

Florida HOA Governance

Board and Management Company Reference for Board Docket

Disclaimer. This reference is for general operational planning and product design. It is not legal advice. Requirements should be confirmed against the current Florida Statutes, the association's governing documents, its management agreement, adopted policies, and association counsel before action is taken.

Purpose

Board Docket should help an association identify who has authority to act, what process is required, what record should be retained, and what action follows. The Board governs the association; a community association manager (CAM) or management firm carries out work within its lawful and delegated authority.

Authority framework

Category	Role in the association	Primary source of authority
Board of directors	Exercises governance responsibilities, takes actions reserved to the Board, and directs association affairs through authorized processes.	Florida law, governing documents, Board resolutions, and adopted policies.
CAM / management firm	Acts as the association's agent and performs management services within authorized scope.	Written management agreement, applicable law, and Board delegation.
Association counsel	Provides legal advice and reviews matters requiring statutory or document interpretation.	Engagement agreement and attorney-client relationship.
Members	Exercise rights and voting powers assigned by law and governing documents; may petition the Board on qualifying issues.	Florida law and governing documents.

Board governance responsibilities

- Maintain fiduciary responsibilities to the association and its members.
- Conduct Board and covered committee business through the required meeting, notice, voting, and minute-taking processes.
- Approve or direct matters reserved to the Board by law, governing documents, policy, or an established authority limit.
- Maintain official records, respond to record requests, and oversee required website or application publication where applicable.
- Meet director education, continuing education, and conflict-disclosure obligations as applicable.

Management responsibilities

- Perform services assigned in the written management agreement and lawful Board directions.
- Prepare and organize operational information, recommendations, notices, packets, vendor information, and records as delegated.
- Act within approved spending, contracting, maintenance, and emergency authority limits.
- Provide required CAM or management-firm information, attend required meetings, and return association records as required by law and contract.
- Escalate items when authority, legal requirements, budget status, or supporting documentation is unclear.

Board management interaction

Item status	Description	Typical next action
Information only	Management reports a completed or ongoing item; no Board action is requested.	Retain as a record or add to the next report.
Management action	The item is within defined delegated authority.	Perform, document, and report according to policy.
Management recommendation	Management proposes action outside its delegated authority.	Collect support and route for Board consideration.
Board direction	The Board directs preparation, research, procurement, or other authorized work.	Assign to management and track completion.
Board decision	The item requires formal Board action.	Prepare the required agenda, notice, materials, vote record, and minutes.
Authority review	Authority or process is unclear.	Review governing documents, agreement, policy, and counsel guidance as needed.

Board Management Authority Matrix

Each association should configure this matrix from its own documents and policies. The examples below are operational defaults, not universal legal conclusions.

Item type	Default owner	Required record or control
Routine, budgeted maintenance within a delegated limit	Management	Budget, authority limit, work order, invoice, and completion record.
Material contract change or item outside a delegated limit	Board	Scope, bids, budget impact, conflict review, Board action, and minutes.
Emergency life-safety or property-protection work	Management within an emergency policy	Incident record, emergency authority, prompt Board notice, and follow-up documentation.
Special assessment or parcel-use rule amendment	Board through required process	Required notice, agenda, supporting documents, vote record, and minutes.
Member petition item	Board	Petition validation, deadline, required notice, agenda, member comments, and recorded disposition.

Board Docket workflow

Stage	Required outcome
1. Intake	Capture the request, requester, description, cost, deadline, documents, and requested action.
2. Classify	Mark the item as information, management action, recommendation, Board direction, Board decision, or authority review.
3. Determine authority	Apply the association-specific authority matrix, management agreement, budget, policy, and legal flags.
4. Determine process	Set applicable meeting, notice, vote, petition, bid, conflict, records, and deadline controls.
5. Prepare	Collect supporting documents; prepare notices, agenda language, and decision materials.
6. Record action	Document direction, Board action, vote or abstention, conditions, and minutes reference.
7. Execute and close	Assign work, track completion, verify output, retain records, and report status.

Florida statutory reference points

The following provisions are central reference points for a Florida HOA workflow. Exact application may depend on the facts and current law.

- Section 720.303: Board meetings, notices, petition process, minutes, official records, records inspection, and website or application obligations.
- Section 720.3033: director education and continuing education, specified officer and director rules, and conflict disclosures.
- Section 468.4334: CAM and management-firm agency, professional standards, meeting attendance, manager information, contract disclosure, and return of records.

Primary legal references

Florida Statutes § 720.303. [https://leg.state.fl.us/statutes/index.cfm?](https://leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&URL=0700-0799/0720/Sections/0720.303.html)

[App_mode=Display_Statute&URL=0700-0799/0720/Sections/0720.303.html](https://leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&URL=0700-0799/0720/Sections/0720.303.html)

Florida Statutes § 720.3033. [https://www.leg.state.fl.us/statutes/index.cfm?](https://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&URL=0700-0799/0720/Sections/0720.3033.html)

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Florida Statutes § 468.4334. [https://www.leg.state.fl.us/statutes/index.cfm?](https://www.leg.state.fl.us/statutes/index.cfm?App_mode=Display_Statute&URL=0400-0499/0468/Sections/0468.4334.html)

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