STONEBRIDGE RANCH COMMUNITY ASSOCIATION, INC.
POLICY
Records Production and Copying Policy

Revision 3 06/23/2022

I. PURPOSE/REFERENCE:

The Board of Directors (the "Board") of Stonebridge Ranch Community Association, Inc. (the "Association") is required to establish a records production and copying policy which shall govern the costs the Association will charge for the compilation, production, and reproduction of information pursuant to Section 209.005(i) of the Texas Property Code.

II. PROCEDURE:

The following Records Production and Copying Policy is established by the Board:

1. Subject to the rights of the Association to limit or restrict access to certain records as set forth in Section 209.005 of the Texas Property Code or other applicable statutory authority, every owner of a lot in the Association is entitled to inspect and copy the Associations books and records of the Association, including financial records, as long as the request is specifically related to ownership and membership rights and interests in the community and not for pecuniary gain or commercial solicitation. An owner, or a person designated by the owner as the owner's agent, attorney, or certified public accountant may inspect records after a written request has been submitted.
2. An owner or owner's authorized representative must submit a written request for access or information by certified mail, with sufficient detail describing the property owners' association's books and records requested, to the mailing address of the association or authorized representative as reflected in the most current management certificate filed under Section 209.004 of the Texas Property Code. The request must contain an election either to inspect the books and records before obtaining copies or to have the Association forward copies of the requested books and records.
3. If an inspection is requested, subject to the other terms and conditions of this Policy, the Association, on or before the 10th business day after the date the Association receives the request, shall send written notice of dates during normal business hours that the owner may inspect the requested books and records to the extent those books and records are in the possession, custody, or control of the Association.
4. If copies of the identified books and records are requested, subject to the other terms and conditions of this Policy, the Association shall, to the extent those books and records are in the possession, custody, or control of the Association, produce the requested books and records for the requesting party on or before the 10th business day after the date the Association receives the request.
5. If the Association is unable to produce the books or records requested on or before the 10th business day after the date the association receives the request, the association will provide to the requestor written notice that:
    a. Informs the requestor that the Association is unable to produce the information on or before the business day after the date the Association received the request; and Records Production and Copying Policy
    b. States a date by which the information will be sent or made available for inspection to the requesting party that is not later than the 15th business day after the date of the letter provided under this paragraph 5.
6. Any inspection shall take place during normal business hours at a mutually agreed upon time.
7. All inspections shall take place at the office of the Association's management company, or such other location as designated by the Association. The Association may produce all requested books and records in hard copy, electronic, or other format reasonably available to the Association.

8. An owner is responsible for costs related to the compilation, production, and reproduction of the books and records of the Association. Costs shall be the same as costs under Texas Administrative Code Section 70.3 and are subject to increase in the event T.A.C Section 70.3 is amended. Any increase in costs provided for in 70.3 of the T.A.C. is hereby incorporated by reference for all purposes as if set forth verbatim. Relevant Current costs from T.A.C. 70.3 are below:

    a. Copy Charges
        i. Standard paper copy. The charge for standard paper copies reproduced by means of an office machine copier or a computer printer is $0.10 per page or part of a page. Each side that has recorded information is considered a page.
        ii. Nonstandard copy. The charges in this subsection are to cover the materials onto which information is copied or other format reasonably available to the association and do not reflect any additional charges, including labor, that may be associated with a particular the charges for nonstandard copies are:
            1. Rewritable CD (CD-R W) - $1.00;
            2. Non Rewritable CD (CD-R) - $1.00;
            3. Digital video disc (DVD) - $3.00;
            4. USB drive - actual cost;
            5. Other electronic media- actual costs;
            6. Oversize paper copy (e.g.: 11 inches by 17 inches, greenbar, bluebar, not including maps and photographs using specialty paper) - $0.50
            7. Specialty paper (e.g.: Mylar, blueprint, blueline, map, photographic)- actual cost.
    b. Labor charge for locating, compiling, manipulating data, and reproducing information.
        i. Labor charge for programming. If a particular request requires the services of a programmer in order to execute an existing program or to create a new program so that requested information may be accessed and copied, the Association may charge for the programmer's time. The hourly charge for a programmer is $135.00 an hour. Only programming services shall be charged at this hourly rate.
        ii. The charge for labor costs incurred in processing a request for information is $25.00 an hour. The labor charge includes the actual time to locate, compile, manipulate data, and reproduce the requested information. A labor charge shall not be made for complying with a request where the records to be copied are 50 or fewer pages unless the records to be copied are located in two or more separate buildings that are not physically connected to each other or in a remote storage facility.
        iii. When confidential information is mixed with public information in the same page, a labor charge may be recovered for time spent to redact, blackout or otherwise obscure confidential information in order to release the information. A labor charge shall not be made for redacting confidential information for requests of 50 or fewer pages.
    c. Overhead charge
        i. Whenever any labor charge is applicable to a request, the Association may include in the charges direct and indirect costs, in addition to the specific labor charge. This overhead charge would cover such costs as depreciation of capital assets, rent, maintenance and repair, utilities, and administrative overhead. If the Association chooses to recover such costs, a charge shall be made in accordance with the methodology described in paragraph iii of this subsection. Although an exact calculation of costs will vary, the use of a standard charge will avoid complication in calculating such costs arid will provide uniformity.

ii. An overhead charge shall not be made for requests for copies of 50 or fewer pages of standard paper records.

iii. The overhead charge shall be computed at 20% of the charge made to cover any labor costs associated with a particular request. Example: if one hour of labor is used for compiling and reproducing, $15.00 x $0.20 = $3.00. Programming labor charge, $135.00 x $0.20 = $27.00. If a request requires one hour of labor charge for locating, compiling, and reproducing information ($15.00 per hour); and one hour of programming labor charge ($135.00 per hour), the combined overhead would be: $15.00 + $135.00 = $150.00 x $.20 = $30.00.

d. Miscellaneous supplies. The actual cost of miscellaneous supplies, such as labels, boxes, and other supplies used to produce the requested information, may be added to the total charge.

e. Postal and shipping charges. The Association may add any related postal or shipping expenses which are necessary to transmit the reproduced information to the requesting party.

9. The Association may require advance payment of the estimated costs of compilation, production, and reproduction of the requested information. If the estimated costs are lesser or greater than the actual costs, the Association shall submit a final invoice to the owner on or before the 30 business days after the date the information is delivered. If the final invoice includes additional amounts due from the owner the additional amounts, if not reimbursed to the Association before the 30th day after the date the invoice is sent to the owner, may be added to the owner's account as an assessment. If the estimated costs exceeded the final invoice amount, the owner is entitled to a refund, and the refund shall be issued to the owner no later than the 30th business day after the date the invoice is sent to the owner.

This policy shall supersede and render null and void any and all previously adopted Records Production and Copying Policy and revisions adopted by the Board.

The foregoing Records Production and Copying Policy was adopted by the Board of Directors, in accordance with Section 209.005(i) of the Texas Property Code.

III. REVISION HISTORY

REVISION	DATE	CHANGES
	10/8/2003	Original
1	6/16/2016	Wording and format changes to policy
2	6/22/2017	Added section II. 7. b. I for programing and updated II 7.c. iii to include programming costs.
2	6/28/2018	Reviewed by the Board of Directors with no changes.
2	6/20/2019	Reviewed by the Board of Directors with no changes.
2	6/18/2020	Reviewed by the Board of Directors with no changes.
2	6/24/2021	Reviewed by the Board of Directors with no changes.
3	6/23/2022	Added language regarding use of information Sections II. 1 through 4. and cost of records production Sections II. 8. A. through c.

IT IS FURTHER RESOLVED that this Policy for Records Production and Copying Policy (Rev. 3 June 2022), replaces and supersedes in all respects all prior versions of this document as of the date of recording, and is effective upon adoption hereof, to remain in force and effect until revoked, modified or amended.

This is to certify that the foregoing policy was adopted by the Stonebridge Ranch Community Association, Inc., Board of Directors at a meeting held on June 23, 2022, and has not been modified, rescinded or revoked.

Date: Aug 25, 2022 Signature: _____