
ORGANISATIONAL
HEALTHCHECK:
OVERVIEW

PARRY FIELD LAWYERS

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Lawyers



To the heart of what matters.



”

***Nā tō rourou, nā
taku rourou ka
ora ai te iwi.***

***With your food
basket and
my food basket
the people will
thrive.***

”

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About Parry Field Lawyers

We are a New Zealand owned company that has been serving our clients since 1948. Our aim is not only to provide sound legal advice, but to also find solutions which deliver the best practical outcome for those we represent.

Our History

In 2023 we celebrated 75 years in practice and today we have grown to 11 partners, around 100 staff, and operate from five locations.

To The Heart Of What Matters

We see our clients in a rounded way and wanted to help them with 'what really matters', for legal services and beyond, where appropriate. With our growing team, we are excited by what the future holds and look forward to continuing to provide exceptional legal services to our valued clients.

Find out more at parryfield.com

Compiled by Parry Field Lawyers

parryfield.com

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PARRY FIELD LAWYERS

ORGANISATIONAL HEALTHCHECK: OVERVIEW

Having supported hundreds of organisations, we have seen the same challenges arise time and again. This organisational healthcheck guide addresses those challenges and provides a framework to lead you through key themes and questions, helping you learn quickly what is often discovered only through trial and error.

Our encouragement is to use this as a tool at your next board meeting. Choose a theme and consider, discuss and reflect on how things could be improved – there is always room to continue learning.

This healthcheck sets out the key legal risks that charities and organisations should know about, and could work to improve, in order to mitigate risks to Board members and the organisation.

This is not a textbook, it is brief and deliberately high level. Think of it as a tour guide – offering insights that help you see the landscape more clearly than if you explored it alone.

Our role is to be a catalyst to solve your legal problems. With a team of lawyers focused on 'for purpose' organisations and around 100 staff across five offices, we are one of New Zealand's leading law firms for charities, churches, companies, and entrepreneurs who want to do things differently – with purpose and impact at your core.

Together, let's make things better.

NGĀ MIHI NUI



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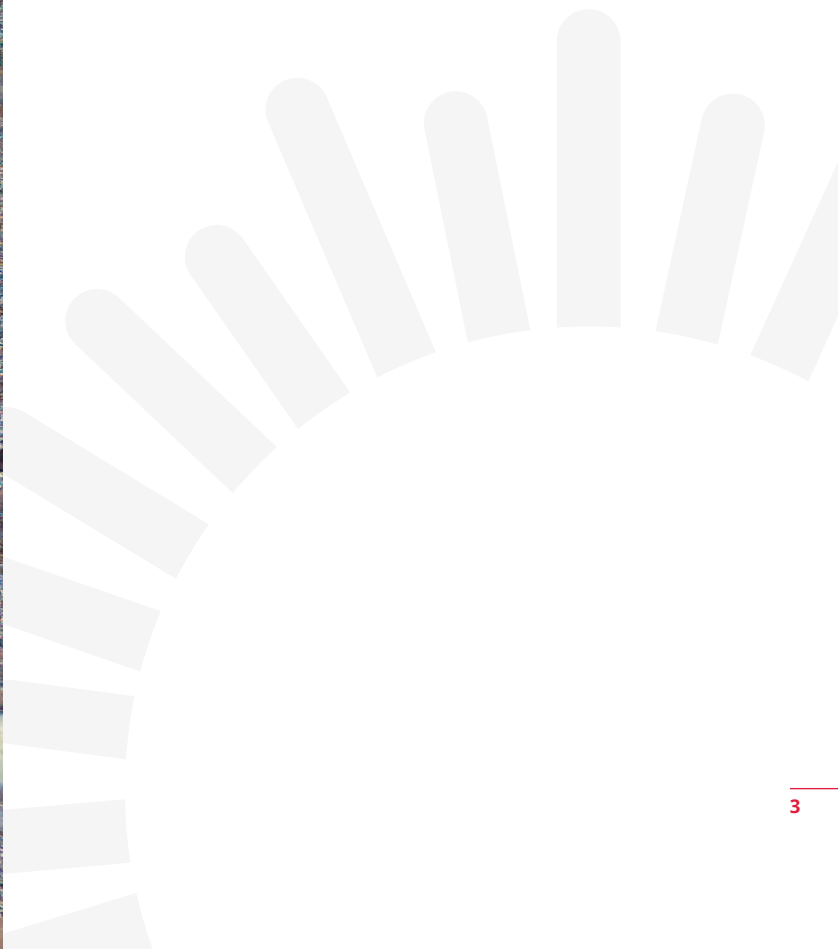
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BRAIDED RIVER REFLECTION

Braided rivers in Aotearoa New Zealand are unique, constantly shifting and reshaping themselves as they flow in the same general direction, yet never remaining exactly the same.

Trying to plan every aspect of your life can mean missing out on opportunities if you stay in just one stream. In the end, much comes down to this: persistence, serendipity, and the relationships you cultivate. The magic ingredient, though, is the willingness to let your direction shift, like a braided river, and to follow the flow of new opportunities as they arise.



1. Your Founding Document

WHY IT MATTERS: This document forms the foundation of your organisation. It should be clear, set out the rules by which you operate, and be compliant with all legal requirements.

Questions to provoke discussion	Ranking
• When did you last review this document? Is it currently compliant with the law, including new laws e.g. The Trusts Act 2019?	/10
• Does your purpose clearly state: <ul style="list-style-type: none">◦ Why you exist◦ The problem you seek to solve, and for whose benefit◦ Your strategy	/10
• What would be the conditions for your organisation to close (e.g. the mission has been completed)	/10

Key Resource: [Charting the Future paper](#)

Notes

2. Governance

WHY IT MATTERS: Governance provides focus for the future, so this is important to get it right.

Questions to provoke discussion	Ranking
• What do your leaders understand their role in governance to be?	/10
• Are the roles and responsibilities of trustees, kaumātua, management, advisors, volunteers, and donors clearly defined and understood?	/10
• How does the Board evaluate its performance, both as a group and as individual members?	/10

Key Resource: [Governance 101 Course](#)

Notes

3. Strategy

WHY IT MATTERS: Focusing on the future is vital, and a well-defined strategy helps your organisation stay ready for whatever comes next.

Questions to provoke discussion	Ranking
• How often does the Board hold dedicated strategy sessions? Do you review and discuss the outcomes you aim to achieve each year?	/10
• Do you use a Board composition matrix to guide recruitment decisions? Is there a succession plan in place for Board membership? (See additional questions on this below.)	/10
• Does the Board set annual objectives that align with the organisation’s strategic plan and longer-term goals?	/10

Key Resource: [Community Governance Aotearoa](#)

Notes

4. Practical steps for good governance

WHY IT MATTERS: To ensure good governance, it requires intentional planning and a commitment to continual learning.

Questions to provoke discussion	Ranking
• Do Officers have a learning and development plan that includes Governance?	/10
• Is there a standing agenda that allocates time for each matter? Is it more future-focused rather than past-focused?	/10
• Are Board members aware and familiar with key operating policies that affect them? Could they be included in a shared operating handbook?	/10

Key Resource: [Board Matters Podcast](#)

Notes

5. Employees & Volunteers

WHY IT MATTERS: People are at the heart of every organisation's success, so it is essential to look after them and have clear terms that set out how they contribute to advancing the purpose.

Questions to provoke discussion	Ranking
• When did you last review your employment agreements? Is this a regular thing, say once a year with performance reviews?	/10
• Do your volunteers have agreements? Do they sign NDAs, and do you collect references?	/10
• Do you have a code of conduct or policy that spells out behaviour expectations for staff, volunteers and elders/kaumātua?	/10

Key Resource: [Charities in New Zealand: A Legal Handbook](#)

Notes

6. Taking care of your people

WHY IT MATTERS: We should look after those who contribute to our organisations in a proactive way.

Questions to provoke discussion	Ranking
• Do you run an appraisal or performance review process for employees? How often does it occur, and are objectives clearly aligned to the organisation's purpose and strategic plan?	/10
• Are volunteers and staff appropriately managed, supervised and supported, and covered by suitable insurance?	/10
• How are you safeguarding the mental health and wellbeing of staff and volunteers?	/10

Key Resource: [Employment New Zealand guidance](#)

Notes

7. Health & Safety

WHY IT MATTERS: This is not a box-ticking exercise; a genuine culture of caring for employees, volunteers and everyone we work with prevents injuries and saves lives. Build a culture where this is a priority.

Questions to provoke discussion	Ranking
• Does the board receive regular health and safety reports, including incidents, near misses and actions? Setting an example from the top has a flow on effect to the rest of the organisation.	/10
• What measures are in place for identifying and managing risk?	/10
• Do you have a health and safety plan in place for all activities, and are your staff and volunteers trained?	/10

Key Resource: [WorkSafe reference guide](#)

Notes

8. Human Rights Act

WHY IT MATTERS: Complying with this legislation is not optional; make sure your processes and policies are robust and keep people safe.

Questions to provoke discussion	Ranking
• Are you aware of what the Human Rights Act 1993 says and its implications for your policies, decisions, and day-to-day practice?	/10
• How are you ensuring diversity and inclusion?	/10
• Have you considered how your charity is contributing to human rights in your activities? For example, are your suppliers ethically sourced?	/10

Key Resource: [Human Rights Commission guides](#)

Notes

9. Complaints

WHY IT MATTERS: The way your organisation responds to complaints will set it apart. Don't just think about current complaints, also think about historical ones.

Questions to provoke discussion	Ranking
• What process would you go through if there was a complaint brought against the organisation/ member of staff/ volunteer/ board member?	/10
• What established procedures are there for handling historical complaints and what is needed to preserve the reputation of the organisation?	/10
• Can your organisation take a proactive approach to identify potential complaints early and resolve them before they are formally raised?	/10

Key Resource: [Charities Services guidance on complaints](#)

Notes

10. Privacy

WHY IT MATTERS: [The Privacy Act 2020](#) sets out key principles which are aimed at protecting individuals' personal data and information.

Questions to provoke discussion	Ranking
• Is your Privacy Policy up to date? Do you have a review plan/schedule?	/10
• If there was a privacy breach, how would you respond?	/10
• Is there information that has been kept longer than its required purpose?	/10

Key Resource: [Privacy information article](#)

Notes

11. Property

WHY IT MATTERS: Property is a key asset, so it is important to look after it well.

Questions to provoke discussion	Ranking
• Do you have a costed long-term maintenance plan for your properties? Who is responsible for ensuring it is carried out?	/10
• Have you considered forming a separate entity to hold the land/assets for your organisation to “ring-fence*” liability?	/10
* Ring-fence liability means to separate your assets so that any losses or legal claims connected to them do not affect the organisation as a whole.	

Key Resource: [Christian Savings on long term maintenance plans](#)

Notes

12. Finances

WHY IT MATTERS: Taking care of the finances is vital for a charity to be able to operate and advance its purposes. Having good processes in place will ensure the long-term viability of your organisation.

Questions to provoke discussion	Ranking
• Do you have appropriate systems and processes in place for monitoring your financial solvency?	/10
• Are you preparing and reporting your finances in accordance with the correct charity reporting tier (one of four tiers)?	/10
• If there were a change in circumstances, does your organisation have financial reserves to continue functioning?	/10

Key Resource: [XRB guidance for charities on tiers and reporting](#)

Notes

13. Finance controls

WHY IT MATTERS: Having controls in place to ensure that the finances are looked after is critical to the long-term viability of the organisation.

Questions to provoke discussion	Ranking
• What internal controls are in place to manage financial matters?	/10
• Who holds delegated financial authority and what are the defined parameters of that authority?	/10
• Is there a fraud policy outlining how fraud is prevented and detected?	/10

Key Resource: CAANZ [tools and resources](#)

Notes

14. Reporting on impact

WHY IT MATTERS: Your organisation may be doing incredible work, but how are you sharing that story? Communicating it well helps attract interest and support from volunteers, funders, and other stakeholders.

Questions to provoke discussion	Ranking
• Do your annual accounts clearly communicate your impact?	/10
• Have you considered Impact Reporting and what this means for your organisation?	/10
• There is often a noticeable gap in how charities report on non-financial performance. It is important to define what success looks like, but even more valuable to explain how you plan to achieve your goals for the year and how you have performed against them.	/10

Key Resource: Charities Services [guide on reporting](#)

Notes

15. Insurance

WHY IT MATTERS: Things do go wrong – insurance helps provide a safety net for when it happens.

Questions to provoke discussion	Ranking
• What insurance do you have in place?	/10
• Are your coverage and excess terms appropriate and do you understand the scope and any exclusions of your coverage?	/10
• When were your insurance policies last reviewed? Do you have a review schedule?	/10

Key Resource: Article on [why insurance matters](#)

Notes

16. Related Trusts / other Stakeholders

WHY IT MATTERS: It is vital to establish clear and well-defined relationships with any related or affiliated groups.

Questions to provoke discussion	Ranking
• What links are there between your organisation and related groups?	/10
• Your organisation may have created a new entity – does your organisation remain as an umbrella group, or are they separate?	/10
• Should the ties between entities be strengthened or loosened?	/10

Key Resource: [10 minutes on how to set up an impact driven organisation](#)

Notes

17. Other entity legal structures

WHY IT MATTERS: Sometimes organisations are connected to others with similar purposes – so how do you engage with them, and what type of entity should they be?

Questions to provoke discussion	Ranking
• What structures are in place for aligned initiatives such as preschools, cafés, funeral homes, counselling services, or social housing?	/10
• Have you considered “ring fencing” those initiatives into separate entities rather than keeping the under your main organisation	/10
• If so, what is the most suitable legal structure for them – for example, a company, trust, partnership, or incorporated society?	/10

Key Resource: [10 minutes on how to set up an impact driven organisation](#)

Notes

18. Contracts

WHY IT MATTERS: Being clear in your contracts are important as they set out how your organisation will relate with other groups like suppliers, customers, contractors, and government.

Questions to provoke discussion	Ranking
• Do you have a Contract / Agreement register that states who is responsible for each relationship?	/10
• Are agreements in written or verbal form only? For key supplier/customers, ensure they are written and signed/dated.	/10
• Check key clauses in your contract/agreements such as: <ul style="list-style-type: none">◦ termination rights◦ indemnities◦ liability◦ right to vary◦ scope of services	/10

Key Resource: [Startups legal toolkit](#)

Notes

19. Policies

WHY IT MATTERS: Having good policies in place will ensure that you stay up to speed with the key aspects that keep your organisation healthy.

Questions to provoke discussion	Ranking
• What policies do you have in place?	/10
• Policies can easily become lengthy and overlooked. How do you ensure yours remain realistic, practical, and up to date?	/10
• How often do you review your policies?	/10

Key Resource: See our [Policies Page](#) - we offer three tiers of policy

Notes

20. Te Tiriti o Waitangi

WHY IT MATTERS: Being clear on your relationship with Tāngata Whenua and the Treaty is important here in Aotearoa New Zealand – these questions will help you consider that.

Questions to provoke discussion	Ranking
• How are the principles of Te Tiriti o Waitangi — partnership, participation, and protection — reflected in the way your organisation operates?	/10
• Have you considered the relationship with your local Iwi? What are some initiatives you could come up with to involve your local Iwi?	/10
• Do you have someone who can help you on the journey of understanding your organisation and its role from a Māori/Pasifika perspective?	/10

Key Resource: [Kate Frykberg's reflections on this](#)

Notes

21. Publications and Media

WHY IT MATTERS: Think early about how your organisation communicates with the public and media. By considering this early on, it gives you more control on the narrative you want to put out there and can mitigate dealing with issues if they arise.

Questions to provoke discussion	Ranking
• Do you have publications / brochures / flyers / pamphlets and are these checked regularly to ensure they comply with current law?	/10
• Do you have a publications policy and clear communication processes? Who is responsible for managing them?	/10

Key Resource: [Charities in New Zealand: A Legal Handbook](#)

Notes

22. Continuity

WHY IT MATTERS: Being aware of potential risks and how your organisation would continue to operate is vital to ensuring you are prepared in advance.

Questions to provoke discussion	Ranking
• Do you have a Business Continuity Plan? How often is it reviewed and updated?	/10
• How often do you refer to it?	/10
• How integrated is it into the daily activities of your organisation?	/10

Key Resource: [Employment New Zealand guidance](#)

Notes

23. Cybersecurity

WHY IT MATTERS: There is an increasing risk from people seeking to access information online, so having strong cybersecurity measures in place is essential to keep your organisation safe.

Questions to provoke discussion	Ranking
• Have you considered cybersecurity risks and developed a plan for responding to ransomware attacks?	/10
• Are digital records backed up regularly?	/10
• How would you respond to a cyberattack? Do you have a plan, and is it tested each year?	/10

Key Resource: [ACNC guidance](#) – Australian but relevant here too

Notes

24. Environmental Sustainability and Climate

WHY IT MATTERS: Every organisation should consider the impact it has on the climate, as this is increasingly becoming part of formal reporting requirements.

Questions to provoke discussion	Ranking
• Are you aware of the climate change risks to your organisation, including: <ol style="list-style-type: none"> 1. Infrastructure and operations 2. Human health, equity, and community wellbeing? 	/10
• Do you measure and report on waste volumes, and have a strategy to reduce landfill waste?	/10
• Do you measure and report on carbon emissions, and have a strategy to reduce them?	/10

Key Resource: [Guidance for charities on this](#)

Notes

25. Some final “other” issues

WHY IT MATTERS: This section brings together a mix of issues your organisation may face. While it might seem a random collection, these are additional areas we believe are important to consider. There may be some overlap with earlier sections, but it’s worth reviewing these as useful reminders.

Questions to provoke discussion	Ranking
• Do you own your Intellectual Property (IP)? Have you trademarked names and logos? What other IP do you have? How is your IP protected and maintained?	/10
• Do you have a risk matrix and mitigation plan, and is this reviewed on a regular basis?	/10
• How do you protect your organisation’s reputation and social license to operate?	/10

Key Resource: [Charities in New Zealand Guide](#)

Notes

ORGANISATIONAL HEALTHCHECK

This document is intended to be an overview of our Organisational Healthcheck resource.

If you wish to begin a more in-depth review of your organisation, our follow-up resource, *Organisational Healthcheck and the Questions You Should Ask*, is a good next step.

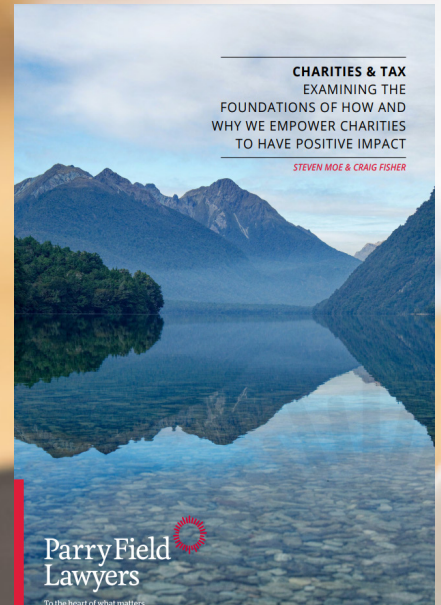
The content has been organised into the following themes, allowing you to focus on specific areas most relevant to your organisation:

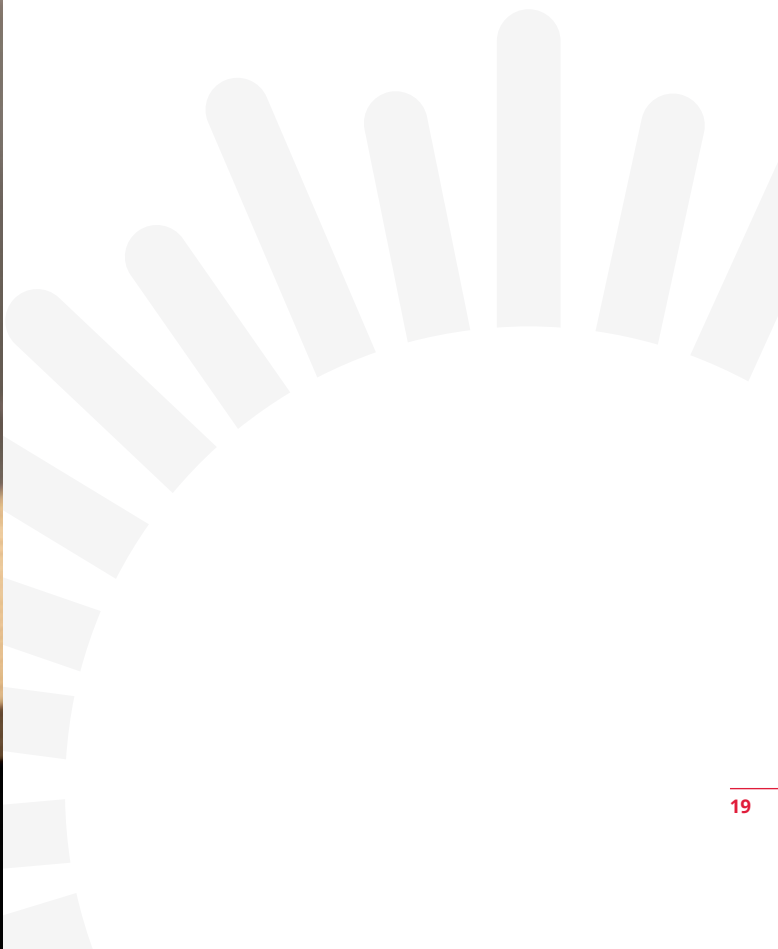
- Governance
- People
- Assets
- Policies
- Faith Groups

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