



Bedford Estates
Homeowners Association

ATTACHMENT A
POLICIES AND GUIDELINES
February 2023

RECORDS RETENTION POLICY

Permanent:

- Articles of Incorporation
- By-laws
- Restrictive covenants

Any amendments to these documents

Seven Years:

- Financial books and records
- Minutes of meetings of owners and the board of directors
- Tax returns or exemption paperwork
- Audits

Five Years:

- Account records of property owners

Four Years after expiration:

- Contracts with a term length of at least a year

RECORDS INSPECTION POLICY

Property owners may request an inspection of the Association's books and records either in person or request copies of specific documents. The Association can charge a fee for copies at the rate of 12 cents per page.

To request access to records, a request must be in writing and sent by certified mail. The Association must respond within 10 business days but may extend this time for up to 15 additional days if they provide proper written notice.

The President retains a notebook with the following records:

- Articles of Incorporation
- Bylaws & all amendments
- CCRs & all amendments
- Notarized Management Certificate for TREC, Resolutions & Policy documents
- In-force Board Insurance policy
- Mission Statement, Vision, Ethics



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- Strategic & Long-Range Planning Documents
- Projected cost estimates for maintenance/replacement of communal property such as fencing, stonework, sprinklers, signage, landscaping at Cheek-Sparger
- Current year Board & Annual Meeting Agendas/Minutes¹
- Pertinent non-profit registration numbers for legal and tax purposes
- Board membership information in professional organizations when applicable
- Legal counsel contacts & pertinent correspondence when applicable
- Organization chart, duties, and documented processes for each officer.
- City of Bedford contacts and other Bedford HOA contacts

The Vice President (as Chair of ARC) retains a notebook with the following records:

- Current CCRs
- Current acceptable materials list
- Contact information of ARC members
- Copies of Resolutions, policies and guidelines affecting the ARC
- Current bylaws
- In-force state statutes or Internet links
- Articles of Incorporation
- Directions to access property owners' deeds from Tarrant County
- Current process and forms for property owners to submit ARC requests

The Treasurer retains a notebook with the following current year records:²

- Bank statements, contact information & authorized signatories
- Approved budgets (also posted on website)
- Profit and Loss statements
- Quarterly YTD statements (also posted on website)
- Audit report
- Checks, receipts, etc.
- Expense Reimbursement Form

¹ Previous year agendas and minutes are filed on the website & archived to BEHA google drive.

² Previous year financials are archived to BEHA google drive



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- State and federal tax guidelines and forms/contacts

At year end, the Treasurer will email the approved budget, P&L, YTD documents to BEHAmailbox@gmail.com for archiving on google drive.

The Treasurer is also charged with initiating an Association Fees (dues) Campaign at the start of the fiscal year and entering all receipts (by physical check, or electronic) into the Association's database.

The following in-force documents are available on the Association's website:³

- Board Minutes - since 2018
- Annual meeting minutes and presentations - since 2017
- Current year approved budget
- Articles of Incorporation
- Bylaws
- Covenants, Conditions and Restrictions (CCRs)
- Resolutions that supplement the bylaws and CCRs
- Policies & Guidelines that supplement the bylaws and CCRs
- Management Certificate
- Architectural Review Committee process, property owner request form and list of acceptable materials.
- Organization chart with duties
- Annual newsletters
- Map of the neighborhood
- Zone Ambassadors for the neighborhood

EMAIL REGISTRATION & SECURITY POLICY

All residents are asked to provide the following information:

- Primary and secondary resident name(s)
- Primary and secondary email(s)

³ All legal documents are scanned and archived to BEHA google drive



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- Primary and secondary phone number(s)
- If renters, also the name and contact information for the property owner.
- Initially, the Neighbor Relations Chair and Zone Ambassador visit all new residents to request this information and, in turn, relay it to the Association's Treasurer who enters it into a secure database as part of the Association's website.
- As emails become invalid i.e. Association emails are undelivered, the Treasurer will contact the resident by phone or text to request an update.
- Residents must have a secure website password for access.
- Residents can request that their information only be accessible to the website database administrator (Treasurer)
- There is no public access and resident information is not published in hard copy or sold.
- Residents can choose not to provide a valid email, in which case, Association business is sent via mail.

ARC GUIDELINES

- The Association's Bylaws outline in detail the authority vested in the Architectural Review Committee
- Resolutions pertinent to an ARC denial and the process for mediation are filed on the Association's website
- The process for a property owner to submit a request to the ARC and all necessary paperwork is filed on the website
- A current acceptable materials list is filed on the website and updated annually.
- Specific guidelines for extensive exterior remodeling are contained in the Association's Declarations (CCRs) which are filed with Tarrant County and available on the Association's website.

GUIDELINES FOR LANDSCAPING & EMERGENCY BACKUP:

- The Association approves the installation of rain barrels, however, they shall not:
 - Be visible from the street unless shielded
 - Be of a color not compatible with the surrounding homes



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- Contain commercial or political messages
- Breed mosquitoes, become stagnant and smell or pose a health hazard
- The Association approves in composting, however, it shall not:
 - Be visible from the street unless shielded
 - Be maintained so as not to attract vermin, smell, or pose a health hazard
- The Association approves drought resistant irrigation systems, landscaping such as xeriscape, or water-conserving natural turf and plants, however, they shall not:
 - Be overgrown or unsightly and at odds with neighboring homes
 - Be allowed to self-seed and populate neighboring gardens
- The Association approves the use of stand-by generators on an emergency basis and attempts should be made to shield installation from the street.

CONFLICT OF INTEREST

- This policy is outlined in the Bylaws. Current bylaws are available on the Association's website.



FILED AND RECORDED
OFFICIAL PUBLIC RECORDS OF
TARRANT COUNTY, TEXAS
02/22/2023 11:46 AM

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PROPERTY OWNERS ASSOCIATION MANAGEMENT CE

Pages: 7

Fees: \$43.00

Mary Louise Nicholson
MARY LOUISE NICHOLSON
COUNTY CLERK

Resolution