



# PLANO

*Professional Landmen's Association of New Orleans*

**AUGUST 2004**

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**PLANO BULLETIN #031**

## PLANO EVENTS

August No Monthly Luncheon  
Aug 18 **PLANO** OCS Sale 192 WGOM - Breakfast  
Oak Alley Room, N.O. Hilton Riverside  
Sept 13 **PLANO** Luncheon –  
Muriel's Jackson Square  
Sept 16 **PLANO** Seminar & Icebreaker  
Royal Sonesta Hotel  
Oct 11 **PLANO** Fall Golf Tournament  
Carter Plantation, Springfield, LA  
Oct 18 **PLANO** Luncheon  
Andrea's Restaurant, Metairie, LA  
Nov 8 **PLANO** Luncheon  
Royal Sonesta Hotel, Bienville Suite  
Dec 9 **PLANO** Christmas Social  
The Napoleon House  
Dec 14 **PLANO** Luncheon  
Galatoire's Restaurant

## OTHER ACTIVITIES

Aug. 7 HAPL Annual Skeet Shoot  
The American Shooting Center  
Aug 18 MMS OCS Sale 192 WGOM  
New Orleans Hilton Riverside Hotel  
Sept 27 HAPL Annual Golf Tournament  
Kingwood & Deerwood Country Clubs  
Oct 14 HAPL Annual Executive Night, Hyatt



*Gone Fishing*

**PLANO LUNCHEON**  
**MONDAY, SEPTEMBER 13, 2004, 11:30 A.M.**  
**MURIEL'S JACKSON SQUARE**  
**801 CHARTRES AT ST. ANN STREET**  
**NEW ORLEANS, LA**

PLANO is celebrating a 50th birthday, and to mark the occasion, the Board of Directors wishes to invite all past PLANO Presidents to this luncheon. Many of our members, we feel sure, would welcome shaking the hands of those of you who helped shape PLANO, making it the wonderful, vibrant organization it is today. Indeed, one of our Past Presidents, a good storyteller, may even want to share some interesting anecdotes with us over lunch. A formal invitation to this luncheon will be issued to all Past-Presidents in the course of the next week or so.

A speaker has been obtained for the luncheon. The name of the speaker, together with the topic to be covered at this event, will be issued to membership in the course of the next week or so.

Please mark your calendars and plan to attend this event. It promises to be a lot of fun. Advance reservations may be made by e-mailing [margo\\_cameron@dom.com](mailto:margo_cameron@dom.com).



## MESSAGE FROM THE PLANO PRESIDENT 2004-2005



August will bring with it OCS Lease Sale 192 (Western GOM) to be held on Wednesday, August 18, at the New Orleans Hilton Riverside Hotel, Poydras Street at the River, and another opportunity to get together. As in the past, PLANO will host a breakfast in the Oak Alley Room at the hotel immediately prior to the sale, i.e. from 7:00 a.m. till approximately 9:00 a.m. This is a great chance to see many of our out-of-town members along with other personnel in our members' firms. All attendees at the Lease Sale are urged to have breakfast with us.



We are also anticipating quite an eventful September with lunch at Muriel's Jackson Square on Monday, September 13, 11:30 a.m., and the PLANO Seminar, with a subsequent Icebreaker, at the Royal Sonesta Hotel, on Thursday, September 16. Kudos to Jan van Loon for putting the seminar together, and to Margo Cameron for arranging the Icebreaker. The Fall Seminar and Icebreaker represent two of PLANO's important events of the year. The seminar provides an excellent learning opportunity and the Icebreaker an excellent means of meeting potential new members and getting together with old friends. I encourage as many of you as possible to take advantage of these functions.

Following the lead of PLANO's own Harold J. Anderson as President of AAPL for the year 2004-2005, we should point out that as mentioned in his article in the July/August AAPL Landman magazine, there is great value in the affiliation between our organizations. We should support our professional organizations and help grow and maintain strong memberships. Harold will be busy meeting with many of the national Land associations but we'll make sure to get a moment on his schedule to address PLANO at some point during the year. We should all be very proud of a PLANO member reaching this pinnacle.

As we move into the Fall of 2004, I look forward to seeing many of you at our functions.

### William A. ("Bill") Gordon, PLANO President

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## LOUISIANA LEGAL UPDATE OIL & GAS LAW DEVELOPMENTS CASES OF INTEREST

*Presented by Andrew M. ("Andy") Adams  
Gieger, Laborde & Laperouse, L.L.C.,  
New Orleans 1-504-561-0400*

In a recent decision by the Fifth Circuit Court of Appeals, the court held that a notice given to a lessee of its failure to make timely or proper payments of royalties on behalf of a putative class (royalty owners not named in the letters) did not satisfy the requirements of Article 137 of the Louisiana Mineral Code for the unnamed members of the class. Chevron USA Inc. v. Vermilion Parish School Board, No. 03-30602 (5th Cir. 7/06/04).

The history of the dispute began in 1999 when counsel for the Vermilion Parish School Board and counsel for another royalty owner (the "Royalty Owners") sent individual demand letters to Chevron USA Inc., Texaco Inc., Amerada Hess Corporation, Union Oil Company of California, Mobil Oil Corporation, and ExxonMobil Corporation (the "Oil Companies") pursuant to Louisiana Mineral Code Article 137, which provides:

"If a mineral lessor seeks relief for the failure of his lessee to make timely or proper payment of royalties, he must give his lessee written notice of such failure as a prerequisite to a judicial demand for damages or dissolution of the lease."

The demand letters stated that the notices were sent on behalf of the Royalty Owners and "all similarly situated royalty owners – all royalty and overriding royalty owners to whom you pay gas royalties in Louisiana." The demand letters requested payment of unpaid royalties due on natural gas liquids the Oil Companies allegedly underpaid as a result of using a certain method to determine royalties.

In 2000, counsel for the Royalty Owners again sent individual demand letters to the Oil Companies, on behalf of the royalty owners and "all similarly situated royalty owners – all royalty and overriding royalty owners to whom you pay dry gas royalties on production in Louisiana" requesting payment of underpaid dry gas royalties resulting from the Oil Companies method of computing royalties. The

Oil Companies responded to the demand letters and each filed a declaratory judgment in federal court seeking a determination that it had no liability to the Royalty Owners.

The Royalty Owners Counterclaimed "individually and as representatives of a class of all others similarly situated" against each of the Oil Companies complaining of underpayment of royalties on natural gas liquids and dry gas production. The putative class would include all royalty and overriding royalty owners in all Louisiana mineral leases held by the Oil Companies whose royalties had been computed using either of the two methods challenged by the Royalty Owners. The Royalty Owners conceded that such a class would number in the thousands. The district court found that the demand letters were "legally insufficient to serve as written notice on behalf of the unnamed royalty owners" under the Louisiana Mineral Code and granted a motion by the Oil Companies to deny class certification to the putative class. The Royalty Owners then appealed to the Fifth Circuit.

In examining the issue, the Fifth Circuit noted that there were conflicting rulings by the Louisiana Courts of Appeal. As such, the Fifth Circuit certified the following question to the Louisiana Supreme Court:

Whether the notice given in this case by counsel for a lessor on behalf of the putative class satisfies the requirement of Articles 137-141 of the Louisiana Mineral Code, requiring the lessor to give written notice of the lessee's failure to make timely or proper payment of royalties as a prerequisite to a judicial demand for damages or dissolution of the lease. Chevron USA Inc. v. Vermilion Parish School Board, 364 F.3d 607 (5th Cir. 2004).

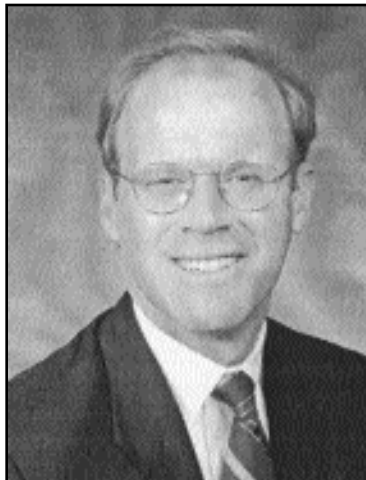
However, the Louisiana Supreme Court denied certification, thus the task of resolving the issue fell back onto the Fifth Circuit.

In analyzing the issue, the Fifth Circuit noted that

### About the Author

**Andrew M. ("Andy") Adams:** Attended the University of Colorado, Boulder (BS., Minerals Land Management, 1985); California State University, Bakersfield (M.B.A. 1991), and Loyola University School of Law, New Orleans (J.D., magna cum laude 1999) - member of the Loyola Law Review. He has been a speaker at the 41st Annual Institute for Professional Landmen, the 2002 AAPL Gulf Coast Land Institute, and the 2003 PLANO Executive Night Seminar, and has authored *Oil and Gas, Fifth Circuit Symposium*, Loyola Law Review (2001). Andy is currently serving on the Board of Directors of PLANO.

Andy has a career practice in the energy law field, primarily in examination of titles for oil and gas exploration and production activities, due diligence and contract review regarding acquisitions and divestitures, for both onshore Gulf Coast and offshore on the Federal Outer Continental Shelf. He has been employed in the New Orleans region since 1985.



although it may be guided by the decisions of the Louisiana appellate courts, it was not bound by them, particularly when the jurisprudence has not developed to the status of *jurisprudence constante* (a series of decisions in accord on a given issue). As additional authority for its role in interpreting the statutes, the court cited a prior decision that quoted an article authored by the late Judge Albert Tate, Jr.:

The primary basis of law for a civilian is legislation, and not (as in the common law) a great body of tradition in the form of prior decisions of the courts.

The concept of *stare decisis* is foreign to the Civil Law, including Louisiana.

To properly understand Article 137, the court thought it necessary to summarize the provisions of the related Louisiana Mineral Code Articles 138 through 141. Once written notice pursuant to Article 137 has been given by a lessor to his lessee to make timely or proper payment of royalties, Article 138 states that the lessee has thirty (30) days to either pay the royalties due or respond in writing stating a reasonable cause for non-payment. Article 139 treats the consequences of payment. It provides that if the lessee pays the royalties demanded within the 30-day period, the remedy of dissolution of the lease becomes unavailable to the lessor, unless the lessee fraudulently withholds payment. Article 140 provides for the consequences of failure by the lessee to respond favorably to the notice provided in Article 137. If the lessee fails to pay the royalties due or fails to inform the lessor of a reasonable cause for failure to pay in response to the notice, the court may award as damages double the amount of royalties due, interest on that sum from the date due, and a reasonable attorney's fee, regardless of the cause for the original failure to pay royalties. Article 140 also provides that a court may dissolve the lease in its discretion. However, Article 141 cautions that dissolution should be granted only if the conduct of the lessee, either in

failing to pay originally or in failing to pay in response to the required notice, is such that the remedy of damages is inadequate to do justice.

In reading these provisions as a whole, the Fifth Circuit found that the notice to lessees under Article 137 was not a 30-day waiting period before suit could be filed. Instead, it triggered an obligation on the lessee to investigate the complaint and respond in order to avoid substantial penalties, including lease cancellation. The court believed that if a putative class was formed and allowed to make demand on a class basis, it would deprive the lessee of any real ability to respond within the relatively short time period allowed and "upset the balance of rights between lessor and lessee carefully established by the Louisiana Legislature in Mineral Code Articles 137 to 141." The court noted that allowing demand to be made on a class basis raised other significant questions not answered by the Louisiana Mineral Code. Thus, the Fifth Circuit concluded that class notice does not satisfy the requirements of the Mineral Code as to unnamed members of the class.

The holding of the court recognizes the balance of interests between the lessor and lessee under the Louisiana Mineral Code. Because the lessor may be able to recover harsh damages under these articles (such as double damages, attorney's fees, and lease cancellation), the lessee is entitled to individualized pre-suit notice by each of the lessor. A demand submitted on behalf of names class representatives and unnamed royalty owners does not meet the requirement of individualized pre-suit notices.

*If you would like a copy of the above case, please contact the writer at Gieger, Laborde & Laperouse, New Orleans, LA, Area Code 504-561-0400, or by-e-mail: [aadams@gllaw.com](mailto:aadams@gllaw.com).*

*The above summary is intended for informational purposes only and is not a substitute for legal advice and counsel.*

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