

Ballot/Voting Checklist

- ___ Early in the year (Jan or Feb), decide on a deadline for petitions and nominations.
- ___ Change the dates on both forms on the website.
- ___ Email blast seeking nominations and announcing deadline date.

Any member in good standing can initiate a petition and get 25 to 30 signatures. Must be turned in to office by deadline. Office sends to Bylaws Committee to vet proposed amendments and to treasurer to vet signatures, then to Elections Committee.

For BoM candidates, office verifies candidates' membership and good standing. Name MUST be on deed (spouse is not automatically included) and must have registered deed on file. Check with treasurer that account is not in arrears.

___ Prepare solicitation document and ballot. Present to Board at a mid-May Meeting for approval. (Modify the previous years' documents...no need to reinvent the wheel.) For dues increase, this should happen ASAP following the Budget ratification meeting in September.

- ___ Coordinate printing & mailing supplies needed with the office.
 - 306 small **BALLOT** envelopes
 - 550 legal #10 envelopes
 - 40 mailing label sheets (only 20 if CCOA address and CCOA return address are printed directly on the envelopes)
 - 260 **BALLOT** envelope diagrams (can be printed on backside of solicitation document)

___ Check with the office for the actual number of owners (approx 260).

___ Board of Managers must vote to approve ballot and solicitation document.

- ___ Coordinate documents/printing with office admin. Items to print:
 - 18 sheets of CCOA return address labels (unless printed on envelopes)
 - Solicitation document (actual number of owners; not lots)
 - Ballots (306)

___ Check with office administrator to be sure all address labels have been updated. Cross reference lots that have 2 owners. Be sure **only** the designated contact receives a ballot. **Print 2 sets** of the owners' address labels (unless printed on envelopes). Do this close to the mailing date as ownership can change.

___ Figure out postage and order stamps accordingly several days before mailing date (get with treasurer or office administrator to pick up & pay)

___ Check if members are in Good Standing:

- Ask office admin to verify owners' proof of ownership (files with red labels do not have proof of ownership).
- Have treasurer identify any arrears accounts.
- Remove any owner not in good standing from both sets of labels. Labels should be saved to a slick surface in the event an owner's account is brought up to date or proof of ownership is provided. Keep removed labels in yellow folder marked "Owners Ineligible to Vote." (If addresses printed on envelopes, pull envelopes.)

___ Prior to mailing, have the committee prepare owner envelopes, return envelopes, stamp **BALLOT** envelopes and emboss ballots. Postage can also be added to the owner envelopes if amount for multiple lots is known.

___ Have office admin create Ballot Check-in Sheet. Proofread to be sure owners with multiple lots are cross-referenced in secondary column. Office admin will check in returned envelopes up to the deadline. Be sure the envelopes are organized by lot number.

___ Assemble the ballots to include:

- One Solicitation Document
- One Ballot Envelope Diagram (possibly printed on the back of the Solicitation Document)
- One embossed ballot **per lot** (see lot numbers on address label)
- One **BALLOT** envelope **per lot**
- CCOA self-addressed envelope with Owner's return address label in top left corner. Do not add postage.

___ Sort envelopes into groups by number of lots owned (groups are necessary only if postage varies with the number of enclosures). Keep Nathrop separate from the rest of the mailing; post office will deliver them directly instead of sending them off to BV.

___ **Mail at least 30 days prior to the deadline for ballots to be returned: Day of election (July General Membership Meeting) OR designated date for Dues Increase.**

___ On the day of counting, have the following documents/supplies ready:

- Ballot Tally Sheets (4 to 5 depending on how many counters there are)
- One extra Ballot Tally Sheet to combine the totals from the individual tally sheets, marked "Combined Totals"
- One CCOA Ballot Summation Report
- Letter openers, calculators, rubber bands and large paper clips
- Trash cans and several boxes
- Large manila envelope for storing docs and ballots after the count

At the beginning of the meeting, the president will declare the voting closed and dismiss the committee to count ballots. You may go upstairs or to the pantry area.

___ Gather all returned envelopes from the office along with Ballot Check-in Sheet.

- The envelopes should already be in numerical order by lot number.
- Divide the envelopes to match the pages of the check-in sheet.
- Verify the envelopes by initialing the far-right hand column; be sure the lot numbers on the envelope match the lot numbers on the check-in sheet. For multiple lots, some lots might be on other pages of the check-in sheet.
- Open the outer envelopes; verify that the number of **BALLOT** envelopes matches the number of lots on the return label.
 - Toss **unopened BALLOT** envelopes into a central box.
 - Keep the opened outer envelopes in numerical order.
- Divide up the **BALLOT** envelopes for tallying.
 - Check that each **BALLOT** envelope contains only **1** ballot
 - Check each ballot for the embossed CCOA stamp
- Keep careful tallies. Avoid distracting conversation. If you have a question say, "Question." When all the other counters reach a good stopping point, ask your question and discuss with the group.
- Keep each tally sheet with the corresponding stack of ballots.
- Add the totals of the individual tally sheets on the "Combined Totals" tally sheet.
- Compare the number of votes counted with the number of verified units on the check-in sheet. They should match. If not, check the combined totals again. Check the tally sheets to the number of corresponding ballots.
- Fill in the Summation Report. Total Ballots Received = Spoiled + Counted.
- Calculate percentages and have a second person calculate the percentages to ensure accuracy.
- Have all ballot counters sign the Summation Report.
- Make copies of the Summation Report and deliver to the president and board members for certification. Keep the original for the manila envelope.
- ALL ballots & documentation are sealed in the manila envelope & stored in file cabinet 3, 2nd drawer. Include ballots, outer envelopes, all tally and summation sheets, and solicitation document.
- Write a Final Report to email to BoM and post on CCOA website.