

## Article 11

### **Member Access to Records Policy (Revised February 24, 2026)**

#### **Purpose**

The purpose of this policy is to promote transparency, accountability, and member engagement. As a member-owned organization, the cooperative recognizes that informed members strengthen governance and trust. This policy governs active member's access to cooperative records. It defines which materials are publicly available and which remain confidential to protect the cooperative's financial, legal, and personnel interests.

Requests must be for legitimate and reasonable purposes related to the active member's interests in the Cooperative and be made in good faith. The request shall be related to the cooperative's business or governance. Information obtained pursuant to a request shall be used solely for the purpose stated in the request and shall not be disclosed, reproduced, or distributed to non-members or any other parties without written authorization from the Cooperative. The information shall not be used in any manner that violates federal, state, or local law.

#### **Information Available on the Cooperative's Website:**

To promote openness, the cooperative provides access to key governing and financial documents on its official website, including but not limited to:

- Articles of Incorporation
- Bylaws
- Audited Financial Statements
- IRS Form 990
- Member Policies and Rate Classifications
- Other pertinent cooperative information as deemed appropriate

#### **Information Not Available for Member Review**

Information which is confidential will not be made available to members due to privacy, legal, operational, or other considerations.

The Cooperative may choose to release only excerpts or limited portions of documents or redacted documents, in keeping within the scope of the request and the confidences of the Cooperative.

The Cooperative's decision on what documents or portion thereof are confidential, is final and not subject to review.

If any request is denied or limited, the Cooperative will not explain other than to state that "the information requested is confidential."

#### **Requests for Cooperative Information**

Members who wish to access information not already published on the cooperative's website must submit a **Member Information Request Form**. Requests will be reviewed by the Chief Executive Officer or their designee, who will determine whether:

- The request is relevant to the member's cooperative interests, and

- Disclosure complies with cooperative policy and applicable laws.
- For sensitive matters, the CEO may consult with the Board Chair or directors, legal counsel, or other appropriate staff or advisors as may be needed.

The CEO shall take as much time as may be reasonably necessary in making such determinations.

### **Viewing Records**

If approved (or to the extent approved), the member may review the requested materials in person under the following conditions:

- Viewing will take place by appointment only, at the Cooperative's office and during regular business hours.
- Scheduling will be made by the Cooperative and will consider staff availability and any other pertinent factor. The appointment must be scheduled so that it does not place undue burden or stress on cooperative resources. The appointment shall not exceed 60 minutes.
- The CEO or their designee will be present at all times during the review.
- No more than two (2) people (aside from Cooperative staff) shall be present for the viewing, and each person must have signed a Member Information Request Form.

### **Restrictions During Review**

To protect the integrity of cooperative records and member privacy:

- No photographs, photocopies, or audio recordings are permitted.
- Members may take handwritten notes with approval from the supervising staff.
- If any policies or staff directions are not complied with, the CEO or their designee may immediately terminate the review. It may limit or deny any future requests made by the member.

### **Policy Oversight and Review.**

This policy is maintained under the supervision of the Board of Directors. The Board may review and revise it at any time to ensure compliance with cooperative principles, legal standards, and the best interests of the membership.

## Member Access to Records -Request Form

Please complete this form to request access to records or information not already available on the cooperatives website.

### Member Information:

Member Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Are you an active member of record? Yes \_\_\_\_\_ No \_\_\_\_\_ Account Number \_\_\_\_\_

### Requested Information and Purpose of Request:

Please describe the specific document(s) or information you are requesting and the purpose of the request. Be as detailed as possible to help us identify the record(s) (including any applicable year(s)):

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### Acknowledgement

By signing below, I acknowledge the following:

- I am an active member of the Cooperative
- I have read, understand, and agree to abide by **Article 11-Member Access Records**.
- I agree that I will not photograph, record, or copy any records reviewed and that viewing will occur only by appointment and under supervision at the cooperatives office.
- I understand that approval of this request is at the discretion of the CEO, based on the relevance of the request, cooperative policy and any other factor deemed relevant.
- I understand that if I violate this policy, that my request may be immediately terminated and any future request made by me may be subject to additional scrutiny.

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

### For Cooperative Use Only

Date Received: \_\_\_\_\_ Received By: \_\_\_\_\_

CEO Review Complete: \_\_\_\_\_  Approved  Denied

If approved, Scheduled viewing Date/Time: \_\_\_\_\_

If approved, EnerStar management team assigned to supervise: \_\_\_\_\_

If denied, reason for the denial:” The information requested is confidential” \_\_\_\_\_