

A USER MANUAL FOR RESEARCHERS: PROJECT TEAM MEMBERS ROLES AND RESPONSIBILITIES TEMPLATES

Research Project Management
<https://research-tools.mun.ca/rpm>

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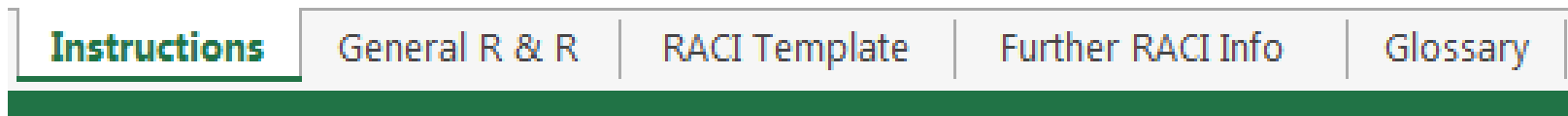
As part of the Project Management services offered at Memorial University of Newfoundland, Project Management resource packages, consisting of tools and templates, have been designed to aid researchers in the management of research project activities.

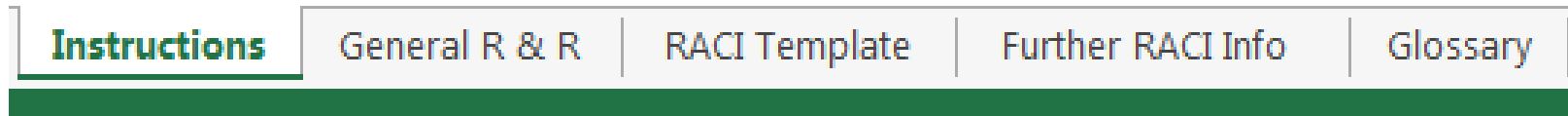
This user guide focuses on the Project Team Members Roles and Responsibilities Templates. The Roles and Responsibilities templates are of value to researchers when planning and communicating the roles and responsibilities of project team members.

Note: Project management definitions outlined within this guide are referenced from the Project Management Institutes, Project Management Body of Knowledge, Fifth edition.

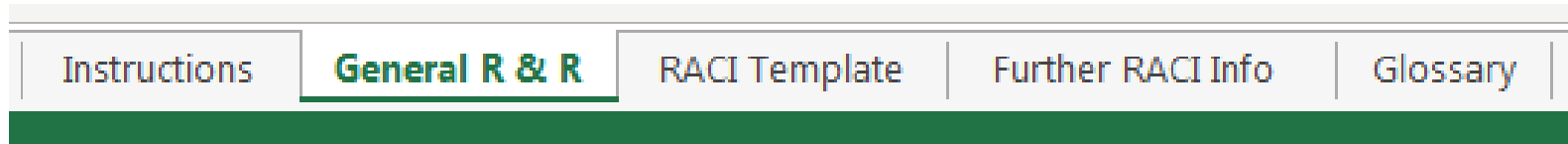
The Scope template is a Microsoft Office Excel file which consists of 5 tabs:

1. Introduction
2. General Roles and Responsibilities (R&R) Template
3. RACI Template
4. Further RACI Information Template
5. Glossary of Terms





- Brief instructions are provided in this tab to provide the user a high level overview of the templates.
- For more detailed guidance on the use of these templates, users are encouraged to review the User Guide.



- The General R&R template is designed for planning and communicating project team members roles and responsibilities at a high level. This will provide all team members an overview of their role on the project and any responsibilities they may have.

GENERAL ROLES AND RESPONSIBILITIES TEMPLATE

- The General R&R template has an *project identifier field* which consists of 4 rows.
- This identifier is found on all templates within this resource package.

Research Project Name:	
Principal Investigator:	
Project Manager (If Applicable):	
Project Start Date:	
Project End Date:	

The general roles and responsibility consist of 4 columns:

- Objective/Activity/Task
- Title
- Team Member (s)
- Role/Responsibility

Objective/Activity/Task	Title	Team Member (s)	Role/Responsibility

Objective/Activity/Task:

- It is recommended that when inserting objectives/activities/tasks, that a hierarchical breakdown of project work be used. This is the method that was employed in using the 'Activity List Template' within the 'Plan Project Scope' template package. If you have the 'Activity List Template' completed you can simply copy and paste the activity list directly into this template.
- In this method numerical coding is used in this identify objectives, activities, and tasks. For example:
 - **1** - Represents an **identified project objective** (displayed in grey)
 - **1.1** - Represents an **activity** associated with that objective (displayed in white)
 - **1.1.1** - Represents a **task** associated with that activity (displayed in red)
- Please note that objectives may have many associated project activities, and an activity may have many associated tasks.

Objective/Activity/Task	Title	Team Member (s)	Role/Responsibility
1			
1.1			
1.1.1			
2			
2.1			
2.2			
2.2.1			

GENERAL ROLES AND RESPONSIBILITIES TEMPLATE

Title:

- This is a short identifying title for the respective objective/activity/task

Team Member(s):

- Any project team member assisted with that objective/activity/task should be listed.

Role/Responsibility:

- This space can be used to qualify what is expected from identified team members with-respect-to associated project objectives/activities/tasks.

Objective/Activity/Task	Title	Team Member (s)	Role/Responsibility
1			
1.1			
1.1.1			
2			
2.1			
2.2			
2.2.1			

[Instructions](#)[General R & R](#)[RACI Template](#)[Further RACI Info](#)[Glossary](#)

The RACI method is a common approach for identifying roles and responsibilities, and avoiding confusion over those roles and responsibilities during a project. Once complete the RACI template is a quick communication mechanism for the roles and responsibilities of a project. The RACI template is recommend on projects that have large project teams. The acronym *RACI* stands for:

- **Responsible (R):** The person who does the work to achieve the task. They have the responsibility for getting the work done or decision made.
- **Accountable (A):** The person who is accountable for the correct and thorough completion of the task. There can only be one person who is accountable. For academic research projects this will most often be the Principal Investigator. The person who is responsible for a task will report up to the person who is accountable.
- **Consulted (C):** The people who provides information for the project and with whom there is two-way communication. This is usually several people, often subject matter experts.
- **Informed (I):** The people kept informed of progress and with whom there is one-way communication. These are people that are affected by the outcome of the tasks, so need to be kept up-to-date.

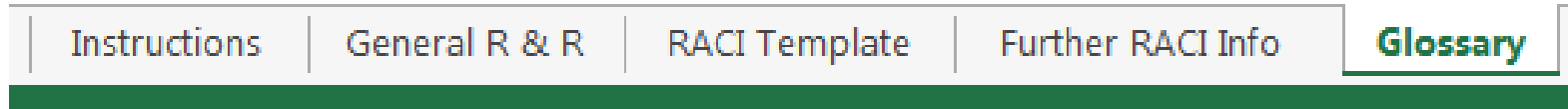
- The template consists of ‘Objective/Activity/Task’ and ‘Title’ columns. Completion of these fields follows the same procedure and numerical coding rules as contained within the ‘General R&R Template’. Please refer back to that section for instructions.
- The template works by identifying who is responsible and accountable for each objective/activity/task, and who needs to be consulted or informed. This is done by placing the respective R,A,C, or I identifier with the appropriate team member and the associated objective/activity/task.
- Common examples of project team members are provided within the template, however additional team members can be added through the insertion on new column’s to the excel spreadsheet.

Objective / Activity / Task	Title	Project Manager	Project Investigator	Co-op Student	MUCEP/ISWEP Student	Masters Student	PhD Student	Faculty/Department Contact
1	Prepare Quarterly Reports	R	A	C	C	C	C	I

FURTHER RACI INFORMATION TEMPLATE

- The 'Further RACI Information' template allows researchers to outline in greater detail the specifics regarding project team members roles and responsibilities on a project. It allows researchers to qualify details regarding the RACI template that can add in planning and communicating roles and responsibilities within the project team.
- For example, for each Object/Activity/Task, specifics how team members are Responsible, Accountable, Consulted, or Informed can be outlined.

Objective/Activity/Task	Title	Team Member(s)	Responsible	Accountable	Consulted	Informed
1						
1.1						
1.2						
1.2.1						
1.2.2						
1.2.3						



- This tab provides the researcher definitions to terms within the Roles and Responsibilities templates.