



TOOL RACI CHART FOR ROLE CLARITY

OVERVIEW

The acronym RACI refers to four different roles: Responsible, Accountable, Consulted, and Informed. It is a tool that helps define roles, delegate tasks, and hold one another accountable. Whether your organization includes fluid roles with folks who wear many hats, works on projects with many moving pieces, or is part of a collaborative where several different entities are coming together, a RACI can be a valuable structure to support a culture of collaboration. In alignment with our [Equity Standards of Practice](#), RACI can help to spread roles and responsibilities throughout a group to distribute power. It can help the group reflect on how norms question, challenge, or reinforce institutional, organizational, or cultural norms.

Responsible	Person(s) who performs an activity or does the work
Accountable	Person who is ultimately accountable and has Yes/No/Veto
Consulted	Person(s) that needs to provide feedback or contribute to the activity
Informed	Person(s) that needs to know of the decision or action

WHEN TO USE

Creating, revisiting, or analyzing a RACI can be useful for:

- **Role clarity** - If you find yourself asking “Who was supposed to do that?” or “Who was in charge of that?”
- **Navigating a transition** - If a group is new or undergoing a cycle of renewal and needs some grounding in the new structure.
- **Project Management** - The start of a new project is a great time to break down the phases of work and assign activities across group members.
- **Collaboration** - Separate parties are coming together to achieve a greater vision need tools to hold each other accountable to individual parts.

HOW TO USE

Gaining Role Clarity

1. Build a RACI chart using a table, excel spreadsheet, etc.

Project Phase	Activity	Responsible	Accountable	Consulted	Informed
Project Planning	Planning meeting with partner	Alex	Alex	Farah	Canopy Team
	Create participant tracking and email communication	Farah	Alex	Alex	Ernesto
	Develop pre-event materials and mail packet	Ernesto	Alex	Fatima	Farah, Partner
	Create post-event short evaluation	Fatima	Alex	Farah	Ernesto
Day of Event	Facilitate the event	Alex	Alex	Farah	Partner
	Handle production	Farah, Fatima	Alex	Alex, Ernesto	Partner
Post-Event Follow Up	Survey participants	Fatima	Alex	Ernesto, Farah	Partner
	Meet with partner to decide next phase of work	Alex	Alex	Brenda, Ernesto	Canopy Team



WORKSHEET RACI

PROJECT PHASE	ACTIVITY	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED



2. List out activities, projects, or tasks - organizing however you need to. In our example, we organized project phases.
3. Describe each activity or decision using a suitable action verb. A few examples include:

Evaluate	Record	Monitor	Update	Write	Inspect
Collect	Develop	Publish	Review	Conduct	Approve
Authorize	Schedule	Determine	Plan	Decide	Prepare

4. Assign each activity, based on role, to those who will be Responsible, Accountable, Consulted, and Informed. Some questions to ask yourself: what is this person's capacity? Who has content expertise? Who has the appropriate skills to complete this? Who does this impact?
 - a. For all the categories, you may have multiple names EXCEPT the Accountable category. Only one person should be ultimately accountable for making sure a given activity gets done so it doesn't get lost.
5. Analyze: Where is the same name repeated? Are there any missing gaps? What does power look like when you look at this RACI?

A RACI can be a living document that is revisited along a process or a helpful grounding point at the beginning of a journey. It is not meant to be a perfect depiction of what each person is doing, but rather a best guess at capturing the many roles, responsibilities, and accountabilities that we take on as we work together.

Reflecting on Equity

One of the important functions of collaboration is to act together. Having clear roles helps ensure actions don't slip through the cracks and that responsibility doesn't fall on just one person's shoulders. At the Canopy, our equity standard for collaborative action is:

Responsibility for action is distributed across the group, the diverse assets of group members are fully engaged, and any symbolic and/or material rewards for actions taken are disbursed fairly.

Using this as the north star, you can review your finished RACI and ask yourself the following questions:

1. Do some group members have more responsibilities than others? Why?
2. Do some team members have more responsibilities that fall in each category? (Responsible, Accountable, Consulted, Informed)? Why?
3. What incentives or rewards will each group member get for taking these actions?



- a. For example, are some group members paid for the time they're dedicating to the project, is there a local newspaper recognizing their efforts? or will they be able to build important relationships with funders or policymakers based on their role in the project?

Equity doesn't mean that every person will have the exact same role or rewards for taking action. That's equality, not equity. By asking these questions, however, you can begin reflecting on whether the distribution of both work and rewards feels fair based on what each person can contribute to the group.

COMMUNITY LEARNING MODEL

Culture of Collaboration

Strengthen the capacities that support collaborative work such as facilitative leadership, communication, information sharing and shared accountability.

These elements strengthen the ability to move through the stages of the Community Learning Model.

RACI is a tool for the Culture of Collaboration phase of the Community Learning Model. To learn more about tools for dialogue and the other areas of the Community Learning Model, visit civiccanopy.org/clm.

