

Annual P&C To Do List



Tick off essential tasks for P&Cs and parent associations this year with our handy checklist. Items in **orange** must be completed to fulfil your **regulatory obligations**.

Before the AGM (Dec - Jan)

Task	By Who?	By When?
<input type="checkbox"/> Prepare a financial report and get the accounts audited or reviewed How? See Audit Help page on our website or Section 11 of the Treasurer's Handbook .	Treasurer	Auditor/reviewer report must be signed at least 2 weeks before the AGM
<input type="checkbox"/> Prepare for the AGM (notice to members, reports, call for nominations) How? See AGM Information Sheet and preparation checklist .	Secretary & President	2-3 weeks before the AGM (but check your constitution)
<input type="checkbox"/> Prepare handover notes and files to give to the new committee How? See Handing Over on our website for tips and templates to quickly create useful handover notes.	All Committee Members	AGM

After the AGM (Feb - May)

<input type="checkbox"/> Ensure you get a good handover from the previous person in your role	All Committee	ASAP after the AGM
<input type="checkbox"/> Report to Government on your activities from the previous year How? See Reporting to Government on our website.	Secretary	Before end June to avoid fees
<input type="checkbox"/> Complete Council's Office Bearers' Form so we have up to date membership details How? Complete online from the ' Forms ' page of our website	Secretary	ASAP after the AGM
<input type="checkbox"/> Change signatories on the P&C's bank accounts to reflect the new committee. How? See Section 6 of our Treasurer's Handbook .	Treasurer to coordinate	ASAP after the AGM
<input type="checkbox"/> Get help with your new role How? Attend Council workshops (see Training on our web), browse our online resources , or contact our office any time.	All Committee Members	Workshops usually in May

Mid-year

<input type="checkbox"/> Arrange insurance (fill out renewal/declaration forms to detail your needs, then pay invoice) How? See Section 13 of the Treasurer's Handbook	Treasurer	Renewal forms due 31 May Pay by 30 June
<input type="checkbox"/> Pay Council Membership (invoice sent June)	Treasurer	Pay by 31 July

Note: P&Cs employing staff or running canteens, After School Care or other business activities will have **additional regulatory/legal obligations**. Please see [Information Sheets 29-32](#) on these topics.