

P&C Executive Handover Checklist

For All Executive Members

- Support Guide for P&Cs*
- Accounting Manual for P&Cs*
- Purchasing Policy and Procedures for P&C Associations*
- Copies of roles and responsibilities for each position (Support Guide for P&Cs)
- Current P&C approved Constitution
- Subcommittee operating guidelines / policies
- Other P&C policies (e.g. Smart Choices, Red Occasions or Representative)
- List of contacts for assistance – Principal, Business Services Manager, P&Cs Qld, Nutrition Australia, QAST, Work Cover, Industrial Relations or an Employers Union (CMS, NRA), ATO, QCAN, Gaming Benefit Fund, Raffles, Marsh Advantage Pty Ltd (Include contact name, phone, fax, email and website information where possible).
- Blue cards for all executives if the P&C Association operate an OSHC program
- Blue card if the person nominating for a position on the P&C executive does not have a child attending the school
- Information about the Outside Hours School Care (if one is operated by the P&C Association)
- Quick Guide for P&C Executive Officers available from P&Cs Qld or DETE
- Any passwords including the P&Cs Qld Members' Area password (new passwords are issued in early April each year).
- P&C Association ABN
- P&C Social Media Guide

Documents for the AGM

- Membership forms (with P&C Code of Conduct on back) and membership register
- Life Membership Register
- Executive position nomination forms
- List of ongoing subcommittees to be endorsed
- Letter or verbal confirmation from the appointed auditor accepting the role for the coming year
- Change of bank signatories form to be signed by the incoming executive
- Notice of new executive officers for both DETE and P&Cs Qld
- Annual Audited Statements and Audit Report
- President's Report
- Student Protection Risk Management Strategy ready for approval
- Previous AGM Minutes for approval

President/Secretary

- ATO Change of Contact Form
- Register of P&C members
- Register of life members of P&C
- Previous AGM Minutes
- Minutes books with minutes from all meetings since P&C commenced/or location of archives
- Motions register – this is a suggestion only but it helps new executive continue ongoing actions from motions from the past.
- P&C template for agenda and minutes
- P&C Meeting attendance book
- A list of any important issues/projects which need to be followed up or continued by the new executive.
- Any diary that has been kept by the P&C on issues, events and/or invitations attended by the outgoing executive.
- Building fund DGR (Deductible Gift Recipient) information available from the ATO
- Bank form for change of signatories for P&C general, subcommittee and any investment accounts
- Passwords and access to any P&C social media sites - P&C Associations are not encouraged to have separate standalone accounts on social media sites as they need to monitor the site 24/7. If the P&C does have a site you must be able to manage it in line with the Social Media Toolkit for P&C Associations.

Treasurer

- Accounting Manual for P&Cs*
- Books of accounts for current and previous year
- Access to archived records for the past 7 years
- List of active subcommittees
- Registers for:
 - Accountable Forms Register- cheque, receipt, bank tokens and order books
 - Assets Register (P&C owned and used assets)
- Auditor's statements and reports for the past seven years including current year
- Bank form for change of signatories for P&C general, subcommittee and any investment accounts
- P&C ABN
- Insurance details
- Staff files – location
- List of upcoming funding grants
- All Deductible Gift Recipient (DGR) information. P&C can only operate a School Building Fund DGR and it must be registered with the ATO
- Document disposal schedule fact sheet (P&Cs Qld Website)

Employment

- Current employee personnel files including Letters of Appointment, Tax File Numbers, Role Descriptions, any training that they have attended and their starting date
- Employment files kept in a secure location on the school site
- Current hours and pay rates of all employees (Rates change every September)
- List of emergency staff
- Status of all employees (i.e. casual, permanent part-time or full time)
- Current Awards available to the P&C executive and staff
- Current record of all leave entitlements including Long Service Leave
- List of past employees for the previous 7 years
- List of Superannuation Funds – as per the award
- WorkCover Insurance
- List of contacts or support agencies

If you have any questions please do not hesitate to contact the P&Cs Qld office for further advice.