



Bayshore Records Policy

This policy provides the procedure and practices associated with the request for, and compilation, production, and reproduction of, Bayshore's records. The policy designates the records available to members and records that are confidential and thus not available to members. Finally, this policy provides information regarding the viewing and costs of obtaining requested records.

The following list contains Bayshore records that are available for request. Some of these records are available on the Bayshore's [webpage](#)

- Founding/Governing Documents: Covenants and Restrictions (C&Rs), Articles of Incorporation, Bylaws, Guidelines for Determination, Policies and Procedures (P&Ps)
- Minutes of Meetings
- Committee action records
- Accounting records (7 years)
- Financial books and records (7 years)
- Tax returns and any audit records
- Any documents or information relied on to prepare Bayshore's taxes (7 years)
- Records of receipts and expenditures related to Bayshore's operations (invoices, receipts, reserve account balances, check registers, canceled checks, approved purchase orders, bank account statements, credit card statements in Bayshore's name, and reimbursement requests (7 years)
- Financial statements and most recent statement of assets and liabilities (7 years)
- Current written contracts for work performed (4 years)
- Insurance policies and claims (7 years)
- Alphabetic membership list showing voting rights
- Current director and officer contact information
- Ballots, proxies, and other records for election (1 year)

The following list contains Bayshore records that are not available for request.

- Personnel matters relating to a specific identified person or a person's medical records.

- Personal member data (e.g., Social security numbers and Tax IDs, email addresses not used for official notices)
- Member assessment records and payment histories
- Details of violation notices and enforcement actions
- Health-related information from accommodation requests
- Files of individuals owners, other than from the requesting owner or requesting mortgagee of an individual owner, including any individual owners' file kept by or on behalf of Bayshore.
- Members' bank account information, phone numbers, email addresses, driver's license numbers
- Correspondence between members, vendors, or others with the board (unless a letter is used as evidence in a disciplinary action against another owner, in which case the disciplined owner has a right to see it)
- Information from executive sessions by the Board of Directors
- Information gathered during the lease or sale of property
- Banking information and payment details
- Contracts, leases, and other business transactions currently under negotiation to purchase or provide goods or services.
- Payment plans for delinquent owners
- Attorney-client privileged communications and work product
- Legal invoices
- Disclosure of information in violation of the law.
- Security measures and software
- Interior architectural plans of home
- Architectural approvals and denials
- Records likely to lead to fraud or identity theft
- Security camera recordings
- Video recordings of meetings

Reasonable Deadlines for Production of Records

A member, or a person designated in writing signed by the member as the member's agent, attorney, or certified public accountant, may make a request to access the records of Bayshore. The request must be submitted via a written request by certified mail, return receipt requested.

The time period for producing Bayshore records varies depending on the records requested. For example, Bayshore will make current fiscal year records available for

inspection within ten (10) business days of receipt of request, while a request to inspect records from the two (2) previous years will be made available no later than thirty (30) business days. There may be mitigating factors that could delay the production of records. The request for multiple years may take longer for Bayshore to go through records, redact personal information, and (potentially) make copies. A request to inspect Bayshore records more than three (3) years need not be honored unless otherwise stated above.

If the requesting member elects to inspect Bayshore's records, Bayshore will notify the requesting member within ten (10) business days after receiving the request of the dates during normal business hours that the requesting member may inspect the requested records. All inspections will take place at Bayshore's office or such locations as Bayshore designates and occur in front of Bayshore's office coordinator or one of its Board Directors. No requesting member or other individual will remove original records from where the location of the inspection is taking place, nor alter the records in any way. All individuals inspecting or requesting copies of records will conduct themselves in a business-like manner and will not interfere with the operation of the Bayshore's office coordinator or one of its Board Directors.

Costs

Bayshore may require advance payment of the estimated costs of compilation, production, and reproduction of the requested information. If such advanced payment is required, Bayshore will notify the requesting member in writing of the cost.

Bayshore adopts the following schedule of charges for the production and copying of records:

Copies: \$.10 per page for standard copies; \$.50 per page for oversize paper. If postal and shipping costs are required, the requesting member will be charged at the current USPS rate.

Labor: \$20 per hour for actual time to locate, compile, and reproduce records (no charge for requests of 25 or fewer pages). A labor charge also will be charged for time required to redact, blackout, or otherwise obscure confidential information in order to release the information. If the charge for providing a copy of information includes costs for labor, the requesting member may require Bayshore to provide a written statement as to the amount of time that was required to produce (and provide a copy) of the requested materials, signed by a Bayshore officer.

Overhead: 20% of the total labor charge (no charge for requests of 25 or fewer pages).

Miscellaneous: Bayshore may charge for actual costs incurred in responding to the request, including costs for labels, boxes, folders, postage and/or shipping.

If the estimated costs are lesser or greater than the final invoice amount, Bayshore will provide the owner a final invoice within 30 days after the information is provided. If the invoice includes additional amounts due from the member, those amounts will be added to the member's account as an assessment if not paid within thirty (30) days the invoice is sent the member. If the estimated costs exceeded the final invoice amount, the member is entitled to a refund within thirty (30) business days the invoice is sent to the member.

This is to certify that the forgoing resolution was adopted by the Board of Directors at a meeting held on June 20, 2026, and not been modified, rescinded, or revoked.

Date: 6/23/26

Corporate Secretary: 