

SC PTA Steps to Conduct a Vote on the Budget

Each spring, the general membership of each PTA unit should vote to approve the budget for the upcoming school year. Although changes may need to be made and another vote to approve the amended budget held in the fall, approving a budget in the spring allows the unit to conduct financial transactions over the summer if necessary.

Once the proposed budget has been approved by the PTA Board, it should be distributed to the general membership five days prior to the vote to allow for review. Be sure to include contact information for the PTA President or Treasurer if members should have questions about the proposed budget.

While conducting an electronic vote to approve the budget is the recommended method, in-person and hybrid voting are permitted. Steps to conduct each type of vote are provided below.

To Conduct an Electronic Vote:

1. Create a Google form for your electronic budget vote by using [the template provided by SCPTA](#) or by creating your own form.
2. If you use the template provided, click on Make a Copy to download an editable copy of the voting template. Make the necessary changes on the template by inserting the correct years, PTA unit name, etc.
3. Include a link to the proposed budget or insert a snapshot of the budget directly into the template.
4. Be sure your form captures each respondent's name and email address so you can compare them to your roster of paid PTA members for the current year.
5. Once the Google voting form is created, you can simply copy the link and paste it into an email that goes out to your entire membership. You may send the email through Givebacks or whatever distribution method you typically use to communicate with your members. *Note. It's always good to send the email to just the PTA Board first to ensure that the voting form is functioning properly before sending it to the entire membership. Just remember to delete the "test" votes before sending out the voting form to avoid duplicate votes.
6. To send the message through Givebacks, log in and click *Communications* in the menu along the left side. Select *Messages* from the boxes that pop up, then click *New Message* in the upper right corner. Click the everyone, hubs, saved filter, etc. link (whichever one you typically use to email your membership), include a VOTE NEEDED subject line to get everyone's attention, and type your message in the big blank box. You can attach a jpg of your budget to the email so members can review it again if they want. Then paste the link to your Google voting form in the box and click *Send*.
7. Clearly indicate in the email to the membership when the voting for the proposed budget will close. It is suggested that the voting form be available for five (5) days.
8. Once the voting period has ended, go back to your Google form and download the responses to a spreadsheet so they can be counted to ensure a quorum was obtained and verified to ensure that only the votes of current PTA members are counted.
9. Following the verification process, document the budget vote using the [Sample Budget Voting Minutes](#).
10. Upload the minutes, combined with a copy of the approved budget, to Givebacks by logging in and selecting *Compliance* from the menu on the left side. Then click *Enter Submissions (Form 990s, Financials)* in the list that appears on the left. On the screen that appears, click the *Submit* button to the right of *Budget & Minutes Approving Budget Submissions*. Fill in the *Budget Amount* by typing in your total budgeted income in the box. Click the *Add Document* button and select your file. Then scroll down to the bottom and hit *Submit*.

To Conduct an In-Person Vote:

1. Publicize the time, date, and location of the membership meeting at least ten days in advance.
2. At the meeting, have copies of the membership roster available so attendees can initial by their name on the roster to confirm they are current members of your unit.

3. At the start of the meeting, someone needs to count the number of attendees to confirm that you have a quorum (check your bylaws for the exact number required for quorum).

To Vote by Ballot:

- Ballots must all be the same color and size and should only be given to those eligible to vote that are present at the time the voting is taking place.
- Ballots are counted before they are distributed because the number of eligible votes has already been determined by the Secretary and verified by the President.
- The President appoints three (3) to five (5) members to serve as tellers. The President should also designate one of those tellers to serve as the head teller. The tellers have the ballot box in view at all times and are the individuals responsible for counting the ballots after everyone has cast them.
- The President explains to the members how to fill out the ballot.
- No one shall touch the ballot other than the voter.
- The voting member folds their ballot one time and then places their ballot in the ballot box.
- The ballot box should be placed on a table in the front of the room and always guarded by a teller.
- The President must ask if all who wanted to cast a ballot that was eligible to do so has had enough time to vote and then announce that the polls are closed.
- The tellers take the ballot box to a quiet or separate area to count.
- During the counting of the ballots, one of the tellers should read each ballot out loud while two other tellers record the votes on their tally sheet.
- All tellers should sign the final tally sheet presented to the President.
- The head teller, as designated by the President, brings the tally sheet to the President and the President announces the result.

To Vote by Voice:

- The President should explain to the membership that they will be voting on the proposed budget that was made available for review prior to the meeting.
- The President then asks that all those in favor of approving the proposed budget say “aye”.
- After a brief pause, the President should ask all those opposed to approving the proposed budget to say “nay”.
- If the voice vote yields unclear results, the vote may be taken again by a show of hands using the same process. The Secretary or an appointed teller should count the number of votes for and against and record it.

4. Following the verification process, document the budget vote using the [Sample Budget Voting Minutes](#).

5. Upload the minutes, combined with a copy of the approved budget, to Givebacks by logging in and selecting *Compliance* from the menu on the left side. Then click *Enter Submissions (Form 990s, Financials)* in the list that appears on the left. On the screen that appears, click the *Submit* button to the right of *Budget & Minutes Approving Budget Submissions*. Fill in the *Budget Amount* by typing in your total budgeted income in the box. Click the *Add Document* button and select your file. Then scroll down to the bottom and hit *Submit*.

To Conduct a Hybrid Vote:

1. Following the in-person vote (detailed above), an email containing the link to cast a vote electronically (described above) can be sent to all current PTA members in your unit who did not vote at the in-person meeting.

2. Be sure to compare the contact information from the in-person vote to the contact information captured by the electronic vote to ensure that no one casts more than one vote.

3. Following the verification process, document the budget vote using the [Sample Budget Voting Minutes](#).

4. Upload the minutes, combined with a copy of the approved budget, to Givebacks by logging in and selecting *Compliance* from the menu on the left side. Then click *Enter Submissions (Form 990s, Financials)* in the list that appears on the left. On the screen that appears, click the *Submit* button to the right of *Budget & Minutes Approving Budget Submissions*. Fill in the *Budget Amount* by typing in your total budgeted income in the box. Click the *Add Document* button and select your file. Then scroll down to the bottom and hit *Submit*.