

**NPO DIAGNOSTIC**

**STRICTLY CONFIDENTIAL**

**Organisation Information**

- Name of Organisation: \_\_\_\_\_
- Physical Address: \_\_\_\_\_  
\_\_\_\_\_
- Postal Address: \_\_\_\_\_
- What Type of Organisation is your NPO?: Voluntary Association (VA); Non-Profit Company (NPC - with members) ; Non-Profit Company (NPC without members); Non-Profit Trust (NPT) - *(Please Circle)*
- What is your NPC or NPT's registration number? \_\_\_\_\_
  - Date registered: \_\_\_\_\_
- Registered With the Department of Social development's NPO Directorate YES / NO  
If yes, NPO number: \_\_\_\_\_
- Date Registered: \_\_\_\_\_
- Is your NPO: Local only – National – Global? *(Please Circle)*
- Office Telephone: \_\_\_\_\_
- Office Fax: \_\_\_\_\_
- Email: \_\_\_\_\_
- Website: \_\_\_\_\_
- Social Media:  
\_\_\_\_\_  
\_\_\_\_\_

**Core organisational focus**

- Social issues being addressed:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Vision Mission of Organisation:

---



---



---

- Main Objective - Mandate:

---



---



---

**Governance**

- What foundational document is in place? Memorandum of Incorporation / Constitution / Trust Deed. *(Please Circle)*
- What Governing Body do you have? - Board of Directors – Board of Trustees – Board of Governors - Steering Committee *(Please Circle)* Other/explain

---

- How many Directors / Trustees / Governors/ Members? \_\_\_\_\_
- What duration is the Board members tenure on the board? \_\_\_\_\_
- Are there Sub-committees YES / NO  
If yes, what sub-committees are there?

---



---



---

- Are there clear Terms of Reference in place for each sub-committee? YES / NO
- When are Board Meetings held? - Quarterly - Half-yearly. *(Please Circle)*
- Does the organisation hold an AGM? YES / NO
- Is there a Governance Manual in place? YES / NO
- Are there Policy Documents in place? YES / NO
  - Which Documents? i.e.
    - Approval Framework YES / NO

- Levels of Authority YES / NO

Other/explain

---



---

- Is there a current strategic plan in place? YES / NO
  - If yes, when last was it updated: \_\_\_\_\_
- Is there a Board Succession Plan in place? YES / NO
- Is there a CEO Succession Plan in place? YES / NO
- Is the organisation King III/IV Code of Good Practice Compliant? YES / NO
- If Yes, what Chapters? \_\_\_\_\_
- Has the Board signed the Inyathelo Code of Good Practice? YES / NO
- Are new board members taken through a board orientation workshop? YES / NO
- Are board performance evaluations conducted on a regular basis? YES / NO

**Legal and statutory requirements**

- What are the legal and statutory requirements which the organisation must comply with? Such as: *Non-Profit Organisations Act, 1997; The Companies Act, No 71 of 2008; The Children’s Act 38 of 2005; Mental Health Care Act 17 of 2002.* Please list them below:

---



---



---



---



---

- Is there a need to be PFMA / MFMA Compliant? YES / NO

**Executive - Management and staff**

- What is the Highest Executive Function? Executive Director (ED); Chief Executive Officer (CEO); Managing Director (MD); General Manger (GM); Centre Manager (CM); Other/explain:

---

- Number of Staff: \_\_\_\_\_
- Number of Volunteers: \_\_\_\_\_
- Number of Programmes/Projects: \_\_\_\_\_

**Funding**

- Funding Streams / Sustainability Strategy %
  - Personal Sponsorship \_\_\_\_\_
  - Corporate CSI \_\_\_\_\_
  - Government \_\_\_\_\_
  - Donor Agencies \_\_\_\_\_
  - Bequests \_\_\_\_\_
  - Legacy \_\_\_\_\_
  - Own revenue generation \_\_\_\_\_
  - Other \_\_\_\_\_
- Is the organisation registered with SARS as a PBO? YES / NO
  - If yes, what is the PBO number? \_\_\_\_\_
  - Is the organisation registered under: Section 18(a) or Section 10(1)(cN)?  
*(Please Circle)*

**Impact – Outcomes reporting**

- Is there a Monitoring and Evaluation (M&E) system in place? YES / NO
- Is there a Management Dashboard in place? YES / NO

Completed by: \_\_\_\_\_

Position in Organisation: \_\_\_\_\_

Date Completed: \_\_\_\_\_