



# ACCOUNTABILITY MATRIX PLANNING CANVAS



This planning tool will help you build an Accountability Matrix for your collaboration. For more information and a detailed description, see the Tamarack Institute's [Accountability Matrix Tool](#).

## What Is an Accountability Matrix?

Most collaborations have multiple parts. An Accountability Matrix helps groups identify the different parts of the collaboration structure. It also can be used to help collaboration partners know who is accountable to whom and for what purpose.

The Accountability Matrix Planning Canvas and tool can be used for all types of collaborations but will need to be customized depending on the size and scope of the collaborative structure. Single tier or program-focused collaborations might have fewer sub-groups. Collective Impact collaborations will have many different subgroups including a leadership table, working groups and a backbone team.

## Collaboration Roles

Here is a list of common collaboration roles.

- Convener – the individual or group hosting the collaboration
- Fiscal Sponsor – the organization holding the financial resources
- Leadership Table – the senior decision-making table
- Working Groups – sub-groups supporting the collaboration
- Backbone / Staff Team – designated staff members working directly for the collaboration
- Collaboration members – community or organization members

## Simple Accountability Matrix Example

Role	Primary Focus & Contributions	Accountability
Convener/ Fiscal Sponsor	<ul style="list-style-type: none"><li>• Local charitable organization that receives the funding to convene the collaborative</li><li>• Is a member of an accountable to the Leadership Table(s)</li><li>• May be the location for the backbone staff team</li></ul>	<ul style="list-style-type: none"><li>• Accountable for funding and reporting</li><li>• Accountable to the Partners or Leadership Table for how funding is spent</li><li>• Accountable to the community for results</li></ul>
Leadership Table	<ul style="list-style-type: none"><li>• 10-15 local leaders</li><li>• Shapes and leads the strategy overall</li><li>• Aligns work of various action teams</li><li>• Hold commitment to common agenda &amp; Theory of Change</li><li>• Engage other stakeholders</li><li>• Mobilize resources &amp; knowledge</li></ul>	<ul style="list-style-type: none"><li>• Accountable for setting the common agenda and core strategies</li><li>• Accountable for progress</li><li>• Accountable to the community for results</li></ul>
Staff Team	<ul style="list-style-type: none"><li>• Includes the Leadership &amp; core staff of the backbone infrastructure</li><li>• Support the work of the Steering Committee &amp; Initiative overall –</li><li>• Design &amp; facilitate engagement across the initiative and meetings of various groups</li><li>• Ensures progress is being made</li></ul>	<ul style="list-style-type: none"><li>• Accountable to the Fiscal Sponsor for funding allocations and following the Fiscal Sponsor policies</li><li>• Accountable and working with the Leadership Table</li><li>• Accountable for reporting</li><li>• Accountable to the community for results</li></ul>
Working Groups or Action Teams	<ul style="list-style-type: none"><li>• Scale-up on-the-ground solutions around key areas of focus/priorities</li><li>• Co-design &amp; refine solutions around key shifts/strategic priorities</li><li>• Number of size of work groups to be determined</li><li>• Each work group includes youth leadership</li></ul>	<ul style="list-style-type: none"><li>• Accountable to the Leadership Table and Backbone team for progress on common agenda</li><li>• Accountable to the community for results</li></ul>
Community Network or Community Eco-System	<ul style="list-style-type: none"><li>• Provides insights and ideas on key shifts &amp; ideas</li><li>• Offers feedback on priorities to maximize impact of the initiative</li><li>• Contributes knowledge, resources &amp; connections</li></ul>	<ul style="list-style-type: none"><li>• Accountable to the collaborative effort for direction, engagement and support</li></ul>

## Guiding Notes for the Accountability Matrix Canvas

- Consider whether an Accountability Matrix may not fit the needs of the collaboration.
- Consider how the Accountability Matrix may support and equity and inclusion approach.
- Build the Accountability Matrix with collaboration members.
- Revisit and revise the Accountability Matrix when the collaboration shifts and changes.
- Share the Accountability Matrix with all members of the collaboration and ask for their input.



Promoting a Culture of Accountability

- Set measurable goals
- Hold yourself and others accountable
- Give and get feedback

Steps to Building An Accountability Matrix

1. Consider the equity and inclusion implications when building an accountability matrix for the collaboration.
2. Determine whose perspectives should be invited and included to join the collaboration including individuals who are directly impacted by the problem, challenge or opportunity.
3. Confirm the structure and size of the collaboration.
4. Confirm the shared agreements, common agenda and core strategies of the collaboration.
5. Identify and confirm the collaboration’s values and principles for working together.
6. Identify the different parts of the collaboration – Leadership Team, Steering Committee, Working Groups, Staff, other groups as required.
7. Briefly describe their core roles and responsibilities.
8. Identify what accountabilities each group has to other parts of the structure.
9. Add a column about decision-making if appropriate.

Accountability Matrix Template – Adjust to your collaboration structure as required

Parts of the Collaboration Examples below; change as required	Primary Focus & Contributions Describe the focus and contributions of each group – core roles and responsibilities	Decision-Making What decisions are the responsibility of this group?	Accountability Who is this group accountable and for what?