

BOARD OF DIRECTORS ELECTION CALENDAR CALCULATOR
MONTAGE AT MISSION HILLS HOMEOWNERS ASSOCIATION
 UPDATED June 2023

Year Start **2023**

Election Year **2024**

Required Completion Date

Instructions

Insert Start Year preceding the election year in C5 (Yellow Box). Insert the year of the election in C6 (Yellow Box). Insert date of general meeting in C9 (Green Box). All dates will populate. Be sure to check with Board president as to any proposed changes in Regular Board Meeting dates and adjust calendar as necessary.

Step	Status	Required Completion Date		Days Before Election	Days to Next Deadline
		Saturday, March 16, 2024	Annual Meeting and Vote Counting		
1	<input type="checkbox"/>	Wednesday, August 23, 2023	September Newsletter Mailing The IoE submits the first election summary article for the September Newsletter to inform the membership about the election process, nomination forms, and election calendar.	206	69
2	<input type="checkbox"/>	Friday, September 15, 2023	September Board of Directors Meeting The Board will appoint an IoE and Election Committee and approve an Election Day and Election Calendar no later than the September Board meeting. The IoE will begin the preparation or updating of nomination forms, election calendar and voters list for review and approval.	183	8
3	<input type="checkbox"/>	Saturday, September 23, 2023	First Candidate Recruitment Mailing The IoE sends an official email to the membership at least 90 days prior to the nomination deadline to solicit nominations and provide election information, nomination forms, election by acclamation procedure and election rules. Nominations received must be acknowledge within 7-10 days.	175	38
4	<input type="checkbox"/>	Tuesday, October 31, 2023	November Newsletter Mailing and Voters & Candidates List	137	20

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			The IoE submits second election summary article for the November Newsletter to inform the membership about the election process, nomination forms, election calendar and voters list to be reviewed at the November Board meeting. Include wording indicating that Nominations received will be acknowledge within 7-10 days. IoE requests Property Manager prepare and provide preliminary Voters List and Candidates List.		
5	<input type="checkbox"/>	Monday, November 20, 2023	November Board of Directors Meeting The IoE will submit a report to the Board at the November Board meeting including nomination forms, election calendar and voters list and candidates list for review and approval. Approved Nomination Procecedures, Forms and Notice of Deadlines are mailed to the membership within one week of meeting.	117	10
6	<input type="checkbox"/>	Thursday, November 30, 2023	Notice of Nomination Procedures and Deadline Mailing Date (Last day based upon established election date) Last day to mail Notice of Nomination Procedures and Deadline by general notice or, preferably, individual notice. Include nomination procedures (including how to submit nominations per the election rules), nomination deadline, and candidate and director qualifications. Nominations received must be acknowledge within 7-10 days.	107	27
7	<input type="checkbox"/>	Wednesday, December 27, 2023	Nomination Deadline	80	3

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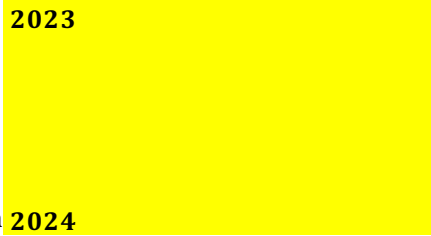
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Step	Status	Required Completion Date		Days Before Election	Days to Next Deadline
			Last day to accept Board nominations or postmark date if provided for in election rules. IoE reviews candidate list and nominations forms to determine if candidate qualifications are met. IoE informs Board and Candidates of candidate status and possible need for an IDR. Nominations received must be acknowledge within 7-10 days.		
8	<input type="checkbox"/>	Saturday, December 30, 2023	January Newsletter Published IoE prepares the third election information newsletter article identifying upcoming election dates.	77	2
9	<input type="checkbox"/>	Monday, January 1, 2024	IDR Notice Date Give ten days' individual notice to any non-qualifying candidate that they are not qualified to serve on the board, stating the reason and offering an opportunity to participation in IDR on a business day of their choosing between 10 and 15 calendar days after the notice.	75	1
10	<input type="checkbox"/>	Tuesday, January 2, 2024	Select Inspector of Elections (Last Day) Select one (1) or three (3) inspector(s) of elections consistent with the election rules. This is a "soft" date. it allows adequate time for the inspector(s) to understand and delegate their duties. An inspector must be selected before the pre-ballot notice is delivered. Recommend that the IoE be selected by Board in September to facilitate administration of the entire election process working with the Board and Management.	74	10

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11	<input type="checkbox"/>	Friday, January 12, 2024	January Board of Directors Meeting Board conducts candidate IDR if necessary. Board reviews and approves final list of nominees and determines if election by acclamation is warranted. Board decides whether to certify the candidate and approve the final ballot format or to declare the election by acclamation. Board approves final voters list and and period for voter list review and approval dates.	64	3
12	<input type="checkbox"/>	Monday, January 15, 2024	IDR Completion Date and Preparation of Lists (Last day based upon established election date) Last day to complete IDR for any non-qualifying candidates. After close of the nomination period, receipt of all nominations, and completion of any non-qualifying candidate IDR (or the passing of that deadline), and before mailing pre-ballot notice, prepare the candidate registration list and the voter list to be ready for any verification requests.	61	1
13	<input type="checkbox"/>	Tuesday, January 16, 2024	Pre-Ballot Notice or Election by Acclamation Date (last day based upon established election date)	60	14

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Election Year	2024			
Step	Required Completion Date			
14	<input type="checkbox"/> Tuesday, January 30, 2024	<p>March Newsletter Published</p> <p>IoE provides election article 4 on status of election and a reminder to mail or bring ballots to PPM or General Board Meeting location.</p>	46	7
15	<input type="checkbox"/> Tuesday, February 6, 2024	<p>Voter List and Candidate Registration List Correction Deadline</p> <p>Last day for members to report errors or omissions in the voter list or candidate registration list to the inspector(s) of election. Any errors or omissions must be changed or corrected within two (2) business days of being reported. Members are allowed to verify their own information only on either list. Owners may not see the voter list or candidate registration list during the election process. Lists may be subject to disclosure after the election as part of a records request.</p>	39	9

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16	<input type="checkbox"/>	Thursday, February 15, 2024	Ballot and Election Rule Mailing Date and Finalize Voter List Latest date to (1) mail or otherwise deliver ballots to the members and (2) deliver election rules to the members by either individual delivery (mail) or posting them to the Associations internet website address identified on the ballot. Finalize and retain the voter list (including all owners of record as of the date the ballots were mailed or delivered). All ballots to be returned directly to the IoE.	30	22
17	<input type="checkbox"/>	Friday, March 8, 2024	March Board of Directors Meeting IoE reports on status of election.	8	8
18	<input type="checkbox"/>	Saturday, March 16, 2024	Voting Deadline and Ballot-Counting Meeting Ballot-counting at/during Board meeting. Counting can be scheduled after voting deadline if permitted in election rules. Conduct Annual Meeting or other ballot-counting meeting according to bylaws and election rules. Results are reported at meeting. Votes are automatically recounted following the meeting to validate the earlier count.	0	15
19	<input type="checkbox"/>	Sunday, March 31, 2024	Election Results Deadline Last day to provide general notice (mail or posting) of the tabulated election results (setting forth the number of votes for each director). IoE organizes and safely stores ballots for a period of one year as required by law.	Days After 15	15

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Step Status

			Days Before Election	Days to Next Deadline
20	<input type="text"/>	Friday, May 10, 2024		
		Final Election Certification Report and Recommendations. IoE prepares final election report and recommendations for presentation at the May Board Meeting.	Days After 40	40

Disclaimer: This timeline generator is designed to not set dates on weekends or certain holidays (New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and the Friday after, and Christmas Day. It may schedule dates on other holidays

Credit: This calculator, as modified for Montage at Mission Hills HOA, is based upon the Community Association Election Timeline Creator as developed by Davis-Stirling.com by ADAMS | STIRLING PLC. Dates and events important to Montage at Mission Hills HOA have been added to reflect the HOA's

Note: As of January 1, 2020, attorneys, law firms, managers and management companies providing the Association with services other than solely as an inspector of election are prohibited from serving as inspectors.