



TRILLIUM COMMUNITY ASSOCIATION, INC.
ACCESS, PRODUCTION, AND COPYING POLICY

STATE OF TEXAS §
 §
COUNTY OF FORT BEND §

I. PURPOSE

The purpose of this Access, Production, and Copying Policy (this “**Policy**”) is to prescribe (i) accessibility to books and records of Trillium Community Association, Inc. (the “**Association**”) and (ii) the costs the Association will charge for the compilation, production, and reproduction of information requested under Section 209.005 of the Texas Property Code. The Board of Directors of the Association (the “**Board**”) has determined that it is in the best interest of the Association to establish this Policy concerning the production and copying of information, books, and records of the Association.

II. APPLICABILITY AND AUTHORITY

The property encumbered by this Policy is that property restricted by the Declaration of Covenants, Conditions, and Restrictions for Trillium, recorded in the Official Public Records of Fort Bend County, Texas under Clerk’s File Number 2023101009, as same has been or may be amended from time to time (the “**Declaration**”), and any other property which has been or may be subsequently annexed into Trillium and made subject to the authority of the Association.

The capitalized terms used in this Policy are defined in the same manner as set forth in the Declaration and the interpretation provision set forth in the Declaration applies to this Policy, which definitions and interpretation provision are incorporated in this Policy by this reference.

The Board is authorized by the Dedicatory Instruments to adopt rules and policies pertaining to the governance of the Association.

The Board adopts this Policy, which runs with the land and is binding on all Owners and Lots within the Property. This Policy is effective upon the recording of same. After the effective date, this Policy replaces any previously recorded or implemented policy that addresses the access, production, and copying of Association books and records.

Invalidation of any one or more of the covenants, conditions, restrictions, or provisions contained in this Policy will in no way affect any one of the other covenants, conditions, restrictions, or provisions of this Policy, which remain in full force and effect.

III. ACCESS, PRODUCTION, AND COPYING POLICY

1. Access

The books and records of the Association, including financial records, must be open to and reasonably available for examination by an Owner, or a person designated in writing signed by the Owner as the Owner's agent, attorney, or certified public accountant. An Owner is entitled to obtain from the Association copies of information contained in the books and records. An Owner, or the Owner's authorized representative, must submit a written request for access or information by certified mail, with sufficient detail describing the books and records requested, to the mailing address of the Association as reflected on the Association's most current management certificate. 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.

An attorney's files and records relating to the Association, excluding invoices requested by an Owner under Section 209.008(d) of the Texas Property Code, are not records of the Association and are not subject to inspection by the Owner or to production in a legal proceeding. If a document in an attorney's files and records relating to the Association would be responsive to a legally authorized request to inspect or copy Association documents, the document must be produced by using the copy from the attorney's files and records if the Association has not maintained a separate copy of the document. Any document that constitutes attorney work product or that is privileged as an attorney-client privileged communication is not required to be produced.

The Association is not required to release or to allow inspection of any books or records that identify (a) the Dedicatory Instrument violation history of an Owner, (b) an Owner's personal financial information, including records of payment or nonpayment of amounts due the Association, (c) an Owner's contact information other than the Owner's address, or (d) information related to an employee of the Association, including personnel files. These records may be made available only (i) with the express written approval of the Owner whose records are the subject of the request or (ii) if a court of competent jurisdiction orders the release of the records. Information may be released in an aggregate or summary manner that would not identify an individual Owner.

If inspection is requested, the Association, on or before the 10th business day after the date the Association receives the request, must send written notice of dates that the Owner may inspect the requested records to the extent the records are in the possession or control of the Association. The inspection will take place at a mutually agreed upon time during normal business hours.

If copies are requested, the Association must produce the requested records for the Owner on or before the 10th business day after the date the Association receives the request except as otherwise provided in this Policy. The Association may produce the requested records in hard copy, electronic, or other format reasonably available to the Association.

If the Association is unable to produce the records on or before the 10th business day after the date the Association receives the request, the Association must give the Owner notice that it is unable to produce the records within 10 business days and state a date by which the information will be sent or made available for inspection, on a date not more than 15 business days after the date the notice is given.

Notwithstanding anything contained in this Policy to the contrary, all records must be produced subject to the terms of this Policy as set out below. The Association may require advance payment of estimated costs per its adopted policy.

2. Custodian of Records

The Secretary of the Board or other person designated by the Board, is the designated Custodian of the Records of Association. As such, the Secretary of the Board or other person designated by the Board, as applicable, is responsible for overseeing compliance with this Policy. Any questions regarding this Policy must be directed to the Custodian of the Records of the Association.

3. Procedures for Responding to Requests for Information

All requests for information must comply with the requirements set forth above. The dated and signed, written request must state the specific information being requested.

Requests for information will **NOT** be approved when the information (1) regards pending legal issues, unless specifically required by law; (2) regards personnel matters, such as individual salaries; (3) regards other Members; or (4) is privileged or confidential.

4. Cost of Compiling Information and Making Copies of Records

The costs of compiling information and making copies may not exceed those set forth in 1 TAC §70.3. The following fee schedules and explanations comply with this code section.

The following are the costs of materials, labor, and overhead which will be charged to the Owner requesting. 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 must submit a final invoice to the Owner on or before the 30th business day 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 business 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 must be issued to the Owner not later than the 30th business day after the date the invoice is sent to the Owner.

4.1 Copy Charge:

(1) Standard paper copy: The charge for 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.

(2) Nonstandard copy: These charges cover materials onto which information is copied and do not reflect any additional charges, including labor, that may be associated with a particular request. The charges for nonstandard copies are:

- (A) Diskette – \$1.00
- (B) Magnetic tape – actual cost
- (C) Data cartridge – actual cost
- (D) Tape cartridge – actual cost
- (E) Rewritable and non-rewritable CD – \$1.00
- (F) Digital video disc – \$3.00
- (G) JAZ drive – actual cost
- (H) Other electronic media – actual cost
- (I) VHS video cassette – \$2.50
- (J) Audio cassette – \$1.00

(3) Oversize paper copy (e.g. 11 x 17, green bar, blue bar, not including maps and photographs using specialty paper): \$0.50

(4) Specialty paper (e.g. Mylar, blueprint, blueline, map, or photographic): actual cost

4.2 Labor Charge:

For locating, compiling, manipulating data, and reproducing public information, the following charges apply:

(1) Labor charge – \$15.00/hour. This charge includes the actual time to locate, compile, manipulate data, and reproduce the requested information.

(2) When confidential information is mixed with public information on the same page, a labor charge may be recovered for time spent by an attorney, legal assistant, or any other person who reviews the requested information to redact, blackout, or otherwise obscure confidential information in order to release the public information.

(3) No labor charge may be billed for requests that are 50 or fewer pages of paper records, unless the documents to be copied are located in:

- (A) 2 or more separate buildings that are not physically connected with each other; or

(B) A remote storage facility.

4.3 Overhead Charge:

Whenever a labor charge is applicable to a request, the Association may include in the charges direct and indirect charges, in addition to the specific labor charge. This overhead charge covers such costs as depreciation of capital assets, rent, maintenance and repair, utilities, and administrative overhead. If the Association chooses to recover such costs, the charge will be made in accordance with the methodology described below:

(1) The overhead charge may not be made for requests for copies of 50 or fewer pages of standard paper records unless the request also qualifies for a labor charge;

(2) The overhead charge is computed at 20% of the charge made to cover any labor costs associated with a particular request.

4.4 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. Related postal or shipping expenses which are necessary to transmit the reproduced information may be added to the total charge. If payment by credit card is accepted and a transaction fee is charged by the credit card company, that fee may be added to the total charge.

5. Denial of Requested Information


If it is decided that a request for information is inappropriate or unapproved, the Board, or its designee, will notify the requesting Member of that decision and the reason for it in a timely manner. The Board, or its designee, will inform the Owner, in writing of their right to appeal to the Board.

[SIGNATURE PAGE FOLLOWS]

CERTIFICATION

I certify that, as President _____ of Trillium Community Association, Inc., the foregoing Access, Production, and Copying Policy was approved on the 24th day of October _____, 2023, at a meeting of the Board of Directors at which a quorum was present.

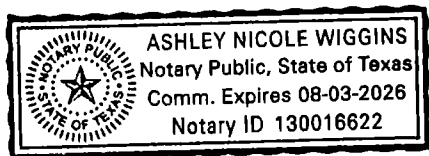
DATED this the 24th day of October _____, 2023.

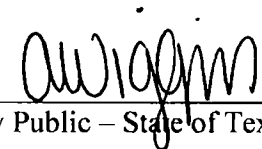
By: 
Print Name: Robert Skinner
Title: President

STATE OF TEXAS §
 §
COUNTY OF Harris §

BEFORE ME, on this day personally appeared Robert Skinner, the President of Trillium Community Association, Inc., known by me to be the person whose name is subscribed to this instrument, and acknowledged to me that s/he executed the same for the purposes and in the capacity stated in this instrument, and as the act and deed of said corporation.

Given under my hand and seal of office, this 24th day of October _____, 2023.




Notary Public – State of Texas

After Recording Return To:
Lisa L. Gambrell
Isabella L. Vickers
Roberts Markel Weinberg Butler Hailey PC
2800 Post Oak Blvd., 57th Floor
Houston, Texas 77056