

AGM checklists

Time for your Annual General Meeting?

Use our checklists to get your year off to a good start.

Before the AGM

- Choose a date for the AGM** which suits parents and the school and ensures good attendance (eg linked to a popular event or school information night).
- Notify members** of the meeting date (check your constitution for any rules about the notice required).
- Prepare a financial report and get the accounts audited.** Note that the auditor must sign off on the accounts at least 14 days before the AGM. See our [resources](#) to help treasurers prepare for the audit.
- Call for nominations** for positions on the P&C and advertise the benefits of being involved (for example, in the school's newsletter). See [Information Sheet 7](#) for benefits.
- Prepare a brief Annual Report.** We have a [template](#) to help.
- Prepare an agenda** for the meeting.
- Remind parents** about the meeting and distribute papers.

After the AGM

- Ensure a good handover from the previous committee** (See [Information Sheet 18](#)).
- Submit the Annual Return (AR form)** to the Office of Regulatory Services (ORS). The auditor who reviewed your financial records must sign this form and usually does so at the time of the audit. You can find the form on our [website](#).
- Complete Council's online Office Bearers' Form.** This allows us to contact your new committee members.
- Tell the school community who your new P&C officers are** and how to contact them (eg in the school newsletter). It is a good idea to include information about your passions or relevant background, and even better if the principal will introduce you. All this helps establish you in your new role in the community.
- If your P&C is a registered charity, **complete an Annual Information Statement for the Australian Charities and Not for Profits Commission (ACNC).** Do this [online](#). See this [FAQ](#) if you are unsure.
- Make new committee members signatories on the P&C's bank accounts.** Take a copy of the AGM minutes with you to the bank.
- Attend Council's workshops** to assist you with your new role.
- Get help from Council's [website](#) (there is a great range of resources, templates and proformas) or contact our office at any time for assistance.