

SECTION 3 OUTLINES A RANGE OF TOOLS FOR USE IN THE ORGANISATIONAL STRUCTURING PROCESS.

- **CHAPTER 15: INTRODUCES THE TOOL KIT AND PROVIDES AN INVENTORY OF TOOLS**
- **CHAPTER 16: DESCRIBES TOOLS FOR USE IN PHASE 1: DIAGNOSIS**
- **CHAPTER 17: DESCRIBES TOOLS FOR USE IN PHASE 2: DETERMINE REQUIREMENTS**
- **CHAPTER 18: DESCRIBES TOOLS FOR USE IN PHASE 3: DESIGN FUTURE ORGANISATION**
- **CHAPTER 19: DESCRIBES TOOLS FOR USE IN PHASE 4: BUSINESS CASE AND IMPLEMENTATION PLANNING**
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CHAPTER 18

DESCRIBES TOOLS FOR USE
IN PHASE 3: DESIGN FUTURE
ORGANISATION

CHAPTER 18

18. TOOLS FOR PHASE 3: DESIGN ORGANISATIONAL STRUCTURE

18.1 TOOLS FOR STEP 8: DESIGN FUNCTIONAL AND OPERATIONAL STRUCTURE

Tools	Highly recommended	Recommended	Nice to have
Structure gap map	X		
Structure selection matrix	X		
Governance structure requirements matrix	X		
Benchmarking			X
Behaviour/structure analysis matrix (refer to step 6 tools)	X		
Culture Print		X	
Industry best practices		X	
Organisational charts	X		
Structure assessment questions (refer to step 6 tools)	X		

18.1.1 TOOL 42: STRUCTURE GAP MAP

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> A tool to determine the gap between the current structure and design principles identified in step 6. 	<ul style="list-style-type: none"> Transfer the ratings from both the current and desired structure data collection tables to the first and second columns. Determine the gap between current and desired structure states by converting low ratings to 1, medium ratings to 2, and high ratings to 3. Find the difference between the desired rating number and the current rating number to determine the gap. Indicate the gap by shading the box from left to right to indicate the size of the gap: <ul style="list-style-type: none"> Small (<i>difference of 0</i>) = 1 box shaded Medium (<i>difference of 1</i>) = 2 boxes shaded Large (<i>difference of 2</i>) = 3 boxes shaded Determine the effort (low, medium, or high) that it will take to close the gap. 	<ul style="list-style-type: none"> Should be considered to be a standard tool.

Design principles/structure characteristics	Current rating	Desired rating	Gap (numeric difference)		
			0	1	2
• Adaptability to market/customer events					
• Diversity of products/services/geographies/markets					
• Task integration					
• Complexity of work					
• Economies of scale					

Example of a structure gap map

Structure characteristics	Current rating	Desired rating	Gap (numeric difference)		
			0	1	2
Adaptability to market/customer events	L	H			
Diversity of products/services/geographies/markets	M	M			
Task integration	H	M			
Complexity of work	L	M			
Economies of scale	L	H			


18.1.2 TOOL 43: STRUCTURE SELECTION MATRIX

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> • A tool to assist in selecting an appropriate structure for the organisation. • It provides for both traditional and non-traditional structures. • It further provides matrices to review the advantages and disadvantages of any given structure. 	<ul style="list-style-type: none"> • Review each of the structure types and their respective rationales to identify the best fit for the capability requirements and the service model. • Categorise the appropriateness for the organisational architecture and lower operational structures. • Identify the structure or selection of structures which best suit your requirements. • Review the advantages and disadvantages before making a final decision. 	<ul style="list-style-type: none"> • Applicable to every instance of structuring.

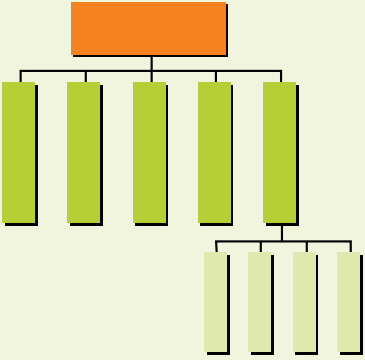
Example of a structure selection matrix

Structure type	Rationale	Appropriateness for organisational architecture	Appropriateness for lower hierarchy
Functional structure	• Routine tasks with specialised resources.		
	• Small to medium size in stable environment.		
	• Focus on efficiency and technical quality within.		
Divisional structure	• Technological interdependence across functions.		
	• Product/service specialisation and innovation.		
Process-orientated structure	• Large size where contribution to value chain must be clear.		
	• Variation in tasks and changing environment.		
	• Coordinating work flow that is highly interdependent.		
	• Customer-focused.		
Project-based organisation	• Adaptable to fast changing external environment.		
	• Clear accountability for specific deliverables.		
Geographical form	• Sensitivity to regional R&D demands.		
	• Speed to market and access to citizens.		
Matrix organisation structure	• Multiple expertise focused on a problem (i.e. project teams).		
	• Dual focus on unique products/services and technical specialisation (citizen, product, service line).		
	• Processing large amount of complex information.		
	• Pressure for shared resources and opportunities for technical staff to generalise.		
Hybrid structure	<ul style="list-style-type: none"> • Typically, there is no single structure that perfectly achieves a Company's business strategy. The implementation of a hybrid structure allows an organisation to tailor the design to best achieve its business strategy by combining the strengths and eliminating the weaknesses of various models. • The hybrid structure enables an organisation to reap the benefits of a particular structure while also mitigating its weaknesses by incorporating characteristics of one or more structures. • By combining multiple structures, an organisation may potentially achieve exponential benefits. 		

Simple structure

Structure	Rationale	Application
<div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; padding: 5px; text-align: center;">Farm</div> → <div style="border: 1px solid black; padding: 5px; text-align: center;">Sellers / Dealers</div> </div> 	<ul style="list-style-type: none"> The organisation is small enough for everybody to do more or less everything. 	<ul style="list-style-type: none"> In general applicable to smaller organisations and seldom utilised in larger organisations.
	Advantages	Disadvantages
	<ul style="list-style-type: none"> Fewer handovers. Quick response time. Improves ownership. 	<ul style="list-style-type: none"> Control risk. Duplication. Lack of standardisation.

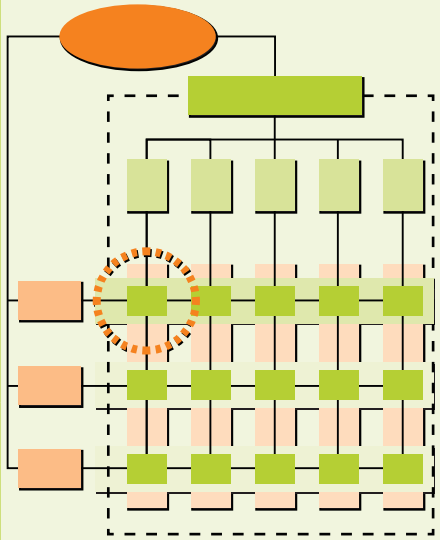
Functional structure

Functional structure	Rationale	Application
	<ul style="list-style-type: none"> Grouping of specialised resources. Optimising allocation of scarce resources. Quality driven within a function (to be the best HR specialists). Separation of specialist areas, e.g. HR, finance. 	<ul style="list-style-type: none"> Stable environment with routine technology. Central decision making (strong risk management). Low need for collaboration across functional units. Best for single product line, single market, single expertise tasks.
	Advantages	Disadvantages
	<ul style="list-style-type: none"> Standards: Encourages consistent standards and functional loyalty. Risk management: Complements centralised control and risk management. Economies of scale: Creates efficiencies through economies of scale. Simplicity: Clarity of roles and relationships, easier supervision and easier to mobilise specialised skill. 	<ul style="list-style-type: none"> Slow decisions: Difficult to obtain quick decisions or actions. Inflexible: Lacks flexibility and common problem solving or goal focus. Limited sharing of information: Limits horizontal information flow. Tends to produce bottlenecks as work moves horizontally across functions. Limited customer focus: no collective focus.

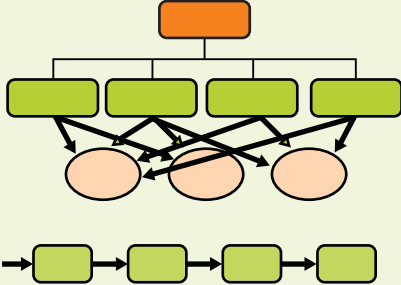
Divisional (strategic business unit) structure

Divisional structure	Rationale	Application
<pre> graph TD CEO[CEO] --- VIP_Finance[VIP Finance] CEO --- VIP_Human_Resources[VIP Human Resources] CEO --- VIP_RnD[VIP R&D] CEO --- VIP_Production[VIP Production] CEO --- VIP_Marketing[VIP Marketing] VIP_RnD --- HR1[HR] VIP_RnD --- RnD1[R&D] VIP_RnD --- Operations1[Operations] VIP_RnD --- Marketing1[Marketing] VIP_RnD --- Finance1[Finance] VIP_Production --- HR2[HR] VIP_Production --- RnD2[R&D] VIP_Production --- Operations2[Operations] VIP_Production --- Marketing2[Marketing] VIP_Production --- Finance2[Finance] VIP_Marketing --- HR3[HR] VIP_Marketing --- RnD3[R&D] VIP_Marketing --- Operations3[Operations] VIP_Marketing --- Marketing3[Marketing] VIP_Marketing --- Finance3[Finance] </pre>	<ul style="list-style-type: none"> • Each unit is responsible for the design, production, and sales of a product or family of products. • All resources are directly available to the unit. • Product development life cycle is shorter. 	<ul style="list-style-type: none"> • Units within a product or service line model are responsible for the design, production, and sales of a product or family of products. • Strongly product focused with multiple products for different citizens.
	<p style="text-align: center;">Advantages</p> <ul style="list-style-type: none"> • Adaptable to changes in customer needs as regards product or service. • Product contribution/revenue/profit easily calculated. • Accountability is clear. • Coordination across functions within the division is easier. • Speed and quality of decision making are enhanced. 	<p style="text-align: center;">Disadvantages</p> <ul style="list-style-type: none"> • High cost structure due to poor economies of scale. • Duplication of efforts. • Reduced specialisation of skill. • Difficulty in coordination of multiple products within a single geographic area. • Potential conflicts between product unit and business unit interests.

Matrix structures (project based or process based)

Matrix structure	Rationale	Application
	<ul style="list-style-type: none"> • Multiple expertise focused on a problem, career opportunities for technical staff to generalise. • Just-in-time projects: Organising teams of people from various sections or disciplines for the duration of a project reporting to a project leader on day-to-day duties and to original line area for specialised input and support. • Decentralised support services: Allocating specialists to product or service areas with responsibility for service quality resides in the specialist area, but day-to-day service delivery resides in the product area. 	<ul style="list-style-type: none"> • Quite frequently utilised across the spectrum of organisations and seems to improve speed. • There seems to be a trend for support services to get closer to their clients. This results in allocating individuals to certain areas to improve service delivery.
	<p style="text-align: center;">Advantages</p> <ul style="list-style-type: none"> • Individuals can be chosen according to the needs of the project. • The use of a project team which is dynamic and able to view problems in a different manner. 	<p style="text-align: center;">Disadvantages</p> <ul style="list-style-type: none"> • Taking people out of their original positions puts pressure on the remaining personnel. • Conflict of loyalty between line and project leader. • Independence makes performance management difficult. • Cost increase to carry additional project managers.

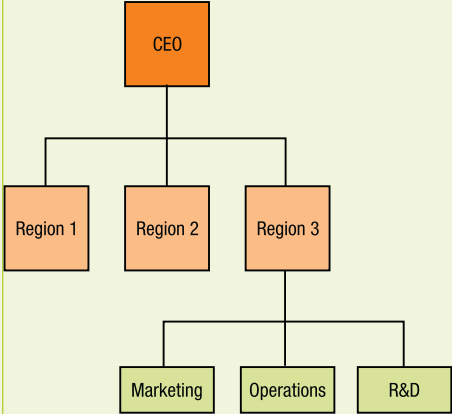
Process-oriented structures

Process structure	Rationale	Application
	<ul style="list-style-type: none"> • Many organisations choose to be process-oriented, with the basic objective of focusing on the customer to prevent suboptimal solutions and a lack of common focus among business units. • Contribution to value chain clear. • Customer-focused. 	<ul style="list-style-type: none"> • Best seen as an alternative to the functional structure. • Potential for new processes and radical change to processes. • Reduced working capital. • Need for reducing process cycle times. • Process ownership structure where one individual or group of individuals (multiprofessional or single discipline) takes ownership and responsibility for the development and implementation of a specific business process. • Integrated process team with all the functions in the value chain integrated into one team with a manager or team leader taking responsibility for coordination and line responsibility. Examples are found in the insurance and banking industries where multiprofessional teams execute end-to-end process. • Process-oriented matrix organisation.
	Advantages	Disadvantages
	<ul style="list-style-type: none"> • Offers great flexibility. • Reinforces professional identity and development. • Encourages interfacing of activities across departments. • Uses staff resources efficiently – scarce resources allocated rationally. • Multiple expertise is brought to bear on a problem. • Creates vertical and horizontal information flow. • Conducive to innovation. 	<ul style="list-style-type: none"> • May result in higher overheads because of doubling the number of managers. • Increases potential conflict between functional and project team managers (overlaps of authority and responsibility). • Results in ambiguity for employees in reporting relationships. • Difficult to measure costs. • Difficult to apply in practice. • Some managers cannot deal with the ambiguity and behavioural demands.

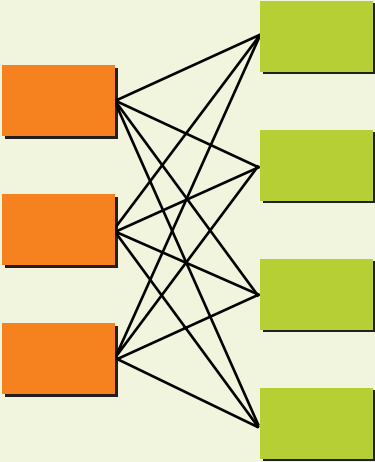
Intermediary (hybrid) structures

Hybrid structure	Rationale	Application
	<ul style="list-style-type: none"> • Two or more traditional forms of organisational design combined. • Often found in large businesses with diverse strategies, markets, and products. • May be the result of mergers/acquisitions or an intermediate form of structure during a gradual shift of emphasis. 	<ul style="list-style-type: none"> • Combination of two or more organisational designs. • Large businesses with diverse strategies, markets, and products. • Result of mergers or acquisitions or an intermediate form. • Effectively targets issues/solutions.
	Advantages	Disadvantages
	<ul style="list-style-type: none"> • Ability to target issues/solutions. • Ability to leverage strengths and weaknesses of models being combined. 	<ul style="list-style-type: none"> • Some duplication. • Managerial control and coordination may be more difficult. • Must be open to making adjustments to the model as some consequences may be unpredictable due to uniqueness of the model chosen.

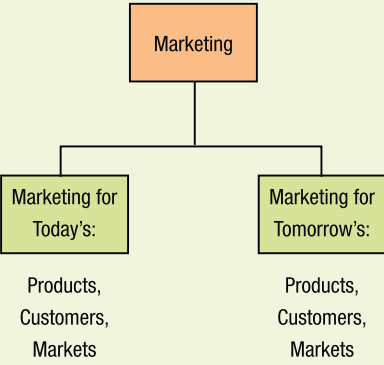
Geographic structure

Geographical structure	Rationale	Application
 <pre> graph TD CEO[CEO] --- R1[Region 1] CEO --- R2[Region 2] CEO --- R3[Region 3] R3 --- M[Marketing] R3 --- O[Operations] R3 --- RD[R&D] </pre>	<ul style="list-style-type: none"> • Each region has full control of all activities within its geographic boundaries. • Geographic regions report directly to the CEO. • Corporate retains responsibility for strategic planning. 	<ul style="list-style-type: none"> • Regions within a geographic model have full control of all activities within their geographic boundaries. • Use the geographic model in the case of: <ul style="list-style-type: none"> o Low value-to-transport cost ratio and service delivery on site. o Closeness to customer for delivery or support. o Perception of the organisation as local is advantageous. o Geographical market segments needed.
	Advantages	Disadvantages
	<ul style="list-style-type: none"> • Economies of scale possible when regional manufacturing facilities can be shared. • Emphasises geography as a profit centre, which demands product development and marketing focused on a geographic area. • Quality of local management (with respect to customers and markets) is higher and more targeted. 	<ul style="list-style-type: none"> • Duplication of processes and high overheads. • Potential conflicts among regions and corporate headquarters regarding regional/local policies versus national policies. • Product variations and new technologies are not easily transferred. • Flow of products to other worldwide markets is more difficult. • Global business strategy is more difficult to implement. • Functional areas (R&D, marketing, etc.) are difficult to coordinate across geographies.

Network and virtual structures

Network and virtual structure	Rationale	Application
	<ul style="list-style-type: none"> Philosophy – Enterprise focuses on what it does best/core competency and outsources/creates strategic alliances to deal with remaining business functions. 	<ul style="list-style-type: none"> Where the organisation has a very high level of maturity in its leadership style, process management and efficiencies.
	<p>Advantages</p> <ul style="list-style-type: none"> Focus on core business. Access to leading edge development. Frees up cash required for capital investment. Frees up key people to focus on mission critical work. Costs for upskilling are not borne by this organisation. 	<p>Disadvantages</p> <ul style="list-style-type: none"> Control: Risk may be high if services are not delivered. Dependencies may negatively affect additional operations if services are not delivered. Long-term costs of outsourcing may be high. Adequately competent people to manage alliances are rare. Alignment of strategic partners with strategic intent. Service level agreements may not cover all future situations.

Time-based structures

Time-based structure	Rationale	Application
	<ul style="list-style-type: none"> Dual organisations with a different focus: one providing service for “to-day’s” needs and one developing and anticipating services for “tomorrow”. Commonly seen in marketing and sales, products and processes and research and development. 	<ul style="list-style-type: none"> Commonly seen in: <ul style="list-style-type: none"> Marketing. Sales. Products and processes. Research and development.
	<p>Advantages</p> <ul style="list-style-type: none"> Could be used to phase in services in the organisation. Specific and controlled focus on growth and innovation. Ensures quick response to market changes. Useful as industry will develop new and different products. Long-term future becomes more tangible. Increases ability to track costs, develop new products, and new markets. 	<p>Disadvantages</p> <ul style="list-style-type: none"> Costly. Creates duplication of some business activities. Can reduce economies of scale. Requires clear and logical distinctions between new and current.

18.1.3 TOOL 44: GOVERNANCE STRUCTURE REQUIREMENTS MATRIX

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> A table indicating the different types of governance structures and providing opportunity to consider the need and the potential benefit of such a governance structure. 	<ul style="list-style-type: none"> Review each of the governance structures and determine what needs to be done (if anything) and how this will improve the effectiveness of the selected structure. Clearly indicate the needs and the benefit next to the selected governance structure. 	<ul style="list-style-type: none"> This should be used as part of any restructuring exercise.

An example of a typical governance structure requirement matrix:

Governance structure requirements	What needs to be done?	How will this improve the functioning of the organisation?
Policy or procedural adjustments (What adjustments to policies and procedures need to be made to support the new structure?)		
Decision making governance structures (Committees, forums, devolution [delegation] of authority, coordinating bodies, service level agreements and policies)		
Service delivery monitoring structures (Customer satisfaction forums, customer relations teams, performance review, business excellence forum/team, communities of excellence)		
Innovation management structures (Communities of excellence, idea generation and portfolio management, multi-work-level meetings, process office, reward and recognition, innovation management process, regular benchmarking, multidisciplinary project team approach)		
Risk management structures (Audit committee, financial committee, budget committee, health and safety forum, security forum, ethical committee, strategic planning team)		
Process management structure (Process improvement groups, visual management, daily meetings, process review meetings, end-to-end process ownership, process measurement, balanced scorecard metrics)		
Organisational culture (Value champions, value teams, team charters, team and organisational culture audits, labour forums, 360 degree assessments, consequence management)		

18.2 TOOLS FOR STEP 9: DESIGN POSITIONS AND ESTABLISHMENT

Tools	Highly recommended	Recommended	Nice to have
Staffing norms table	X		
Full-time equivalent calculation	X		
Single-column process chart	X		
Management span of control: diagnostic grid	X		
Group size effect chart		X	
Job description templates	X		
Position impact analysis	X		
RACI analysis		X	
Work synthesis	X		
Work activity process analysis		X	

18.2.1 TOOL 45: STAFFING NORMS TABLE

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> Staffing norms are the standards which are calculated based on the specific quality, quantity and risk requirements of a specific job or task. The norms will vary from organisation to organisation and job type to job type. The norms are the guidelines which are used to determine how many people are required to perform a job or a group of jobs. 	<ul style="list-style-type: none"> The staffing norms table is designed to guide the practitioner in identifying the typical variables which will influence the decision on staff complement. Review each job or group of jobs against the suggested staffing considerations and determine the standard or norm for each job or group of jobs (e.g. minimum two on duty, four shifts [three on duty and one off duty], day shift requires four people based on FTE calculation and legislative requirements) = two permanent day and eight shift workers. 	<ul style="list-style-type: none"> This should be used as part of any restructuring exercise.

Example of a staffing norms table

Staffing considerations	Quantity considerations	Quality considerations	Risk considerations	Tools to be used
Legislative requirements	<ul style="list-style-type: none"> Work hours. 	<ul style="list-style-type: none"> Basic conditions. 	<ul style="list-style-type: none"> Safety requirements. Segregation of duties. Health requirements. 	<ul style="list-style-type: none"> Document review.
Environmental variables	<ul style="list-style-type: none"> Distance to travel. 	<ul style="list-style-type: none"> Accessibility. Harshness. 	<ul style="list-style-type: none"> Safety policies. Health and safety. 	<ul style="list-style-type: none"> Time/motion. Observation. Measurement (temp, light, etc.).
Working hours	<ul style="list-style-type: none"> 24 hrs in three shifts. 	<ul style="list-style-type: none"> 24/7 availability. 	<ul style="list-style-type: none"> May not work more than 40 hrs per week. 	<ul style="list-style-type: none"> Shift calculation. FTE. PTS (pre-determined time standards).
Work/task	<ul style="list-style-type: none"> Volume of tasks. Effort required per task. 	<ul style="list-style-type: none"> Speed (Response time?) Interdependencies. Complexity (repetitive or dynamic). Standardised or non-standardised work. 	<ul style="list-style-type: none"> Skills availability. Potential impact of mistakes. Interdependencies with other jobs. 	<ul style="list-style-type: none"> Single-column analysis. FTE calculation. Work sampling. RACI. Position impact. Work process analysis.
Industry		<ul style="list-style-type: none"> Complex or stable. 		<ul style="list-style-type: none"> Industry analysis.
Equipment available	<ul style="list-style-type: none"> Availability. Equipment capacity. 	<ul style="list-style-type: none"> Reliability. Condition. 	<ul style="list-style-type: none"> Complexity of equipment or system? Manual input required (short term/ long term)? 	<ul style="list-style-type: none"> Observations. Interviews. Performance tracking.
Part of the organisation		<ul style="list-style-type: none"> Core or non-core. Managerial/ non-managerial. 	<ul style="list-style-type: none"> High risk or low risk. 	<ul style="list-style-type: none"> Management span of control grid. RACI. Position impact. Risk analysis.
People morale	<ul style="list-style-type: none"> Appropriate team size. 	<ul style="list-style-type: none"> Need for supervision. 	<ul style="list-style-type: none"> Boredom. 	<ul style="list-style-type: none"> Group size effect. Work process analysis. Job enrichment'

18.2.2 TOOL 46: FULL-TIME EQUIVALENT CALCULATION

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> Full-time equivalent is the standard for the effort of one person for a year. The standards for full-time equivalents can be expressed in hours (1 800 per year), capacity (25 children per teacher), or volume (150 applications per day). The FTE provides an indication of what an average, fully competent person will be able to achieve. 	<ul style="list-style-type: none"> Map the process which needs to be executed to task level: Process, procedure, task, activity. Identify and list all the tasks. Determine the effort (total number of hours) required to execute the tasks over a calendar year. (make sure they are recurring and not one-off). Calculate the total number of hours required to execute the process. Determine the number of positions required by dividing the number of hours by the FTE standard, e.g. process requires 8 000 hrs per year, FTE = 1 800, therefore number of positions = 4+. 	<ul style="list-style-type: none"> This should be used as part of any restructuring exercise.

Example calculation of FTE standard (hours)

Full-time equivalent variables	Standard p.a.	Standard per month
Total working days	261 working days	21 working days (average)
Public holidays	11 calendar days	1 (average)
Total leave (non-productive days)	22 working days	1,8 working days (average)
Total productive potential (total – holidays – leave)	228 days	19 days (average)
Total hours available (days x 8 hrs)	1 824 hrs	152 hrs
Productivity standard (based on environmental, safety, legislative, skills variables, what is the potential productivity of the average worker?)	75%	75%
Full-time equivalent (standard/norm) (total hours available x productivity standard for the average worker)	1 368 hrs	114 hrs (average)

Staff requirements (how many people are required to do the work based on the FTE norm?)

Procedure/task	Effort required to complete the tasks/ procedure (hours, not lapsed time)	Frequency (hourly, daily, weekly, monthly, bimonthly, etc.)	Total hours p.a.	Full-time equivalent (total hours/FTE standard)
Procedure 1/task 1				
Procedure 2/task 2				
Procedure 3/task 3				
Procedure 4/task 4				

18.2.3 TOOL 47: SINGLE-COLUMN PROCESS CHART

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> A tool to review the types of activities executed by an individual in a specific job. The tool distinguishes between the five types of activities: Operations, transport, inspection, delay and storage. The tool assists in capturing observations and identification of improved methods of work. 	<ul style="list-style-type: none"> Capture all work conducted. Categorise the activity according to type. Calculate the number of activities conducted, distance travelled and time spent on each of the activities. Review the current method and group tasks to ensure that all the inspection tasks happen at the same time, and that the transport activities are as economical as possible. 	<ul style="list-style-type: none"> Use to evaluate repetitive low-level work which is fairly manual-intensive.

An example of the single-column process chart

Department		Study No.		Date									
Division:		Observed by:											
Section:		Chart starts with:											
Present/proposed method	Man/material chart	Chart ends with:											
Task description:													
Abbreviations:													
Step No.	Details of operation	Operation	Inspection	Delay	Transport	Storage	Quantity	Distance	Time	Remarks			
		O	C	D	'	r							
		O	C	D	'	r							
		O	C	D	'	r							
		O	C	D	'	r							
		O	C	D	'	r							
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		O	C	D	'	r							
		O	C	D	'	r							
		O	C	D	'	r							
		O	C	D	'	r							
SUMMARY		Total number of steps		Operation		Inspections		Delays		Transport		Storage	
		No.	Time	No.	Time	No.	Time	No.	Time	No.	Time	No.	Time
Old method													
New method													

18.2.4 TOOL 48: MANAGEMENT SPAN OF CONTROL: DIAGNOSTIC GRID

What is it?	How to use it
<ul style="list-style-type: none"> • A tool to assist in determining the span of control for managerial positions at all levels in the organisation. • The grid distinguishes between five dimensions impacting on ability to manage and coordinate staff: geographic variables, planning, technical work, evaluation requirements, and change frequency. 	<ul style="list-style-type: none"> • Review the complexity of the environment and calculate the total by adding the values of the various blocks selected. • Determine the level of the managerial position and compare the total obtained on the diagnostic grid with the suggested span of control on the span of control sheet.

Diagnostic grid

Time away from work	Seldom 1	Occasionally 2	Regularly 4	Often 8	Very often 16
Planning requirements	Minimal 1	Little complexity 2	Moderate complexity 4	Complex 6	Highly dynamic environment 8
Specialisation of work	Routine work 2	Somewhat specialised 5	Fairly specialised 8	Quite specialised 12	Highly specialised 16
Evaluation to be conducted	Spot checks 1	Basic analysis 2	Investigations 3	Special investigations 4	Comprehensive with audit trails 5
Change requirements	Minor improvements 5	Process modifications 9	Process improvements 11	Major initiatives 13	Transformation 14
Total					

18.2.5 TOOL 49: POSITION DEPENDENCY MAP

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> • A tool to determine and map the interdependencies for positions, processes and functions. • It provides a clear overview of requirements and critical tasks which need to be executed for the organisation to function effectively. 	<ul style="list-style-type: none"> • Determine the components to be reviewed: Processes, positions, functions, etc. • Review the interdependencies per row. Example: The IT manager position is the first position in the left-hand column of row 1. Review the requirements of the IT manager from the perspective of all the other positions in the header row. • Complete the analysis and identify critical dependencies which have to be incorporated into the design principles for each column and each row. 	<ul style="list-style-type: none"> • When designing positions. It can be used to eliminate duplication and do horizontal workload alignment.

	IT manager	Facilities manager	HR manager	Important implications for job description
IT manager	<ul style="list-style-type: none"> • N/A. 	<ul style="list-style-type: none"> • Information about office hours. 	<ul style="list-style-type: none"> • HR policies. • HR processes. • Recruitment. 	
Facilities manager	<ul style="list-style-type: none"> • New technologies. • Security system support. 	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Recruitment of staff. • Office space requirements. 	
HR manager	<ul style="list-style-type: none"> • HR software. • System performance. 	<ul style="list-style-type: none"> • Information about office hours. • Adequate space. 	<ul style="list-style-type: none"> • N/A. 	
Important implications for the job descriptions				

18.2.6 TOOL 50: RACI ANALYSIS/TASK ANALYSIS

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> • A task analysis based on the RACI acronym which represents R=responsible, A=accountable, C=consulted and I=informed. • This is used to review responsibilities which are then reflected in the job descriptions. • It is also used to review horizontal workload balance. • The task analysis uses the same table, but expands the explanations to include the following: <ul style="list-style-type: none"> o Capture. o Evaluate. o Execute. o Input. o Approve. o Develop. • Review/read etc. • The task analysis reviews the position task link in more detail. 	<ul style="list-style-type: none"> • List the tasks to be performed as part of a process (this suggests a detailed process map: process, procedure, task, activity). • Review the involvement of each position with each of the tasks by indicating either R, A, C, I or a combination A/R. • Identify the tasks which do not have responsibility or accountability OR where more than one position has accountability and responsibility. • Review the job descriptions based on the information. 	<ul style="list-style-type: none"> • Standard tool for job design.

Example: RACI analysis (R=Responsible A=Accountable C=Consulted I=Informed)

	Position 1	Position 2	Position 3	Position 4
Task 1	R	C	I	A/R
Task 2		C		
Task 3	I		R	A

Example: Task analysis

	Position 1	Position 2	Position 3	Position 4
Task 1	Capture	Read	Approve	Review
Task 2	Capture	Develop	Evaluate	Input
Task 3	Review	Approve	Execute	Execute

18.2.7 TOOL 51: GROUP SIZE EFFECT CHART

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> It provides an indication of optimal group size based on what the team needs to achieve. The chart indicates the baseline (norm) as a group from eight to 12 and compares smaller and larger groups to the norm. 	<ul style="list-style-type: none"> Identify the dimension or task the group would have to be good at. Review the appropriate group size for the task. Select the appropriate group/team size. 	<ul style="list-style-type: none"> When designing work teams as part of the operational structure.

Size Dimension	Under 4	4-7	8-12	13-18	Over 18
Collective problem solving	Worse	Equal	Baseline	Much better	Worse
Speed of decision making	Better	Much better	Baseline	Worse	Much worse
Participation of members	Much better	Better	Baseline	Worse	Much worse
Togetherness	Much better	Better	Baseline	Worse	Much worse
Flexibility	Much better	Better	Baseline	Worse	Much worse
Individual productivity	Worse	Equal	Baseline	Slightly worse	Much worse
Group performance	Worse	Slightly worse	Baseline	Better	Worse
Collective focus	Worse	Worse	Baseline	Best	Worse
Team management	Slightly worse	Equal	Baseline	Equal	Worse

18.2.8 TOOL 52: JOB DESCRIPTION REQUIREMENTS

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> A standard template to capture the content of a specific job or role. 	<ul style="list-style-type: none"> Obtain all information required for the new job and complete the required fields as indicated. 	<ul style="list-style-type: none"> In all circumstances where a new job has to be designed or reviewed and implemented as part of the structure.

A. JOB INFORMATION SUMMARY
1. Job title/job category
2. Qualifications and experience
3. CORE
4. Grade and salary
5. Name of the component
6. Organisational placement (simplified organogram indicating superior and direct reporting relationships)
7. Decision making authority
8. Location
9. Date on which the description is completed/reviewed

B. PURPOSE OF THE JOB

The purpose is an accurate, short statement about the position's/job's overall purpose or reason for existence. It also serves to give some indication about how a job can be linked to the organisation's mission and objectives.

C. MAIN OBJECTIVES/KEY PERFORMANCE AREAS

Describe the objectives or key performance areas of the position and the associated success indicators for each objective which must be achieved to fulfil the overall purpose of the position.

OBJECTIVE/KEY PERFORMANCE AREA	TASKS (optional)	PERFORMANCE INDICATORS
Example: Improved service user satisfaction with response time and quality of information.		<ul style="list-style-type: none"> • % achieved on a service user satisfaction index. • Average turnaround time on requests. • Number of queries to manager as a result of incorrect information.
Key performance area 1		
Key performance area 2		
Key performance area 3		
Key performance area 4		

E. INHERENT REQUIREMENTS

INHERENT REQUIREMENTS	LEARNING AREAS AND INDICATORS
Technical skills: (Examples) <ul style="list-style-type: none"> • Writing skills. • Typing skills. • Computer skills. • Reading and language skills. • Vocational skills (HR, finance, policing, firefighting, research, etc.) 	
Behavioural competencies: (Examples) <ul style="list-style-type: none"> • Communication skills. • Negotiation skills. • Planning. • Problem solving. 	
Knowledge areas: Any specific area of knowledge or awareness within a specific discipline.	
Attributes: (Examples) <ul style="list-style-type: none"> • Result-oriented. • Patient. • Service-oriented. • Love for people. • Detail-oriented. • Quick decision making. • Ability to work under pressure. 	

F. CAREER PATH

Progression to the next higher post	Progression to the next higher salary range
<ul style="list-style-type: none"> Name of post. Nature of work. Requirements. Process to achieve the next higher position. 	<ul style="list-style-type: none"> Next higher salary. Requirements. Process to achieve the next range.

18.2.9 TOOL 53: WORK SYNTHESIS

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> To determine the variance between the actual time and effort spent on a task and the suggested time and effort based on the job description and responsibilities. 	<ul style="list-style-type: none"> List all the tasks the individual executes during a month. List the detailed activities for each task and determine the time spent on the different activities per day, which adds up to a time for the task. Determine the frequency of activities per month and calculate the effort per month on a specific task (multiply hours by number of days). Determine the required effort either by asking the person, consulting the line manager or content expert or a combination of both. Determine the variance (V) by dividing the effort per month (E) by the required effort (RE). 	<ul style="list-style-type: none"> Alternative to the single-column activity analysis. This tool may be more appropriate for analysing non-repetitive, high-level work.

Suggested table for this tool:

Key result area	Tasks	Detailed activities, volume and frequency of these activities	Hours per day (H)	Days per month (D)	Effort per month (E)=(H)x(D)	Required effort per month (RE)	Variance V=(E)/(RE)

Use the following questionnaire to complete the above table:

PROCESS EVALUATION QUESTIONNAIRE				
DATE: / /				
PERSON(S) INTERVIEWED:				
	CURRENT SITUATION	SUBSTANTIATION	ALTERNATIVE	TO-BE
INPUT CRITERIA Determine input/link [Document ref.] [Structure]	<ul style="list-style-type: none"> What is needed? 	<ul style="list-style-type: none"> Why is this needed? 	<ul style="list-style-type: none"> What else can be provided/ who else can provide this? 	<ul style="list-style-type: none"> What is supposed to be provided/who is supposed to provide this?
PURPOSE OF ACTIVITY Eliminate unnecessary activity [Authority/policy]	<ul style="list-style-type: none"> What is done? 	<ul style="list-style-type: none"> Why is it done? 	<ul style="list-style-type: none"> What else can be done? 	<ul style="list-style-type: none"> What is supposed to be done?
PLACE OF ACTIVITY Combine or change place [Geographical location]	<ul style="list-style-type: none"> Where is this done? 	<ul style="list-style-type: none"> Why is it done there? 	<ul style="list-style-type: none"> Where else can it be done? 	<ul style="list-style-type: none"> Where is it supposed to be done?
SEQUENCE OF ACTIVITY Combine or change time or sequence in process [Standard operating procedure flow]	<ul style="list-style-type: none"> When is it done? 	<ul style="list-style-type: none"> Why is it done then? 	<ul style="list-style-type: none"> When else can it be done? 	<ul style="list-style-type: none"> When is it supposed to be done?
PERSON RESPONSIBLE Combine or change person/unit	<ul style="list-style-type: none"> Who is doing it? 	<ul style="list-style-type: none"> Why is this unit doing it? 	<ul style="list-style-type: none"> Who else can do it? 	<ul style="list-style-type: none"> Who is supposed to do it?
METHOD OF WORK Simplify or improve and computerise Standard operating procedure / system]	<ul style="list-style-type: none"> How is this done? 	<ul style="list-style-type: none"> Why is it done like that? 	<ul style="list-style-type: none"> How else can it be done? 	<ul style="list-style-type: none"> How is it supposed to be done?

18.2.10 TOOL 54: WORK/ACTIVITY PROCESS ANALYSIS

What is it?	How to use it	When to use it
<ul style="list-style-type: none"> A tool to review the current practices within a specific job or job family and identify potential improvements. 	<ul style="list-style-type: none"> List all the tasks the individual executes during a specific period e.g. a day/ week/month. Review the activities (by interviewing subject experts) according to the review criteria by first stating the current situation, then understanding why that is the situation, thirdly identifying alternatives to the current situation and fourthly formulating an ideal scenario based on the alternatives. Review criterion 1: Review the purpose of each of the activities to determine what is supposed to be done. Review criterion 2: Review the sequence of activities to determine the best possible time and sequence to do the job. Review criterion 3: Review the method utilised to identify the best way of doing the job. Review criterion 4: Review the actual person or position responsible for performing the activities. Review criterion 5: Review the geographic location where the work is done to identify the best place for the activities to take place. Review criterion 6: Review all the input requirements to perform the tasks to ensure that all enablers are in place for effective performance of the job. 	<ul style="list-style-type: none"> When individual jobs are reviewed with the objective of optimising specific activities. This tool can be used to further review information collected from work synthesis and process engineering.