

V. INSPECTION AND COPYING OF SPOA RECORDS⁴

1. Any **Member** may request to inspect and copy **SPOA** records on the following conditions:
 - a. The request must state with reasonable particularity the records requested;
 - b. Not less than ten days notice is given; however records may be made available at the next regularly scheduled meeting if such meeting is scheduled within thirty days of request.
2. Copies shall be charged to the requesting **Member** at the actual cost to **SPOA**, including administrative time and may be collected in advance.
3. Requests for copies shall be made to the **Manager**. Records shall be available for inspection only by appointment with the **Manager**.
4. No membership lists or any part thereof shall be obtained or used for any purpose unrelated to a **Member's** interest as an owner without consent of the **Board**.
5. The following **SPOA** records shall be posted regularly on the **SPOA** website:
 - Declaration of Covenants;
 - By-Laws
 - Responsible Governance Policies;
 - Most recent Minutes of **Members** and **Board** Meetings;
 - Most recent Approved Budget;
 - Rules and Regulations;
 - List of name and home or business address of current **Directors** and officers.
6. Hard copies of the following **SPOA** records shall be maintained as permanent records and kept at the principal office.
 - Detailed records of receipts and expenditures affecting the operation and administration of the association.
 - Records of claims for construction defects and amounts received pursuant to settlement of those claims;
 - Minutes of all meetings of **Members** and the **Board**;

⁴ Entire policy amended October 26, 2013

- A record of all actions taken by the **Members** or **Board** without a meeting;
- A record of all actions taken by any committee of the **Board**;
- Written communications among, and the votes cast by, **Board** members that are:
 - a. directly related to an action taken by the **Board** without a meeting pursuant to the Colorado Revised Nonprofit Corporation Act; or
 - b. directly related to an action taken by the **Board** without a meeting pursuant to the bylaws.
- The names of **Members** in a form that permits preparation of a list of the names of all **Members** and the physical mailing addresses at which the **Association** communicates with them, showing the number of votes each **Member** is entitled to vote; except that this does not apply to a unit, or the **Member** thereof, if the unit is a time-share unit;
- Declaration;
- Covenants;
- Bylaws;
- Rules and Regulations, Responsible Governance Policies and any other policies adopted by the **Board**;
- Financial statements for the past three years;
- Tax returns for the past seven years, to the extent available;
- A list of the names, electronic mail addresses, and physical mailing addresses of the **Association's** current **Board** member and officers;
- The Association's most recent annual report;
- Financial records sufficiently detailed to enable the Association to provide a written statement setting forth the amount of unpaid assessments currently levied against a requesting **Member's** unit;
- The Association's most recent reserve study, if any;
- Current written contracts to which the Association is a party and contracts for work performed from the Association within the immediately preceding two years;
- Records of **Board** or committee actions to approve or deny any requests for design or architectural approval from **Members**;
- Ballots, proxies, and other records related to voting by **Members** for one year after the election, action, or vote to which they relate;
- Resolutions adopted by its **Board** relating to the characteristics, qualifications, rights, limitations, and obligations of members or any class or category of members;

- All written communications within the past three years to **Members** generally as **Members**; and
- Records the associations is required to make available within 90 days after the end of each fiscal year as set forth in CCIOA. See C.R.S. 38-33.3-209.4(2). *

* 38-33.3-109.4(2) states: The association shall make the following information available to unit owners upon reasonable notice in accordance with subsection (3) of this section:

- a. The date on which its fiscal years commences;
- b. Its operating budget for the current fiscal year;
- c. A list, by unit type, of the association's current assessments, including both regular and special assessments;
- d. Its annual financial statements, including any amounts held in reserve for the fiscal year immediately preceding the current annual disclosure;
- e. The results of its most recent available financial audit or review;
- f. A list of all association insurance policies, including, but not limited to, property, general liability, association director and officer professional liability, and fidelity policies. Such list shall include the company names, policy limits, policy deductibles, additional named insureds, and expiration dates of the policies listed;
- g. All the association's bylaws, articles, and rules and regulations;
- h. The minutes of the executive board and member meetings for the fiscal year immediately preceding the current annual disclosure; and
- i. The association's responsible governance policies adopted under section 38-33.3-209.5.

7. **SPOA** may withhold the following records from inspection and copying to the extent they are a concern:

- a. Architectural drawings, plans, and designs, unless released upon the written consent of the legal owner of the drawings, plans, or designs.
 - b. Contracts, leases, bids, or records related to transaction to purchase or provide goods or services that are currently in or under negotiation.
 - c. Communications with legal counsel that are otherwise protected by the attorney client privilege or the attorney work product doctrine.
 - d. Disclosure of information in violation of the law.
 - e. Records of an executive session of a **Board**.
 - f. Individual units other than those of the requesting **Member**.
8. **SPOA shall** withhold the following records from inspection and copying:
- a. Personnel, salary, or medical records relating to specific individuals.
 - b. Personal identification and account information of **Owners** including:
 - 1) bank account information
 - 2) telephone numbers
 - 3) electronic mail addresses
 - 4) driver's license numbers
 - 5) social security numbers