ATTORNEY GENERAL OF TEXAS
GREG ABBOTT

November 28, 2005

Mr. Kirk Swinney
McCreary, Veselka, Bragg & Allen, P.C.
5929 Balcones Drive, Suite 200-A
Austin, Texas 78731

OR2005-10633

Dear Mr. Swinney:

You ask whether certain information is subject to required public disclosure under the Public Information Act (the "Act"), chapter 552 of the Government Code. Your request was assigned ID# 236947.

The Sutton County Appraisal District (the "district"), which you represent, received a request for "[all] detailed mineral appraisal data and [all] supporting mineral appraisal data for the 2004 and 2005 appraisal years." You assert that the requested information may involve the third-party proprietary interests of Thos. Y. Pickett & Co., Inc. ("Pickett"). Accordingly, you inform us, and provide documentation showing, that pursuant to section 552.305 of the Government Code, the district notified Pickett of the request for information and of its right to submit arguments explaining why the information concerning the company should not be released. *See* Gov't Code § 552.305 (permitting interested third party to submit to attorney general reasons why requested information should not be released); *see also* Open Records Decision No. 542 (1990) (determining that statutory predecessor to section 552.305 permits governmental body to rely on interested third party to raise and explain applicability of exception in certain circumstances). You also indicate that neither the district nor Pickett maintains some of the requested information.[1] You claim that the remaining requested

[1]The Act does not require a governmental body that receives a request for information to create information that did not exist when the request was received. *See Econ. Opportunities Dev. Corp. v. Bustamante*, 562 S.W.2d 266 (Tex. Civ. App.—San Antonio 1978, writ dism'd); Open Records Decision Nos. 605 at 2 (1992), 563 at 8 (1990), 555 at 1-2 (1990).

information need not be released in accordance with section 552.027 of the Government Code. Alternatively, you argue that the remaining requested information is excepted from disclosure under section 552.101 of the Government Code. We have considered your arguments and reviewed the submitted representative sample of information.[2] We have also considered comments submitted by the requestor and Pickett. *See* Gov't Code §§ 552.304 (providing that interested party may submit comments stating why information should or should not be released), .305.

Initially, we address the district's claim that the submitted information is not subject to disclosure under the Act because the information is commercially available to the requestor. Section 552.027 of the Government Code provides:

> (a) A governmental body is not required under this chapter to allow the inspection of or to provide a copy of information in a commercial book or publication purchased or acquired by the governmental body for research purposes if the book or publication is commercially available to the public.
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> (b) Although information in a book or publication may be made available to the public as a resource material, such as a library book, a governmental body is not required to make a copy of the information in response to a request for public information.
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> (c) A governmental body shall allow the inspection of information in a book or publication that is made part of, incorporated into, or referred to in a rule or policy of a governmental body.

Gov't Code § 552.027. This section is designed to alleviate the burden of providing copies of commercially available books, publications, and resource materials maintained by governmental bodies, such as telephone directories, dictionaries, encyclopedias, statutes, and periodicals. We have reviewed your arguments and the information at issue and find that you have failed to demonstrate the applicability of section 552.027 to that information. *See* Gov't Code § 552.027.

Next, you indicate that a great deal of the requested information was prepared for the district by Pickett, an outside appraiser. Therefore, this information is subject to section 25.01(c) of the Tax Code, which provides as follows:

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[2]We assume that the representative sample of records submitted to this office is truly representative of the requested records as a whole. *See* Open Records Decision Nos. 499 (1988), 497 (1988). This open records letter does not reach, and therefore does not authorize the withholding of, any other requested records to the extent that those records contain substantially different types of information than that submitted to this office.

> A contract for appraisal services for an appraisal district is invalid if it does not provide that copies of the appraisal, together with supporting data, must be made available to the appraisal district and such appraisals and supporting data shall be public records. "Supporting data" shall not be construed to include personal notes, correspondence, working papers, thought processes, or any other matters of a privileged or proprietary nature.

Tax Code § 25.01(c). The effect of this provision is to make public the appraisal and "supporting data" which were provided to the district. *See* Attorney General Opinion JC-0424 at 2 (2001) (section 25.01(c) provides that certain information used or created by appraisal firm must be made available to appraisal district and deems that information public). Exceptions to disclosure under the Act generally do not apply to information that is made public by other statutes, such as section 25.01(c). *See* Open Records Decision Nos. 623 at 3 (1994), 525 at 3 (1989). Therefore, to the extent the information at issue constitutes an appraisal or supporting data for purposes of section 25.01(c), such information is a public record which must be released to the requestor. *See* Tax Code § 22.27(b)(6) (information made confidential by section 22.27(a) or record that the appraisal office is required to prepare or maintain). To the extent the information at issue does not constitute an appraisal or supporting data for purposes of 25.01(c), we will address the submitted arguments against disclosure.

Pickett asserts that the requested information related to its "mass appraisal system" is excepted from disclosure under section 552.110 of the Government Code. Section 552.110 protects: (1) trade secrets, and (2) commercial or financial information the disclosure of which would cause substantial competitive harm to the person from whom the information was obtained. *See* Gov't Code § 552.110(a), (b). However, we note that neither the district nor Pickett has submitted this information for our review. We do not reach Pickett's arguments with regard to information that has not been submitted for our review. *See* Gov't Code § 552.301(e)(1)(D) (governmental body requesting a decision from Attorney General must submit a copy of the specific information requested, or representative sample if voluminous amount of information was requested).

We next address the district's claim under section 552.101 of the Government Code, which excepts from disclosure "information considered to be confidential by law, either constitutional, statutory, or by judicial decision." Gov't Code § 552.101. This section encompasses information protected by other statutes. You state that a great deal of the submitted information, including the operating expenses and remaining reserves, is confidential under section 22.27 of the Tax Code. This section states in pertinent part as follows:

> (a) Rendition statements, real and personal property reports, attachments to those statements and reports, and other information the owner of property

> provides to the appraisal office in connection with the appraisal of the property, including income and expense information related to a property filed with an appraisal office and information voluntarily disclosed to an appraisal office or the comptroller about real or personal property sales prices after a promise it will be held confidential, are confidential and not open to public inspection. The statements and reports and the information they contain about specific real or personal property or a specific real or personal property owner and information voluntarily disclosed to an appraisal office about real or personal property sales prices after a promise it will be held confidential may not be disclosed to anyone other than an employee of the appraisal office who appraises property except as authorized by Subsection (b) of this section.

Tax Code § 22.27(a). You indicate that the submitted documents contain information which concerns specific real or personal property and property owners. You state that "a great deal of the information[,]" including the operating expenses and remaining reserves, was either "acquired under confidentiality agreements with multiple property owners[,]" or it "concerns the appraisal of property and was acquired from the owner." We note that the requestor asserts that section 22.27 is not applicable on the basis of Open Records Decision No. 550 (1990). In Open Records Decision No. 550, this office determined that section 22.27 was not applicable because the records at issue in that instance involved "[i]nformation compiled by a private market research firm . . . as part of a commercial transaction." *See* ORD 550 at 7. Here, the information was not compiled by a "private market research firm" in connection with a "commercial transaction," but rather was compiled by an appraisal firm for tax purposes as contemplated by section 25.01(b) of the Tax Code. *See* Tax Code § 25.01(b) (chief appraiser may contract with private appraisal firm to perform appraisal services for district). The requestor also asserts that information subject to "[s]ection 22.27 should lose its confidential nature when it is reformatted and combined with other information such that it can no longer be identified as information that was provided by an operator under [s]ection 22.27." However, this section expressly provides that information an "owner of property provides to the appraisal office in connection with the appraisal" is confidential and does not indicate the information loses its confidential character "if reformatted and combined with other information." *See id.* § 22.27. As such, we find that section 22.27 is applicable to the operating expenses and remaining reserves.

Therefore, upon review, we conclude that, to the extent the operating expenses and remaining reserves were provided by property owners with the understanding that they would be kept confidential *and* are not otherwise subject to section 25.01(c) of the Tax Code, then such information must be withheld under section 552.101 of the Government Code in conjunction with section 22.27(a) of the Tax Code. We note, however, that neither the district nor Pickett has specifically indicated which portions of the remaining information are confidential under section 22.27. *See* Gov't Code § 552.301(e)(1) (requiring the

governmental body to explain the applicability of the raised exception). Therefore, because neither the district nor Pickett has indicated which portions of the remaining information are confidential under section 22.27, none of it may be withheld under section 552.101 on that basis.

The district also asserts that some of the requested information is protected by copyright. A custodian of public records must comply with the copyright law and is not required to furnish copies of records that are copyrighted. Attorney General Opinion JM-672 (1987). A governmental body must allow inspection of copyrighted materials unless an exception applies to the information. *Id.* If a member of the public wishes to make copies of copyrighted materials, the person must do so unassisted by the governmental body. In making copies, the member of the public assumes the duty of compliance with the copyright law and the risk of a copyright infringement suit. *See* Open Records Decision No. 550 (1990).

Finally, the district asserts that the requested information need not be released in the format desired by the requestor. The requestor states that he is "requesting the information in a format that [he] will be able to readily import into a database[.]" The district informs us that the requested information is available in hard copy, but that it does not have the ability to provide the information in the requested electronic format. The requestor states that a hard copy is not acceptable, and suggests that some of the information is maintained by Pickett in the requested electronic format. While you acknowledge that Pickett may maintain the requested information in the requested electronic format, you inform us that the district has no right under its contract with Pickett to access the information in that format. Accordingly, because the district does not have the technological capability to provide the requested information in the requested format, and because the district does not have a right of access to that information in the requested format, we find that the district need not release the requested information in the requested electronic format.[3] *See* Gov't Code §§ 552.228(a) (the Act requires a governmental body to provide a "suitable copy" of public information), .228(b) (a governmental body must provide requested information in an electronic format if the governmental body has the technological ability to do so, it is not required to purchase software or hardware to do so, and the provision of the information will not violate any copyright agreement).

In summary, to the extent that the operating expenses and remaining reserves in the submitted information were provided by property owners with the understanding that they would be kept confidential *and* are not otherwise subject to section 25.01(c) of the Tax Code,

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[3]We note that you state that the district has "offered to provide estimates of compiling the [non-confidential] material in manipulable media if [the requestor] clarifies his request." You also indicate that the Terry County Appraisal District "has provided [the requestor with] an estimate . . . for compiling all of the non-confidential data into an electronic media[.]"

then such information must be withheld under section 552.101 of the Government Code in conjunction with section 22.27(a) of the Tax Code. The remaining information must be released to the requestor. In doing so, however, the district must comply with applicable copyright laws for any information protected by copyright.

This letter ruling is limited to the particular records at issue in this request and limited to the facts as presented to us; therefore, this ruling must not be relied upon as a previous determination regarding any other records or any other circumstances.

This ruling triggers important deadlines regarding the rights and responsibilities of the governmental body and of the requestor. For example, governmental bodies are prohibited from asking the attorney general to reconsider this ruling. Gov't Code § 552.301(f). If the governmental body wants to challenge this ruling, the governmental body must appeal by filing suit in Travis County within 30 calendar days. *Id.* § 552.324(b). In order to get the full benefit of such an appeal, the governmental body must file suit within 10 calendar days. *Id.* § 552.353(b)(3), (c). If the governmental body does not appeal this ruling and the governmental body does not comply with it, then both the requestor and the attorney general have the right to file suit against the governmental body to enforce this ruling. *Id.* § 552.321(a).

If this ruling requires the governmental body to release all or part of the requested information, the governmental body is responsible for taking the next step. Based on the statute, the attorney general expects that, upon receiving this ruling, the governmental body will either release the public records promptly pursuant to section 552.221(a) of the Government Code or file a lawsuit challenging this ruling pursuant to section 552.324 of the Government Code. If the governmental body fails to do one of these things, then the requestor should report that failure to the attorney general's Open Government Hotline, toll free, at (877) 673-6839. The requestor may also file a complaint with the district or county attorney. *Id.* § 552.3215(e).

If this ruling requires or permits the governmental body to withhold all or some of the requested information, the requestor can appeal that decision by suing the governmental body. *Id.* § 552.321(a); *Texas Dep't of Pub. Safety v. Gilbreath*, 842 S.W.2d 408, 411 (Tex. App.—Austin 1992, no writ).

Please remember that under the Act the release of information triggers certain procedures for costs and charges to the requestor. If records are released in compliance with this ruling, be sure that all charges for the information are at or below the legal amounts. Questions or complaints about over-charging must be directed to Hadassah Schloss at the Office of the Attorney General at (512) 475-2497.

If the governmental body, the requestor, or any other person has questions or comments about this ruling, they may contact our office. Although there is no statutory deadline for contacting us, the attorney general prefers to receive any comments within 10 calendar days of the date of this ruling.

Sincerely,

James A. Person III
Assistant Attorney General
Open Records Division

JAP/sdk

Ref: ID# 236947

Enc. Submitted documents

c: Mr. Neil Job
IHS, Inc.
15 Inverness Way East D304
Englewood, Colorado 80112
(w/o enclosures)

Mr. John Greytok
Law Office of John Greytok
P.O. Box 26652
Austin, Texas 78755-0652
(w/o enclosures)