

Organisational matrix (adapted from Australian Council for International Development (ACFID) - see below for full reference)

Use the following matrix below to understand if your organisation has an activity, process/system or integrated, learning and partner oriented approach to organisational development and to identify areas for improvement/review. Information for each of the areas of organisational development can be adapted to be more appropriate to your organisation- perhaps management and staff can brainstorm what they consider indicative for each of the dimensions below? This matrix is not designed to be prescriptive but to assist a structured dialogue about the stages of organisational development, and to assist participants to view organisational development in a holistic way. Participants can rank their organisation in each of the areas, or tick the descriptions that 'best fit' their organisation.

	Activity oriented (3)	Process/System Oriented (2)	Integrated, learning and partner oriented (1)
Values and Principles	<input type="checkbox"/> the organisation has a set of agreed values <input type="checkbox"/> there is an established and accessible Code of Conduct	<input type="checkbox"/> staff are aware of and can describe aware of organisation's values <input type="checkbox"/> organisational goals, plans and strategies are consistent with the organisational values <input type="checkbox"/> the organisation adheres to the Code of Conduct	<input type="checkbox"/> all stakeholders are aware of the values of the organisation <input type="checkbox"/> key stakeholders are included in processes of evaluating adherence to organisational values <input type="checkbox"/> the organisation regularly reviews the Code of Conduct and its applicability to its organisation, and uses this to review policies and practice
Leadership-Governance - Structure and people - The role of the board - Accountabilities	<input type="checkbox"/> the governance of the organisation comprises people motivated by a personal commitment to the work of the organisation <input type="checkbox"/> the Board is regularly involved in organisational management issues	<input type="checkbox"/> the governance of the organisation comprises people with an appropriate mix of skills and competencies <input type="checkbox"/> there is a clear separation of the governance and management roles for the organisation, in both principle and practice	<input type="checkbox"/> the governance of the organisation anticipates future requirements and recruits/attracts an appropriate balance of skills and leaders to fulfil governance responsibilities <input type="checkbox"/> the effectiveness and efficiency of the board is reviewed periodically

		<input type="checkbox"/> the governing body has mechanisms for assessing the accountability of the organisation to major stakeholders	<input type="checkbox"/> the governing body has clear means of managing its multiple accountabilities, including an ability to listen to all stakeholders
Leadership-Management <ul style="list-style-type: none"> - Coherence & direction - Culture - Partnerships - Performance 	<input type="checkbox"/> Direction is mainly determined by activities rather than by an overall strategy <input type="checkbox"/> Management work on a largely individual basis <input type="checkbox"/> The organisation has ad-hoc relationships with other organisations based on the activities it undertakes <input type="checkbox"/> Management or individuals determine what and how things are to be improved <input type="checkbox"/> The organisation has no explicit policies or strategies to address EEO/affirmative action issues at an organisational level <input type="checkbox"/> Long-term partnerships are ad-hoc and rarely reviewed for effectiveness <input type="checkbox"/> The organisation has strategies to attempt to genuinely involve stakeholders/partners in activity planning <input type="checkbox"/> Monitoring and evaluation is usually focused on activities/services not on outcomes/impact <input type="checkbox"/> Lessons learned are usually retained in the memory of long serving staff	<input type="checkbox"/> Management combines activities into a coherent plan based on an overall strategy and sets priorities <input type="checkbox"/> Management clarifies functional responsibilities and delegates responsibilities to staff <input type="checkbox"/> The organisation is linked to a wide range of networks and uses these relationships to share useful knowledge and skills <input type="checkbox"/> Management encourages learning from other organisations and innovation <input type="checkbox"/> The organisation has specific strategies to address EEO/affirmative action issues <input type="checkbox"/> Organisation's plans and strategies clearly articulate the role of partners and building partnerships is a priority for organisational development <input type="checkbox"/> The organisation has a systematic procedure for regular monitoring, review and evaluation of all aspects of service planning and delivery, including outcome measures. The experience of current and previous workers is recorded and accessible.	<input type="checkbox"/> Management ensures that the organisation has a flexible structure that enables it to adapt and respond to changes in the external environment <input type="checkbox"/> Management looks ahead and build organisational capacity and skills in time to meet future demands <input type="checkbox"/> The organisation culture is an enabling one which encourages different teams/individuals to work together to achieve results <input type="checkbox"/> The organisation has open, robust and strategic relationships with others, and the maintenance of such relationships is identified formally as a competency required of staff <input type="checkbox"/> The organisation plays an important role in improving the community mental health sector as a whole <input type="checkbox"/> There are methods in place to mutually assess partnerships <input type="checkbox"/> The organisation systematically uses its learning to improve its own practices and inform other organisations of evidence for best practice <input type="checkbox"/> All stakeholders are involved in the process of continuous improvement and the development of the organisation

<p>People -Organising, investing in and respecting staff</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Recruitment and selection take place whenever there is a need <input type="checkbox"/> Terms of employment, personnel policies and procedures are clearly defined by management <input type="checkbox"/> Professional and personal development usually initiated by the employee <input type="checkbox"/> Individual performance review is ad-hoc 	<ul style="list-style-type: none"> <input type="checkbox"/> Recruitment and retention is aimed at fulfilling strategic objectives <input type="checkbox"/> Personnel policy is in line with organisational policy and values and there are clearly stated lines of responsibility <input type="checkbox"/> A formal system for performance appraisal exists and provides an opportunity for two-way feedback <input type="checkbox"/> The organisation has a professional and personal development plan in place which is determined by strategic objectives and the outcomes from performance appraisal 	<ul style="list-style-type: none"> <input type="checkbox"/> Personnel policy reflects sector-wide good practice <input type="checkbox"/> Performance appraisal systems seeks feedback from multiple stakeholders, e.g. consumers and carers and rewards good performance (both team and individual) <input type="checkbox"/> The organisation has a comprehensive organisational development plan which aims to make the organisation an attractive place to work through a commitment to professional and personal development
<p>Resources</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Budgeting and financial planning occur annually and as part of activity assessment and funding <input type="checkbox"/> Limited resources for non-project work <input type="checkbox"/> The organisation has adequate information and technology infrastructure to manage its activities 	<ul style="list-style-type: none"> <input type="checkbox"/> The organisation has a system of planning and budgeting that allows it to manage its resources effectively <input type="checkbox"/> There is funding for non-project work e.g. capacity building with other organisations, research, mentoring <input type="checkbox"/> The organisation has IT infrastructure that provide staff with the means to access information needed to do their jobs 	<ul style="list-style-type: none"> <input type="checkbox"/> Benchmarking occurs with similar organisations for similar activities <input type="checkbox"/> Cost benefits/risks measured <input type="checkbox"/> The organisation uses resources to strengthen networks and sector-wide relationships <input type="checkbox"/> The organisation has IT infrastructure that allow rapid exchange of information and knowledge with a range of partners

Create a profile of your organisation below - tally the total ticks for each of the above areas of organisational development and then tick in which column - activity/process/system or integrated, learning and partner oriented - your organisation best fits.

	Activity oriented (3)	Process/System Oriented (2)	Integrated, learning and partner oriented (1)
Values and Principles			
Governance			
Structure			
The Role of the Board			
Accountabilities			
Management			
Coherence and Direction			
Culture			
Partnerships			
Performance			
People			
Resources			