

Instructions for Election Ballot Voting via Zoom

Set Up Zoom Meeting

Recommend requiring registration with manual approval (in options) for the meeting so that you can check membership ahead of time.

- Upon receipt of the registration request, check your membership list to ensure that the attendee is a member
 - Be sure your membership list is up to date with emails and date of membership included
- Once verified, approve the registration and Zoom will send a unique link to the registrant to enter the Zoom meeting (cannot be shared)
- If the registrant is not on the member list:
 - Check with your membership chair to make sure that no member is inadvertently denied access.
 - If confirmed, choose deny access, and send a custom message to cordially thank them for registering and explain that they are not on the membership list, and who they can contact for inquiries about their membership or to join.

Send Meeting Notification at least 30 days in advance

Make sure to send a written notice of your election meeting to ALL members at least 30 days before the meeting date. Find the date of your election in your bylaws (month of election, day of the week and week of the month). The notice should include clear instructions on how to gain access to the teleconference.

Here's a sample notice:

Notice of Annual Election Meeting of _____ PTA

The Association meeting to conduct annual elections will be held on [date] at [time] via teleconferencing on Zoom.

For the security of our meeting, each member wishing to attend must register to receive access to the meeting. An invitation with a unique Zoom link, which cannot be shared, will be emailed upon receipt of registration and confirmation of membership.

Please register to attend the meeting before [time and date – give as long as you reasonably can] to help us ensure that all those eligible to vote can have their voices heard. Note that the meeting will be closed for entry during the voting. We appreciate your time and cooperation in helping us to make sure our meeting runs smoothly and efficiently.

Please use this link to register to attend the meeting: [put zoom registration link here]

If you have any questions, please feel free to contact us at _____.

Preparation for the meeting

Check your membership list and make sure it is current. The list should include the date joined and emails.

- Recommend highlighting those whose membership is less than 30 days (ineligible to vote).
- Share list with the Zoom Administrator and co-host who will verify memberships on the meeting date.

Please note that you should not exclude members from the meeting who do not pre-register to the best of your ability. Have a membership list on hand and someone available to host/co-host who can verify membership and admit those who register late, and during the meeting.

Zoom administrator should set up the Zoom poll ahead of time. You can use the nominating committee report to set up the ballot for all officers, and delete the ones not needed at the time of the ballot vote.

- Make the vote anonymous and single choice
- Question should indicate the name of the office being voted upon (e.g. president, treasurer, etc.)
- Possible answers should include the name of the nominee from nominating committee; “abstain” and “not eligible to vote” (if there are members present who are not eligible to vote)
- At the time of the meeting, you will add in the names of nominees from the floor to the offices where there are multiple nominees. All others can be deleted if there is no motion for a ballot vote.

Meeting Ground Rules

At the beginning of the meeting, state the ground rules. You may want to put them on a slide. Some suggestions are:

- Show respect to all in the meeting and maintain orderly conduct.
- Please respect those who are speaking and do not speak out of turn.
- Remind everyone to please keep yourself on mute during the meeting until called upon.
- If you would like to speak, please raise your hand or write in the chat and wait to be acknowledged.

<If you use the chat for people to be recognized, you may want to designate the parliamentarian or someone to monitor the chat to assist the president in recognizing requests from the floor.>

Instructions for Ballot Voting (To be read by president)

The meeting will now be closed for admittance until the vote is completed.

We will be collecting votes electronically via Zoom poll and have established the following rules to maintain a fair anonymous ballot vote. We appreciate your time and cooperation with the process to help us run the election as smoothly and efficiently as possible.

In accordance with our rules, only **members attending the meeting**, who have been **members for at least thirty days**, and **whose dues are paid**, are eligible to vote at an election (*CAPTA Toolkit*). Each eligible person is entitled to **one vote**.

<Conduct the Roll Call if there are members present that are not eligible to vote. If all attendees are eligible voters, you can skip this step.>

President: We will conduct a roll call to ensure that all who are present and eligible to vote are counted. The tellers will count the house during roll call to determine the number of eligible voters. The recording secretary will now conduct the roll call of those who are eligible to vote.

Recording Secretary: When your name is called, please raise your hand or type in the chat “Present” to acknowledge you are here.

<The recording secretary will read each name on the registration list who are eligible to vote and check if they are present. It may be helpful to have someone to assist. Following the reading of the list, say:>

Is there anyone present that was not called that is eligible to vote? *(If anyone raises their hand, membership list should be checked to ensure that the person is eligible to vote. If not, please let them know they are ineligible to vote and for what reason.)*

President: The vote will be taken via anonymous Zoom poll. A majority vote (more than half of the eligible voters) is needed to elect a nominee. Two ballots cast by the same person are considered illegal votes and will not be tallied for the nominee. If the number of votes received exceeds the total number of eligible votes, the ballot vote is compromised and may need to be repeated.

When the Zoom Poll appears on your screen, all eligible voters (called in the Roll Call), please select one nominee name or select “abstain” if you do not wish to vote for either nominee. If your name was not called in the roll call, please select “not eligible to vote” and submit the poll.

Alternatively, if no ineligible voters present, say: When the Zoom Poll appears on your screen, please select one nominee name or leave it blank if you do not wish to vote for either nominee.

After the vote:

The tellers and observers will move to a breakout room to verify the count and report back once the vote has been tallied. Host can share screen with tellers and observers to verify.

If there are more votes than eligible voters, announce that there were more votes than eligible voters, which invalidates the vote.

If the number of ineligible votes would clearly not affect the outcome of the vote, the president may put the question: Because the number of ineligible votes will not affect the outcome, the members can accept the vote as it stands or vote again. All those in favor of accepting the vote, say aye. Those opposed, say no.

<If it is accepted, president will proclaim the winner. If it is not accepted, the vote will be conducted again.>

The vote should be conducted again reiterating instructions and reminding attendees that those who have not been members for at least 30 days and were not in the roll call are not eligible to vote and should choose ineligible to vote in the zoom poll. Conduct the vote again.

If the same occurs again, let the attendees know that all ineligible voters will be moved to a breakout room during the vote to ensure that only eligible voters receive the poll. They will be returned to the main meeting once the vote has been conducted. Share the poll only with those eligible to vote and tellers will count again.