
ORGANISATIONAL HEALTHCHECK

AND THE QUESTIONS YOU SHOULD ASK

PARRY FIELD LAWYERS

Governance - People - Assets - Policies



ParryField
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.***

”

ORGANISATIONAL HEALTHCHECK

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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

AND THE QUESTIONS YOU SHOULD ASK

Having supported hundreds of charities and for purpose organisations, we have seen the same challenges arise time and again. This organisation 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 intention is for this project to continue evolving and we would love to hear feedback for future releases. Please reach out if you think more value can be added to this, we would love to hear from you.

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

- Part 1: Governance
- Part 2: People
- Part 3: Assets
- Part 4: Policies
- Part 5: Faith Groups

Our role is to be a catalyst to solve your legal problems. With a team of lawyers focussed on 'for-purpose' organisations and about 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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PART 1: GOVERNANCE

What is Governance?

Before exploring the detailed questions on the following pages, it is important to set the scene by explaining what governance is, and what it is not.

In charities and 'for purpose' organisations, people often need to "do everything", which can blur the lines between governance and management. Let's look at what each involves:

- **Management** is about the day-to-day operation of the organisation. Think of it like running a ship – plugging leaks, fixing the engine, repairing the sails, cleaning the deck, and steering moment by moment.
- **Governance**, on the other hand, is like being in a helicopter flying above the ship. The focus is on the future. Strategy, direction, and identifying risks that those on the ship cannot yet see: "Watch out for that iceberg!"

Governance is vital for a healthy organisation because it is future focused. While those in governance consider the past, their primary role is to look ahead and ask what is coming.

A Board's role includes setting direction, providing oversight, appointing and evaluating management, representing the organisation externally, developing resources, and managing risk.

A governance group that descends into day-to-day management does the organisation a disservice. Although the distinction can blur in volunteer-led settings, it is essential to stay clear about these roles before turning to the detailed questions that follow.



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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• How does your founding document reflect your organisation's purpose and vice versa?	/10
• How does your founding document reflect your organisation's purpose and vice versa?	/10
• Do you follow the processes outlined in your founding document? For example, holding an AGM, electing Board members, making amendments, and notifying Charities Services when required.	/10
• Is your governance structure aligned with the purpose stated in your Trust Deed (or equivalent document)?	/10
• Have you considered reconnecting with your purpose? And, in doing so, revitalising your organisation's strategy?	/10
• Do you maintain clear records of Board member appointments that align with the processes required in your founding document?	/10
• Is your current legal structure fit for purpose? For example, Trust, Incorporated Society, Company, or Partnership?	/10
• Are you tracking each Board member's term length to ensure continuity and renewal?	/10
• Do you have a clear succession plan for governing body members?	/10
• Do your organisation's leaders share an understanding of the key strategic risks and opportunities in the charitable sector? How is your Board shaping and integrating these into management decision-making?	/10

2. Governance

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Are all those in governance aware of their roles and officer responsibilities, and do they understand the organisation's purpose?	/10
• Do leaders understand their obligations under the Charities Act?	/10
• How do you recruit Board members? Do you advertise widely, have an application process, and interview potential candidates? Do you actively seek diversity in your recruitment?	/10
• Do you have a Board Charter that defines clear expectations for Board members and the Executive Officer? The Institute of Directors (IoD) provides a free template and sample committee charters .	/10
• Do you provide an induction pack or learning resources for new Board members? For example, copies of key policies, previous minutes, the Board Charter, a summary of the organisation's history, purpose, future direction, and an outline of their role.	/10
• Does the Chair lead the induction? Is there more than just reading material for new members? A face-to-face induction is highly recommended.	/10
• Have you defined what "success" means in light of your purpose? This might be expressed through the desired outcomes in your Statement of Service Performance Report.	/10
• Is the distinction between governance and management clearly understood, modelled, and communicated by Board members and other leaders?	/10
• Do management and staff clearly understand what is expected of them?	/10
• How does the Board demonstrate its commitment to Te Tiriti o Waitangi and to tangata whenua? For example, through co-governance arrangements or Māori members on the Board?	/10
• How does the Board work with committees to ensure that: <ol style="list-style-type: none"> 1. Ultimate decision-making remains with the Board, and 2. Committees do not duplicate, substitute, re-litigate, or undermine management? 	/10
• Do you have sub-committees to manage key aspects of the Board's role? Are people with the right skills serving on the right committees? How often do you review the effectiveness of these sub-committees?	/10
• How does your organisation manage conflicts of interest on the Board? For example, by regularly updating and reviewing the conflict-of-interest register?	/10

- | | |
|---|-----|
| <ul style="list-style-type: none"> • Are those in governance able to separate their governance responsibilities from management functions, or are they expected to roll up their sleeves and do the mahi within the organisation? If the latter, does this make it harder for them to act on strategic information that is vital for effective and efficient governance? | /10 |
|---|-----|

Note: In start-up or smaller organisations, it is common for governance and management roles to overlap or even be interchangeable. As your organisation grows, aim to develop a clearer separation between the two.

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.

Overview Questions	Ranking
<ul style="list-style-type: none"> • How often does the Board hold dedicated strategy sessions? Do you review and discuss the outcomes you aim to achieve each year? 	/10
<ul style="list-style-type: none"> • 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
<ul style="list-style-type: none"> • Does the Board set annual objectives that align with the organisation's strategic plan and longer-term goals? 	/10

Questions to provoke further discussion	Ranking
<ul style="list-style-type: none"> • How do those new to governance come up to speed with their roles and responsibilities? Do you have a structured onboarding plan for new Board members? 	/10
<ul style="list-style-type: none"> • Can Board opportunities be used to develop people for future governance roles - within your organisation or elsewhere? Is this facilitated to ensure the best chance of success? 	/10
<ul style="list-style-type: none"> • How actively involved are the Board and CEO in fundraising activities? 	/10
<ul style="list-style-type: none"> • Are key staff given the opportunity to present directly to the Board, or does all communication go through the CEO? 	/10
<ul style="list-style-type: none"> • Do you have a governance skills matrix that maps individual Board member skills against the organisation's current and future needs, particularly when a member leaves or major changes occur (for example, a pandemic or a building project)? <ul style="list-style-type: none"> ◦ Do you have a clear selection checklist and process for appointing new Board members that identifies the characteristics, skills, and values you seek? Have some Board members been there for a long time, and is it time to bring in new perspectives? ◦ Does the Board assess which skills it lacks and maintain a network of advisors who can offer regular support, not just when issues arise? 	/10
<ul style="list-style-type: none"> • Do you have a longer-term strategic plan (for example, a five-year plan) developed in collaboration with the Board and key stakeholders? 	/10
<ul style="list-style-type: none"> • How does the Board identify and monitor strategic risks, including both opportunities and threats, that could impact the organisation's mission and success? 	/10
<ul style="list-style-type: none"> • Does the Board meet each year to review and update the strategic plan? 	/10

4. Practical steps for good governance

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Are you familiar with the “prudent businessperson” test for decision-making, that is, what a reasonable and careful person would do (rather than a ‘perfect’ one)? What steps are taken to safeguard decisions and the overall decision-making process?	/10
• Have you explored Board member liability? Are protections included in your founding document, such as insurance cover? Have members also considered how their personal affairs (e.g. family trusts) are structured for protection?	/10
• Do all those in governance understand best practices for keeping minutes and passing resolutions? Who serves as your governance support or resource person for this area?	/10
• Have Officers considered addressing forward-looking matters first in meetings, followed by standard items like minutes and reports? Too often, Boards focus on the past rather than planning for the future.	/10
• When are Board papers circulated? At least one week before meetings?	/10
• Have the Trust Deed provisions on liability and indemnification been updated to align with the Trusts Act 2019?	/10
• Who reviews the content of the Annual Return, in addition to the Performance Report? Is there a clear process and schedule for reviewing organisational policies?	/10
• Do all those in governance understand the financial statements, rather than relying solely on the Treasurer?	/10
• How and where are records stored, and who is responsible for their security? Are they digitised, and is there an alternate custodian in case of emergency?	/10
• Are you meeting all Charities Services reporting obligations? E.g. are retiring Officers formally reported?	/10
• How do you ensure that new Officers understand the organisation’s financial position and associated risks before accepting their roles?	/10
• Do you have an online Board portal? As your organisation grows, consider tools such as BoardPro to manage papers and records efficiently.	/10
• Do you have an impact model in place? Have you considered how to protect your organisation’s purpose. Check out this resource on How to Lock Your Mission .	/10

PART 2: PEOPLE

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Are all HR processes and systems up to date and managed online?	/10
• Are employment agreements updated whenever new legislation affects your employees, rather than waiting until the annual review discussion?	/10
• Individual Employment Agreements (IEAs): <ul style="list-style-type: none"> ◦ Does every employee have a current IEA or contract that complies with current legislation? ◦ Do you hold a signed copy on file? ◦ Do you have a schedule for reviewing IEAs? ◦ Are your IEAs consistent, or have they been signed at different times over the years with varying terms and conditions? ◦ Have all IEAs been reviewed by a lawyer before being signed? 	/10
• Does every employee have an up-to-date job description that accurately reflects their current role and is signed by both the employee and the Chair (or an internally delegated person)? Is this reviewed annually during performance discussions?	/10
• What is your process for managing staff who also volunteer? Do you have documentation clearly recording those additional hours, beyond paid work, are genuinely voluntary and is this being applied in practice?	/10

<ul style="list-style-type: none"> • Are volunteers truly volunteers? Are you careful to ensure they are not being compelled or rewarded in a way that creates an employment relationship? Even where they are not compelled, is what they are asked to do reasonable? 	/10
<ul style="list-style-type: none"> • Leave and payroll: <ul style="list-style-type: none"> ◦ Who is responsible for managing holiday pay and leave provisions/obligations, and how is this reported to the Board? Do you periodically check that payroll software correctly calculates holiday pay and entitlements? ◦ Do you ensure staff are taking leave? (It can be easy for part-time employees to build up excessive leave balances if not monitored.) ◦ Are accurate payroll records maintained including hours worked, remuneration, deductions, and records of annual, sick, and bereavement leave? Are you checking these records regularly to confirm that staff are working the agreed hours (not less or more)? 	/10
<ul style="list-style-type: none"> • What role does police vetting play in your recruitment and appointment processes? Are all employees and volunteers required to have police checks, and are these renewed regularly (for example, every two years)? 	/10
<ul style="list-style-type: none"> • Some roles may be fixed-term or contract-based because they are linked to specific grant funding. Consider this when relevant, particularly at contract rollover or when transitioning to employment. 	/10
<ul style="list-style-type: none"> • Do all fixed-term agreements clearly state the genuine reason for the fixed term, and is that reason directly connected to the term of employment? (Note that “trialling” an employee is not a genuine fixed-term reason.) 	/10
<ul style="list-style-type: none"> • From whom do you seek legal advice, particularly for employment matters? Ensure that this advice comes from someone independent of the Board. 	/10

6. Taking care of your people

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• What feedback mechanisms are in place to measure staff engagement, and how does the organisation act on that feedback?	/10
• Does every employee have a professional development plan in place?	/10
• Senior management pastoral care – How do you ensure your senior leaders receive the care and support they need (for example, burnout prevention, wellbeing checks, or a mental health 'warrant of fitness')?	/10
• Senior management remuneration – Who determines senior leader remuneration, and what process is used?	/10
• Do you have clear processes and appropriate support in place to address performance or conduct issues when they arise?	/10
• For staff working from home, what steps are taken to ensure their environment is safe and supportive?	/10
• Have you considered appropriate protections for both volunteers and staff who work with vulnerable people?	/10
• Is your Board staying connected with the culture of your organisation, both the positive and the challenging aspects, rather than focusing only on the transactional elements of HR?	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• What feedback mechanisms are in place to measure staff engagement, and how does the organisation act on that feedback?	/10
• Who is considered a PCBU (Person Conducting a Business or Undertaking) and/or a Health and Safety Officer within your organisation? <ul style="list-style-type: none"> ◦ Are those individuals fully aware of their health and safety obligations under the relevant legislation? 	/10
• Are health and safety issues and incidents clearly recorded and reviewed?	/10
• What is your organisation's key health and safety liabilities?	/10
• Are you confident that risks are being accurately reported to the Board?	/10
• Do you have an Emergency Health and Safety Plan or a Business Continuity Plan in place for events such as natural disasters or pandemics?	/10
• Do you carry out risk assessments and have approved controls in place for all events and activities?	/10
• For Health and Safety, best practice is to include a dedicated Risk section with a Risk Framework and documented response plans.	/10
• Does the organisation hold personal liability insurance for trustees or officers? If so, what is the level of cover?	/10
• Do you have a clear process for incident grading and reporting to ensure consistent follow-up and accountability?	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do you have a clear policy on who can hire your venue, and does it comply with the Human Rights Act?	/10
• Are you aware of Modern Slavery legislation and its implications for charities and your organisation's activities?	/10
• Are your employment policies inclusive of people with disabilities, different ethnicities and genders, and those who identify as LGBTQIA+? Do they provide clear guidance and accommodate during recruitment, induction, and orientation?	/10
• How does your organisation actively ensure diversity and inclusion across all levels?	/10
• Do you expect staff to align with and uphold your organisation's values or beliefs in their work? <ul style="list-style-type: none"> ◦ Does this expectation extend to their conduct outside of work? If so, is this stated clearly and transparently? And is it reasonable, given the nature of your organisation and the person's role? Have you sought advice on any potential legal implications? 	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do you have a clear policy on who can hire your venue, and does it comply with the Human Rights Act?	/10
• How are current (not just historical) complaints handled, and what could be improved in your organisation's response process?	/10
• Where do you seek legal advice, particularly for complex or sensitive complaints?	/10
• What is your organisation's policy for communicating with complainants?	/10
• Do you have a Whistle-blower Policy that protects those who raise genuine concerns?	
Note: A Whistle-blower Policy provides a safe and confidential way for people within an organisation to report concerns about wrongdoing, such as misconduct, fraud, or breaches of law or policy. It sets out how such concerns will be handled and protects the person raising them from retaliation or disadvantage for speaking up in good faith.	/10
• Do you have a Dispute Resolution Policy, and is there a supporting clause or process outlined in your founding document?	/10
• How does your organisation manage requests from individuals who wish to know what information you hold about them, or who ask for their data to be completely removed from your records?	/10

10. Privacy

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• How do you store personal information about your members and contacts? What about financial information?	/10
• Do you have appropriate cybersecurity measures in place to protect personal data? (See the later section on cybersecurity.)	/10
• Do you collect more information than what is necessary?	/10
• Do you know how long different types of information must be retained under the law?	/10
• Who is your organisation's designated Privacy Officer? Do they have a plan for ongoing privacy training for staff and themselves?	/10
• Are you familiar with the guidelines and requirements of the Privacy Act 2020?	/10
• What steps would you take if there were a privacy breach?	/10
• Do your staff and volunteers handle personal information with care and respect, regardless of whether it seems sensitive or trivial? Do they understand that this information still "belongs" to the person it identifies and must be protected accordingly?	/10
• Does your website include a clear Privacy Policy explaining why you collect personal information, how it is used, and whether your practices match what is stated?	/10
• Do you have a policy on the use of images (particularly images of children) in your publications? Do you obtain and record consent before using those images (for example, via a signed form or recorded consent)?	/10
• What is your policy for storing charity documents and information? If materials are kept on individual trustees' devices, what security standards apply?	/10

PART 3: ASSETS

11. Property

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• How do you store personal information about your members and contacts? What about financial information?	/10
• Does your depreciation policy align with your long-term maintenance plans and the expected lifespan of your property assets? Are these costs factored into your budgeting and reserves?	/10
• Do you have up-to-date seismic reports for your buildings, where relevant?	/10
• Is your property compliance and/or building Warrant of Fitness current? Do you have a process to regularly check and certify that fire alarms, extinguishers, automatic doors, security systems, sprinklers, and other safety features meet council and regulatory requirements?	/10
• Do you have clearly identified muster/assembly points for emergencies, and are these communicated to all users of the premises?	/10
• Have you appointed fire wardens to assist in the event of an evacuation and are they aware of the evacuation process/ responsibilities?	/10
• Do your Health and Safety policies accurately reflect the specific risks associated with your buildings and facilities?	/10
• Do you have clear ‘Right of Admission Reserved’ signage displayed where appropriate?	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do trustees understand how revenue and costs are incurred, and do they have the capability to meaningfully analyse both financial and non-financial information?	/10
• Are you GST registered? If so, do you have a regular and ongoing income stream (beyond donations) to maintain that registration?	/10
• How relevant and up to date are your Reserves Policy and Statement of Investment Policy and Objectives (SIPO)? How do these frameworks support your mission to innovate, experiment, learn, and grow?	/10
• Have you set aside savings for ongoing operations, ideally a minimum of three months' average operational expenditure, as well as for maintenance of your property and assets?	/10
• Do you hold sufficient reserves or savings to cover operating expenses, contractual obligations, and any construction or capital commitments?	/10
• Are material variances against budget clearly highlighted, along with information on how many months of reserves the organisation holds?	/10
• Are you a donee organisation? Do you know what percentage of your income is applied in New Zealand and overseas? (To maintain donee status, no more than 25% of funds can be applied offshore. See the relevant IRD guidance for details and our article on the "Wholly or Mainly" test.)	/10
• Is there clear segregation of financial duties? I.e. are the roles of processing, approving, and paying expenses separated to reduce fraud risk? If full separation isn't practical, is there at least a final authorisation by a separate person?	/10
• Do you have robust expenditure controls, such as requiring two people to authorise payments and evidence that all invoices were approved before payment?	/10
• Do you have a position on applying for funding from gaming trusts, lotteries, or other sources linked to gambling?	/10
• Are your accounts audited each year? (Note: this may not be required.)	/10
• Do you have a budget development and approval process in place?	/10

• Are your tax obligations known, documented, and managed? For example, GST, PAYE, and related filings, and are these completed accurately and on time?	/10
• Is your GST registration still valid? Are you generating revenue from a taxable activity?	/10
• Is your Performance Report audited, reviewed, or prepared by a Chartered Accountant? Do you know what your Trust Deed requires in this regard?	/10
• Do you have a Koha Policy in place?	/10
• What is your policy regarding accepting sponsorship, gifts, or koha from certain categories (e.g. fossil fuel related), individuals, grantmakers or sponsors?	/10
• What policies guide your approach to stewardship, including receipting, thanking, and reporting to donors, grantmakers, sponsors, and other supporters?	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do you have clearly defined management approval limits for expenditure?	/10
• Does your organisation have a minuted resolution authorising paperless financial transactions?	/10
• How often are subscription levels reviewed to ensure they remain appropriate and sustainable?	/10
• Have you removed retired Board members as bank signatories, and do you have a process to ensure this happens routinely?	/10
• Are you aware of the compliance requirements under Anti-Money Laundering (AML) legislation? What steps are in place to ensure your organisation's resources are not used in criminal or unethical activities, locally or overseas?	/10
• What policies and procedures govern the receipt of funds? Are staff and volunteers trained to recognise and report suspicious transactions? Are they aware of their obligations under the AML/CFT Act, if it applies to your organisation?	/10

• Do you have a Reserves Policy? Given the uncertainty of income sources such as government contracts, charitable grants, bequests, subscriptions, and fundraising, do you plan ahead to maintain adequate cash reserves?	/10
• Is there a process in place to ensure all credit card spending is reviewed and approved appropriately?	/10
• Who has access to financial records and bank signing authorities? Credit card transactions should be authorised at a level above the cardholder.	/10
• Are financial reports presented to the Board in the context of the approved budget? If there have been significant changes, are these clearly explained?	/10
• Suggested financial reports for regular Board review: <ul style="list-style-type: none"> ◦ Statement of Income and Expenditure (monthly, since the last meeting) ◦ Statement of Income and Expenditure (year-to-date versus budget) ◦ Balance Sheet 	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Ensure your organisation's operating activities remain aligned with both your founding document and overall strategy.	/10
• What numbers do you hope to report on and how can these figures be verified?	/10
• Transparency is important. Systems that support consistent and robust non-financial reporting, similar to financial reporting, will strengthen accountability and build confidence among funders and stakeholders.	/10
• Impact reporting goes beyond non-financial reporting. It involves developing a clear theory of change and setting out how progress will be measured - for example, through an evaluation and monitoring framework.	/10

15. Insurance

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Liability Insurance – Is this required for your organisation? What types of cover do you hold, what are the levels of cover, and when were they last reviewed?	/10
• Have you considered Directors and Officers (D&O) or Trustee Liability Insurance to protect those in governance roles?	/10
• Are all vehicles owned or used by the organisation insured, registered, and regularly maintained? Is there a secure location on site for storing vehicles to help prevent theft?	/10

16. Related Trusts / other Stakeholders

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

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do Officers understand the organisation's legal structure, such as a trust or other entity types? Do they understand the limitations or obligations that structure may impose?	/10
• Are links and relationships between entities documented and understood by both Officers and Management? Are these relationships being used effectively, or is it time to review or discontinue them?	/10
• Do you provide education or guidance on recognising and managing conflicts of interest?	/10
• Do you have a clear and current Conflict of Interest Policy that is understood and followed by all those in governance?	/10

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?

Overview Questions	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](#)

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do you regularly check end dates for agreements, or maintain a schedule to ensure contracts are renewed on time?	/10
• Does your organisation have a relationship with a professional services firm to assist with issues? Explore pro bono or discounted support options.	/10
• What is your process for reviewing and negotiating contracts or agreements? Who has the legal authority to bind your organisation?	/10
• Who oversees contractual obligations within your organisation? Do you fully understand the legal implications and responsibilities of the agreements currently in place?	/10



PART 4: POLICIES

Policies provide clarity and direction, helping everyone in an organisation paddle the waka in the same direction. Without them, assumptions can form, and confusion can arise. Good policies also hold management accountable to the Board and help reduce organisational risk.

There are generally two types of policies:

- **Governance Policies** – These address Board-level matters, strategic implications, and decision-making processes.
- **Operational Policies** – These guide day-to-day practices across activities or specific areas. They often clarify roles, responsibilities, and delegations of authority.

Using a consistent policy template can promote clarity and professionalism and may include when the policy was created and its most recent review date.

However, be mindful of policy overload. Too many lengthy policies can be counterproductive and ignored. The best ones are concise, relevant, and easy to understand. Some policies, such as Health and Safety, may benefit from visual aids or illustrations to make key information more accessible.

We have compiled a set of commonly used policies, including many referenced throughout this Health Checklist.

We offer a suite of policies which cover key matters in three tiers. Reach out if you would like to know more.

Policies Package – Tier 1

Includes:

- Child Protection Policy
- Code of Conduct
- Privacy Policy
- Video and Photography Policy
- Dispute Resolution Policy
- Donations Policy

Policies Package – Tier 2

Includes:

- Tier 1; and
- Board Charter
- Police Vetting Policy and Process
- Bullying, Harassment and Discrimination Policy
- AI Policy

Policies Package – Tier 3

Includes:

- Tiers 1 and 2; and
- Motor Vehicle Policy
- Mobile Phone Policy
- Media Policy
- Social Media Policy

If you require a tailored package to suit your organisation, please contact us to discuss your requirements.

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.

Overview Questions	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

Questions to provoke further discussion	Ranking
• What review processes have Trustees agreed to for organisational policies?	/10
• Is it clearly defined which policies are the responsibility of the Board to write and which are the responsibility of management?	/10
• Do you have Board selection and induction policies in place?	/10
• How do you decide which policies are needed? Have you considered who the stakeholders are and what their needs may be?	/10
• Are policies reviewed annually on a rotating cycle, or sooner if organisational, regulatory, or environmental changes occur, or if new risks are identified?	/10
• Do you have document control, storage, and access policies? Is a document management or online reporting system used? How and where are Master policy documents stored, and who has access to them? Ideally, key policies should also be made available on your website for members and stakeholders.	/10
• If appropriate for your organisation, does the charity have committees such as a Policy and Security Committee, Audit and Risk Committee, Finance Committee, or Fundraising Committee? <ul style="list-style-type: none"> ◦ How often do they meet and what is their mandate? Make sure the team is made up of senior and experience members. 	/10
• Do you have a process for managing related party transactions and conflicts of interest?	/10
• Do you have a policy for the approval of asset purchasing and disposal, and is there an accurate asset register maintained, including depreciated values?	/10
• Are you reinventing the wheel, or could you reach out to like-minded organisations that may already have policies you can adapt?	/10

Commonly Used Policies

Here is a list of policies we suggest you consider. Not all of these will apply to every organisation, and while the list may seem extensive, focus on selecting the policies that are most relevant to your needs and context.

- Protection policy for children and other vulnerable persons
- Volunteer management
- Non-disclosure agreement for volunteers
- Communications
- Media
- Data deletion
- Data Governance/ policies on collection of qualitative data
- Vehicle operating policy, (business / personal use – FBT risk)
- Travel and accommodation
- Reimbursement of expenses, description, time, format, approval process (may include mileage allowances)
- Whistleblower / feedback from employees'
- Anti-Money laundering and Countering of Financial Transactions (to comply with Anti Money Laundering and Countering Financing of Terrorism Act 2009)
- Risk Management (may be incorporated in governance policies) to identify, assess, plan, mitigate and report on risks and issues) between board and management.
- Business Continuity (may be incorporated in risk management policy)
- Code of Conduct (may be included in governance policies)
- Cybersecurity
- Membership
- Donations- are donations tax deductible? (Must be a registered charity to qualify).
- All donations over \$5 require an invoice and registered Charity number included on receipt). Limitation on donations to political parties
- Fundraising/ special events
- Sponsorship
- Managing Change
- Intellectual Property
- Consumer protection
- Human Resources (HR), Induction, HR resourcing, Job descriptions, internal/ external delineation of expertise
- Health and Safety
- Insurance
- Anti-slavery
- Climate Disclosure standards/ Carbon mitigation
- Cultural
- Learning and Development
- Training
- Privacy
- Working from home
- Hours and leave
- Parental leave
- Disaster recovery plan
- IT disaster recovery plan
- IT security
- Bring your own device
- IT vulnerabilities
- Record management and retention
- Publications
- Financial reserves
- Performance management
- Recruitment and onboarding
- Disciplinary and grievance
- Complaints
- Rewards and remuneration
- Resignation and retirement
- Redundancy
- Diversity, equity and inclusion
- Food safety
- Hospitality, gifts and Koha
- Event management
- Speakers fees
- Sustainability
- Strategic planning

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Have you considered how you name initiatives and whether these processes are culturally appropriate and correctly followed?	/10
• Have you provided training to build cultural competency for your staff and governance team?	/10
• Is there a basic understanding across your organisation of te reo Māori (the language), te ao Māori (the Māori worldview), and Te Tiriti o Waitangi (The Treaty of Waitangi), as well as tikanga (customs and traditional values) and kawa (protocols)? For example, the use of karakia?	/10
• Are you familiar with the Māori and non-Māori history of your area, including Treaty settlements, the New Zealand Wars, and land confiscations?	/10
• Does your founding document acknowledge or include Te Tiriti o Waitangi / the Treaty of Waitangi? <ul style="list-style-type: none"> ◦ The Treaty Resource Centre is an excellent source of information and this resource from their website helps guide community organisations on how to engage with the Treaty. 	/10
• How are you ensuring your services are accessible to Māori and that your organisation can effectively engage with Māori communities? <ul style="list-style-type: none"> ◦ In connection with this, how does your organisation engage with Pasifika peoples and other ethnic communities? 	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Does your organisation have a website? Is it reviewed and updated regularly to ensure information is current and the format remains accessible? Are Terms and Conditions of Use and a Privacy Policy clearly displayed?	/10
• For mailing lists and newsletters, are you familiar with and compliant under the Unsolicited Electronic Messages Act 2007 (anti-spam legislation)? This is an important compliance risk to manage.	/10
• How would the Board respond to a media story about the organisation?	/10
• Who is authorised to speak to the media and represent your organisation publicly?	/10
• What is your organisation's position on media and social media engagement? Who authorises public content, and is this process clearly documented in a communications policy?	/10
• What are your responsibilities and controls for social media posts? Do you have guidelines in place, and which platforms are approved by the Board? (Consider the particular risks associated with platforms such as TikTok.)	/10
• Do you obtain consent before posting photos or videos online? This is a privacy risk, ensure you have a consent form, and that consent is recorded.	/10
• How, when, and what donor information is collected? How do you ensure that such information is securely deleted when no longer required?	/10
• How do you ensure that donor funds are used for their intended purposes, and that your organisation complies with any restrictions or conditions approved by the Board?	/10
• Are you complying with the Copyright Act 1994 in how your organisation uses and shares materials?	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Has your Business Continuity Plan been updated to include potential impacts such as a pandemic, earthquake, fire, or the need to operate from temporary premises or home offices?	/10
• What Emergency Management and Response Plan is in place and has it been tested recently?	/10
• What Disaster Recovery Plan exists for restoring operations if all data or assets were lost?	/10
• Are staff and Board members trained in your Business Continuity and Emergency Response procedures, and is this training reviewed regularly?	/10

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.

Overview Questions	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

Questions to provoke further discussion	Ranking
• Are you confident that your cyber-risk reporting accurately reflects its impact across your wider organisational risk profile?	/10
• What is your policy on surveillance, such as the use of security cameras or monitoring systems?	/10
• Have you considered whether your organisation should obtain cybersecurity insurance?	/10
• Are staff and volunteers trained in both media communication protocols and cybersecurity awareness, including recognising phishing, spear-phishing, and social engineering risks?	/10
• What is your most valuable or sensitive information, and are you confident it is adequately protected?	/10
• In the event of a cyber-attack, who would you seek advice from?	/10
• Would your organisation pay a ransom if confronted with ransomware? Have you discussed or documented this position?	/10
• Does your IT provider's contract clearly outline their obligations in the event of a breach? For example, how quickly they must notify you of an incident?	/10
• Does your cybersecurity policy detail how to respond to an actual, alleged, or suspected attack, including the immediate actions to take within the first 24 hours, during the first week, etc.?	/10
• Do you have multi-factor authentication, regular data backups, an independent audit process, and a data breach response plan in place?	/10
• If a major cyber incident occurred, do you know how long it would take to restore or replace your IT systems?	/10

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.

Overview Questions	Ranking
<ul style="list-style-type: none"> • 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
<ul style="list-style-type: none"> • Do you measure and report on waste volumes, and have a strategy to reduce landfill waste? 	/10
<ul style="list-style-type: none"> • Do you measure and report on carbon emissions, and have a strategy to reduce them? 	/10

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

Questions to provoke further discussion	Ranking
<ul style="list-style-type: none"> • Do you have clear targets or goals in place to work towards carbon zero? 	/10
<ul style="list-style-type: none"> • Are you exploring how environmental sustainability connects with and supports your commitment to Te Tiriti o Waitangi? 	/10
<ul style="list-style-type: none"> • Do you have a position statement on climate change, and how are you communicating your sustainability strategy? 	/10
<ul style="list-style-type: none"> • Are you encouraging staff and volunteers to engage creatively with opportunities where their work intersects with caring for the natural world? 	/10

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.

Overview Questions	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](#)

Questions to provoke further discussion	Ranking
• Do you have a Food Safety Policy in place (particularly if you operate a café, serve meals after services, or provide food to the public)?	/10
• Have you assessed and mitigated donor-related risks, including how donor associations may affect your organisation’s public perception or charity status?	/10
• Do you respect the IP rights of others?	/10
• Do you have a policy on accepting funds and donations, including clear guidance on who you will and will not accept support from?	/10
• Do you understand your key person risks? How would your organisation continue operating if a key staff member or volunteer resigned? Do you have a succession plan in place?	/10
• Are you complying with relevant gambling regulations (e.g. Class 3 or Class 4 gambling (pokies) and harm minimisation requirements)?	/10
• For incorporated societies, do you maintain an accurate membership register that complies with the new Incorporated Societies Act? (We have a guide on the new Incorporated Societies Act)	/10
• If you use external venues or facilities, do they have an emergency plan, and are your staff and volunteers familiar with it?	/10
• Have you considered how your organisation contributes to climate change and ways to reduce your impact, such as using fewer animal products or reducing air travel?	/10
• Are your activities consistent with your stated purpose in your Trust Deed? Do you engage in any activities, such as lobbying or political advocacy, that are not included in your stated purposes?	/10
• How are records and documents maintained to provide evidence and reporting on your programmes and outcomes?	/10
• If you engage in fundraising, are the necessary licences in place? Do you have appropriate controls to ensure funds are used for their intended purpose? How and when do you report on fundraising results, and to whom?	/10
• What policies are in place to ensure the safety and protection of children involved in your activities?	/10

PART 5: FAITH GROUPS

WHY IT MATTERS: Faith groups have their own unique dynamics. This section looks at Churches, but the principles apply broadly across all Faith-based organisations.

Questions to provoke further discussion	Ranking
<ul style="list-style-type: none"> • What is the relationship between different groups in your organisation – for example, spiritual authority, operational leadership, and strategic decision-making – and who holds responsibility for each? <ul style="list-style-type: none"> ◦ Recognise the type of structure your organisation has – for example, member-led or apostolic-led. Do you have appropriate safeguards in place for your model and its variations? ◦ What is the role of the Senior Pastor or Minister? Who appoints them, for how long, and how are any concerns or issues addressed? 	/10
<ul style="list-style-type: none"> • What is the role of Elders? Are they Trustees or do they only play a spiritual role? 	/10
<ul style="list-style-type: none"> • Have you considered engaging external spiritual advisers from respected groups outside your own leadership? 	/10
<ul style="list-style-type: none"> • Does your organisation have a statement of belief, and what role does it play? Are those in governance required to sign it as confirmation of their agreement? 	/10
<ul style="list-style-type: none"> • Consider establishing a ‘Safer Church Committee’ to investigate and report on incidents to the trustees or board. Ensuring psychological, spiritual, and sexual safety is now an important aspect of church governance. 	/10
<ul style="list-style-type: none"> • What is the role of elder groups in your Church? Are they the people where the “buck stops”? Do they hold decision-making power, and if so, do they have the necessary governance knowledge and experience? <ul style="list-style-type: none"> ◦ Often, appointing people for certain roles is done through internal “shoulder tapping” rather than based on governance experience. That can work well – but how can you sensitively encourage and support upskilling? 	/10
<ul style="list-style-type: none"> • What does ‘governance’ look like in a local church? Although leaders are seen throughout the Bible, the word governance does not show up. 	/10
<ul style="list-style-type: none"> • What risks have you identified and what are you doing to mitigate those risks. 	/10
<ul style="list-style-type: none"> • What is the role of Elders in an affiliated church compared with those in an independent church? 	/10
<ul style="list-style-type: none"> • Complaints – Is there a clear and accessible complaints process that everyone understands? 	/10

RESOURCES

Perhaps this Healthcheck guide has got you thinking about best practise and wanting more information. If so, then check out these free resources as well:

Written guides and resources

- [Charities in New Zealand: A Legal Handbook](#)
- [Churches in Aotearoa New Zealand: A Legal Handbook](#)
- [Social Enterprises in New Zealand: A Legal Handbook](#)
- [Capital Raising Guide](#)
- [Changing Paradigms: For Charity and Business book](#)
- [Governance Masterclass: 7 scenarios](#)
- [Governance essentials hub](#)
- [10 minutes on how to set up an impact driven organisation](#)
- [Health and Safety regarding volunteers](#)
- [Start-ups guide](#)
- [Governance podcast for IOD](#)
- [Impact Investing in NZ](#)
- [Reimagining Business Book](#)
- [Seeds podcast](#)
- [About privacy policies and what they should cover](#)
- [Article on different types of roles: Volunteers, Employees, Contractors](#)
- [Trust control over other trusts article](#)

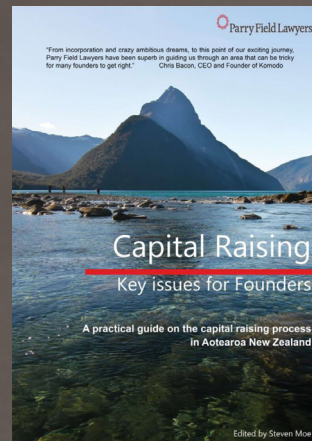
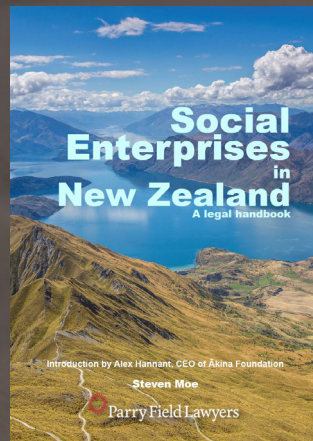
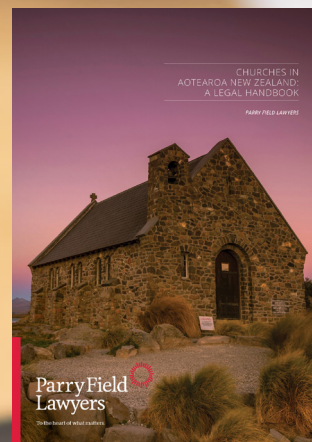
Governance related videos

- [Video of Chairing the Board](#)
- [Video of Governance Masterclass – 7 scenarios](#)

Other websites

- [Charities Services on types of tiers](#)
- [NZ Navigator online charity assessment kit](#)
- [Community Governance Aotearoa](#)
- [IOD NFP site](#)
- [Community Networks Aotearoa: Tick for Governance course](#)
- [‘Better Banking’ report from CNA](#)
- [Christian Savings on long term maintenance plans](#)
- [Community Law Manual](#)
- [Questions on reputational risks](#)

Other free guides at parryfield.com/publications include:



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- Nicola Nation of The Akina Foundation
- Angela Norton of the Public Fundraising Regulatory Association
- Anja O'Connor of Flaxroots NZ
- Sue Peat of StepsForward
- Beverley Richards of the J R McKenzie Trust
- Rod Robson
- Brian Saipe of Child Rescue New Zealand
- Delwyn Shaw
- Liam Sheridan of Foundation North
- Terry Shubkin of Young Enterprise
- Holly Snape of Community Waikato
- James Stewart of Gemelli Consulting
- Carolyn Stiles of Brackenridge
- Faumuina Felolini Maria Tafuna'i of Flying Geese Pro
- Rev Dr Clint Ussher of Laidlaw College
- Peter van Hout of the Methodist Church of NZ
- Judy Whiteman
- David Woods of the New Zealand Advisory Board for Impact Investment

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