

MORRIS COUNTY APPRAISAL DISTRICT PUBLIC RELATIONS PLAN



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PUBLIC RELATIONS PLAN

INTRODUCTION:

Morris County Appraisal District was established in 1981. Texas voters approved Appraisal District's in 1979. Morris County Appraisal District is a political subdivision of the State of Texas created by the Texas legislature.

Website Address: www.Morriscad.com

MISSION STATEMENT:

Our Mission is to appraise all taxable property within the boundaries of the Morris County Appraisal District in an equal and uniform manner, recognizing we are a public service organization, serving both the taxing entities and the taxpayers.

It is our Mission to earn and keep the public's trust and confidence in the work we perform, striving to provide quality services and demonstrating a professional attitude through teamwork, a positive attitude, and well educated and informative staff.

This professional attitude will include:

- ☐ *Always being respectful and courteous*
- ☐ *Communicating with understandable language*
- ☐ *Being honest with the people we meet*
- ☐ *A willingness to correct errors to the extent allowed by law*
- ☐ *Respecting the taxpayer or entities concerns or problems*
- ☐ *Providing comprehensive and accurate information*
- ☐ *Treat everyone in the manner you would like to be treated*

PROFESSIONAL STANDARD:

IAAO's Standard on Public Relations is the basis for the Morris County Appraisal District's Public Relation Plan. This standard outlines the requirements for developing and maintaining an effective plan.

"The International Association of Assessing Officers is the internationally recognized leader and preeminent source for innovation, education, and research in property appraisal, assessment administration, and property tax policy."

THE PUBLIC RELATIONS PROGRAM:

The appraisal district's public relations program builds on competent administration, it is the "first line of

defense”. First impressions are in the first seven seconds. 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 the 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, a courteous staff trained to deal with the public and written rules of procedure.

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.

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.

PUBLIC RELATIONS OFFICER

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, newsletters, reports, correspondence, post information in all applicable places, coordinate special

events such as open houses and public appearances, edit special publications and annual reports, and coordinate the release of information to media channels.

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. Feedback shall also be obtained from other local sources.

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 at citizen's groups.

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

1. Impact of a reappraisal and value increases or decreases.
2. Explanation of property Value Study and the relationship to the school district.
3. Incompetence accusations against the chief appraiser, appraisal district employees, and/or the property tax system.

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 spokesman in the event of a crisis situation. The chief appraiser may appoint an employee to fill this roll in the event that 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. The following steps should be taken:

1. Identify the problem.
2. Develop a strategy to respond.
3. Seek input of staff before drafting a final response.
4. Respond quickly and completely with supporting documentation and copy to all staff.
5. Follow-up with the media to answer additional questions.

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 services 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. Web sites (convenient access to information and records).
5. Community forums (direct and timely access).
6. Community sponsored events (fairs and festivals, exhibit displays, hand-out materials, opportunity to answer questions).
7. 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 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 an 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. Guidelines and authorization process for using intellectual property, logos, trademarks, and copyrights.
8. Code of conduct for online behavior.
9. Protocols and authorization for posting information to on-line media such as web sites, social media sites, and community forums.
10. Identification of media outlets and communication services that staff are authorized to use.
11. Policy regarding appropriate online use of the appraisal district's name and identity.
12. Policy regarding endorsements and political statements.
13. Suggestions for responding to irate taxpayers.
14. Guidelines for hearings and appeals.
15. Appearance and attire.
16. Telephone and e-mail etiquette.
17. Guidelines for the style and structure of letters and e-mail.
18. Methods for recording actions.

Staff shall be reminded periodically about providing good customer service and the benefits of being successful in that task.

Whenever major events occur, such as mailing valuation notices or tax bills and holding hearings, they will be reminded about having patience, keeping their composure and providing quality service.

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 timeliness. 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 requests 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 requests 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 criticisms should be addressed promptly and be resolved in a non-judgmental way.

ANNUAL REPORTS

An annual report is prepared each year after property values have been certified and tax roll created. Some of the information that should be included in the local annual report is:

1. Total number of parcels
2. Total value
3. Uses of property
4. Types of property
5. Exemption data
6. Appeal data
7. Ratio study analysis
8. New construction
9. Legislative changes.

MEANS OF CIRCULATING INFORMATION

Media Contacts

It is the responsibility of the chief appraiser to present technical information in clear and understandable language.

The chief appraiser shall speak carefully, explain fully, ask for feedback before the

reporter leaves, arrange to review the material before it is published, if possible, limit radio and television to selected staff members only, and 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, multipage brochure.

All printed matter must be clear, accurate, and attractive.

Speaking Engagements

Public speaking gives the appraisal district access to organized groups such as civic clubs, associations, real estate organizations, etc.

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.

The chief appraiser shall prepare, in advance, standard speeches, charts and graphs, and films or slide shows so that the quality of the presentation does not suffer and last-minute invitations can be accepted.

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 NEWS 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 most important facts shall appear first.
9. Deadlines, editing procedures, and other requirements of the media shall be accommodated.
10. The chief appraiser shall distribute copies of the release to all appraisal district staff.
11. Anyone mentioned in the release shall be notified before it is submitted for publication or distributed to the public.

Media Contacts:

The Bee - thebee@etcnonline.com -

The Bee

106 Webb Street
Daingerfield, TX 75638

The Monitor - themonitor@valornet.com -

The Monitor

207 Main St
Naples, TX 75568

PUBLIC SERVICE ANNOUNCEMENTS

Public service announcements shall be sent to local newspapers and be posted to online media if available. The announcement dates shall be specified, and the chief appraiser shall be designated as the person to contact for follow-up.

INTERVIEWS AND CONFERENCES

The chief appraiser shall be the appraisal district spokesperson unless another employee is designated as such.

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. 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. It is recommended that the chief appraiser meet with some of these groups just prior to mailing of appraisal notices or any other major action planned by the appraisal district.

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).

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 taxes. 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 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 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. Welcome page by the chief appraiser.
2. Office hours, location, and contact information.
3. Property information, including ownership, property characteristics, sales history, and value.
4. News releases.
5. Mission statement or strategic plan.
6. Job openings.
7. An explanation of the protest/appeals process.
8. Exemptions
9. Taxpayer forms.
10. Links to other relevant web-sites.

CALENDAR OF KEY EVENTS

PROJECTED DATES

APPRAISAL RELATED ACTIVITY OR EVENT

August

- Begin appraisal fieldwork according to the Biennial Reappraisal Plan
- Begin Homestead Audit Procedures within the Biennial Reappraisal Plan
- Begin Office Tasks
- Begin data collection of sales, cost and income for model calibration.
- Review ratio study, identify key areas for review.
- Roll appraisal year.
- Annual TAAO Conference.

September

- September 1 – Statutory Appraisal Date for certain Inventory Properties (23.12).
- Labor Day – District office closed.
- Office Tasks process ongoing
- Begin review of Business Personal Property (BPP) valuation models.
- Invoices for 4th Quarterly Budget Allocations mailed to taxing units.

October

- Submit for approval, 3rd Quarter Change Dockets, to the ARB.
- Office Tasks process ongoing
- Customer Service Training
- Complete Annual Report.
- Taxing units mail tax bills.
- Columbus Day- District office closed.

November

- Annual Texas Rural Chief Appraiser's Conference.
- Ag Advisory Board meeting.

- Office Tasks process ongoing
- Veteran's Day and Thanksgiving Holidays – District office closed.

December

- Annual Employee Performance Reviews.
- Office Tasks process ongoing
- Christmas Holidays – District office closed.
- Mail Applications that require annual filing.
- Invoice for 1st Quarterly Budget Allocation mailed to taxing units.

January

- Continue appraisals.
- Office Tasks process ongoing
- Begin BPP appraisals for all of county.
- Submit for approval, 4th Quarter Change Dockets, to the ARB
- January 1 – Statutory appraisal date for most categories of taxable properties.
- Begin running sales ratio reports.
- Identify necessary schedule adjustments.
- New Year and MLK Holidays – District office closed.
- Update all known regular homestead Exemptions to over-65 exemptions
- Mail Income Information Requests to Income Producing Properties
- Mail Income Information Requests to Agriculture Special Appraisal Properties

February

- Begin working BPP Renditions.
- Office Tasks process ongoing
- President's Day – District office closed.
- Annual TAAD's Conference.
- Continue running sales ratio reports.
- Refine sales analysis and mass appraisal schedules.

- Statistically test schedules.
- Complete data entry of all reappraisal and maintenance changes.

March

- Completion of field work including BPP, commercial and residential.
- Finalize Office Tasks
- Complete Mass Appraisal Report.
- Finalize RE schedule changes.
- Execute mass appraisal/maintenance activities.
- Invoice for 2nd Quarterly Budget Allocation mailed to taxing units.
- Run Error Edits in preparations of 25.19 Notices for Appraised Values.
- Prepare for 25.19 Notice of Appraised Value.
- Publish Property Tax Information (22.21) & Render Notice.

April

- Submit for approval, 1st Quarter Change Dockets, to the ARB.
- Release to Pritchard & Abbott, Inc. for printing of 25.19 Notices of Appraised Value.
- Mail notices of appraised value for single-family residence homestead properties (Sec. 25.19).
- Notify the taxing units of the form in which the appraisal roll will be provided to them (Sec. 26.01).
- Property owners to file renditions and property information reports unless they request a filing extension in writing (Sec. 22.23) by April 15.
- Submit Certified Estimated Value to taxing units.
- Begin Operating Budget preparations for 2027.
- Last day for property owners to file these applications or reports with the CAD:
 - Some exemption applications (Sec. 11.43) **
 - Notice to chief appraiser that property is no longer entitled to an exemption not requiring annual application (Sec. 11.43);
 - Applications for special appraisal or notices to chief appraiser that property no longer qualifies for 1-d and 1-d-1 agricultural land, timberland, restricted-use timberland, recreational-park-scenic land and public access airport property (Secs. 23.43, 23.54, 23.75, 23.84, 23.94, 23.9804);

- Railroad rolling stock reports (Sec. 24.32);
- Requests for separate listing of separately owned land and improvements (Sec. 25.08);
- Requests for proportionate taxing of a planned unit development property (Sec. 25.09);
- Requests for separate listing of separately-owned standing timber and land (Sec. 25.10);
- Requests for separate listing of undivided interests (Sec. 25.11); a
- Requests for joint taxation of separately owned mineral interest (Sec. 25.12).
- Begin informal hearings with property owners/agents.

May

- Period when chief appraiser must publish notice about taxpayer protest procedures in a local newspaper with general circulation (Secs. 41.41, 41.70).
- Property owners to file renditions and property information reports if they requested an extension in writing. For good cause, chief appraiser may extend this deadline another 15 days (Sec. 22.23).
- Prepare appraisal records and submit to ARB (Secs. 25.01, 25.22).
- Memorial Day – District office closed.
- Budget Workshop.
- Hold informal hearings with property owners/agents.

June

- Invoice for 3rd Quarterly Budget Allocation mailed to taxing units.
- Proposed Budget to Entities by June 15. (PTC Section 6.06)
- Juneteenth – District office closed.
- Hold Formal Protest hearings with ARB.
- Begin preparing upcoming Biennial Reappraisal Plan.

July

- July 4th – District office closed.
- Submit for approval, 2nd Quarter Change Dockets, to the ARB

- Hold Formal Hearings of all Mineral, Utility & Industrial Hearings with property owners/agents.
- July 20 - Date ARB must approve appraisal records, but may not do so if more than 5 percent of total appraised value remains under protest.
- July 25 - Last day for Texas Comptroller to certify apportionment of railroad rolling stock value to counties, with supplemental records after that date (Sec. 24.38).
- July 25 - Last day for chief appraiser to certify appraisal roll to each taxing unit (Sec. 26.01). (Creates Appraisal Roll)

*The projected dates incorporated into the calendar may be adjusted within the overall plan due to unforeseen change in staffing, budgetary constraints, weather, legislative changes, and /or reevaluation of the priorities of the project with the plan. **
