A successful project, whether it is a remote work initiative or other IT project, requires a team effort. Team members must clearly understand their roles and responsibilities to meet project objectives. Creating a responsibility grid, or RACI, is an easy and effective way to visually display everyone’s roles for each specific task or activity involved in the project.
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Introduction
Defining and assigning roles and responsibilities is essential to the success of any project or program. As important as it is to clarify project objectives, leaders have to clarify who is responsible for each project activity. Without clearly defined roles, team members may assume others are performing necessary tasks and as a result, miss deliverables and cause schedule delays. Or, team members may fail to include other people or parties on key decisions which can cause internal conflict or result in project results that fall below expectations. Therefore, it is a vital function of the leader to ensure people know what is expected of them through every phase of the project or program.

An effective technique leaders can use to define roles and clarify specific responsibilities is a responsibility assignment matrix. A responsibility assignment matrix is a grid that visually displays the project resources assigned to each activity and what the role of each team member is in relation to that activity. The most popular responsibility assignment matrix is the RACI (pronounced ray-see), which is acronym for 4 possible roles of a team member: Responsible, Accountable, Consulted, Informed. Many organizations already use some variant of the RACI approach to facilitate disciplined and operational excellence within a firm’s leadership group or within individual project teams. The RACI also provides the basis for communication plans, stakeholder management, and change management plans the team will need to make the telework implementation a success.

Before diving into the definitions of RACI and how to construct the matrix, it’s important to remember that the RACI is supposed to be a living document. Leaders should revisit the RACI from time to time and make necessary modifications or updates.

Definitions
Although some organizations may deviate slightly, the generally accepted RACI role definitions are:

**Responsible (R)**
Team members designated as Responsible, execute the identified task. This person or group of resources assist the person accountable to achieve the desired outcome. In short, those Responsible do the work. They are also responsible for the quality and timing of the specific task and for understanding inputs/outputs and hand-off responsibilities of the activity. This level of responsibility can be shared
among two or more people or may reside with one person. The degree and level of responsibility is determined by the person accountable or the owner of the function.

Note that the person(s) responsible are not the final arbiter of decisions that affect those accountable for cross-functional decisions. In other words, those accountable (discussed in the next section) may retain decision-making authority for certain cross-functional issues that are beyond the scope of those performing the work. Also, the person(s) responsible are not a consultant or overseer; responsible parties always have direct involvement with the work. They have "skin in the game."

**Accountable (A)**
Accountable individuals are ultimately accountable for delivering the product, program, task or service on time and to an agreed-level of quality. He or she must sign off or approve when the task, objective or decision is complete. Therefore, he or she should be the ultimate decision-maker. Typically, only one Accountable person is assigned a process, task, or activity (usually better to list an individual’s name versus a department or organization). The value in establishing one person as Accountable is to clearly highlight where the buck stops. Think about it another way—if everybody owns a task or program then nobody really does. It can diffuse ownership and accountability.

**Consulted (C)**
Large, complex initiatives, such as implementing a telework arrangement, require input from many sources. More often than not, the person or people assigned to execute a task will need counsel, advice, or feedback from subject matter experts, executives, or peers within the organization. Leaders may want to consult and bring these experts or stakeholders into the process before a final decision or action is taken. Consulted individuals or parties need to be consulted on an activity or task before it can be completed. Typically, those consulted are directly impacted the outcome of the activity or the decision associated with the task.

Although there is no limit to the number of individuals or parties to consult with, it is a two-way communication and major issues or concerns raised by those consulted have to be taken into account or addressed before moving ahead. Consulted parties should provide input and help those Accountable and/or Responsible to understand the full ramifications of their actions and decisions. Note that
Consulted parties cannot override the decisions of the Accountable individuals; they only help decision-makers make the best possible choices.

Informed (I)
Lastly, those that need to be informed of a decision or the progress of the activity should be identified. Unlike those Consulted, it is strictly one-way communication with those Informed. Informed parties don’t directly contribute to decisions. However, there can be multiple parties or individuals Informed and “I’s” can form a community of people represented by a person in a Consulted role.

Other Options or Additions – Signatory/Support and Omitted
Many variants of this model exist and can be found online. Two popular variations include RASIC or RACI-O. Depending on the version, the additional S can either mean support or signatory. Acting in a supporting role, the person or organization may provide resources to support the task or assignment. Unlike Consulted parties, Supporting individuals or teams are expected (or needed) to provide materials, people, or budget, not just feedback or guidance. Supporting parties are also different than those Responsible. Remember that those Responsible do the work. Supporting members may not necessarily do the work but just provide something necessary to the Responsible designees so they can carry out the task.

Using the S as Signatory, this refers to the person that has to signoff or approve the deliverable. This would only be used in cases where the Accountable designee needed someone else to approve the deliverable. For example, a project team may be created to implement a telework program. The team is Responsible for many of the tasks associated with the implementation. The manager or director the team falls under may be Accountable for the actions of the team. However, in the course of the implementation the team may have to do certain tasks, such as write an HR policy on the new work arrangement, that has to be signed off by someone other than the manager. In this case, the Vice President of Human Resources may have to sign off on the policy before it can be implemented. The signatory may only participate as the formal approver and not necessarily be involved in the execution of the task.

Another variation may include the “O” for Omitted individuals or groups. Although less common than RASIC, the Omitted designation is used to specifically call out groups or individuals that should not be
used for an activity. For example, suppose in the course of planning a telework implementation the IT Help Desk noted that it was unable to handle the potential volume of service calls originating from the new teleworkers as they set up their home offices. The business elects to handle this through self-service tools or funneling the issues or queries to another business group. The task “Develop FAQs for remote employees” may list the business as Responsible and the IT Help Desk is Omitted, to specifically draw attention that IT is excluded from the task.

Regardless of which designation is used, the intent is to give those using this tool the flexibility to include key stakeholders that may not be covered by the basic RACI model. In many organizations, the basic RACI model will suffice, and in general, simpler is usually better. If the organization chooses to go beyond the basic RACI model, we recommend ensuring that terms and definitions are clearly explained and communicated to all.

Creating the Matrix
The RACI matrix is relatively easy to construct. Simply, it is a two-dimensional table with participants listed across the top and the activities or tasks listed down the horizontal side of the table. In the table itself are the RACI designations.

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<table>
<thead>
<tr>
<th>“What needs to get done”</th>
<th>Role A</th>
<th>Role B</th>
<th>Role C</th>
<th>Role D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity/Task 1</td>
<td>R</td>
<td>A</td>
<td>C</td>
<td>I</td>
</tr>
<tr>
<td>Activity/Task 2</td>
<td>A</td>
<td>R</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Activity/Task 3</td>
<td>C</td>
<td>C</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Activity/Task 4</td>
<td>R</td>
<td>I</td>
<td>I</td>
<td>A</td>
</tr>
<tr>
<td>Activity/Task 5</td>
<td>I</td>
<td>R</td>
<td>R</td>
<td>A</td>
</tr>
</tbody>
</table>
```

“Who’s involved”
When listing the tasks or activities, avoid trivial or generic activities, e.g., "attend meetings." Each activity or decision should begin with a good action verb, such as Evaluate, Create, Record, Schedule, Write, Operate, Plan, Update, Monitor, Prepare, Collect, Develop, Inspect, Train, or Authorize. When the action verb implies a judgment or decision (e.g., evaluate, monitor, inspect, review), add a phrase to indicate the primary outcome. For example: “Analyze space utilization data,” or “Evaluate service providers to determine best solution.” Activities or decisions should be short, concise, and apply to a role or need, not to a specific person (keeping in mind that roles can be individuals, groups, or entire departments).

**RACI Analysis**

Once the RACI is complete, leaders should analyze the matrix to ensure completeness and resolve any discrepancies before issues arise. We refer to this as vertical and horizontal analysis. Vertical analysis infers that leaders will review the matrix by role, looking down the columns and what each person or team is assigned to. The horizontal analysis requires leaders to look across the rows at each of the individual tasks or activities.

Here’s what to look for:

- **Vertical Analysis:**
  - Too many R’s: If an individual or team is listed on many tasks as Responsible, can they handle the workload? Remember that being responsible in RACI terms means that they
are doing the work. Perhaps it may be better to break the tasks into smaller, more manageable deliverables for others to perform or offload the tasks onto someone else.

- **No spaces in columns**: If the individual(s) plays a part in every task or activity (even if it is as Consulted party), ask if they need to be involved in so many activities? Are they a "gatekeeper" that could bog down progress? Can Consulted individuals be reduced to Informed, or left to the individual's discretion when something needs particular attention? Not every role needs to have an assignment on every task.

- **Not any R's, A's, or C's**: If an identified role is only informed, should they be eliminated from the matrix? Have processes changed to a point where other resources should be reutilized?

- **Too many A's**: Does a proper "segregation of duties" exist? Should other groups/people be accountable for some of these activities to ensure checks and balances and accurate decision making throughout the process? Is this a "bottleneck" in the process - will everyone be waiting for decisions or direction?

  - **Horizontal Analysis**:
    - **No R's**: If a task has no one listed as Responsible, who is getting the job done? This may indicate that everyone sees themselves as an approver, or someone that can add their two cents or be informed but no one sees their role as taking the initiative.
    - **Too many R's**: This is the reverse of the problem above. With too many people labeled as doing the work, are there too many hands involved? With so many people assigned to getting a specific activity done, will it create more confusion or conflict?
    - **No A's**: There must be someone Accountable for every task. No exceptions. Accountability should be pushed down to the most appropriate level.
    - **More than one A**: One person, and only one person, should be Accountable to avoid confusion. Every person with an "A" will have a different view of how it is or should be done.
    - **Too many C's**: Remember that if someone is consulted, the task is conditional based on the Consulted party's input. Consulting too many individuals or groups may slow the activity down. Do all the identified groups or people really need to be consulted? Are there justifiable benefits in consulting this many?
    - **Too many I's**: Do all the identified roles need to be routinely informed or only in exceptional circumstances?
    - **Every box filled in**: If every box for a given task is filled in it could indicate too many people may be involved.
Additional Tips & Recommendations
Some final thoughts to help you maximize the RACI:

- The RACI is not meant to be a solitary effort. It’s best done in an open, team environment and leaders are encouraged to use the tool to build teamwork. Participation will ensure the matrix is adopted and maintained.

- 100% accuracy is usually not essential. Over time the RACI may be refined and adjusted as necessary. Don’t get hung up looking for perfection. A perfect tool is still useless if it’s never used.

- Place Accountability (A) and Responsibility (R) at the lowest possible level.

- Minimize the number of Consulted (C) parties and groups/people Informed (I). It is a common mistake for RACI builders to list many groups in the Consulted category. Ensure that everyone listed in the RACI is really necessary.

- All roles and responsibilities must be documented, communicated, and ownership achieved.

- RACI cannot substitute for well-defined process or thorough planning. The RACI is a tool – one tool among many to ensure the success of a project or initiative. It is meant to be used within the context of the project lifecycle. Use the RACI as the basis for developing more detailed planning.

- The golden rule of the RACI - there should be only one “A.” We’ve intentionally reiterated this point since it is so often missed. It’s a common mistake and easily avoidable with a little horizontal analysis.
References

Website: www.flexworkglobal.com