

# VIRTUAL ELECTIONS 2021

The On-Line Election Process  
Fourth District PTA

# VIRTUAL MEETING BASICS

## **Association/General Meetings and Events**

The 2020 Bylaw template now allows for Association meetings to be held via teleconferencing. (Article VII, Section 8)

Beginning in October 2020 Associations may hold their meetings via teleconferencing or videoconferencing without a vote from the association.

If you have just updated your Bylaws in 2018 or 2019 you may do one of the following in order to “add” this allowance to your Bylaws:

- You may vote as an association to add the verbiage in Article VII, Section 8 as an additional Standing Rule.  
(Standing Rules may be amended without going through the Bylaw updating process)
- You may vote as an association to allow for meetings by teleconferencing for the remainder of the school year and then vote again to continue if you wish.

**California State PTA rules do not allow proxy votes but teleconferencing and videoconferencing still allows for voting by the members themselves.**

# VIRTUAL MEETING BASICS

## Before the Meeting

- Give notice of the meeting.
- Establish the ground rules for the teleconferencing meeting.
- Prepare the agenda, financial reports, minutes from the last association meeting.
- Email the agenda and ground rules for the meeting to those who indicate they will be on the call.
- Make sure your membership list is up to date and your secretary has a copy.

## During the Meeting

- Conduct the meeting as you normally would. Make note of time you open the meeting as well as adjourn the meeting.
- Set ground rules for the call.
- Verify everyone on the call can hear and be heard.
- Remind people to “Mute” themselves to get rid of outside noises.
- Quorum should be established by roll call and identification of individual members.
- Have your Secretary do a roll call of the Executive Board that is on the call.
- Have your Secretary do a roll call of other attendees that are on the call.
- While the Secretary is calling Roll, have your Membership Chair verify who is a paid member and who is not.

**Remember:** The normal rules of holding a meeting apply to your teleconferencing meeting. People should be treated and treat others with respect and courtesy.

# VIRTUAL MEETING BASICS

## **Is it mandatory that we hold an Association Meeting via teleconferencing?**

No, we are just giving our Units, Councils, and Districts an alternative to hosting an in-person meeting during these uncharted times. Remember to always use BEST PRACTICE. Communicate with your school site and plan your meetings accordingly.

## **How much notice of a Regular Association meeting do I need to give?**

General Association meetings need a minimum of 10 days' notice before hosting the actual meeting. Standard notice is 30 days. No meeting can be held with less than 10 days' notice.

## **How do we give notice of the meeting?**

1. Use the PTA's social media platforms as well as the website to announce details of the meeting
2. See if your principal can place notice of the meeting on the school website and social media platforms
3. Email your membership list directly announcing the meeting and agenda
4. Board members should also share information about the meeting on their personal pages. This may notify people who are not following the PTA.

# BEFORE YOUR ELECTION MEETING

## Before your Election Meeting takes place be sure to do the following:

- Ensure that your Membership VP/Chair has an up-to-date list of current members available. In order to be eligible to vote during the Election Meeting a member **MUST** have paid their dues 30 days prior to that meeting.
- Ensure that 30 days notice of your Election Meeting has been given. Email, Social Media, School Website are all valid means by which to give notice of your meeting.
- If you think you will have a hard time reaching your Quorum number, ask your board members to start reminding others about the meeting by using email or social media.
- **YOU MUST HAVE QUORUM TO CONDUCT YOUR ELECTION MEETING!**
- Prepare your Zoom or other platform meeting. Be sure that the information is given out to **EVERYONE** at your school site. Every parent at your school has the right to attend your Election Meeting whether they are a member or not. If they are not a member they will not be allowed to vote, unless..... (see note later during Election Basics)
- Prepare your Google Doc or other means of “Ballot” ahead of time. (next slides)
- **Assemble your TEAM and exchange Cell Phone #'s to communicate throughout the meeting:**
  - President – Conducts the Meeting
  - Parliamentarian – Ensure Quorum is met (keep track of Participant # during the meeting)
  - Ballot Creator and Monitor – Assign someone who can update the Ballot and monitor the responses

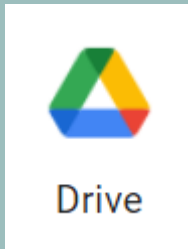
# PREPARING FOR A BALLOT VOTE

Note:  
Using the Zoom  
**Poll Feature** is also an  
anonymous way to  
conduct a Ballot Vote.

## Steps to Preparing a Google Form as a Ballot:

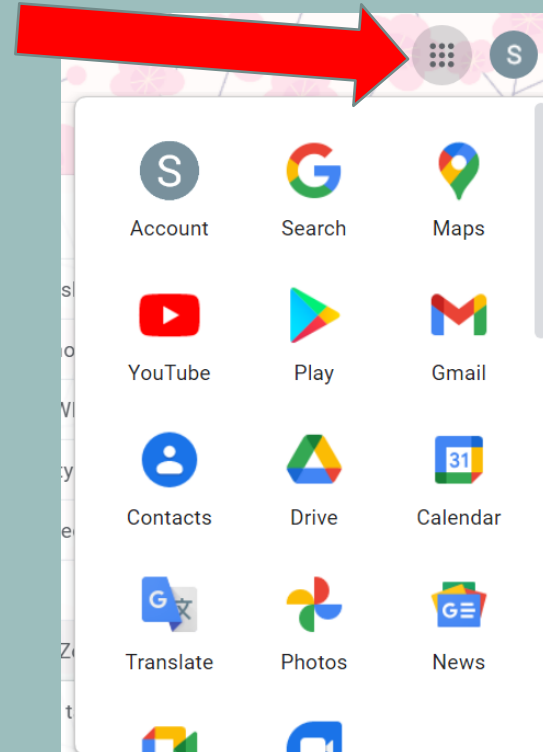
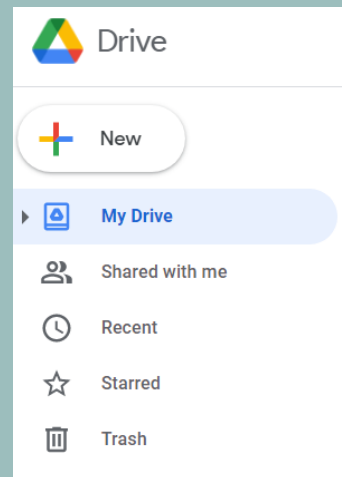
#1: You will need to have a Gmail account in order to access the Google Drive to create the document. You will access the Drive from the “Settings” at the top of the screen.

#2. Click on



This will take you to Google Drive:

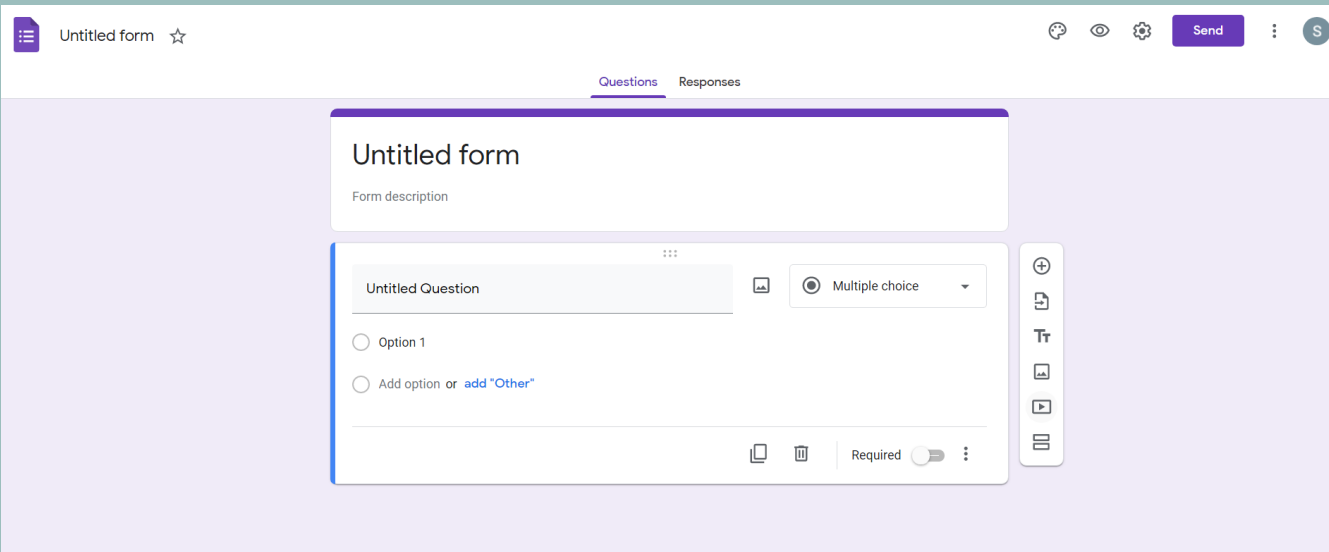
Note:  
Another great program to  
use for your ballots is  
**Survey Monkey**



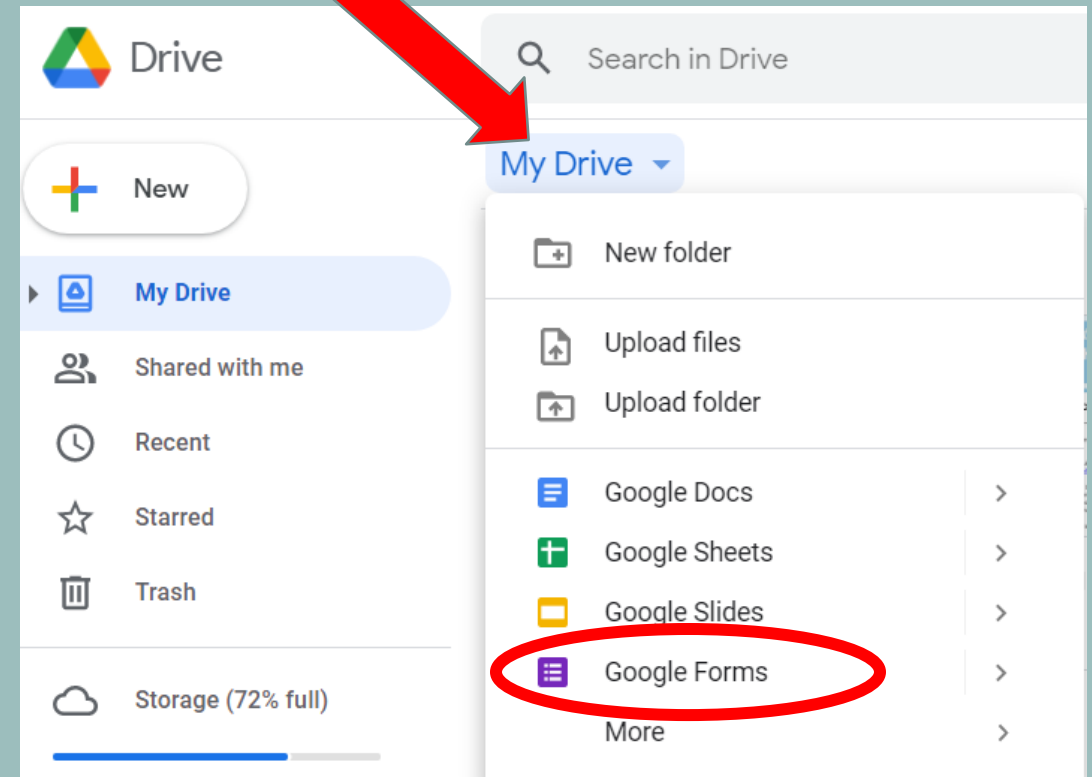
# PREPARING FOR A BALLOT VOTE

#3: Use the “drop-down” menu under “My Drive” to access Google Forms:

#4. This will bring you to an “Untitled” new form:



The screenshot shows the Google Forms editor interface. At the top, there's a header bar with the text 'Untitled form' and a star icon. Below this, there are tabs for 'Questions' and 'Responses'. The main area is titled 'Untitled form' with a subtitle 'Form description'. A question is being created with the title 'Untitled Question' and the type 'Multiple choice'. There are two options: 'Option 1' and 'Add option or add "Other"'. At the bottom right, there are icons for 'Required' (a toggle switch) and a 'Send' button.



# PREPARING FOR A BALLOT VOTE

## Note:

This Tool Bar helps you access photos and add sections



#5: Once here you will give your Form a title.

- My recommendation is that you create a “Ballot” for EVERY elected position. If you have a completed Slate of Officers created by your Nominating Committee, be sure that the FIRST position on every Ballot includes the name of that nominee.
- Each Form will have its own Title: **For Example:**



2021 HUC Election Ballot - President



Then carry that same name down into the body of your Form.

Questions Responses

Untitled form

Form description

Questions Responses

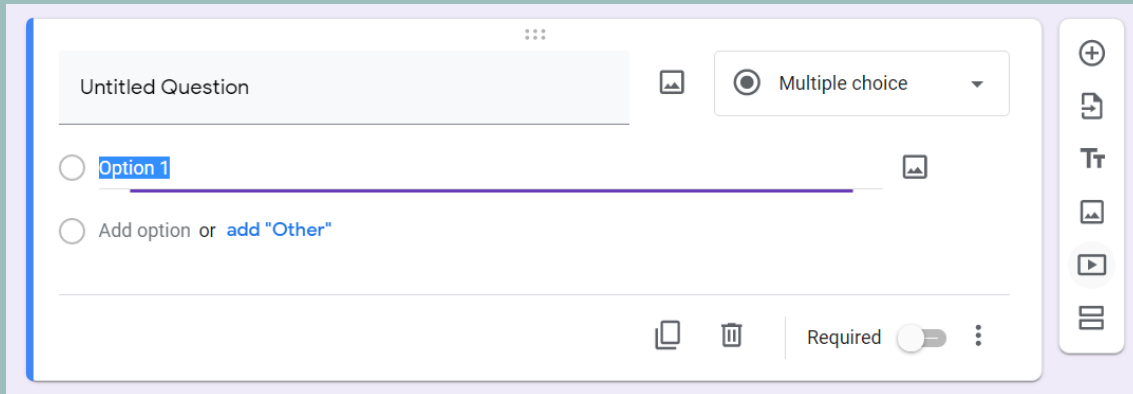
HUC Election Ballot 2021-2022

Nominees for President



# PREPARING FOR A BALLOT VOTE

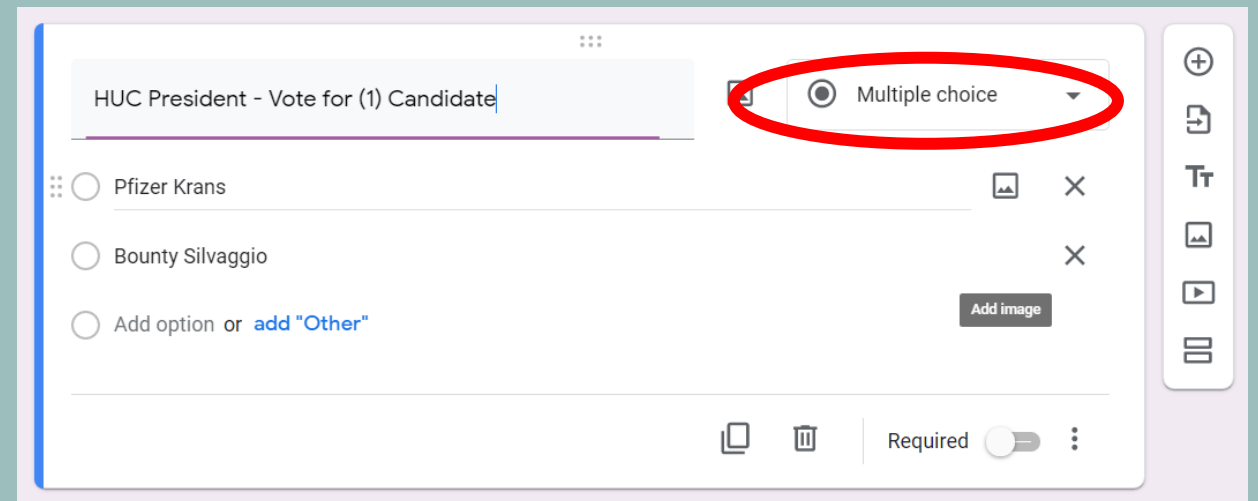
#6. Once you have a Title and have started the body of your form using the same Title, move onto the next Section of the form.



A screenshot of a form editor interface. At the top, there is a text box labeled 'Untitled Question' with a small image icon to its right. To the right of this is a dropdown menu set to 'Multiple choice'. Below the title box, there are two radio button options: 'Option 1' and 'Add option or add "Other"'. At the bottom right of the form body, there is a 'Required' toggle switch which is currently turned off. A vertical toolbar on the right side of the editor contains icons for adding, deleting, and other actions.

#7. Give your Question a Title. For example: Your unit's name and “President – Vote for (1) Candidate”

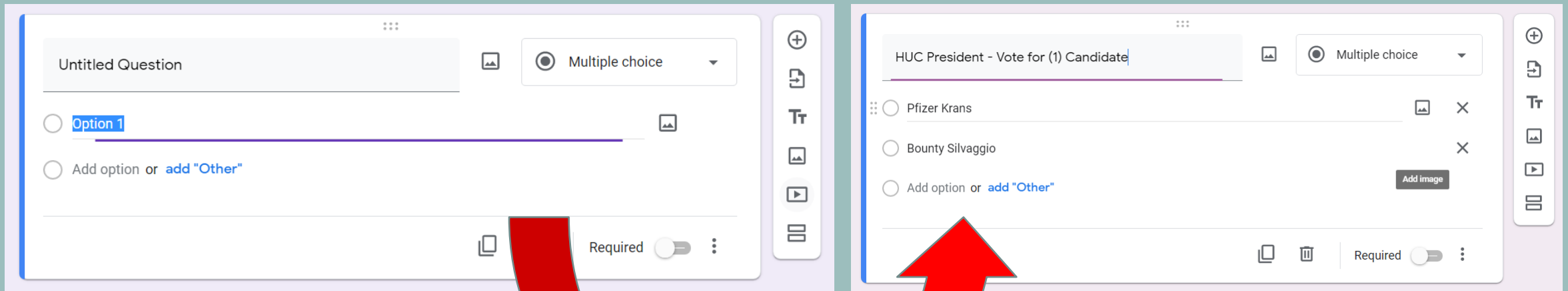
#8. Make certain that your Question says “Multiple Choice” at the top right drop down.



A screenshot of the same form editor interface, but now with a completed question. The title box contains the text 'HUC President - Vote for (1) Candidate'. The dropdown menu at the top right is circled in red and still shows 'Multiple choice'. The radio button options are 'Pfizer Krans', 'Bounty Silvaggio', and 'Add option or add "Other"'. There is an 'Add image' button next to the 'Add option or add "Other"' option. The 'Required' toggle switch at the bottom right is now turned on. The vertical toolbar on the right remains the same.

# PREPARING FOR A BALLOT VOTE

#9. Once you have given your question a title, you will need to “label” each response. Simply type in on each line the names of your candidates. Hopefully, you will only have (2) candidates for each ballot.



The image displays two side-by-side screenshots of a digital ballot creation interface, connected by a large red curved arrow pointing from the left screenshot to the right one.

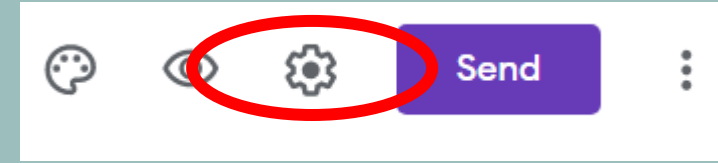
**Left Screenshot:** Shows a blank ballot form. The title field is labeled "Untitled Question". The question type is set to "Multiple choice". There is one option labeled "Option 1" with a radio button. Below it, there is a prompt "Add option or add 'Other'" with a radio button. At the bottom right, there is a "Required" toggle switch.

**Right Screenshot:** Shows the same ballot form but now populated with specific content. The title field is "HUC President - Vote for (1) Candidate". The question type remains "Multiple choice". There are two options listed: "Pfizer Krans" and "Bounty Silvaggio", each with a radio button. Below these, there is a prompt "Add option or add 'Other'" with a radio button. At the bottom right, there is a "Required" toggle switch. A red curved arrow points from the left screenshot to the right one, indicating the progression of the ballot creation process.

# PREPARING FOR A BALLOT VOTE

#10. Once the Ballot is complete you will need to adjust the settings. Click on the “gear icon” at the top right of the page.

- This will bring you to the Settings menu. Under General make sure that you **DO NOT** check the box “limit to 1 response. (if you check that box **ONLY** Gmail users will be able to access the form)
- DO NOT collect email addresses. The email addresses will show up in the Responses and therefore the votes will not be Anonymous.
- DO NOT check the “edit after submit” box.

A screenshot of the 'Settings' menu in a form editor. The 'General' tab is selected. The 'Limit to 1 response' checkbox is circled in red. The 'Edit after submit' checkbox is also circled in red. The 'See summary charts and text responses' checkbox is checked. The 'Cancel' and 'Save' buttons are at the bottom right.

Settings

General Presentation Quizzes

☐ Collect email addresses

☐ Response receipts ?

Requires sign in:

☐ Limit to 1 response

Respondents can:

☐ Edit after submit

☒ See summary charts and text responses

Cancel Save

# PREPARING FOR A BALLOT VOTE



**#11. REPEAT STEPS 1-10 FOR EVERY POSITION ON THE SLATE.** If you have OPEN positions, simply prepare your Ballot for that position and it will remain blank until the day of the election. In Google as soon as you update a form, that update becomes immediate. It will not take long for you to update the specific ballot during the meeting.

## FINAL STEP – DAY OF THE ELECTION:

As the Election progresses and you come upon a Ballot vote, the Parliamentarian or whoever has created the ballots will then go into the Google Form for that position and update it with the additional name(s) for voting.

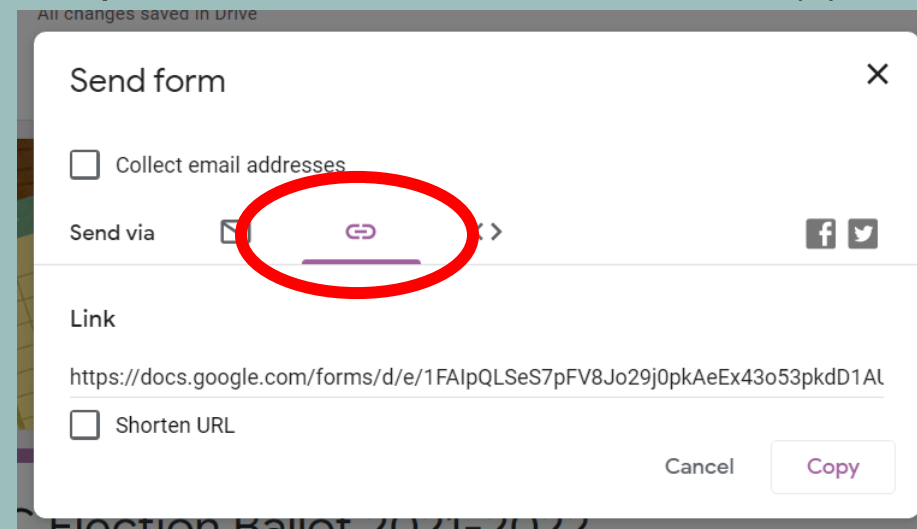
At that point you will need to do the following:

Click the “Send” tab at the top right.

Click the icon that looks like a “link”.

Copy the Link given.

Take that Link and paste it into the “Chat” of the Zoom call, allowing everyone present to use it.



# PREPARING FOR A BALLOT VOTE

## IMPORTANT INFORMATION:

- If you cannot establish that those in attendance are current members, then **EVERYONE** in the election meeting will be permitted to Vote. The President needs to make an announcement to that affect and ask if there are any objections to that procedure. This would only be done if membership is in question and you are comfortable allowing everyone a vote.
- **If you choose to only allow paid members to vote during the election, steps must be taken to ensure that only those members have access to your Poll, Google Form or Survey Monkey. For example:**
  - You can move voting members into a Break-out room for the purposes of voting, ballot or voice.
  - Or...you can move non-members into a Break-out room when the election voting is being done.
  - Once voting is complete the two rooms **MUST** merge back together to finish the meeting and announce the newly elected board.
- Make certain that once your Election begins....**NO ONE** leaves or enters the meeting! This is the same as if you were in person! Make that announcement and inform anyone that if the number of participants changes during the election process the entire election must start again.
  - To ensure that this does not happen, enable the “waiting room” control on Zoom or another platform. That will ensure that no one enters during the meeting unless you allow them to.
- Remind everyone that only **ONE** vote may be cast per attendee! If more votes are cast than are eligible voters, the process starts over.

# PREPARING FOR A BALLOT VOTE

## Counting the Votes:

The responses portion of the Google Form is ANONYMOUS. Everyone can see what the results are, but no one knows how anyone voted.

A Teller Committee must be formed and have access to the Google Form so that they may look at the responses and tally the votes.

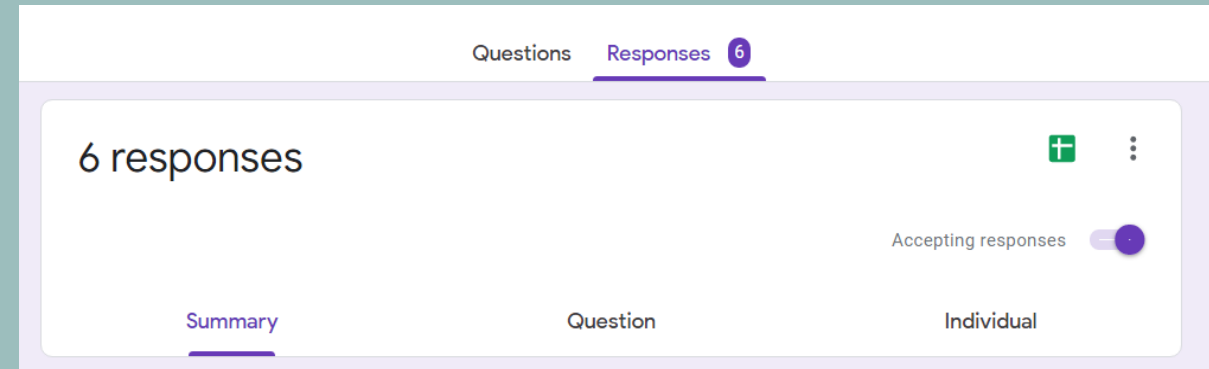
**They can see what everyone else sees they do not need special access to that form.**

The counting and procedure for announcing those votes is the same as it would be in person.

Consult the Election Script provided later in this PowerPoint.

The responses can be viewed in (3) different ways: Summary, Question, Individual.

Once appointed, the Teller Committee members can communicate by phone or text. Or if the President is able, create a “break-out” room for the Teller Committee to meet in.  
If the candidates appoint their own observers, they too must be admitted to the Break-out Room.



# ELECTION BASICS

## The Election

1. The election of officers for the ensuing year shall be conducted no later than the second week of April. This will afford the president-elect an opportunity to register and attend convention representing the association. Additionally, the transition process for all officers can begin and required reports can be submitted in accordance with due dates established by councils, PTA districts and the California State PTA.
2. Thirty (30) days' advance written notice of the election meeting must be provided to the membership ([Association Meetings](#)).
3. The president presides at the election meeting.
4. The privilege of voting shall be limited to members of the association who are present, whose dues are paid, and who have been members of the association for at least thirty (30) days.
5. Election of officers is held at the annual meeting and will come under "new business" on the agenda. The president calls upon the parliamentarian to read the sections of the bylaws pertaining to nominations and elections. (Article V, Sections 1, 2, 3a, 3b, 3c, 3d, 3g, 4, 5, 6, and 11)
6. After the parliamentarian has finished, the president calls upon the chairman of the nominating committee to read the report of the committee. If a nominee has withdrawn prior to the election and another nominee has been selected, the chairman will read a revised report to inform the membership of the new nominee.
7. The president restates the slate of nominees and asks each one to stand. The president conducts the election of officers even if (he/she is) nominated for an office. The president thanks the nominating committee for its report and states:

"According to our bylaws, nominations from the floor are now in order."

### Point of Order:

- Remember to follow all guidelines given by the California State PTA regarding virtual meetings.
- Many of these recommendations were given earlier in this PowerPoint.
- <https://capta.org/news-publications/covid-19/covid-19-resources-for-pta-leaders/>

### Correction:

Parliamentarian reads Article V, Sections 1-8

The privilege of nominating from the floor is extended to members of the association who are present, whose dues are paid, and who have been members of the association for at least 30 days. An eligible member may nominate him- or herself.

Nominations do not require a second, only the nominee's consent.

The president can:

- a. Ask for additional nominations for all positions in the order in which they are listed in the *Bylaws for Local PTA/PTSA Units*, Article V, Section 2, before closing nominations for all elected offices and then proceed with the election; or
- b. Ask for additional nominations for each position, one at a time, in the order in which they are listed in the *Bylaws for Local PTA/PTSA Units*, Article V, Section 2, and then proceed to elect the officer after nominations are closed on each position.

The president says,

" \_\_\_\_\_ has been nominated for president, are there further nominations for president?" (Pause.)

" \_\_\_\_\_ has been nominated for vice president, are there further nominations for vice president?" (Pause.) This procedure is used for each office.

The president then says,

"Are there further nominations for any of these offices?" (Pause.) "Hearing none, I declare the nominations closed. The bylaws state that where there is but one nominee for an office, the ballot may be dispensed with, and the election held by voice. Is there any objection to this procedure?" (Pause.) "Hearing none, the following are presented for election: \_\_\_\_\_ for president, \_\_\_\_\_ for vice president, etc." After all offices have been presented say the following: "All those in favor say 'aye,' those opposed say 'no.'"

The president says,

"The ayes have it, and you have elected the following officers." (The president restates names and offices.)

# ELECTION BASICS

## Point of Order:

- Remember to follow all guidelines given by the California State PTA regarding virtual meetings.
- <https://capta.org/news-publications/covid-19/covid-19-resources-for-pta-leaders/>

## DOWNLOAD ELECTION SCRIPT HERE:

<http://downloads.capta.org/parl/ElectionsScript.pdf>



# ELECTION BASICS BALLOT VOTE

Ballot Vote - Two or  
More Candidates for an  
Office

1. When there are two or more nominees for an office, the election is held by ballot. To verify eligibility to vote, the membership list must be checked before ballots are distributed. The secretary has the official membership list. If a membership list is not available, all adults present will be allowed to vote. If it is known prior to the election meeting that there will be two or more nominees for any office, ballots may be distributed at a registration table as members arrive for the meeting and present their membership cards.
2. The president appoints a tellers committee, including a chairman and at least two (2) tellers, whose duties are to distribute, collect, and count the ballots. Ballots may also be collected in a ballot box.
3. The president requests all members eligible to vote to rise and be counted. This count will determine the number of ballots to be tallied.
4. A nominee for an office cannot be involved in the election procedure as a teller who collects ballots and counts votes.
5. Blank ballots are not counted.
6. Illegal ballots are counted to determine the number of votes cast, but are not applied as a vote for or against any nominee. Ballots are considered illegal if:
  - They are unintelligible;
  - They contain the name of a nominee who is not a member; or
  - Two or more filled out ballots are folded together. These are recorded as one illegal vote.

# ELECTION BASICS BALLOT VOTE

Ballot Vote - Two or  
More Candidates for an  
Office

7. In a contested election, each nominee may designate a person as an observer at the time the ballots are counted.

8. If another vote is necessary, the voting members must be recounted to establish the number of ballots to be tallied. If a member eligible to vote was not present when the original ballot was cast but arrives in time for another vote, the member is entitled to vote.

9. The results of the voting are reported by the chairman of the tellers, in writing to the president, as follows:

Number of members eligible to vote \_\_\_\_\_

Number of votes cast \_\_\_\_\_

Number needed to elect \_\_\_\_\_

(Nominee)\_\_\_\_\_ Received \_\_\_\_\_

(Nominee)\_\_\_\_\_ Received \_\_\_\_\_

10. This procedure is repeated for each contested office. The president announces who has been elected to office. Unless requested, the president does not have to announce the number of votes cast for each nominee, but the complete Tellers' Report must be recorded in the minutes. Following the announcement of the vote, the chairman of the tellers moves that the ballots be destroyed.

11. It is permissible to use these two procedures in one election by using voice vote for uncontested offices and a ballot for those that have two or more nominees.

12. With few exceptions, a challenge to procedures or outcome must be made during the election meeting. An election must be declared "null and void" whenever discovery is made that the individual elected did not meet the qualifications for office as stated in the bylaws. Refer to *Roberts Rules of Order Newly Revised, latest edition, Contesting the Announced Results of an Election* and *Point of Order* sections. For assistance contact the district PTA.

# ELECTION BASICS QUESTIONS

## Questions and Answers

**Q.** *Can the nominating committee fill one position with two people who are willing to share the duties of the office?*

**A.** No. A position may be filled by only one person. If unusual circumstances exist that require more than one person to handle the duties of a particular position, then an assistant or deputy position may be created.

*Caution:* If the assistant or deputy position is included by amending the bylaws, that position will then be required on all future boards. Alternatively, an assistant or deputy position with a clear description of the job duties may be added to the standing rules to allow for the position without requiring it on all future boards.

**Q.** *Can one person be nominated for more than one office?*

**A.** Yes. However, a member can serve in only one capacity at a time. In such a case, if the person elected to two or more offices is present, he/she can choose which office he/she will accept. If he/she is absent, the assembly should decide by vote the office to be assigned, and then elect others to fill the other office(s).



# ELECTION BASICS QUESTIONS

**Q.** *Can a vacant position on the proposed nominating committee report be filled after the report has been submitted and posted?*

**A.** Yes. If a nominee withdraws before the election, the committee must reconvene as soon as possible to agree upon another nominee. If an office is vacant after the election because an officer-elect resigns or because no one was elected to fill the office, it shall be considered a vacant office to be filled by the board-elect according to the bylaws.

**Q.** *How does the nominating committee handle the acceptance of the nomination for a position after the report has been submitted?*

**A.** If someone accepts a nomination after the report has been submitted (at least 30 days prior to the election meeting), the nominating committee chairman will read a revised report that includes the new nominee for office to the executive board and to the membership at the annual election meeting.

**Q.** *Can an association member be nominated to serve a third consecutive one-year term for any office?*

**A.** No. An individual who has already served two consecutive one-year terms in any elected or appointed association office is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. The individual may serve in a different officer position. (See *Bylaws for Local PTA/PTSA Units*, Article V, Section 8.) An individual serving as an officer of a council or district for one two-year term is not eligible to be nominated, elected or appointed to serve an additional consecutive term in the same officer position. At least one full term must elapse before an officer who has served the maximum number of terms is eligible for nomination and election or appointment to the same office.



# ELECTION BASICS QUESTIONS

STEPHANIE KLAUSS

4<sup>TH</sup> DISTRICT PARLIAMENTARIAN

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