



## POLICY

---

### Record Request Rules and Guidelines

*Approved at WLCA Board Meeting, September 28, 2015*

### Record Request Rules and Guidelines Effective September 28, 2015

Pursuant to Section 720.303 (5) (c), Florida Statutes, the Waterford Lakes Community Association, Inc. (the "Association"), based upon approval of the Board of Directors of the Association at a duly -noticed meeting, hereby adopts the following "Record Request Rules and Guidelines".

For purpose of these rules and guidelines, the term "Records Request" is intended to include all records requested pursuant to Section 720.303(5), Florida Statutes, other than requests by owners to inspect and/or obtain copies of ledgers for their own account ("Owner Ledger Requests"). Owner Ledger Requests can be made and ledgers will be provided for inspection and/or copying without the need for compliance with the requirements of Section 720.303(5), Florida Statutes or the requirements or time limitations below, other than those set forth in paragraphs 3 and 6 below.

This shall not include individual owner ledgers or enforcement actions unless written authorization by the individual owner whose records have been requested or subpoena to disclose such documents is provided.

Per Florida Statute, certain records are not accessible to homeowners. This includes such items as those protected by the lawyer-client privilege, personnel records or owner contact information like telephone numbers. See Section 720.303 (5), Florida Statutes, for a complete list.

1. Each home owner may request an inspection of the Association's official records, based upon a Records Request, for up to one 8 -hour period during one business day per calendar month. If the owner does not utilize the full 8 -hour period, any time remaining will not be transferable to another day in the same calendar month.
2. A Records Request must be sent via certified mail return receipt, to:  
**Waterford Lakes Community Association, Inc.**  
**453 Mark Twain Blvd.**  
**Orlando, FL 32828.**
3. The inspections of records requested in the Records Request be held during regular office hours (which may close for lunch or other reasonable breaks) at:  
**Waterford Lakes Community Association, Inc.**  
**453 Mark Twain Blvd.**  
**Orlando, FL 32828.**
4. The Records Request must be sufficiently detailed to allow the Association to retrieve the records requested. Catch-all phrases like "all" or "since the beginning of time" do not allow the association to comply within the statutory 10-day time period to produce the documents. Therefore, official records of the Association for which review is sought must be described with sufficient particularity, including the specific description, type or category of record or records being requested, and the applicable time frame. For instance, should an owner desire to see copies of all of the association's current insurance policies, he or she should so frame the request. Conversely, notices requesting review of "all official records" of the Association or similarly stated requests cannot be honored without the provision of more sufficient detail, both as to the description, type or category of record or records being requested and the applicable time frame.
5. In the event the description of some or all of the records in the Records Request is unclear to the representative of the Association who is to assemble the documents, based upon that representative's sole

discretion, the Association may send, or may direct its counsel to send, a communication to the person making the Records Request to seek clarification of the records that are being requested. In the communication, the Association may provide the person making the Records Request with the option of inspecting only those records whose description is clear to the representative of the Association who is to assemble the documents or waiting to inspect records until clarification is obtained as to all of the records that are being requested.

6. The Association understands that some owners will only seek to inspect records and will seek to copy them as well. For that reason, the following rules and guidelines are adopted.
  - a. Records Requests which, based upon the sole discretion of the representative of the Association who is to assemble the documents, the Association believes it can fulfill with little effort, will be fulfilled by electronic copies via email at no cost.
  - b. The Association may charge up to 25 cents per page for copies made on the Association's photocopier. If the records requested to be copied exceed 25 pages in length, the Association may have copies made by an outside vendor or Association management company personnel and may charge the actual cost of copying, including any personnel fees and charges at an hourly rate not to exceed \$20 per hour for vendor or employee time to cover administrative costs to the vendor or Association.
7. Any other reasonable rules and parameters for Record Requests the Board of Directors of the Association may adopt from time to time.

ADOPTED this 28th day of September, 2015.

THE BOARD OF DIRECTORS OF WATERFORD LAKES COMMUNITY ASSOCIATION, INC.