

Roles & Responsibility Charting

Many teams are slowed by unclear roles and responsibilities. The practice of responsibility charting will help alleviate role confusion, overlaps and gaps.

Instructions:

- Create matrix with following headings: Function/Task, Assigned to, Role
- List the department's/team's responsibilities/functions/tasks
- Identify C, A, I, R, O for each listed function/responsibility.
- List the person's name under the appropriate column that identifies his/her role relative to the listed function/responsibility.

CAIRO Definitions:

Consult: Parties should be actively consulted during the decision-making process. Their input should be sought. They typically have unique expertise or experience that should be weighed heavily when making the decision. They may also be greatly impacted by the decision, and need an opportunity to discuss what the impact of the decision on their section will be or provide input to the process or the decision. Attempts should be made to reach consensus among parties with a consult designation.

Approve: Parties must formally approve the decision. While they may be involved earlier in the decision-making process, the recommended decision must be brought to him/her for formal approval. If there is a numerical suffix or process flow, this indicates the flow of decision-making. For example, A1 approves the decision first, and then it is passed to A2 for the next approval, and so on.

Incorm: Parties should be informed about the decision once it has been made.

Responsible: Parties are responsible for leading the work, raising an issue, driving a decision, collecting all relevant data, etc. They are held accountable for the final deliverable or result. They are the ones chartered with 'making it happen' even though they may not have the full power or authority. They are the ones that initiate meetings and discussions, consult with affected parties, bring different parties together, formulate recommendations, and present recommendations to those who must approve the decision (if final decision-making doesn't reside with this group/person).

zerO: These people have no involvement in the decision. The decision does not deeply involve them or dramatically affect their work.

