WINDRUSH CREEK PROPERTY OWNERS ASSOCIATION

BOARD RESOLUTION & POLICY: Records Request Policy

Adopted: 2026-07-16
Effective: 2026-07-16
Revised: 2026-11-01
Resolution No.: 1
Authority: Declaration, Bylaws, and Ohio Revised Code Sections 5312.06 and 5312.07

1. Purpose and Authority

Purpose: To establish reasonable standards for inspecting and copying Association records, including what is available, when and where inspection occurs, and applicable fees, while protecting privileged and confidential information.

Intent: The Association intends to allow inspection of most records but must place reasonable restrictions on personal, privileged, and legally protected information.

Authority: This Policy is adopted under the Declaration, Bylaws, and Ohio Revised Code §5312.07, which permits reasonable inspection standards.

2. Rules of Conduct

Owners may not use inspection rights to harass any owner, resident, agent, director, or employee. All persons inspecting records must act in a reasonable, businesslike manner.

3. Definitions

Item: One specific document, one document type for a defined period, or one narrowly defined topic. Example: "May 2025 Board minutes" or "2024 monthly bank statements."

Owner: The record title holder of a lot in Windrush Creek.

4. Records Available for Inspection

- Balance sheets and income statements
- Accounts receivable / arrearage lists
- Bank statements
- Executed contracts and insurance information (except contracts requiring non-disclosure)
- Lot owner names and addresses (telephone numbers, email addresses excluded)
- Board regular and special meeting minutes (after approval by majority vote and signature by Secretary; executive session minutes excluded)

5. Records Not Available for Inspection

- Non-financial records such as owner complaints, violation notices, personnel appraisals, and job applications
- Communications between the Board and legal counsel (attorney-client privileged)

- Pending litigation, personnel matters, enforcement actions against other owners, personal identifiers prohibited by law, and records more than five years old (unless Board approves)

6. How to Submit a Request

Required Form: Owners must use the POA Records Request Form. If an attorney, accountant, or other representative will inspect or copy records, the owner must designate the representative in writing. Representatives are subject to the same rules as owners.

Submission: Via Association website www.windrushcreek.us or U.S. Mail to the Association address on file.

Required Information: Each request must include:

- Owner name, property address, phone, and email
- Specific record requested with exact dates or property address
- Reason for each record and intended purpose

Note: Reason and purpose are required to determine necessary redactions for privileged, personal, or protected information. They will not be used to deny a legitimate request.

7. One Item Per Request

Rule: Each written request may cover only one item:

- a) A single document (e.g., "May 2025 Board minutes")
- b) A single type of item for a defined period (e.g., "2024 monthly bank statements")

Separate Requests: Do not combine unrelated items in one form or email. If you need minutes, invoices, and a landscaping contract, submit three separate requests. The Trustees will process them in order received.

Counting: If you list multiple distinct items in one email, each item counts as a separate request toward the monthly limit.

Example - Appropriate: "Pursuant to ORC §5312.07, I request copies of Board meeting minutes from 9/2025 to 9/2026." (clear, specific date, one type)

Example - Inappropriate: "I request any and all legal opinions, memos, or correspondence from legal counsel about bypassing membership votes." (too broad, seeks privileged communications, multiple topics)

8. Monthly Limit: Four Items

Limit: Each owner may submit up to four (4) items per calendar month. Unused requests do not roll over.

Counting: Examples counting as one item each:

- Minutes from a single meeting = 1 item
- Snow removal invoices, Nov 2024-Feb 2025 = 1 item (same type, same range)
- Current landscaping contract = 1 item
- 2025 budget vs. actual report = 1 item

Excess: A fifth request in the same month is queued for the first business day of the next month.

Exceptions: The Board may approve an exception for urgent business such as a sale closing, insurance claim, or litigation deadline. Mark subject line: "URGENT - Request for Board Exception."

9. Response Time

Standard: The Association will make records available within a reasonable time, not to exceed 20 business days after receipt of a complete request.

Extension: If records are voluminous or require additional preparation, the Board may extend the deadline. The Association will notify the owner in writing of the reason and anticipated completion date.

10. Fees

Payment: Inspection, copying, and mailing charges will be assessed to the owner's account or paid in advance, as determined by the Board. All fees collected become part of the Association account. Electronic PDF copies are preferred when available to minimize costs.

Fee Schedule:

Service	Charge
Draft or approved minutes of Association meetings, upon written request	No charge
Hard copy versions, including copying, scanning or printing regular or legal sized records	$0.25 per page
Records sent via regular mail	$0.82 per page
Investigation / retrieval time	First 15 minutes free. After that, $5 per 15 minutes

11. Inspection Procedure

Appointment: By appointment at a location designated by the Board to prevent theft, destruction, or alteration.

Handling: Originals may not be removed, marked, or altered.

Redactions: Redactions will be made for attorney-client communications, pending litigation, personnel matters, enforcement actions against other owners, and personal identifiers prohibited by law.

12. Effective Date

Effective July 16, 2026. This Policy shall be maintained in the Association's book of Resolutions and Policies and published to all members via the Association website.