

The BC PAC Executive Handover Checklist

From PAC Consult, by Mocha Shmigelsky · 10+ years helping BC PACs run without burning out

This checklist exists because September is chaos.

New PAC executive. Old one barely has time to wave goodbye. Passwords in someone's personal email. Grant deadline in 60 days. Treasurer asking where the bank account is.

Print this. Fill it in before your AGM. Hand it to whoever takes over. It's the single most valuable thing an outgoing PAC chair can do for the community.

Section 1: Digital Accounts

ACCOUNT	USERNAME / EMAIL	WHERE PASSWORD IS STORED	WHO TO CONTACT IF LOCKED
PAC email address			
BCeID (Business or Basic)			
Online banking login			
School district parent portal (if applicable)			
PAC website / social media admin			
Eventbrite / event platform			
Fundraising platform (if used)			
Cloud storage (Google Drive, etc.)			

Password storage: Where does the PAC keep shared passwords? _____

Recommendation: Use a shared password manager (e.g., 1Password Teams, Bitwarden) so no single person holds all the keys.

Section 2: Financial Accounts

ACCOUNT	INSTITUTION	ACCOUNT # (LAST 4)	SIGNING AUTHORITY (NAMES)	ACCOUNT TYPE
PAC General Account				Chequing
PAC Gaming Account				Chequing
Other:				

Cheque books location: _____ **Debit card (if any) location:** _____
Current signing authority (names): _____ **Bank**
contact name and branch: _____

Action for incoming treasurer: Update signing authority at the bank within 30 days of your AGM. Bring the AGM minutes (showing election results) and government-issued ID.

Section 3: Government & Grant Accounts

PROGRAM	ACCOUNT / REFERENCE	NEXT DEADLINE	LAST ACTION TAKEN
BC Community Gaming Grant		April 1 – June 30 application	
Gaming Account Summary filing		90 days after fiscal year end	
Any other grants			
CRA Non-Profit number (if registered)			

Was the most recent Gaming Account Summary Report filed? YES / NO / Not sure

If NO or Not sure: Contact the BC Community Gaming Grants Branch immediately: 1-800-663-7867. An unfiled report blocks your next gaming grant application.

Section 4: Key Documents

All of these should be in the shared drive AND handed over in writing.

DOCUMENT	LOCATION	LAST UPDATED
PAC Constitution / Bylaws		
Most recent AGM minutes		
Most recent Gaming Account Summary filing		
Current-year budget		
Prior-year financial summary		
Insurance policy (if held)		
School district MOU or operating agreement		
Vendor contracts (caterers, entertainment, etc.)		
Gaming event licence, e.g. raffles (if applicable)		

Section 5: Key Relationships & Contacts

ROLE	NAME	EMAIL	NOTES
School Principal			
Vice Principal			
School Secretary			
School District PAC Liaison			
DPAC Chair / Liaison			
Regular PAC vendors (caterers, printing, etc.)			
Gaming licence contact (if applicable)			
Community sponsors (if any)			

Section 6: Annual Calendar, Key Dates

Fill in your PAC's specific dates and add to the incoming executive's calendar on day one.

EVENT	TYPICAL TIMING	YOUR PAC'S DATE
PAC fiscal year start	July 1 (most PACs)	
Fall first PAC meeting	September	
AGM	June or September, per your bylaws	
Gaming Grant application window opens	April 1	
Gaming Grant application deadline	June 30	
PAC fiscal year end	June 30 (most PACs)	
Gaming Account Summary due	~September 28 (90 days after June 30)	
Gaming grant notification (on-time applicants)	September 30	
Grant funds arrive	October–November	
Major annual fundraiser(s)		
Licensed gaming event, e.g. raffle (if any)		

Section 7: The Handover Meeting Agenda

Schedule 60–90 minutes with the incoming and outgoing Chairs and Treasurers together, ideally 2 weeks before the AGM.

1. **Walk through this checklist** (30 minutes): outgoing executive shows incoming where everything is
2. **Bank account transition** (10 minutes): confirm signing authority update plan; bring AGM minutes
3. **BCeID handover** (5 minutes): confirm login access transferred, not just written down
4. **Grant status review** (10 minutes): is this year's application in? Is last year's report filed?
5. **Top 3 things the outgoing executive wishes they'd known** (10 minutes): open conversation; capture in notes
6. **Who to call when stuck** (5 minutes): list 2–3 people still involved in the school community who know the PAC's history

Before You Hand This Over

Outgoing chair / treasurer: please confirm:

- ☐ All accounts in Section 1 have been transferred or shared
- ☐ Signing authority has been / will be updated at the bank
- ☐ All documents in Section 4 are in the shared drive
- ☐ Gaming Account Summary has been filed (Section 3)
- ☐ This checklist has been handed to the incoming executive IN WRITING

This checklist was created by Mocha Shmigelsky, PAC Consult. Free for personal and PAC use. Not for resale. Not legal, tax, or financial advice. For BC PAC context.

Want the complete PAC Executive Toolkit? The Gaming Grant Kit, Bylaws Template, and Treasurer Toolkit are available at <https://mochashmigelsky.com/pac>.

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