



# How can the RACI model be used to balance the workload within an organization?

## INTRODUCTION

The RACI model is a methodology applied to organisational management. It provides quick and clear insight on how workload and responsibilities are shared among a team in relation to each of the key functions of an organisation. RACI is an acronym comprising the first letters of the words “Responsible - Accountable - Consulted - Informed”. In French there is a slightly different version which nevertheless represents the same idea: “Responsable - Acteur - Consulté - Informé”.

Having greatly evolved over time, the exact origin of this methodology remains uncertain (as does its inventor). Nowadays, several forms exist, which are adapted to the particular needs of each organisation. However, since the 1970s and the rise of results-orientated project management, reference is made more and more to the “Responsibility Assignment Matrix”.

This methodology is simple to use and helps organisations to revisit internal structuring and clarify the division of tasks within a team, enabling a quick diagnosis. Hence, It is therefore a useful tool for civil society organisations working with Well Grounded in the Congo Basin. Below is the overview of how to use this methodology:

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## DEFINITION OF THE RACI ACRONYM:

### **R FOR RESPONSIBLE**

This is the person (or people) who actually undertake a task. Of course, there can be several R's for each task, based on the volume of work required. All R's work under the coordination and supervision of the person accountable (A) for the task.

### **A FOR ACCOUNTABLE**

This is the person in charge of a task, who ensures that it is actually carried out. This person is accountable for the task, particularly if it is not done on time or to a high quality. This is not necessarily the person who carries out the action, although sometimes one person may take on both of these roles.

### **C FOR CONSULTED**

This is the resource person (or people) who may have useful or necessary information to ensure that a task is carried out properly. It is therefore important that the person/people in charge of carrying out a task (the A's) consult with this person/people and integrate their recommendations as appropriate. Several people may be consulted about the same task. Several people may be consulted about the same task but care must be taken when selecting: too many consultants may render the process cumbersome.

### **I FOR INFORMED**

This is the person (or people) who must be updated regularly as the task is completed, given that the task is related to the fulfillment of their own responsibilities. For example, it is important for the head of finance to be aware of how the tasks related to the launch of a community forestry project are unfolding as this implies that the organisation will soon have to distribute funds. Thus it is important for this person to be informed of progress so that they can adapt their own work planning accordingly.

It is important to note that differences exist between the wording of the French and English RACI models. In English, R denotes Responsible (the person doing the action) and the A stands for Accountable (the person who is accountable for the realisation of the action). In French, however, the meaning switches: R for Responsable refers to the person accountable for completing the action and A for Acteur refers to the person carrying out the action. R and A therefore have opposite meanings in the French and English versions but are interchangeable as long as the same approach is used consistently.

## IMPLEMENTATION

This is how to implement the RACI methodology in an organization:

- STEP 1**
- 1. List all key roles within the organisation** positioning them horizontally in a table. Please note, this does not refer to individuals. A single person can have several roles within the organisation.
  - 2. List all tasks of the organisation**, placing them in the first column of the table. Please note that reference is made here to “important” tasks of the organisation. For example, it is not worthwhile to include tasks such as “preparing coffee”, regardless of your team’s need for caffeine! If you carry out an in-depth detailing of the tasks, you will end up with a list that is too long and the RACI table will be illegible.

In this way, it is better to include a single task, “Publish the newsletter”, as opposed to four separate tasks, “Write an article” + “Format the article” + “Create the newsletter” + “Send the newsletter”.

In preparing the list of your organisation’s tasks, it is important to use your action plan or your operational plan as a starting point (if you have these to refer to). This will provide you with a clear list of current planned actions, and will, in turn, allow you to verify how the workload related to implementation of activities is distributed. If you are yet to choose a person responsible for each action outlined in your strategic plan, the RACI matrix exercise will provide you with the opportunity to efficiently allocate tasks as a team.

Strategic Objectives	Sample RACI matrix, not yet filled in	Roles						
	Activity per strategic objective	President	Head of Sustainable Development	Head of Research	Finance Director	Project Manager	Head of Development	Head of Communication
Objective 1	Identify key actors in the intervention area							
	Develop an external communications strategy: website, Facebook page							
	Develop project proposals							
	Create a community radio station							
	Develop the project strategy and the capacity-building plan for staff							
Objective 2	Develop an ecotourism plan (project)							
	Implementation of the ecotourism plan							
	Identify new socioeconomic needs of communities							
	Ensure environmental education is taught in schools							
	Carry out a feasibility study of economic sectors							
	Promote local arts and crafts							

**STEP 2** Based on the size of your organisation, you will have to decide on who should fill in the RACI matrix. Ideally, this should be a participatory exercise, involving all members of the team. Firstly, this will ensure that choices stated reflect the manner in which things are actually done, not just a theoretical view of how the organisation is run. Secondly, if everyone participates in the discussion, it will help to overcome spontaneous, potential barriers or doubts. Finally, by involving everyone, no-one can later justify their non-collaboration on the grounds that they were not aware of their roles and responsibilities.

This depends, of course, on the number of employees in the organisation. It may become difficult to undertake this exercise in a participatory manner if the number of employees exceeds 10 or 15. In such a situation, it will be necessary to find a more efficient system while ensuring that each person has the opportunity to comment on the matrix.

Below are some basic principles to keep in mind when filling in the matrix:

**There needs to be at least one “Responsible” person per task:** otherwise, no-one will be in charge of actually carrying out the task.

**Only one A!** Only one person should be accountable for each task. This will ensure that responsibilities are not mixed up: who is responsible for the completion of each task will be clearly defined.

**Resolve doubts and conflicts as they arise:** if doubt is expressed regarding the roles to be distributed for a task, this should be resolved on the spot via a team discussion. This should take the form of a critical analysis of how to make things work. It is important to resolve doubts at this time to resolve doubts as they arise to ensure the smooth running of the organisation afterwards.

Strategic Objectives	Sample RACI matrix, filled in	Roles						
		President	Head of Sustainable Development	Head of Research	Finance Director	Project Manager	Head of Development	Head of Communication
Objective 1	Identify key actors in the intervention area	A	R	R		R	C	
	Develop an external communications strategy: website, Facebook page	C			I	R		A/R
	Develop project proposals	C	R	R	I	A/R	R	C
	Create a community radio station	A			I	R		C
	Develop the project strategy and the capacity-building plan for staff	C			A/R	R		
Objective 2	Develop an ecotourism plan (project)	I	A	R		R		
	Implementation of the ecotourism plan	I	C	I		A		
	Identify new socioeconomic needs of communities		A		C	C	R	
	Ensure environmental education is taught in schools	I	A/R					R
	Carry out a feasibility study of economic sectors	C	R		R	R	A	
	Promote local arts and crafts	I		C	R	R	A	R

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## ANALYSIS

Once the matrix has been completed using a participatory approach, the final fundamental step is analysis. To do this, you must go through the matrix row by row (that is, task by task) and column by column (that is, role by role), asking the following questions:

### Task-by-task analysis

**No “R”:** there is nobody to actually implement the task. Who will do the work?

**Too many “R’s”:** are there too many people involved in carrying out this task? Could this hamper its implementation? Too many cooks can spoil the broth.

**No “A”:** we have seen above that one of the basic principles is that there must be one person accountable for the task’s completion. Otherwise, who is going to ensure its implementation? Who shall be held accountable for a delay in carrying out the task?

**More than 1 “A”:** if two people oversee a task, which of the two shall be held accountable? This is a breeding ground for complications and slow decision-making. Therefore, make sure there is only one A per row.

**All cells are filled in:** is this really necessary? Is it necessary for every employee to have a specific role in relation to each task? Probably not. It is important to use people’s time efficiently.

**Too many “C’s”:** consulting a person requires time not only from the person consulting, but also from the person consulted, from whom a response is expected. If you have to consult numerous colleagues for each task, and wait for a response from each of them, this will obviously slow down the process.

### Role-by-role analysis:

The role-by-role analysis (vertical analysis) allows for reflection on the workload and responsibilities related to each role. Such an analysis is important as it ensures a proper balance amongst team members.

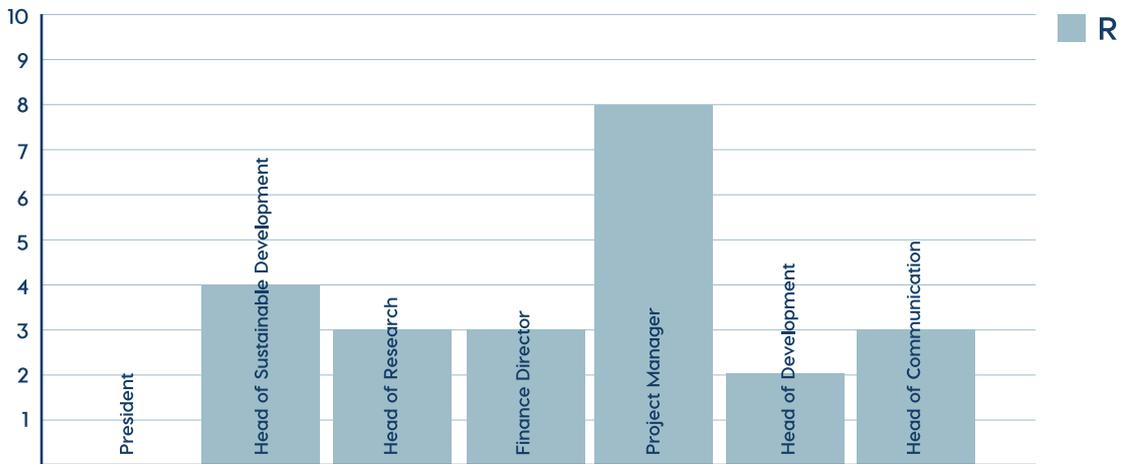
**Too many “R”s for a single role:** too many “R’s” may mean that the workload for the role is too heavy because the person has to undertake several tasks. In such a situation, it will be necessary to review the distribution of “R’s” and possibly redistribute some of the tasks to other roles.

**No empty cells:** does this person need to be involved in every task? This might mean that the organisation relies too much on that particular role and may need to review how it distributes tasks across all roles. This may also provide information about the culture of the organisation and its dependence on particular roles or employees. This is often seen in organisations where the founder plays a leading role and gets involved in all aspects of the organisation.

### Further analyses:

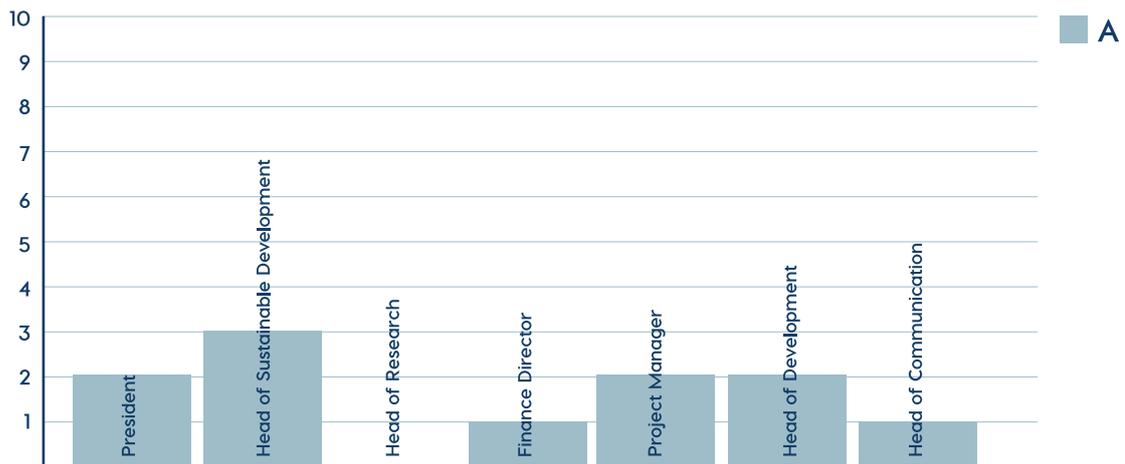
If the direct analysis of the matrix, row by row and column by column, gives a good indication of workload distribution within a team, it may be useful to carry out further in-depth analysis by using some basic functions of an Excel spreadsheet. This provides a quick, visual overview of the different responsibilities of each person. It is worthwhile giving each person a few minutes to analyse the charts, so that each may draw their own conclusions. In this way, your team can participate in a constructive and objective discussion on how to operate and assign tasks within your organisation.

### Responsibilities



Sample graphical representation of division of responsibilities amongst a team using a RACI matrix

### Accountability



Sample graphical representation of how accountability is shared out amongst a team using a RACI matrix

In the example above, the president is accountable for two tasks. This does not mean that the president undertakes each of the tasks, but rather that they oversee their proper implementation. Based on the president's level of involvement in the organisation, this may be normal. If, however, the president has an honorary or representative role and is not involved in the day-to-day management and activities of the organisation, this may lead to problems. It is therefore important to analyse the RACI matrix with regard to how each organisation operates.

Finally, it is quite simple to create job descriptions for each role using the RACI matrix by extracting the type of responsibility (R, A, C, or I) per task for each role. Below is a sample job description created from a RACI matrix.

Head of Development	Identify key actors in the intervention area	
<b>R = Responsible</b> Carries out an action <b>A = Accountable</b> Oversees implementation <b>C = Consulted</b> With regard to implementation <b>I = Informed</b> With regard to implementation	Identify key actors in the intervention area	C
	Develop project proposals	R
	Identify new socioeconomic needs of communities	R
	Carry out a feasibility study of economic sectors	A
	Promote local arts and crafts	A
		R 2
		A 2
		C 1
		I 0
		<b>Total 5</b>

Sample job description created from a RACI analysis

The advantage of this methodology in creating a job description is that a person knows not only what they are responsible for doing, but also the other tasks for which they are to be consulted or informed.

## CONCLUSION

The RACI methodology is a simple and quick way to analyse how an organisation works. It will help you to quickly identify tasks which could create conflict, for example, if several employees want to be accountable for the same task, or, conversely, if there is a task for which no-one is responsible. It also helps to clarify, in the presence of everyone, all the different responsibilities, thereby facilitating a form of mutual control within the team. With this model, no-one will be able to justify their non-completion of a task by claiming to have not been aware of their responsibility or accountability. Lastly, this model will help you to identify roles that are overly solicited (and consequently the person(s) who may not be able to complete all of their responsibilities or tasks). Similarly, it will identify under-solicited roles which could then be eliminated or reassigned to other roles.

**For more information on the RACI methodology and how to implement it, please contact the Well Grounded team.**

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