

BOARD POLICIES

West Meadows Estates
Homeowners Association Inc.

Record & Data Security

Effective: 9-30-2024

Policy 105

By: 
Mike Eastlund, Board President

1. PURPOSE

Provide direction to make Association records available for examination and, upon written request, available for duplication by an owner who requests records. Provide security standards to help protect Association records and the confidentiality of property owner's information.

2. PERSONS AFFECTED

Property owners, Board members, officers, sub-contractors, and employees.

3. REFERENCES

Administration Policy 101

4. DEFINITIONS

- 4.1. **Hard-Copy Records:** Non-electronic records maintained in the property file.
- 4.2. **Property File:** A file with all the hard-copy records for a specific property in the subdivision.
- 4.3. **Personal Private Records:** E-mail addresses, phone numbers, un-redacted letters of violation, and fine letters with a person's name.
- 4.4. **Electronic Records:** Records on a computer essential to the Association's function.
- 4.5. **Furnished Records:** Are association records available for inspection during business hours, from 9:00 a.m. to 5:00 p.m., Monday through Friday.
- 4.6. **Custodian of Records:** The person responsible for maintaining and securing required records.

5. POLICY

- 5.1. The custodian of records shall secure records of the WMEHOA as follows:
 - 5.1.1. Hard-copy records in a locked, secure file cabinet owned by the WMEHOA.
 - 5.1.2. Electronic records stored in a computer must be secured by password and protected by security programs.
- 5.2. The Association shall keep financial records sufficiently detailed for proper accounting purposes.
- 5.3. Access to Association records will be governed by ORS 94.670 (8), ORS

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65.774, and ORS 65.774 (2) after concurrence with the Board's legal counsel.

- 5.4. A member's records can only be used by the HOA and its agents for the official business of the HOA and cannot be used or provided for any other purpose.
- 5.5. The custodian of records may only provide a member's records to the member, their representative, or a court at the direction of the Board President.
- 5.6. Owners requesting records shall submit a detailed list of documents they wish to have duplicated to the Association's president.
- 5.7. Costs for duplication can be charged to the requester.
- 5.8. The charge or reimbursement for printing shall not exceed the following:
 - 5.8.1. Black & White impressions: .10 cents each
 - 5.8.2. Color impressions: .20 cents each.
- 5.9. The treasurer may assess a labor charge of \$40.00 per hour and impression charges.
- 5.10. Copies shall be available for pickup within five (5) business days after the Board President approves them and the payment for printing is received.
- 5.11. The custodian of records shall maintain construction records and changes for the lifetime of a structure.
- 5.12. The custodian of records shall retain proxies and ballots for one year from the date of the vote.
- 5.13. Hard copies of records shall be maintained for the period governed by ORS 94.670 and ORS 65.771.
- 5.14. The custodian of records shall shred all hard copy records when disposed of.
- 5.15. WMEHOA records on private computers shall be removed from the hard drive when the computer's owner is no longer authorized to maintain records or when the computer is recycled.

6. RESPONSIBILITIES

- 6.1. The Board president is responsible for authorizing duplicate records requested by an owner.
- 6.2. The custodian of records is responsible for maintaining the records in a locked file cabinet or area.

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- 6.3. The records custodian purges and shreds records at the appropriate interval.
- 6.4. It is the responsibility of the people responsible for electronic records to provide security and backup.
- 6.5. The owner of any computer holding WMEHOA data is responsible for properly removing records as necessary.

7. PROCEDURES

- 7.1. All hard copy notes, photographs, and records for a property are to be provided to the custodian of records for storage.
- 7.2. The records custodian shall maintain all enforcement records for a maximum period of 180 days.