



Board Docket — Directors Manual

This book is for **seated directors**. It is how you review board business, reply on the record, and signal readiness. It is **not** a vote.

If you are also the **Board Administrator** (the person who runs the association's account), use this book for director work and the [Management Manual](#) for Queue tools, seats, members, billing, and backup. The board chooses officer titles such as President; that is not the same as Board Administrator.

Screenshots in this book are from a sample association. Your live account shows your association's name and items.

Related: [Management Manual](#) · [Members Manual](#) · [Counsel Manual](#)

1. What this is

Board Docket is Florida HOA board correspondence software. It keeps one association-owned record per matter so directors may communicate electronically, prepare a consent agenda, and record Adopted or Not adopted only after a noticed meeting. It is not an electronic vote, not legal advice, and not HOA management software.

Each matter is a **docket item** (sometimes called an Action): a title, a description, files, and one conversation.

You:

- Open items sent to the board
- Reply as **Director**
- Click **I've Reviewed This** when asked
- Click **Ready for Consent Agenda** or **Request Board Discussion** when asked
- From **Mail**, **Suggest for consideration** so the thread enters board consideration. It then leaves Mail.
- Mark **In favor** on a suggested item (not a vote; silence is not in favor)
- **Delete draft** on an unpublished item you can open (it is not yet the board record)

You do **not**:

- Cast a board vote in the app
- See how other directors signaled Ready before agenda lock
- Create a live item for the whole board (you **suggest**; management **Advances**)
- Use **Forward into Docket** (actions+...) — that folder is staff-only
- Hide a message on a DocketItem from management (use **Mailbox** for participant-private threads)
- Delete an item after it is live (management or the Board Administrator use **Cancel** so the record stays)

The **association** owns the record. If the management company changes, history stays.

The header is white. A **sage** line on the bottom of the bar means you are signed in as board. Under the bar: **name · title · Signed in {date time}**, frozen at login until Sign out. Title is your seat label when you have one.

Ask in the header answers product questions from these manuals and the FAQ. It cannot see your association's items. It is not legal advice and not a vote. **Search** finds items you can already open.

2. Sign in

1. Open your Board Docket address (your association may use `https://your-slug.boarddocket.com`).
2. Enter the email on your director seat.
3. Type the **6-digit code** on that same page, in the **same browser**. Codes expire and work once. There is no clickable login link. If a code expires, request another — there is no request cap.
4. If you sit on more than one association, pick the correct one.

 Board Docket

[Demo](#) [Pricing](#) [FAQ](#) [Start trial](#) [Sign in](#)

Sign in

Enter your email. We send a 6-digit code. Type it here in this same browser — not a link.

Email

Email me a sign-in code

[Management: password and authenticator](#)

 Board Docket powered by StoufferAI

[Demo](#) [Pricing](#) [FAQ](#) [Manuals](#) [Firms](#) [Terms](#) [Privacy](#) [Sign in](#)

On a phone: Bookmark sign-in. Request the code from the phone you will use. A forwarded code will not work in a different browser.

Optional: **More → Texts** to get a text when an item is sent to the board or a director asks a question. Texts are notices, not a vote, and never used to log in.

3. Queue (home)

Home is **Queue**. It holds only what is still under consideration, plus your private drafts. A mail thread leaves **Mail** when it is placed here. Later comments stay on that item. They do not continue as a second thread in Mail.

Section	Meaning
My drafts	Unpublished drafts only you can see. They are not on the Queue until you suggest them from Mail.

Section	Meaning
Under consideration	Comment and mark In favor . You see only your own comments and management's replies. You do not see other directors' comments. Not live until management Advances . Not a vote.

Live items, meeting items, and closed items are on **Docket**, not here. When management advances an item, that same conversation moves to the Docket and leaves the Queue.

On **Docket**, and on the public demo Queue, each row shows **Start Date** and **Last Update** before the due date. Start Date is when the item was created. Last Update is the last time that item changed. Dates are month and day. On a phone those two columns stay hidden so the title still fits.

There is no “awaiting others” list. You do not see other directors’ Ready signals before the agenda is locked.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

Director Smith · Director · Signed in Oct 9, 2026, 10:47 AM

Queue ⓘ

Next meeting 9/17/2026

My drafts ⓘ

Fence staining question on Oak Court

Discussion only. No board vote.

Private draft. Finalize to suggest it. This is not a vote.

Emailed

Under consideration ⓘ

Weekend amenity hours — related suggestion

Suggested — not live until accepted

Board Docket powered by StoufferAI

Use the **Search** box in the header to find an item by title or description.

Sign-in opens **Mail**, and that tab is highlighted. **Queue** lists drafts and items under consideration. **Docket** is the live and closed list. **Meetings** is the meeting calendar. There is no **New** tab.

4. Open an item

Tap a card. You will see:

- Title, amount, and classification (with the policy or rule source)
- Description
- Work stages
- **Conversation** — one thread, and it lives in one place. On the Queue you see only your comments and management's replies. After **Advance**, questions and comments on the live item are visible to the full board. Each director turn shows a colored identity mark and a timestamp.
- **Activity** (collapsed under the thread) — status beats such as "placed on a meeting." Not replies. Expand only if you need the log.
- Files — **Open** (read) and **Download** on the reply or at related documents

There is no **Approve** or **Reject**. Talking here is correspondence, like email. **Once posted, a message cannot be edited or withdrawn.** Decisions that need board approval happen at a **noticed board meeting**. After that meeting, the record may say **Adopted** or **Not adopted**.

404

This page could not be found.

← Queue

Landscape contract — \$6,200

\$6200.00

Consent Agenda Candidate (Purchasing Policy §4.2)

RFP circulated to three vendors. Two bids compared. Pulled to the regular agenda after Director Davis requested discussion.

WORK STAGES

Prepare

Board review

Meeting

Closed

WHO CAN SEE THIS

Management

Board

Members

Meeting recap

Request meeting recap

- DJ

DIRECTOR JONES · AUG 23, 5:00 PM

Confirm all three walk the same beds including the Oak Court slope.
- PAT MANAGER · AUG 25, 5:00 PM

Walk completed. All three walked Oak Court. Harbor may no-bid. Waiting on numbers.
- PAT MANAGER · AUG 31, 5:00 PM

Two bids are in. Harbor declined. Greenfield is \$6,200 for the year. Oak & Pine came in at \$7,150 with a wider mulch spec. Both bids are attached.

0

Greenfield-bid.pdf · Open · Download

0

Oak-and-Pine-bid.pdf · Open · Download
- DD

DIRECTOR DAVIS · SEP 1, 5:00 PM

I need the full bid package before consent. Why is Oak & Pine higher, and did both walk the same beds? Please pull this to discussion.
- PAT MANAGER · SEP 2, 5:00 PM

Side-by-side is attached. Same walk date. Oak & Pine includes pine straw that Greenfield priced as an extra.

0

Bid-comparison.pdf · Open · Download
- PAT MANAGER · SEP 4, 5:00 PM

I placed this on the regular agenda of the April noticed meeting. The packet is the RFP, both bids, and the comparison.
- DS

DIRECTOR SMITH · SEP 4, 9:00 PM

Thank you. Regular agenda is the right place. I can support Greenfield if the mulch extra is written as a not-to-exceed.
- DB

DIRECTOR BROWN · SEP 5, 5:00 PM

I will come prepared for the meeting. No further questions from me.
- PAT MANAGER · SEP 17, 5:02 PM

The current landscape contract ends May 31. I am drafting an RFP for annual maintenance: mow, beds, mulch, and an irrigation check. Comment on scope before I send it out. This is not a vote.
- DS

DIRECTOR SMITH · SEP 18, 12:41 PM

Filed from official mail to director.cedarridge@inbound.boarddocket.com.
From: office@oakandpine.example
Subject: Oak & Pine bid follow-up — Oak Court beds

We walked the same beds as Greenfield, including Oak Court slope. The \$7,150 figure is a wider mulch spec, not a different walk. Happy to answer questions on the landscape item.
- AP

ALEX PRESIDENT · SEP 18, 5:02 PM

Include pine straw versus mulch as an alternate so bids are comparable. Send to at least three vendors.
- PAT MANAGER · SEP 19, 5:02 PM

RFP is attached and sent to Greenfield, Oak & Pine, and Harbor Lawn. Walk March 12. Bids due March 19. This is not a vote.

0

Landscape-RFP.pdf · Open · Download
- DD

DIRECTOR DAVIS · SEP 20, 5:02 PM

DB DIRECTOR BROWN · SEP 20, 3:42 PM

Who else was invited? Last year we only got one bid.

DD DIRECTOR DAVIS · OCT 1, 5:02 PM

Asked for board discussion
Need the full bid package

DS DIRECTOR SMITH · OCT 3, 5:02 AM

Ready for the consent agenda
Fine for consent if the mulch extra is written as a not-to-exceed.

DJ DIRECTOR JONES · OCT 3, 5:02 PM

Ready for the consent agenda
Ready once this is on a noticed meeting.

Activity (2)

Status beats for this item. Not conversation.

[Expand](#)

Reply as management

Font **Arial** Size **Normal** **B** *I* U Highlight Clear

Reply to the board

Attach documents ①

Choose Files No file chosen

On the [meeting agenda](#).

2 of 5 eligible directors ready. Silence is not counted as ready.

Record recusal

Related documents ①

0 Landscape-RFP.pdf · [Open](#) · [Download](#)

0 Greenfield-bid.pdf · [Open](#) · [Download](#)

0 Oak-and-Pine-bid.pdf · [Open](#) · [Download](#)

0 Bid-comparison.pdf · [Open](#) · [Download](#)

Choose File No file chosen

Upload

Director	Email	Text	Viewed	Response
DB Director Brown	—	—	9/22/2026, 3:07:24 PM	No response
DD Director Davis	—	—	9/8/2026, 4:45:20 PM	requested discussion
DJ Director Jones	—	—	—	ready for consent
DL Director Liner	—	—	—	No response
DS Director Smith	—	—	9/6/2026, 7:24:58 PM	ready for consent

Board Docket powered by StoufferAI

5. What you can do

When the item is waiting on directors, look for **What you can do**.

I've Reviewed This

On acknowledgment or information items. Confirms you have seen it. Not a vote.

If staff add material after you have finished — a filed mailbox thread, a new document, or a management post — that review no longer covers the item. You return to **Needs your attention**. The item says new material was added. Read it or comment. A request for discussion or more information stays in effect. This is not a vote.

Ready for Consent Agenda

On a consent-agenda candidate. Means you are prepared for this item to sit on the **consent agenda** at the next noticed meeting. That is **not a vote**. The vote is the meeting motion (often one batch motion if the item stays on consent). **If you do nothing, you are not counted as ready**. Silence is

never Ready. If staff add material after you signal Ready, you return to open and signal Ready again on the new content. If Ready no longer meets the threshold, the item leaves the consent agenda.

Request Board Discussion

Pulls the item off the consent track onto the **regular agenda**. You must give a reason. Not a vote.



Director Smith · Director · Signed in Oct 9, 2026, 11:30 AM

← Queue

Landscape contract — \$6,200 ⓘ

\$6200.00

Consent Agenda Candidate (Purchasing Policy §4.2)

RFP circulated to three vendors. Two bids compared. Pulled to the regular agenda after Director Davis requested discussion.

WORK STAGES ⓘ

Prepare

Board review

Meeting

Closed

WHO CAN SEE THIS ⓘ

Management

Board

Members

Conversation ⓘ

PAT MANAGER · AUG 22, 5:00 AM

Three invited. Harbor said they will walk. I will post bids here when they land. Still discussion only.

DJ DIRECTOR JONES · AUG 23, 5:00 PM

Confirm all three walk the same beds including the Oak Court slope.

PAT MANAGER · AUG 25, 5:00 PM

Walk completed. All three walked Oak Court. Harbor may no-bid. Waiting on numbers.

PAT MANAGER · AUG 31, 5:00 PM

Two bids are in. Harbor declined. Greenfield is \$6,200 for the year. Oak & Pine came in at \$7,150 with a wider mulch spec. Both bids are attached.

0 Greenfield-bid.pdf · [Open](#) · [Download](#)

0 Oak-and-Pine-bid.pdf · [Open](#) · [Download](#)

DD DIRECTOR DAVIS · SEP 1, 5:00 PM

I need the full bid package before consent. Why is Oak & Pine higher, and did both walk the same beds? Please pull this to discussion.

PAT MANAGER · SEP 2, 5:00 PM

Side-by-side is attached. Same walk date. Oak & Pine includes pine straw that Greenfield priced as an extra.

0 Bid-comparison.pdf · [Open](#) · [Download](#)

PAT MANAGER · SEP 4, 5:00 PM

I placed this on the regular agenda of the April noticed meeting. The packet is the RFP, both bids, and the comparison.

DS DIRECTOR SMITH · SEP 4, 9:00 PM

Thank you. Regular agenda is the right place. I can support Greenfield if the mulch extra is written as a not-to-exceed.

DB DIRECTOR BROWN · SEP 5, 5:00 PM

I will come prepared for the meeting. No further questions from me.

PAT MANAGER · SEP 17, 5:02 PM

The current landscape contract ends May 31. I am drafting an RFP for annual maintenance: mow, beds, mulch, and an irrigation check. Comment on scope before I send it out. This is not a vote.

DS DIRECTOR SMITH · SEP 18, 12:41 PM

Filed from official mail to director.cedarridge@inbound.boarddocket.com.

From: office@oakandpine.example

Subject: Oak & Pine bid follow-up — Oak Court beds

We walked the same beds as Greenfield, including Oak Court slope. The \$7,150 figure is a wider mulch spec, not a different walk. Happy to answer questions on the landscape item.

AP ALEX PRESIDENT · SEP 18, 5:02 PM

Include pine straw versus mulch as an alternate so bids are comparable. Send to at least three vendors.

PAT MANAGER · SEP 19, 5:02 PM

RFP is attached and sent to Greenfield, Oak & Pine, and Harbor Lawn. Walk March 12. Bids due March 19. This is not a vote.

0 Landscape-RFP.pdf · [Open](#) · [Download](#)

DD DIRECTOR DAVIS · SEP 20, 5:02 PM

Who else was invited? Last year we only got one bid.

DD DIRECTOR DAVIS · OCT 1, 5:02 PM

Asked for board discussion

Need the full bid package

DS

DIRECTOR SMITH · OCT 3, 5:02 AM

Ready for the consent agenda

Fine for consent if the mulch extra is written as a not-to-exceed.

DJ

DIRECTOR JONES · OCT 3, 5:02 PM

Ready for the consent agenda

Ready once this is on a noticed meeting.

Activity (2)

Status beats for this item. Not conversation.

Expand

Reply as Director

Font

Arial

Size

Normal

B

I

U

Highlight

Clear

Reply to management

Attach documents ⓘ

Choose Files

No file chosen

On the [meeting agenda](#).

3 of 5 directors have responded

Related documents ⓘ

0 Landscape-RFP.pdf · [Open](#) · [Download](#)

0 Greenfield-bid.pdf · [Open](#) · [Download](#)

0 Oak-and-Pine-bid.pdf · [Open](#) · [Download](#)

0 Bid-comparison.pdf · [Open](#) · [Download](#)

Board Docket powered by StoufferAI

Request More Information

Pauses the clock until management replies.

Reply as Director

Type in the composer and send. The post is addressed to management. The whole board who can open the item can read it. You may attach files on a reply; **Open** and **Download** stay on that turn. **Once posted, you cannot edit or withdraw.** Send a follow-up.

Do not hunt only at the bottom of the page for files that were attached in the thread.

Delete draft

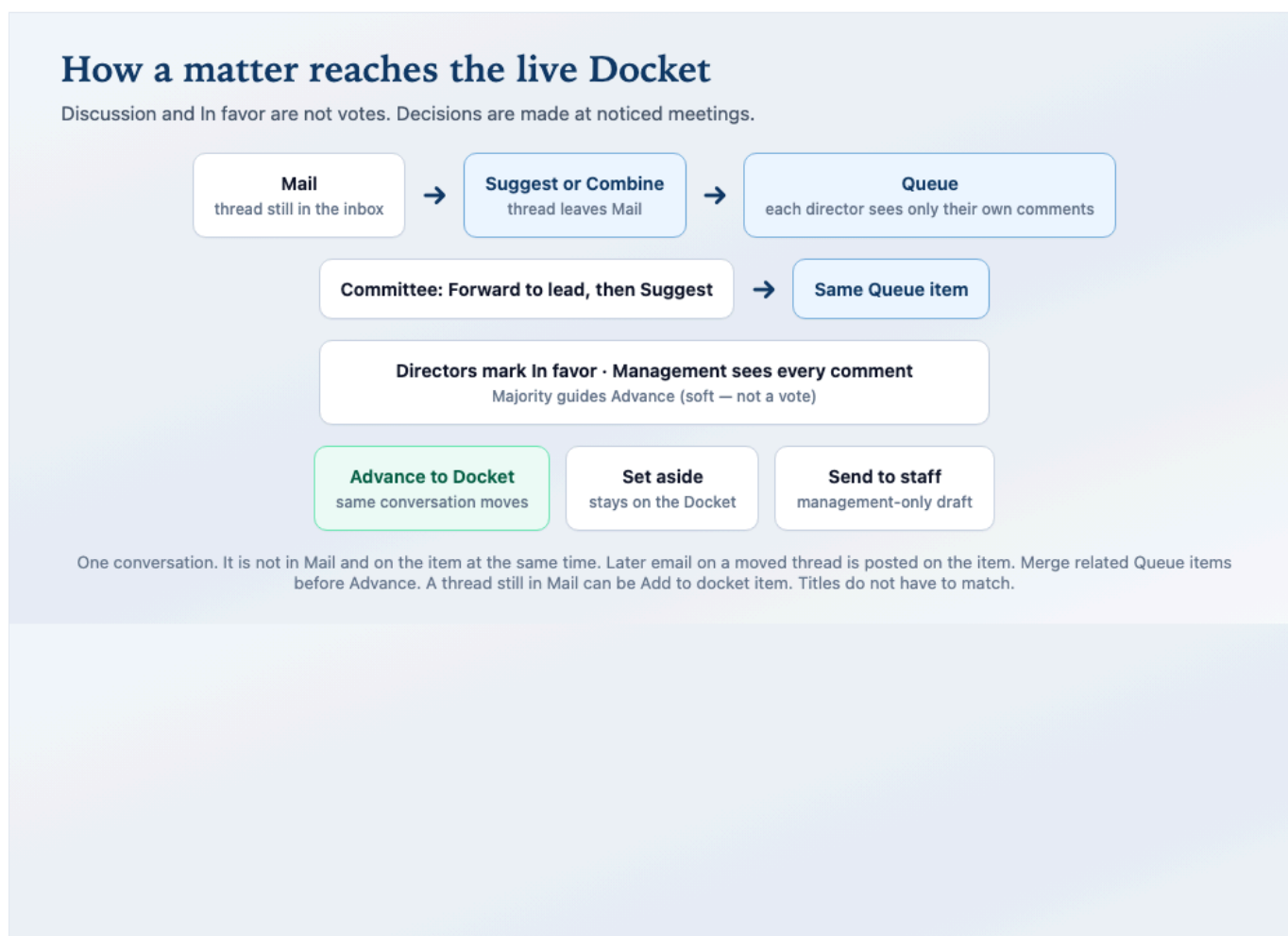
Open an unpublished **draft** on **Docket** (board-visible drafts only; management-only drafts stay hidden). Click **Delete draft**. That removes the item. It is not yet on the board record.

After **Submit**, Delete draft is gone. You cannot cancel a submitted item — ask management or the Board Administrator to **Cancel** it so the trail stays.

6. Suggest an item (consideration)

Flow

Committee rooms feed the same consideration path as a director Suggest. Management decides after comment and In favor.



In the app

1. Open **Mail** and the thread.
2. Click **Suggest for consideration**.

The thread leaves Mail. It is now the Queue item. Mark **In favor** when you support advancing it. You do not see other directors' comments on that item. It is not live until management or the Board

Administrator **Advances to Docket**. That move keeps the same conversation and removes it from the Queue. Commenting is not Advance. In favor is not a vote.

Mailbox (participant email)

Open **Mail**. Engaged management, directors, counsel, and committee members share this screen. On desktop it is a three-pane email client (folders · thread list · reading/compose) on `mail.boarddocket.com`. Mail holds only threads that are not yet on an item. **Suggest for consideration** moves that thread to the Queue and removes it from Mail. A later email on that thread is posted on the item, not as a second Mail conversation. Sent and received messages are **association records**. Visibility is limited to participants until you **Share with full board** or **Suggest for consideration**. Discussion only — not a vote. External threads email every message to outside parties; use **Discuss privately** for a linked internal thread.

Opening a conversation uses the **same form as Compose**: From, To, Cc/Bcc, formatting, and attachments. To, Cc, and Bcc each include a box for any email address, comma-separated. Addresses you type receive the message by email. On To, **All**, each director, and the manager are names with a circle. **All** selects everyone on that line. Names with a circle stay in Board Docket. Counsel, the board administrator, and contacts are not listed. The subject stays the one already on the thread. **Send reply** posts on that conversation. **Save draft** and **Send as** are for a new message. Adding an outside address on a reply makes that thread external, and later messages on it go to those addresses. **Discuss privately** still starts a separate internal thread.

Committee threads: members **Forward to lead**; the lead may **Suggest for consideration** (or Forward to board, then a seated director may Suggest). That opens one Queue item and the mail thread leaves Mail. It is not a staff-only draft. Content-free notices go to your personal email; reply on the item in Board Docket. Confirm records and FS 720.303(2) with association counsel.

Directors do **not** use **Forward into Docket** (actions+...). That folder is for engaged management and the Board Administrator only.



MAILBOX

cedarridge.alex.president@mail.
boarddocket.local

Inbox 4

Drafts 1

Unassigned 0

Compose

Contacts

Records access

Forward into Docket

INBOX

Select related threads. Each director still sees only their own comments.

Combine into one item

☐ April notice draft — board administrator
Internal · B1

☐ Landscape committee — mulch
recommendation to board
Internal · C3

☐ Insurance renewal options (shared with board)
Internal · B2

☐ Draft budget worksheet (shared with board)
Internal · B2

Select a conversation

Choose a thread from the list, or open Compose to write a new message. A thread leaves Mail when it is placed on the Queue. Later comments stay on that item.



MAILBOX
cedarridge.alex.president@mail.
boarddocket.local

Inbox 4

Drafts 1

Unassigned 0

Compose

Contacts

Records access

Forward into Docket

Compose a new message in the right pane.

Available to engaged management, directors, counsel, and committee members. Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

From

Alex President (Cedar Ridge Board)
cedarridge.alex.president@mail.boarddocket.local

Send as

Board / management mailbox

To

[Cc / Bcc](#)

Any email address, comma-separated

☐ All ☐ Brown ☐ Davis ☐ Jones ☐ Liner ☐ Smith ☐ Pat Manager

Subject

Message

Font Arial Size Normal B I U Highlight Clear

Attachments

Choose Files No file chosen

Addresses you type receive this message by email. Names with a circle stay in Board Docket.

Send

Save draft



Director Smith · Director · Signed in Oct 9, 2026, 11:30 AM

MAILBOX

cedarridge.director.smith@mail.boarddocket.local

Inbox

9

Drafts

2

Compose

INBOX

Pool heater quotes — packaging for a draft

Internal · B1

Guest parking signs — wording

Internal · B1

Roof reserve study — questions for next packet

Internal · B1 · Counsel

Landscape committee — mulch recommendation to board

Internal · C3

Clubhouse Wi-Fi upgrade estimate

Internal · B1

Gate motor service window

External · B1

Pool heater quote — private review

Internal · B1

Insurance renewal options (shared with board)

Internal · B2

Draft budget worksheet (shared with board)

Internal · B2

Pool heater quote — private review

Internal thread · B1

Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

Share with full board

Suggest for consideration

Opens a suggested Docket item for the board and management to comment. It is not live until management Advances it. This is not a vote. This cannot be undone.

This elevation cannot be undone.

Director Smith · internal · Mon Oct 05 2026 12:50:36 GMT-0400 (Eastern Daylight Time)

Jones — two heater quotes attached in my notes. Discussion only; not a vote.

Director Jones · internal · Mon Oct 05 2026 14:50:36 GMT-0400 (Eastern Daylight Time)

Thanks. Prefer the unit with the longer warranty before we ask management to package it.

From

Director Smith (Cedar Ridge)

cedarridge.director.smith@mail.boarddocket.local

To

[Cc / Bcc](#)

Any email address, comma-separated

☐ All ☐ Brown ☐ Davis ☒ Jones ☐ Liner ☐ Smith ☐ Pat Manager

Subject

Pool heater quote — private review

Message

Font

Arial

Size

Normal

B

/

U

Highlight

Clear

Attachments

Choose Files

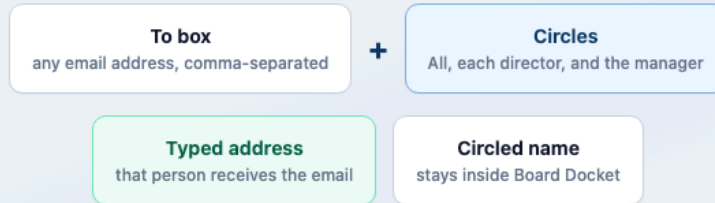
No file chosen

Addresses you type receive this message by email. Names with a circle stay in Board Docket.

Send reply

Same form for a new message and a reply

To, Cc, and Bcc each have a box for any email address. Names with a circle stay in Board Docket.



A reply that adds an outside address makes the thread external

Later messages on it go to those addresses. Discuss privately starts a separate internal thread. The subject stays on the conversation.

Save draft and Send as are for a new message. Send reply posts on the open conversation. This is not a vote.



Pat Manager · Management · Signed in Oct 9, 2026, 10:47 AM

[← Queue](#)**Weekend amenity hours — related suggestion**

Director Jones also raised weekend amenity access. May merge with clubhouse hours. This is not a vote.

WORK STAGES

Prepare

Board review

Meeting

Closed

WHO CAN SEE THIS

Management

Board

Members

Meeting recap [Request meeting recap](#)**Under consideration**

0 of 5 eligible directors in favor (majority needs 3). Silence is not in favor. This is not a vote.

Management decision

Advance moves this to the live Docket. Majority in favor guides that step; below majority you may still Advance with acknowledgment — there are no official electronic votes. Set aside ends consideration. Send to staff parks a management-only draft.

Title

Weekend amenity hours — related suggestion

Description

Director Jones also raised weekend amenity access. May merge with clubhouse hours. This is not a vote.

[Save title / description](#)☐ Acknowledge Advance below majority (not a vote)[Advance to Docket](#)[Send to staff](#)[Reason to set aside](#)[Set aside](#)**Conversation**

The conversation starts when management sends this to the board.

[Reply as management](#)

Font

Arial

Size

Normal

B

I

U

Highlight

Clear

Reply to the board

Attach documents [Choose Files](#) No file chosen**Related documents**

No documents yet.

[Choose File](#) No file chosen[Upload](#) **Official Records Inspection** [Expand](#)

Output

ZIP — ordinary files

[Download](#)

Download is available after you log the written request. ZIP opens on any computer.

[Log a written request](#) to gather this item's writings.

7. Meetings

Open **Meetings**. Each upcoming meeting has:

- **Consent agenda** — items that reached the Ready threshold. At the noticed meeting they may be adopted in one motion if they stay on consent. Ready in the app is preparation, not that motion.
- **Regular agenda** — discussion at the noticed meeting (including items pulled off consent, and items typed **Board meeting required**).
- **Closed session** — a noticed-meeting agenda section with a stated basis (**Personnel** or **Meeting with association attorney**) and a named roster. You see the title, files, and conversation. Members never do, including after the item closes. The public packet does not include this section. Download the **closed-session packet** when you are preparing. This is not a vote and not a chat. After the meeting, the decision is still **Adopted** or **Not adopted**. Confirm process with association counsel.

Download the **meeting packet (PDF)** when you prepare. Placement on an agenda in the app is not a vote.

Closed session — rules of engagement

How a closed session is **performed** in this app:

1. Management or the Board Administrator places a regular-track item on **Closed session** and states a basis. Consent items cannot move here.
2. Seated directors and the Board Administrator always see that HOA's closed items. Management attends only if listed (typically off for personnel, on for meeting with association attorney). Association counsel sees a segment only if they are checked onto it.
3. Talk stays on that docket item. Reply as Director as you would on any other item. There is no executive-session chat and no electronic vote.
4. Prepare from the **closed-session packet**. Do not expect closed Q&A in the public packet or in a public recap.
5. After the noticed meeting, the record is still **Adopted** or **Not adopted**. There is no Approve or Reject on the item.

Privilege is **not** automatic. Closed placement hides the item from members in the app. A records-request ZIP still needs a human exclusion with justification. Confirm process with association counsel. This book is not legal advice.

Closed session — restrictions

Do not
Treat closed session as a board vote, a private director chat, or a private attorney mailbox
Expect members to see the title, files, or conversation on Updates — they never do
Put a public recap or the public packet on closed material
Assume “we met with counsel” is enough for a records exclusion — staff still confirm the justification
Look for Approve / Reject on closed-item chrome

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM

Meetings ⓘ

📅

March board meeting

Wednesday, Aug 12, 2026, 8:43 AM · held · Posted (48 hours) · consent closed

📅

Garage Door Replacement

Thursday, Sep 17, 2026, 9:00 AM · upcoming · Posted (48 hours) · consent closed

📅

April board meeting

Saturday, Sep 19, 2026, 7:11 PM · upcoming · Posted (48 hours) · consent closed

📅

Sunday board meeting

Sunday, Oct 4, 2026, 3:00 PM · upcoming · Posted (48 hours) · consent closed

Schedule a noticed meeting

Title

Board meeting

Date

mm/dd/yyyy

📅

Time

7

00

PM

Pick any day — Saturday and Sunday are allowed.

Notice type

Posted (48 hours)

Create meeting

Board Docket powered by StoufferAI

[← Meetings](#)**April board meeting**

Saturday, Sep 19, 2026, 7:11 PM · upcoming

Notice: Posted (48 hours) · Consent deadline Thursday, Sep 17, 2026, 7:11 PM (consent closed)

[Download meeting packet \(PDF\)](#)[Download closed-session packet \(PDF\)](#)**Official minutes** ⓘ

Official minutes (PDF)

 No file chosen

Accepted at a later meeting (optional)

Not recorded

Closed-session minutes ⓘ

Closed-session minutes (PDF)

 No file chosen

Accepted at a later held meeting (optional)

Not recorded

Add an Action ⓘ

Action

Clubhouse after-hours use — under consideration · correspondence open

Agenda section

Regular agenda

Closed-session basis

Personnel

☐ Management attends this closed session (typically off for personnel, on for meeting with association attorney)

List counsel on this closed session

☐ Ann Attorney☐ Morgan Counsel**Consent Agenda****[Equipment purchase — \\$4,850](#)**

Consent Agenda Candidate (Purchasing Policy §4.2) · on consent agenda

Record decision ⓘ

Adopted

Vote tally (optional)

Resolution number (optional)

Regular Agenda

Landscape contract — \$6,200

Consent Agenda Candidate (Purchasing Policy §4.2) · meeting required

Move up

Move down

Record decision ⓘ

Adopted



Vote tally (optional)

Resolution number (optional)

Record formal decision

Roof replacement — \$15,000

Board Meeting Required (Purchasing Policy §4.3) · meeting required

Move up

Move down

Record decision ⓘ

Adopted



Vote tally (optional)

Resolution number (optional)

Record formal decision

Irrigation main break — emergency repair

Acted Under Emergency Authority (Purchasing Policy §4.4) · ratification pending

Move up

Move down

Record decision ⓘ

Adopted



Vote tally (optional)

Resolution number (optional)

Record formal decision

Closed session

Insurance claim — meeting with association attorney

Closed session — Meeting with association attorney · meeting required

Move up

Move down

Record decision ⓘ

Adopted



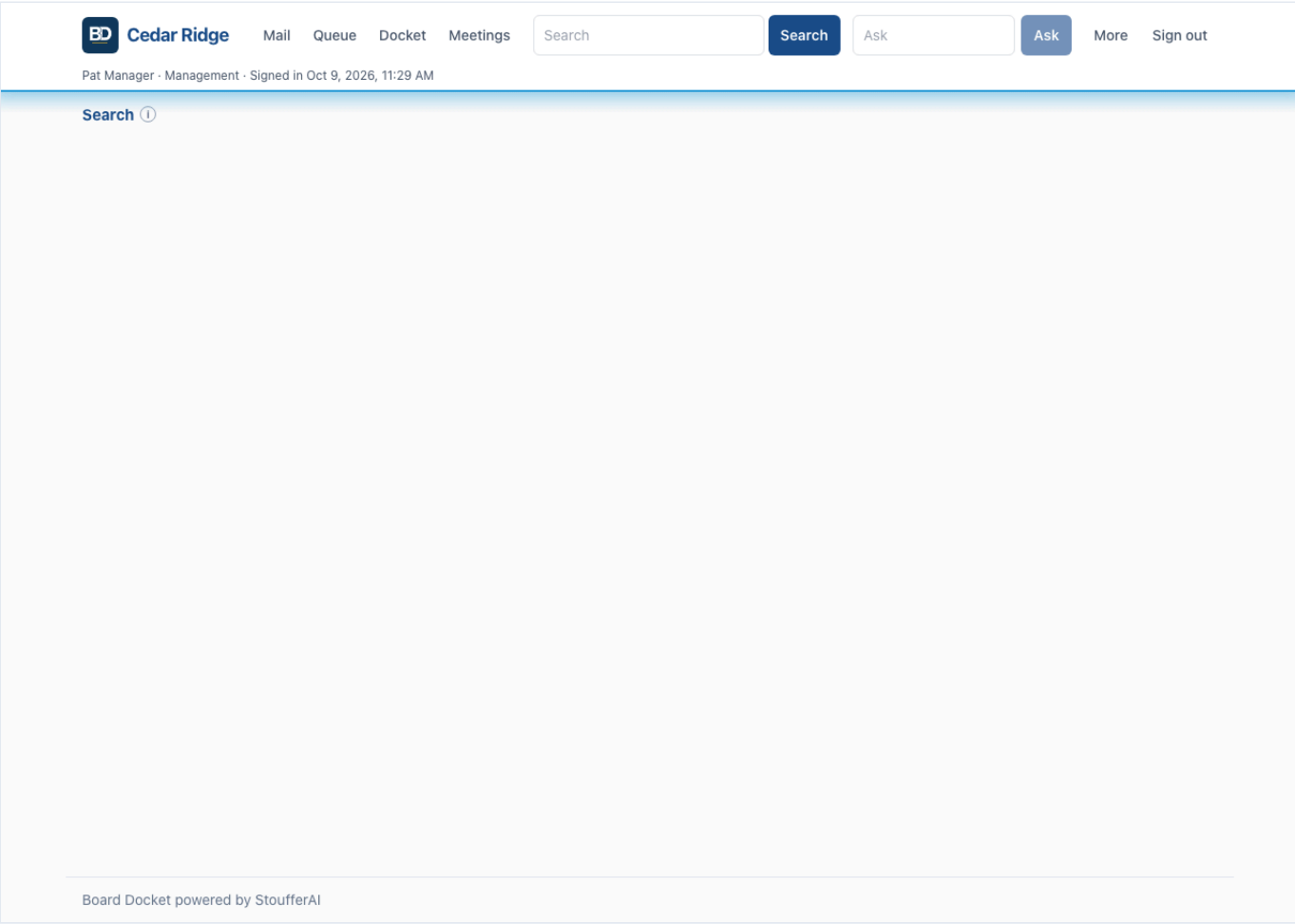
Vote tally (optional)

Resolution number (optional)

Record formal decision

8. Search

The header search is on every screen. Results are items you can already open.



9. Quick rules

Do	Do not
Reply on the item	Email the board a side thread about the same matter if you can use the item
Ready only when you are prepared	Treat Ready, or silence, as a vote
Request discussion if you need the full bid or a debate	Look for Approve / Reject, or expect to edit a posted message
Suggest for consideration from Mail, then comment on the Queue item	Keep writing in Mail after the thread has moved, or expect it to go live until management Advances

Do	Do not
Mark In favor when you support advancing	Treat In favor, Ready, or silence as a vote
Delete a draft that should not go forward	Use Forward into Docket (staff-only) or delete a live item
Keep closed-session talk on that item	Share closed files with members, or treat closed placement as automatic privilege

Need help?

Ask your Board Administrator or management. Product questions: [PRODUCT_SPEC.md](#).

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