

# Association Year-End Checklist

## PLANNING FOR NEXT YEAR:

1. Create a calendar for the next year including:
  - General Meetings
  - Executive Meetings
  - Fundraisers
  - Holidays
2. Create the Association Budget for next year's activities
3. Brainstorm fundraising goals and community events for the Association

## LOOKING FOR RESOURCES:

OFHSA Resources are available on the website <https://ofhsa.on.ca/for-members/>

Subscribe to the OFHSA mailing list on the website to receive important updates

Attend OFHSA Conference and Leadership Days to learn how to make a difference in your community

Attend local H&S Council Meetings

## Contact OFHSA

905-308-9563  
info@ofhsa.on.ca  
www.ofhsa.on.ca

Prior to the Association year-end meeting please:

- Ensure Association delegates who attended the OFHSA Conference and Annual Meeting have shared workshop resources and important updates with other members (preferably verbally and in writing).
- Ensure an Association Annual Meeting has been organized for the members to elect a new Association executive for the coming year. OFHSA Bylaws state each Association must have an Annual Meeting by the end of June.
- Ensure your Association has access to the H&S Communications Binder documents, available through the office on a flash drive or through member Dropbox files. This also includes OFHSA's current **Policy Document** and the **Constitution & Bylaws**
- Ensure arrangements have been made to verify your Association's financial records according to OFHSA's **Verification of Financial Statements** resource (due Oct 31<sup>st</sup> annually).
- Ensure the **Executive Contact Information** form is completed and sent to the Federation office with the incoming Executive's contact information so that any OFHSA email communications reach the appropriate persons.
- Ensure arrangements are made with the Association's banking institution to make the necessary changes to the bank account signing officers. An Association letter that includes the Association Minutes detailing the motion to officially name signing officers must be provided to the bank for verification purposes.
- Ensure there is discussion with school administration about plans for the community for the coming year.

