ATTORNEY GENERAL OF TEXAS
GREG ABBOTT

January 17, 2006

Mr. Joseph T. Longoria
Perdue, Brandon, Fielder, Collins & Mott, L.L.P.
1235 North Loop West, Suite 600
Houston, Texas 77008

OR2006-00534

Dear Mr. Longoria:

You ask whether certain information is subject to required public disclosure under chapter 552 of the Government Code, the Public Information Act (the "Act"). Your request was assigned ID# 240183.

The Lubbock 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 state that you will release some of the requested information. You also state that you have no information responsive to a portion of the request. You claim that a portion of the requested information, which you have stamped confidential, is excepted from disclosure under section 552.101 of the Government Code. We have considered the exception you claim and reviewed the submitted information.[1] We have also considered comments submitted by the requestor and Capitol Appraisal Group, Inc. ("CAG"). *See* Gov't Code §§ 552.304 (providing that interested party may submit comments stating why information should or should not be released), .305 (permitting interested third

[1]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.

party to submit to attorney general reasons why requested information should not be released).[2]

Initially, we must address the district's obligations under the Act. Pursuant to section 552.301(b), a governmental body that receives a request for information that it wishes to withhold must ask for the attorney general's decision and state the exceptions that apply within ten business days after receiving the request. *See* Gov't Code § 552.301(a), (b). Pursuant to section 552.301(e) a governmental body is required to submit to this office within fifteen business days of receiving an open records request (1) general written comments stating the reasons why the stated exceptions apply that would allow the information to be withheld, (2) a copy of the written request for information, (3) a signed statement or sufficient evidence showing the date the governmental body received the written request, and (4) a copy of the specific information requested or representative samples, labeled to indicate which exceptions apply to which parts of the documents. You inform us that the district received this request on September 12, 2005, but you did not request a decision from this office until November 4, 2005. You also did not submit the information at issue until December 22, 2005. Thus, the district failed to comply with the procedural requirements of section 552.301.

Pursuant to section 552.302 of the Government Code, a governmental body's failure to comply with the procedural requirements of section 552.301 results in the legal presumption that the requested information is public and must be released unless the governmental body demonstrates a compelling reason to withhold the information from disclosure. *See* Gov't Code § 552.302; *Hancock v. State Bd. of Ins.*, 797 S.W.2d 379, 381-82 (Tex. App.—Austin 1990, no writ) (governmental body must make compelling demonstration to overcome presumption of openness pursuant to statutory predecessor to section 552.302); Open Records Decision No. 319 (1982). Generally speaking, a compelling reason exists when third party interests are at stake or when information is confidential under other law. Open Records Decision No. 150 (1977). Because section 552.101 can provide a compelling reason to withhold information, we will address your argument concerning this exception.

Next, we note you inform us that all of the information you seek to withhold was provided directly to the appraisers at CAG by the property owners. Thus, we understand that the information you seek to withhold was prepared for the district by an outside appraiser. Therefore, this information is subject to section 25.01(c) of the Tax Code. Section 25.01(c) provides:

> 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

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[2]We note that CAG has submitted arguments for information that the district did not submit to this office. This decision only addresses the information that the district submitted to this office as responsive to the request. *See* Gov't Code § 552.301(e)(1). Accordingly, we do not address CAG's arguments.

> 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* Op. Atty. Gen. 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). 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) may be disclosed if and to the extent the information is required to be included in a public document 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 your argument under section 552.101.

Section 552.101 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. Section 22.27 of the Tax Code states in pertinent part:

> (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). The information at issue contains information about specific real or personal property and property owners. You state that this information was "obtained pursuant to a promise of confidentiality." 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* Tax Code § 22.27. As such, we find that section 22.27 is applicable here.

Accordingly, to the extent the information you seek to withhold constitutes an appraisal or supporting data for purposes of section 25.01(c), such information is a public record which must be released under section 25.01 of the Tax Code. To the extent the information you seek to withhold does not constitute an appraisal or supporting data for purposes of 25.01(c), the district must withhold this information under section 552.101 of the Government Code in conjunction with section 22.27(a) of the Tax Code.

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

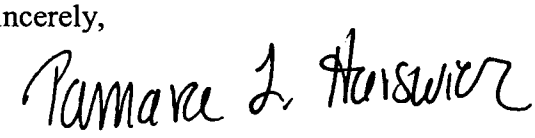
free, at (877) 673-6839. The requestor may also file a complaint with the district or county attorney. *Id.* § 552.3215(e).

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,



Tamara L. Harswick
Assistant Attorney General
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TLH/sdk

Ref: ID# 240183

Enc. Submitted documents

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