

**THE GREENS OF PARK RIDGE  
HOMEOWNERS ASSOCIATION, INC.**

**POLICY RESOLUTION NO. 2023 - 61**

(Establishing guidelines and procedures for requests  
to examine Association books and records)

**WHEREAS**, Article VIII, Section 1(c) of the Amended and Restated Bylaws (“Bylaws”) for The Greens of Park Ridge Homeowners Association, Inc. (“Association”) provides that the Board of Directors (“Board”) shall have power to exercise for the Association all powers, duties and authority vested in or delegated to the Association and/or the Board, not reserved to the Membership by other provisions of the Bylaws, Articles of Incorporation, or the Declaration;

**WHEREAS**, Article XII of the Bylaws for the Association provides that the books, records and papers of the Association shall at all times during reasonable business hours be subject to inspection by any Member, and that the Association may levy reasonable costs for administration of record inspections and production, in accordance with applicable Virginia law;

**WHEREAS**, Section 55.1-1815 of the Virginia Property Owners’ Association Act (“Act”) provides that the Association shall keep detailed records of receipts and expenditures affecting the operation and administration of the Association;

**WHEREAS**, Section 55.1-1815.B of the Act provides that subject to Section 55.1-1815.C of the Act and so long as the request is for a proper purpose related to membership in the Association, all books and records kept by or on behalf of the Association shall be available for examination and copying by a member in good standing or the authorized agent, including, the Association’s membership list and addresses, which shall not be used for purposes of pecuniary gain or commercial solicitation, and salary information of Association employees;

**WHEREAS**, Section 55.1-1815.B of the Act also provides that the right of examination exists without reference to the duration of membership and may be exercised (i) only during reasonable business hours or at a mutually convenient time and location and (ii) upon five business days’ written notice reasonably identifying the purpose for the request and the specific books and records of the Association requested;

**WHEREAS**, Section 55.1-1815.C of the Act provides that certain books and records kept by or on behalf of the Association may be withheld from inspection or copying;

**WHEREAS**, Section 55.1-1815.D of the Act provides that books and records kept by or on behalf of the Association shall be withheld from inspection and copying in their entirety only to the extent that an exclusion from disclosure under subsection C applies to the entire content of such books and records;

**WHEREAS**, Section 55.1-1815.D of the Act further provides that only those portions of the books and records containing information subject to an exclusion under subsection C may be withheld or redacted, and all portions of the books and records that are not so excluded shall be

available for examination and copying, provided that the requesting member shall be responsible to the Association for paying or reimbursing the Association for any reasonable costs incurred by the Association in responding to the request for the books and records and review and redaction of the same;

**WHEREAS**, Section 55.1-1815.E of the Act provides that prior to providing copies of any books and records, the Association may impose and collect a charge, reflecting the reasonable costs of materials and labor, not to exceed the actual costs thereof; charges may be imposed only in accordance with a cost schedule adopted by the Board; and the cost schedule shall specify the charges for materials and labor, apply equally to all members in good standing and be provided to such requesting member at the time the request is made; and,

**WHEREAS**, the Board believes it in the best interest of the Association and its members to establish a procedure which ensures access to Association books and records in accordance with statutory requirements, gives guidance to enable proper responses to requests to examine, and provides notice of the adopted cost schedule to all members.

**NOW, THEREFORE, BE IT RESOLVED THAT** the Board hereby establishes the following procedures for use in the event that a member or other authorized person requests to examine and copy Association books and records.

A. Books and records kept by or on behalf of the Association will be available for examination and copying by a member in good standing, except for the following which may be withheld under Section 55.1-1815.C of the Act:

1. Personnel matters relating to specific identified persons or a person's medical records;
2. Contracts, leases and other commercial transactions to purchase or provide goods or services currently in or under negotiation;
3. Pending or probable litigation;
4. Matters involving state or local administration or other formal proceedings before a government tribunal for enforcement of the Association documents or rules and regulations promulgated by the Board;
5. Communications with legal counsel protected by the attorney-client privilege or the attorney work product doctrine;
6. Disclosure of information in violation of law;
7. Meeting minutes or other confidential records of an executive session of the Board held pursuant to Section 55.1-1816.C of the Act;

8. Documentation, correspondence or management or Board reports compiled for or on behalf of the Association or the Board by its agents or committees for consideration by the Board or Committee in executive session; and
9. Individual lot owner or member files, other than those of the requesting lot owner, including any individual lot owner's or member's files kept by or on behalf of the Association.

These books and records may be withheld in their entirety to the extent that an exclusion from disclosure, as set forth above, applies to the entire content of such books and records. If only portions of the books and records contain information subject to an exclusion from disclosure, as set forth above, the Association may withhold or redact the excluded portion, and the costs associated with the time spent redacting the documents shall be absorbed by the requesting member.

B. Members not in *good standing* may not examine or copy Association books and records. For the purposes of this Resolution, a member is not in *good standing* if the member is delinquent in the payment of any assessment to the Association or has been found by the Board, after notice and hearing, to be in violation of the Association's governing documents or rules and regulations.

C. Requests to examine and copy Association books and records must be made in writing, reasonably identify the purpose for the request, and specify the Association books and records requested. A request form is attached as Exhibit 1 to this Resolution. Requests should be submitted to the Association's managing agent. If a form is not complete, the managing agent shall notify the member of the deficiency and the required corrective action. No records shall be made available until the member takes such corrective action and submits a completed form.

D. Within five (5) days of receipt of a completed request form, the Association's managing agent will provide the member with the cost schedule attached hereto and incorporated herein as Exhibit 2, as well as an estimate on the costs associated with responding to the request. An estimate may include, but not be limited to, the costs of locating, duplicating, and supplying the records, which includes the cost of materials and labor, and legal fees incurred in reviewing and redacting any books and records. The managing agent will also schedule with the member a mutually convenient time during reasonable business hours for the examination of the books and records.

E. Prior to examining the books and records, the member must pay the estimated charges. After rendering the requested services, the Association shall compare the estimate with the actual costs incurred by the Association as set forth in the cost schedule. If the amount paid by the member exceeds the actual costs, the Association shall refund the difference. If the actual costs exceed the estimate, the Association shall notify the member and the member shall pay the difference within fifteen (15) days of such notice. The Association may withhold additional services and/or copies until it receives payment.

F. The Board of Directors may periodically adopt and implement an updated cost schedule to replace the existing cost schedule attached as Exhibit 2 to this Resolution.

G. The Association shall not have any obligation to create documents in response to a request for records that otherwise do not exist.

H. The managing agent may conclude that a request submitted by a member involves a nominal amount of time and cost to the Association, and may, in its sole discretion, waive any of the above requirements.

The effective date of this Resolution shall be December 28, 2023.

**THE GREENS OF PARK RIDGE  
HOMEOWNERS ASSOCIATION, INC.**

  
\_\_\_\_\_  
President

12/20/23

**Exhibit 1**

**THE GREENS OF PARK RIDGE  
HOMEOWNERS ASSOCIATION, INC.**

**RECORD REQUEST FORM**

You may use this form to request copies of or inspect the official records of THE GREENS OF PARK RIDGE HOMEOWNERS ASSOCIATION, Inc. ("Association"). In order to properly submit a request, please complete, sign and date this form and mail or deliver it to the Association's common interest community manager at the address below:

The Greens of Park Ridge Homeowners Association, Inc.  
c/o Burke Community Management Group  
10428 Business Center Court  
Manassas, VA 20110

Name of Requesting Party:

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Mailing Address:

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Address of Lot located within the Association if different than mailing address:

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Phone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_

(Mobile) \_\_\_\_\_ (Email) \_\_\_\_\_

Please describe the records you wish to copy and/or inspect (include all relevant, dates, names or other identifying information as the request must be specific):

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Please describe the purpose of your request:

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Please check applicable box(es):

- I am requesting to receive copies of the above-referenced records. [  ]
  - I am requesting to conduct an in-person inspection of the above-referenced records. [  ]
  - I am requesting to inspect such records on \_\_\_\_\_ at \_\_\_\_\_.
- (The Association will provide you confirmation of the appropriate time, date and location for the inspection).

Please note, not all Association records are available for review and inspection, per Section 55.1-1815 of the Virginia Property Owners Association Act. You will be notified if your request contains records subject to withholding or redaction. You will also be notified of the estimated cost, if any, related to your request and such charges must be paid in advance of the Association fulfilling your request.

Be advised, the Association is only obligated to respond to record requests from those members of the Association who are in good standing and the request is for a proper purpose related to membership in the Association and not for pecuniary gain or commercial solicitation. A member is not in good standing if they are delinquent in the payment of any assessment to the Association by more than thirty (30) days or has been found by the Board, after notice and hearing, to be in violation of the Association Documents or Rules and Regulations.

You must date and sign this form.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

----- **TO BE COMPLETED BY MANAGEMENT** -----

Date Received by Management: \_\_\_\_\_

Signature of Managing Agent: \_\_\_\_\_

Printed Name of Managing Agent: \_\_\_\_\_

**Exhibit 2**

**The Greens of Park Ridge  
Homeowners Association, Inc.**

**Cost Schedule**

**For Examination and/or Provision of Copies of Association Books and  
Records**

Labor Costs:

|  |                  |
|--|------------------|
| Hourly rate for copying of or redacting materials**:     | \$75.00 per hour |
| Records Custodian time for in person review of documents | \$75.00 per hour |

Charges will be billed in 15-minute increments.

Material Costs:

Copies shall be billed at a rate of \$0.20 per page

Mailing costs shall be billed at any actual rate imposed by the U.S. Postal service for standard first class mailing, unless the unit owner requests an alternative mailing method, in which case all actual rates imposed by the requested carrier shall be billed directly through to the requesting party.

\*\* Legal review may be required prior to any withholding or redacting of records in which case the costs quoted above will also include the actual costs of any legal fees incurred by the Association as may be estimated by the Association after consultation with legal counsel. Typical hourly rates for legal counsel range from \$250.00 - \$450.00 per hour and are subject to change.