

RACI - Responsibility Chart

Introduction

In 1988, I read "Målriktad projektstyrning (Goal Directed Project Management)". The book's main premise was that there were three documents required to control a project. Instead, the authors identify the absolute minimum of three documents required to control a project.

The Responsibility Chart is most often called a "RACI" based on the four symbols used to denote roles.

This document provides a flexible template with instructions how to use it; it is not meant to be a guide. It is recommended that you:

- The RACI Model, <https://racichart.org/project>
- "Goal Directed Project Management", Andersen, Grude, and Haug.

Description

The template under the sheet named "RACI" has been designed flexibly to manage a large project consisting of many sub-projects.

- For simpler projects, delete unnecessary parts, or hide them if you might need them later.
- For larger projects, add rows, columns, groups of stakeholders, or sub-projects.
- When you write "AR", "A", "R", "C", or "I" into the chart cells, they are conditionally formatted.
- Sections of information are grouped so they can be collapsed, and support focus on specific areas.
- Note that grouped data in Excel collapses down to its heading. This is because of the way Excel handles grouping. This means that section "Headings" are actually "Footings".

Using the RACI Responsibility Chart

It is recommended to populate the fields in the chart in the following order:-

Title	Description
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PROJECT	Name of the highest level of the project or area which needs to be organised, in order for all key stakeholders to understand their roles.
SUB-PROJECT	If the PROJECT is large enough, or already organised that way, name the SUB-PROJECTS.
MAJOR TASK	As for a project Gantt chart, define the MAJOR TASKS for each SUB-PROJECT.
Key activity	List each KEY ACTIVITY for each MAJOR TASK.
REMARKS	
STAKEHOLDER	This is a grouping name used to gather roles and people from a particular function.
Generic role	A person in the organisation who is directly involved in the PROJECT.
RACI body	R - Responsible: the person responsible for completing or implementing the task. A - Accountable: the person with the authority and ability to say "yes" or "no", making them ultimately accountable for the success or failure of the task. C - Consulted: any person who <i>must</i> be consulted prior to taking a final decision or action. I - Informed: any person who <i>must</i> be informed after decisions or actions are taken so that they may fulfil their duties.

Metrics

METRICS (footer)	Automated filled for all rows in current chart.
METRICS (right)	Automatded filled for all columns in current chart.

nise is that you can plan everything in detail, but if no-one reads it or uses it, then it is a waste of
ct: Milestone Plan, Activity Plan, and Responsibility Chart.

within a project: "R" - Responsible, "A" - Accountable, "C" - Consulted, and "I" - Informed.

: for how to create a RACI. There is a plethora of information readily available, but I can

Basic orientation and understanding.

Detailed, practical advice how to use the RACI effectively, and avoid pitfalls.

sisting of several sub-projects, and multiple groups of stakeholders who have key roles in the

hem later.

as necessary.

ally formatted to highlight the key roles *Accountable* and *Responsible*.

s on one area at a time.

Excel is a spreadsheet, and this function is used to hide detail and show the sum of a column.

Usage

If the project name is random like "Dynamo Project", consider including a tag line which explains for everyone what it is about.

- Fill in in left field, not the middle one.
- If the sub-projects are called "Red", "White" and "Blue", not all stakeholders may understand. Consider using self-explanatory terms (e.g. Requirements [red], Coding [white], Testing [blue]).

Not all tasks - just the major ones necessary to assure control over the project.

Not all activities - just the key activities necessary to assure control over the project. Sometimes, small activities can be very important.

Use only if more clarification is necessary to avoid misinterpretation. Don't add new information which changes the meaning of the activity.

Divisions, departments (e.g. Legal, Sales, Operations).

Start by naming a generic role (e.g. PM), and later naming the actual person involved. If not everyone knows who Sarah is, name the role PM - Sarah C.

R - there must be one, and only one "R" associated with each activity. If several people are actually doing the work, one must be responsible for the others (e.g. PM).

A - there can be zero or one "A" for an activity. Not all activities are significant enough to need someone accountable; use "A" only when it is important to know.

C - can be multiple for an activity. Note it is not "was" or "can", but "must" be consulted, or the decision will not be valid.

I - can be multiple for an activity. It doesn't mean everyone in the project that will hear this at a meeting, but those who "must" be informed of the decision/action.

See how loaded each role is.

See if a task has conflicting roles (e.g. A >1), R is missing or >1