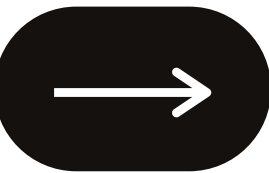




**FREE STATE PTA  
CON LIVE  
AUGUST 12-14, 2021**

# Robert's Rules of Order

How Robert's Rules can help you run an effective meeting!  
(in person or virtually)



# Today's Goals

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- Why we use Robert's Rules?
- Role of the Chair, Secretary and Treasurer
- Parts of a meeting where Robert's Rules is important
- Member participation whether in person or virtually

# Why We PTA!

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## Vision

Every Child's potential is a reality.

## Mission

To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

# Who is Robert?

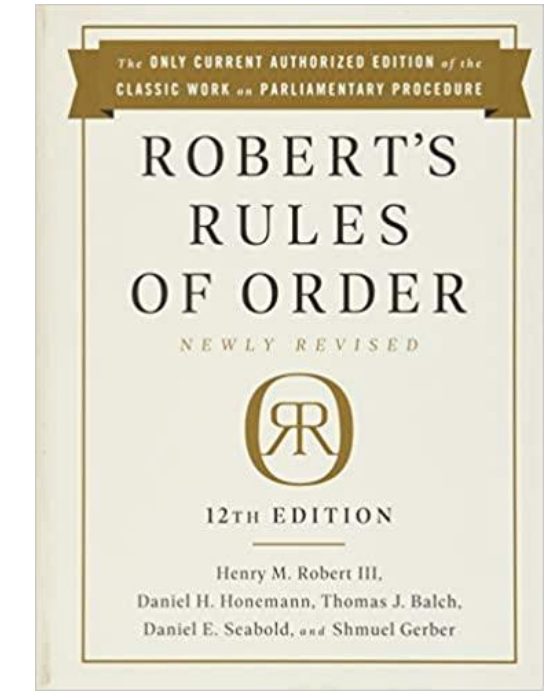
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- Henry Martyn Robert ( 1837-1923)
- American Army Engineer, graduated from West Point
- Active in church and civic and educational organizations
- Asked to preside over a meeting
- Swore to never preside/attend another meeting
- Began the study of parliamentary law.
- 1876 Pocket Manual of Rules of Order for Deliberative Assemblies
- 1915 Roberts Rules of Order Newly Revised

# Why Robert's Rules of Order?

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- Provides Order
- Used as Parliamentary Authority of PTA meetings
- A Guide for conducting meetings and making decisions as a group
- Protects the rights of the majority
- Protects the rights of the minority
- Protects the rights of individual members



# What does Robert's guarantee?

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- Full discussion
- Quorum
- Majority decides unless rights of a member or rule says otherwise
- Silence gives consent
- Chair remains impartial
- Every member has same rights and privileges
- Must be recognized by the chair to speak
- No personal remarks
- One question at a time, one person at a time

# Role of the Chair

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- Remain impartial
- Vote only to break a tie
- Vote if by ballot
- Introduce business in proper order as per agenda
- Recognize speakers
- Is motion in order
- Maintain order
- Put motions to a vote and announce results

# Agenda

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Agenda

- 1.
- 2.
- 3.



- Use a consistent order of business from meeting to meeting and distribute hard copies of the agenda to attendees.
- Post the agenda ahead of time at the school and on your website so members know what issues will be discussed at the upcoming meeting. And be specific.
- Don't just list "unfinished business." State what items of unfinished business will be covered.



# Agenda Format

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*Agenda*



- 1.
- 2.
- 3.

1. Welcome
2. Approval of minutes (from last meeting)
3. President's report
4. Treasurer's report
5. Principal's report

6. Committee reports
7. Unfinished business
8. New business
9. Announcements (including date and time of the next meeting)
10. Adjournment

# Quorum

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A quorum is the minimum number of members required to conduct business at your meeting. This number is stated in your bylaws. If a quorum is not indicated in the bylaws, Robert's Rules of Order sets it at a majority of members.

- No Quorum, No Business!

# Minutes

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- Recognize the secretary
- Reads or announces that the draft was distributed or posted
- Only the secretary can make changes to the minutes
- Approve with unanimous consent as presented or amended
- Approved minutes get distributed if changes were made

# Treasurer's Report

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- Recognize Treasurer
- Must be presented at every meeting
- Chair states that the report is filed for audit



# Motions and Voting

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- Obtaining floor
- Making the Motion
- Seconding the Motion
- Amendments
- Stating the Motion
- Discussion or Debate
- Stating the Question
- Announcing the Vote



# Postponing a Motion

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- If it is clear that a motion cannot or should not be voted upon at the current time, it is typical to postpone (“table”) it until the next meeting.
- Technically there should be a new motion to table the current motion, but most groups can agree to delay discussion without layers of parliamentary procedure.
- Often, it helps to appoint a committee or a member to study the issue and report back to other members at the next meeting.
- This tactic can save time on circular debate, especially when all of the facts aren’t available.

# Adjournment

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- Adjournment is simply a formal way to close a meeting so everyone knows the session has come to an end. The time of adjournment is recorded in the meeting minutes
- The only time you need a motion to adjourn a meeting is if the membership wishes to adjourn before the business is done.

# Virtual Meetings





# OVERVIEW

- Before scheduling a virtual meeting, determine what PTA business is required at this time. Virtual meetings must allow all members participating to be able to communicate with each other, simultaneously or sequentially, during the meeting. A member participating in a meeting by this means is deemed to be present in person at the meeting



Like an in-person meeting, the virtual meeting should be for the purpose of making reports to the membership and conducting PTA business. It should include approval of prior meeting minutes; presenting financial, board of directors, and committee reports; and voting on items such as budget amendments, approval of the proposed budget, and elections. While the president is conducting the meeting, other members of the board of directors should be prepared to do their part to protect the rights of members, capture voting, and keep the meeting running smoothly.





- Find an online platform or app for hosting the meeting.
- Set up an account for your PTA. Some examples are: Zoom, Google Hangouts , GoToMeeting / GoToWebinar ,Microsoft Teams. Each of these have different features and limitations. Find the one that you are most comfortable using that meets your needs (Use of a platform name is not an endorsement by PTA )
- Before the membership meeting, practice using the platform or app with your board members.



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- Review the provided Meeting Rules
  - Make the following decisions:
    - How many days prior to the meeting will people be able to join the PTA, in order to vote on PTA business? (check bylaws) Specify that people join a minimum of days, such as five days prior to the meeting, to allow the PTA time to verify membership of those registered at the meeting.
  - Review the provided Meeting Rules
  - How will minutes from the last meeting be approved?
  - Provide input to the president about the agenda.

- **President/Chair**

- Chair the meeting. Same Agenda order as in person meetings
  - Delegate the meeting responsibilities. Ensure you have enough help in the background so that you can focus on chairing the meeting.



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### •Secretary

- ▪ Before the meeting
- – Notify members through regular electronic channels, using the Meeting Notice Requirements, according to the local PTA bylaws regarding meeting notices.

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- – Make sure you have the complete and current membership list, including those who joined after meeting notice.
- – Verify membership of registered attendees
- . – Send instructions on how to join the meeting to the members and approved guests.
- – Send members any necessary meeting documents (agenda, meeting rules, financials, minutes, explanation of voting process, etc.).
- ▪ Beginning of the meeting
- – Verify that only members or approved guests are in attendance.
- ▪ During the meeting
- – Take the minutes.
- – Present minutes from last meeting for approval
- . ▪ After the meeting – Send the minutes to the members or to the minutes approval committee, if appointed.



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## **Treasurer**

- Present financial report.
- Present any budget amendments, if necessary.
- Present proposed budget, if necessary.

## **Membership Vice President/Chair**

- Make sure you have given the secretary the complete and current membership list, including those who joined after meeting notice.

**Nominating Committee Chair** (if a nominating committee was elected and finished its work)

- Confirm that all nominees meet the eligibility requirements stated in the bylaws.
- Make sure the slate is published in advance of the meeting. Check your bylaws for the notice required. If the bylaws do not specify notice, specify that the slate is publicized a minimum number of days, such as at least seven days, prior to the meeting.
- Read the slate at the virtual meeting.



# Virtual Elections

- Make the following decision:
- How will Individuals run from the floor?
- The PTA can choose to:
- only accept notice of intent to run from the floor received at least five days prior to the meeting.
- allow individuals wishing to run from the floor to state that intention in the meeting, or
- both.





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**Meeting Notice Requirements** Every effort should be made to protect member voting rights, which begins with ensuring your members know what to expect at the virtual meeting. Consider adopting the following procedures to be followed for the benefit of your members.

Communicate the meeting details to your PTA community using the regular means at least seven days prior to the meeting. Refer to your bylaws for the required notice.

The notice must include the following, if applicable:

1. Date and time
2. Criteria for attendance and participation – Only members can participate in PTA business.
3. Membership instructions and deadline – Nonmembers must be allowed to join prior to the meeting, if possible. Include the deadline for joining prior to the meeting. Specify the number of days, such as five days prior to a virtual meeting, for membership to be open to allow time for the PTA to approve all registrants and distribute any materials members may need for the virtual meeting (cont.)



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4. Registration instructions
5. Meeting agenda
6. Nominating committee slate, if completed
7. Election procedure for individuals running from the floor with deadline
8. Meeting rules
9. Virtual meeting platform or app instructions – After registration, the secretary will send specific instructions on how to join the meeting to all confirmed members and approved guests.
10. Voting process

## Meeting Registration Requirements

Attendees must register to attend so that the PTA can verify their membership. A nonmember can register and be approved to attend as a guest; however, only members can vote on any PTA business.

Registration Form

- Required Information. Include the registrant's full name, telephone number, and an email address, in case you need to verify membership or encourage someone to join

- . ▪ Nomination Information. Include an area for attendees to notify the PTA if they intend to run from the floor for any position, if your board of directors has chosen to allow this option.

- Separate Registration. Each PTA member in a household must register separately to receive a link to the meeting for quorum purposes and membership verification.

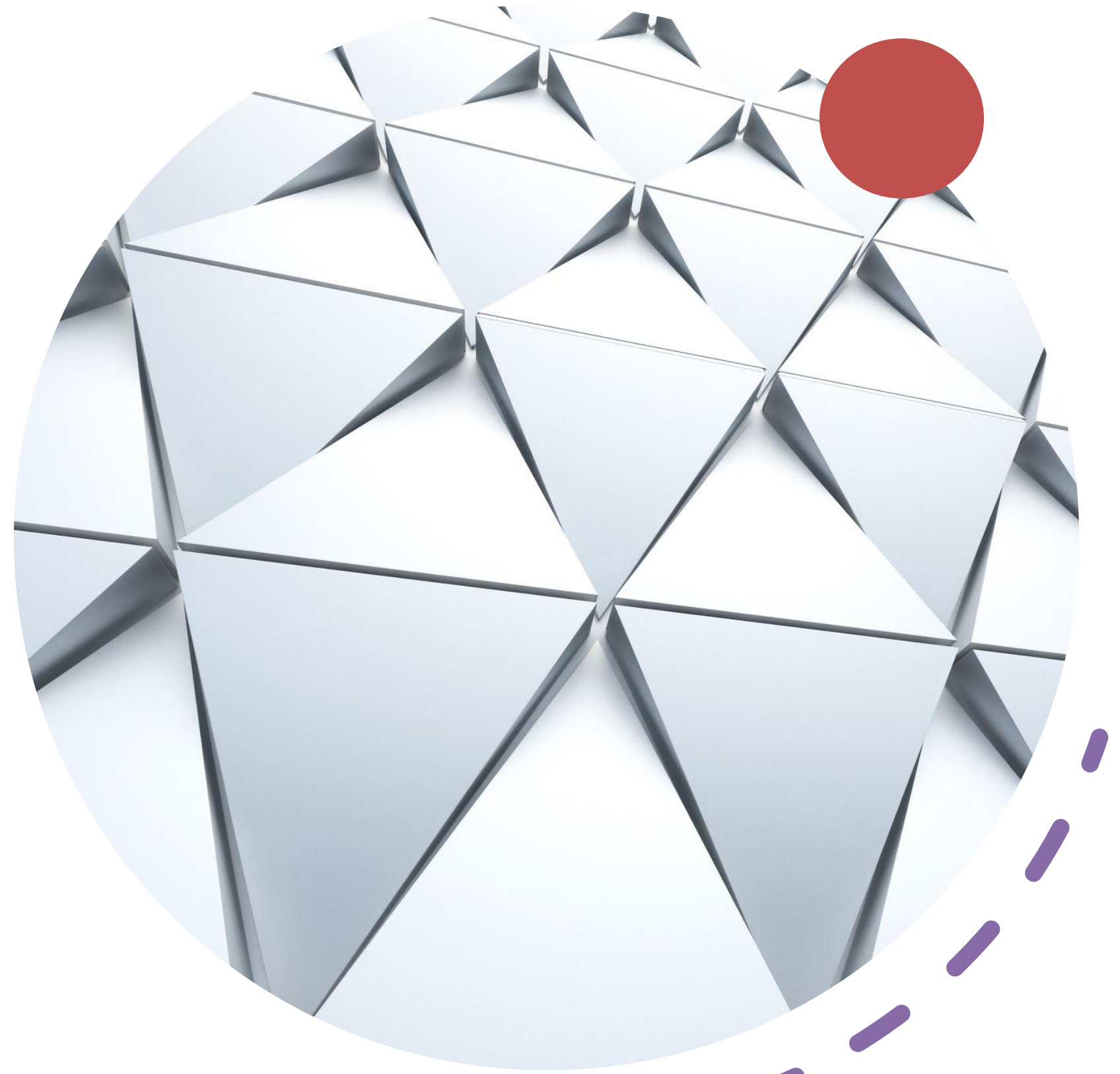


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## Quorum Confirmation

- Appoint a board member to regularly check the registration forms to verify the PTA will have quorum at the meeting.
- Inevitably, situations will change, and people who register may become unavailable to attend.
- Continue posting announcements of the meeting until at least twice the number of your quorum have registered.





**Balloting Requirements** Ballot voting is used for the purpose of collecting members' votes anonymously. Virtual elections that are contested must be conducted using ballots. Methods of balloting must occur in the meeting to be considered as part of the in-person meeting requirements of the bylaws.

When using a platform such as Zoom, the following requirements apply:

- Appoint a teller, subject to the approval of the voting body. The teller should be an unbiased, independent accountant, attorney, or parliamentarian.
- For an election, ballot for each position separately using private chat to the appointed teller. The ballot must be displayed on the screen with the names of all nominees for that position. Take care that you have preregistered the voting body to include only members.
- Verify quorum before each vote to confirm who is participating in the meeting at that time

- Voting must stay open for at least two minutes
- . ▪ Confirm that the number of votes cast is not more than the number of members in attendance.
  - The president declares the results as quickly as possible and does not move to the next item until he/she has declared the results.
  - If voting results in a tie, you must vote again until a majority is reached.

**If using a platform other than Zoom,** be certain that the ballots are sent to the teller by a method that allows the votes to be shared within the meeting platform and not by a method outside the platform (such as a Google Form)







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**Rose Acerra  
National PTA Board Member**

[racerra@pta.org](mailto:racerra@pta.org)

**Jayne Lee  
Baltimore County Council President**

[baltimorecountyppta@gmail.com](mailto:baltimorecountyppta@gmail.com)

