

### Key Role – Parliamentarian

- Assists the president to manage meetings and advises on parliamentary procedure
- Chairs the bylaws committee to review unit bylaws each year and propose revisions to the bylaws every five years
- Schedules the nominating committee's first meeting, providing information on the nomination and election process

### Getting Started

**Preparation** – Review files from last term, including unit bylaws and standing rules, to learn more about the position. It's also worthwhile to talk to the outgoing parliamentarian for advice and tips about the new role.

Visit California State PTA – [www.capta.org](http://www.capta.org) – and learn more about:

- *Robert's Rules of Order, Newly Revised*
- PTA resources and templates on parliamentary basics for meetings
- Bylaws review process
- Free *e-Bylaws* Program online to revise and update unit Bylaws

**Meetings** – Meet with the incoming president to identify ways to work together to make board and association meetings even more effective.

At the first board meeting, ensure copies of the bylaws are distributed and review them together. This helps everyone learn more about PTA.

To make board meetings run smoothly, provide information on parliamentary basics such as how to make a motion and consider proposing and adopting rules of debate.

**Important Tasks** – Contact the PTA council/district to verify that a current copy of the unit bylaws is on file. Remember to update the username and password for online access to California State PTA's *eBylaws* Program

### How Tos

Parliamentarians act as facilitators for bylaws completions and reviews, consultants to manage meetings, and mentors for members on parliamentary procedure. Here are some quick tips to help you get started.

**Facilitator** – Bylaws are the legally binding document of the PTA as a nonprofit 501(c)(3) organization. They provide the basic framework for the PTA's function and structure.

Information about the composition of the board, what the board has the authority to approve, committees, membership, what the membership has the authority to approve, meetings, and elections is in the bylaws.

Details on PTA policies and required procedures for board rosters, financial reports, financial reviews, check-signers, dues amounts, and bylaws review requirements are also included.

Additionally, the unit's legal name and identification numbers – issued by National and State PTA, as well as Federal and State government agencies for tax filings – are listed in bylaws.

As a facilitator, be prepared to know more about how bylaws shape the unit and its operation as a nonprofit organization.

A good first step is to create a quick "Bylaws' Reference Guide" to use throughout the term.

**Go online** – [capta.org](http://capta.org) – and download the resource, *Running Your PTA Made Easy*. It includes the *Unit Bylaws Information Summary* sheet: a one-pager to print and fill in with details about the specific PTA.

During the year, the parliamentarian takes the lead in reviewing the bylaws.

If changes are needed, ask the president to appoint a bylaws committee to prepare revised bylaws and submit them to the PTA council or district parliamentarian. In turn, they will submit the bylaws to the California State PTA parliamentarian for approval.

**Consultant** – Another aspect of the new position is assisting the president to manage meetings well.

For instance, if a question on parliamentary procedure is raised, the president may ask for the parliamentarian's advice before making a ruling. Familiarizing oneself with *Robert's Rules of Order, Newly Revised* for parliamentary basics will prove useful.

Start the year right by working collaboratively with the board to set ground rules for meetings.

Ground rules might include ensuring that mobile devices are turned off during meetings, that side chat is kept to a minimum, or clearly establishing the expectation that meetings will begin promptly at the scheduled time and timely arrival is expected. Rules for debate might include agreement on how many can speak in favor and against a motion and how much time is allowed for each speaker

to ensure that both sides are heard equally. If these agreed norms and rules for debate work well, consider proposing them as additions to the unit's standing rules.

Encourage participants to focus discussion on the agenda item at hand to ensure meetings run smoothly. Help everyone stay on task by acting as a timekeeper so meetings start and end on time.

Remember to keep a speakers' list for the president to use when people raise their hands to be recognized. That way everyone has an equal chance to be heard in order.

**Mentor** – Members often rely on the parliamentarian to clarify how meetings are conducted and how to participate to achieve the PTA's main goals and objectives.

Be proactive in raising awareness of how parliamentary procedure is a reliable way to conduct meetings. This includes understanding five basic 'rules of the game':

- Order – One business item at a time
- Equal Opportunity – Chance to participate
- Justice – Fairness | Everyone understands
- Right of Minority – To be heard
- Right of Majority – To decide

Provide "how-to" instruction at meetings with mini-trainings or handouts on motions, voting, and the rules of debate, to explain the basics. For wider outreach, post these tips on the PTA website, e-news or social media sites.

Parliamentarians also mentor the nominating committee. This includes scheduling the first committee meeting and conducting an election for the chair.

Supply information from the unit bylaws on nomination and election procedures to help the committee get started. Take time to explain what positions to fill as per the current, adopted bylaws and who is eligible to serve on the board for the upcoming term.

### **Did you know? ... PTA Board Members:**

- Adhere to PTA financial procedures as outlined in Bylaws and State and National PTA guidelines
- Protect members' privacy by utilizing member information for PTA work only
- Attend PTA sponsored workshops or trainings
- Maintain a current procedure book to pass on to a successor, in hard copy or electronic format
- Work together as a team to improve the lives of all children and their families

### **Other Useful Information**

#### **Resources:**

#### **California State PTA – [www.capta.org](http://www.capta.org)**

- PTA Leaders tab and more
- *California State PTA Toolkit*
- *Running Your PTA Made Easy*
- *Insurance Guide* – Also mailed annually to PTA presidents

#### **Online Services:**

- Officer Contact System – To enter officer and board member information and generate useful reports
- e-Bylaws – To revise and update PTA unit bylaws
- Tax Filing Support Center – To help units meet Federal and State reporting requirements
- myPTEZ – To handle PTA accounting needs and generate financial reports
- TOTEM - ELECTRONIC MEMBERSHIP SYSTEM – To join and renew membership and for PTAs to manage membership

#### **National PTA – [www.pta.org](http://www.pta.org)**

- Run Your PTA tab and more
- E-Learning Workshops

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