:

1. Avoid surprises, especially public ones. Discuss public statements in advance with officials who might be affected. Get facts before responding to statements made by other officials.
2. Avoid making unreasonable demands on others. Try to anticipate needs in advance so that others have time to prepare.
3. Criticize directly and IN PRIVATE. Do not use the media as a forum for interagency problems.
4. Seek out advice.
5. Learn what other agencies do and understand their functions as they relate to the appraisal office.
6. Keep other agencies informed.
7. Be vocal in praising other offices (share the glory).

### MEANS OF CIRCULATING INFORMATION

It is the responsibility of the chief appraiser to present technical information in clear and understandable language. Press releases should usually be limited to one page.

The chief appraiser shall speak carefully, explain fully, ask for feedback, review any material before it is published, use whatever means possible to avoid being misquoted.

Any and all contact with national media would call for professional and legal guidance.

### PRINTED INFORMATION

Brochures can be as simple as a single typed sheet of paper or as complex as a professionally prepared, multi-page brochure. All printed matter must be clear, accurate, and attractive.

### PUBLIC RELATIONS OFFICER

Interviews and Conferences

The chief appraiser shall serve as the appraisal district spokesperson.

The chief appraiser may, in certain circumstances, designate an employee to serve in the capacity of spokesperson.

The chief appraiser shall coordinate interviews, write and distribute news releases, reports, and correspondence and post information in all applicable places.

### LISTENING

The initial task of public relations is to understand the public's current image of the appraisal office. The appraisal district's chief appraiser and staff must listen 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 messages. All issues that affect appraisal functions must be clearly defined and given full attention. All appraisal district staff are required to be alert to issues and to report to the chief appraiser when problems are identified. Additionally, the chief appraiser shall institute a public feedback mechanism, such as customer survey cards prominently displayed on the counter for the public to pick up and complete. Further, the chief appraiser shall review the surveys submitted and address issues identified.

### ISSUES MANAGEMENT AND ACTION PLANNING

Emerging issues and appropriate responses shall be anticipated and appropriate responses shall be prepared in advance to minimize adverse public reaction. External influences can often dictate which issues demand priority status. The chief appraiser shall be responsible for preparedness to deal with these issues and shall determine priority status. The chief appraiser shall develop an action timetable that defines tasks and establishes priorities for resolving the issues. Planning must be well coordinated. The chief appraiser shall involve the appraisal district staff to ensure critical acceptance and effective implementation.

### CRISIS PLAN

The chief appraiser shall be the spokesperson in the event of a crisis situation. The chief appraiser may appoint an employee to fill this roll in the event he is unavailable or involved in actions to alleviate the crisis situation. Either the chief appraiser or the named employee shall coordinate interaction with the news media in a crisis and be certain that all information released is accurate and precise.

### CRITICISM

When faced with criticism, all appraisal district employees must employ the following actions:

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

## COMMUNICATIONS

Direct communications shall be used to explain the role of the appraisal office and the service it provides. Appraisal district staff shall be able to explain in detail the services provided by the appraisal office, special tax exemptions, the appraisal process, the appeal process, the distribution of tax revenue, and the relationship between the tax rate and the reappraisal process. The chief appraiser shall make use of these available media resources to communicate with the public:

1. Newspapers (large readership and low cost).
2. Professional publications (dissemination of specialized information to targeted audiences).
3. Brochures (general information).
4. Slide presentations and videos for public speaking events.
5. Local public access channels.
6. Radio (for information that can be conveyed orally).
7. Web sites (convenient access to information and records).
8. Community forums (direct and timely access).
9. Community sponsored events (fairs and festivals, exhibit displays, hand-out materials, opportunity to answer questions).
10. Any other local means available.

Any printed information or electronic information placed before the public shall be carefully edited and proofed prior to release. The Chief appraiser shall consider and research the possibility of preparing materials in Spanish.

The chief appraiser shall ensure that all communication with the public, in whatever form, shall be simple, direct, and in plain language.

## REVIEW AND EVALUATION

The chief appraiser shall, with the aid and in-put of appraisal district employees, review and evaluate the public relations plan and its effectiveness. Adjustments shall be made as necessary. Press clippings from newspapers, magazines, and trade publications provide evidence for reviewing and evaluating the program. Comments from the surveys, e-mails, etc. shall be considered.

## STAFF PREPAREDNESS

Employee demeanor in serving the public is important to maintaining good public relations. Every public contact shall be considered and opportunity to improve the organization's image. The chief appraiser is responsible for ensuring that the staff is equipped to communicate with the public in an efficient and courteous manner. The chief appraiser shall ensure that appraisal district employees are well versed in the following:

1. Professional standards.
2. Important dates and deadlines.
3. Rules on data disclosure and rules on confidentiality.
4. Records retention standards.
5. Identification of who is authorized and who is not authorized to communicate as an official spokesperson.
6. Guidelines for interaction with the public.

7. Code of conduct for online behavior.
8. Protocols and authorizations for posting information to on-line media such as web sites, social media sites, and community forums.
9. Identification of media outlets and communication services that staff are authorized to use.
10. Policy regarding appropriate online use of the appraisal district's name and identity.
11. Policy regarding endorsements and political statements.
12. Suggestions for responding to irate taxpayers.
13. Guidelines for hearings and appeals.
14. Appearance and attire.
15. Telephone and e-mail etiquette.
16. Guidelines for the style and structure of letters and e-mails.
17. Methods for recording actions.

## PUBLIC RECORDS

Public access to appraisal records is crucial to good public relations. A climate of openness and transparency shall be established in the appraisal office. Appraisal office employees must understand policies and statutes pertaining to open records, public disclosure and confidentiality, including an awareness of compliance timelines. The chief appraiser shall educate appraisal district employees on the guidelines for the dissemination of real estate records or taxpayer information and should be sensitive to privacy concerns. Information request must be delivered to the chief appraiser who may process it himself or designate an employee to do so and provide that employee specific guidelines to use. All open records or public information request shall be processed in a manner that is compliant with state law and state time requirements.

## CORRESPONDENCE

Written correspondence shall follow specific guidelines:

1. Answer letters and e-mail promptly and acknowledge those that cannot be responded to immediately.
2. State information clearly using common words and phrases.
3. Respond to all relevant questions.
4. Convey a professional image.
5. Add a personal touch whenever appropriate.
6. Correspond positively.
7. Retain a copy of all correspondence for future reference.
8. Be consistent with the office's style.

To avoid contradictory responses, correspondence addressing policy issues shall cite controlling rules, statutes, or professional standards and be communicated within the appraisal office. Responses to criticism should be addressed promptly and be resolved in a non- judgmental way.

All email inquiries are to be answered as promptly as possible. Our goal is to answer the request for information the same day if possible and handled as any open record request.

An email response, unlike a verbal response, is put down in black and white. It may be copied and forwarded by the recipient to other people as official correspondence from the district.

Therefore, it is important that the accuracy, style, clarity, grammar, and usage be correct. If there

is anything that is uncertain, ask questions, consult with others in the office if need be before hitting “SEND”.

Be familiar with the Texas Property Tax Code and keep up-to-date on recent legislative changes. If an issue is extremely complex, write the property owner and explain that you are researching his or her questions and will respond as soon as possible.

Emails should be clear and concise. The tone of an email should be polite, professional, and friendly even when the questions are poorly written and/or rude. Treat people the same way you would want to be treated with kindness and respect.

### TELEPHONE ETIQUETTE

Remember that you are representing the appraisal district and etiquette is very important. Using phrases such as “thank you” and “please” are essential in displaying a professional atmosphere.

Whether answering the phone or making phone calls, using the proper etiquette is a must in order to maintain a certain level of professionalism. Proper etiquette leaves callers with a favorable impression of you, your department, and the appraisal district in general. You’ll also find that others treat you with more respect and are willing to go out of their way to assist you, if you use the proper etiquette.

Sometimes you will have many lines ringing all at once. Please remember to write down the names of the calls on hold and the line, to avoid asking whom the caller is holding for more than once.

#### Answering Calls:

1. Answer promptly (before the third ring if possible).
2. Before picking up the receiver, discontinue any other conversation or activity such as eating, chewing gum, typing, etc that can be heard by the calling party.
3. Speak clearly and distinctly in a pleasant tone of voice.
4. Learn to listen actively without interrupting.
5. Use the hold button when leaving the line so that the caller does not accidentally hear conversations being held nearby. If the person has been on hold for a while, pick up the line and let them know the person they are waiting to speak to is still unavailable and do you wish to continue to hold or would you like to leave a message.
6. When transferring a call, be sure to explain to the caller that you are doing so and where you are transferring them.
7. Remember that you may be the first and only contact a person may have with our office, and that first impression will stay with the caller long after the call is completed.
8. If the caller has reached the wrong department, be courteous. Sometimes they have been transferred all over the office with a simple question. If possible, attempt to find out where they should call/to whom they should speak with. They will greatly appreciate it.
9. When the called party is not in, be sure and let the caller know that they are out and take a detailed message. Let them know if they are calling for a party that will be out of the office for any length of time that they will receive the message as soon as they return to the office.

10. Make sure and enter all phone log information into the system.

#### Taking Messages:

1. Be prepared with pen and message slip when you answer the phone.
2. When taking a message be sure to ask for:
  - Caller's name (asking the caller for correct spelling.)
  - Caller's phone number and/or extension (including area code)
  - Ask what the call is in regard to.
  - Ask for the account number
3. Repeat the message to the caller.
4. Be sure to fill in the date, time and your initials.
5. Place the message slip on their in box in the front office.

#### To announce a call:

1. Find out the name of the caller and ask what it is in regard to.
2. Tell the caller to please hold for a moment.
3. Dial the extension of the person the caller wants to speak to.
4. Wait for the person to answer, (make sure they are not on another line).
5. Tell the person who is calling and what it is in regard to.
6. a) If the person accepts the call, transfer.  
b) If the person asks you to take a message, take a paper message and attach it to their inbox.

#### Checking Messages and Returning Calls:

1. Check your messages daily and return messages within 24 hours. If it will take longer than 24 hours, call the person and advise him/her. Callers should feel comfortable that you are checking your messages daily.
2. Record your message information in the phone log.

#### Leaving a Voicemail Message for Another Person:

1. Speak clearly and slowly.
2. Be sure to leave your name and number. It's best to say it at the beginning and end of your message.
3. Keep messages short and to the point.
4. Remember that you want to leave the person you are calling with a good impression of you.
5. Leave the date and time you called in the message. Let the person know if there is a better time to call you back.

### Handling Rude or Impatient Callers:

1. Stay calm. Try to remain diplomatic and polite. Getting angry will only make them angrier.
2. Always show willingness to resolve the problem or conflict.
3. Try to think like the caller. Remember, their problems and concerns are important.
4. Offer to have your supervisor talk to the caller or call him/her back if the caller persists. Sometimes the irate caller just wants someone in a supervisory capacity to listen to their story even if you are able to help them. When handling irate callers, speak slowly and calmly. Be firm with your answers, but understanding.

Whether answering the phone or making phone calls, using the proper etiquette is a must in order to maintain a certain level of professionalism. Proper etiquette leaves callers with a favorable impression of you, your department, and the appraisal district in general. You'll also find that others treat you with more respect and are willing to go out of their way to assist you if you use the proper etiquette.

### NEWS RELEASES

The news release is a valuable device that shall be used to promote activities, communicate policies, and inform the public of appraisal issues.

#### RECOMMENDATIONS FOR WRITING A NEW RELEASE:

1. Information shall be newsworthy (timely, unique, or significant).
2. Public relations industry-recommended format shall be followed if available.
3. Contact information shall be provided.
4. Shall not exceed two pages in length, if possible.
5. Releases shall be as short and concise as possible.
6. Information shall be localized,
7. The release shall be proofread.
8. The chief appraiser shall distribute copies of the release to all appraisal district staff.
9. Anyone mentioned in the release shall be notified before it is submitted for publication or distributed to the public.

### PUBLIC SERVICE ANNOUNCEMENTS

Public service announcements shall be sent to local newspaper and posted to the appraisal district web page. The announcement dates shall be specified, and the chief appraiser shall be designated as the person to contact for follow-up.

### SPEAKING ENGAGEMENTS

The chief appraiser is the designated spokesperson for the appraisal district. Speaking engagements are an important opportunity for contact between the appraisal office and the

public. This gives the district access to organized groups such as neighborhood associations, board of realtors or regularly scheduled public meetings. Engagements can be spur-of-the-moment or scheduled. In performing speaking engagements, the chief appraiser shall be prepared to hold a question and answer period and shall have answers ready, and must have tact, sympathy and discretion.

### APPEALS PROCESS

Taxpayers shall be made aware of the rules and procedures for appealing appraisals. Information on what constitutes a valid appeal shall be made available. During this process, taxpayers shall be treated with courtesy and respect. New information shall be evaluated thoroughly and objectively. Adequate seating shall be made available for waiting taxpayers.

### PUBLIC EDUCATION

The public needs to know the purpose of appraisals and what public services are funded by property tax. The taxpayer shall 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 appraised value of various properties. Taxpayers shall be informed that they have a voice in the local budgetary process- they elect the officials who set the tax rates, they can attend public hearings, and can vote on bonding or expenditure referendums. Taxpayers need to know the tax rates, how to apply it to the appraised value, and how to arrive at the tax bill. It is the appraisal district'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.

### INTERNET

In addition to more traditional communication methods, the Internet is an effective way of informing the public. Relevant assessment and property tax information may be made available on the web. If the chief appraiser determines this to be an effective and convenient way to communicate, he must research, plan, and implement ways to deliver information on the Internet. Social media sites shall be evaluated to determine their effectiveness for public relations purposes and directing site visitors to authoritative sources of information such as the district's web site.

The appraisal district's web site shall be content-driven so information can be quickly accessed, retrieved, and reviewed. Data shall be accessible by multiple search criteria.

### WEB-SITE CONTENT AND FEATURES

The appraisal district's web site content shall be at the discretion of the chief appraiser. The chief appraiser shall include information determined to be within the guidelines of open records and public information. The site may include information found in the annual report and other informative data such as:

1. Office hours, location, and contact information.
2. Property information, including ownership, property characteristics, sales history, and value.

3. New releases.
4. Job openings.
5. An explanation of the protest/appeals process.
6. Exemptions.
7. Cyclical timetable.
8. FAQs.
9. Parcel tax history.
10. Taxpayer forms.
11. A web-site map.
12. Links to other relevant web sites.

The appraisal district web site should include the following features:

1. Keywords that tell search engines about the page's content (metatags).
2. Copyright statement.
3. Complete contact information for the web site.
4. Up-to-date content.
5. E-mail link to the Webmaster.
6. Search feature and site map.
7. Home page links for current hot issues.

### **Public Relations Policy Timeline:**

In general the district will follow the timeline below; however, the district must remain flexible and react to changes and constituent needs as they arise; therefore, the timeline can and should be altered to respond to individual and special circumstances, and additional customer service and public relation needs as they are identified.

#### **January – December**

- The chief appraiser may attend legislative committee hearings, commissioner's court, city council, school board, and other governmental body meetings, and meetings of professional groups, neighborhood associations and other constituent groups, as invited, to provide information and testimony on matters related to property appraisal.

#### **January – February**

- Review and development of public information brochures and other materials related to property exemptions, renditions and special appraisals.
- Publish notice in local newspapers about the availability of Electronic Communications.
- Publish notice in local newspapers about requirements and availability of applications for deferrals, homestead exemptions, renditions and agricultural appraisals.

#### **February – March**

- The district shall conduct Open Meeting and Public Information training for district staff. Training may include training videos and other materials developed by Attorney General's Office as well as internally developed materials.
- The district shall conduct Customer Service training for district staff. Training may include external training courses and internally developed training material.

**March – April**

- Review and development of public information materials related to appraisal procedures, notices and protests.

**April**

- Prepare press release for notices of appraised values and protest process.

**May**

- Publish notice in local newspapers about taxpayer protests and appeal procedures.

**June – July**

- The chief appraiser shall provide updates to staff, Appraisal Review Board chairperson, and chief financial officers of taxing units on the district's certification efforts.

**August - September**

- Provide public notice of hearings for reappraisal plan and annual budget.

**October – December**

- Review, update and development of website content, specifically sections explaining appraisal district policy and procedures, to include but not limited to frequently asked questions, appraisal information, forms, and property information.

The above public relations program is in addition to other procedures and policies already adopted by the Young Central Appraisal District Board of Directors.