**ROLES AND RESPONSIBILIES TEMPLATE**

**Disclaimer:**

This template/document/framework is not intended to be comprehensive or exhaustive - rather, it seeks to provide a framework, be a reference, stimulate discussions, generate ideas, and facilitate further analysis to encourage additional exploration, research and/or policy development for your organization or group.

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**Preamble:**

This template can be used to define the roles and responsibilities for a team in a program or project. Each initiative is unique; the user of this template may adjust it as required to meet its particular circumstance.

**ROLES AND RESPONSIBILIES TEMPLATE**

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| --- | --- |
| **Team Name/Project Name** |  |
| **Branch/Organization** |  |

**TEMPLATE**

|  |  |  |
| --- | --- | --- |
| **Role** | **Responsibilities**  | **Reports to**  |
| **Name of the Position*** Brief description of the overall role and contribution
 | * List of high-level activities in order of importance
* Responsibilities are briefly described in a one-sentence statement, starting with an action word/verb.
 | * Position Name Who it Reports to
* (May include name and title)
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 |

**EXAMPLE (POPULATED TEMPLATE)**

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| **Role** | **Responsibilities**  | **Reports to**  |
| **Project Sponsor*** Oversees the project from a high level, usually at a senior- management level.
 | * Creates the vision and defines the goals
* Communicates the project’s goals throughout the organization
* Resolves conflicts/removes obstacles
* Makes key decisions within the project
* Approves budget and changes
* Takes inventory of project resources and ensures availability of resources
* Approves all changes to the project scope
* Provides additional funds for scope changes

Approves any major project deliverables | **N/A** |
| **Project Leader*** Responsible for all phases of a project. Accountable for the project results within time and budget constrains. Manages relationships with contributors and stakeholders.
 | * Oversees the day-to-day details of the project
* Creates and manages components of the project plan
* Determines the methodology used on the project
* Creates a project schedule and determines each phase
* Recruits project staff and leads team members through each phase
* Assigns/delegates tasks to key team members
* Oversees the project team to keep everyone on task, mitigate problems, and ensure everyone understands their individual role within the greater project
* Communicates progress and project status to team members and senior management
* Manages deliverables according to the plan: scope, time, and budget
 | Project Sponsor |
| **Project Team Members*** Individuals who actively work on one or more phases of the project.
* (Specify if internal/external and full-time/part-time)
 | * Solve project objectives
* Complete tasks in areas of expertise
* Deliver project responsibilities within deadlines
* Communicate with project lead on roadblocks
* Contribute to overall project objectives
* Complete individual deliverables
* Provide expertise
* Work with users to establish and meet business needs
* Document progress, setbacks, and new processes
 | Project Sponsor |
| **Analyst*** Ensures that tools are in place for the project to keep moving forward efficiently.
 | * Assists in defining the project
* Gathers requirements from business units or users
* Documents technical and business requirements
* Defines needs and recommends solutions to ensure that the project’s objectives solve existing problems or enhance performance and add value to the organization
* Verifies that project deliverables meet the requirements
* Tests solutions to validate objectives
 | Project Leader |
| **Other Committees*** (Common in multi-disciplinary teams)
 | * **Steering Committee (Senior Management) -** This committee serves as a support for the project and solves problems in which the project manager may need some assistance, helps steer a project in a different direction, and approves budget changes.
* **Project Client (Customers) -** This committee can approve project plans, request changes, raise issues, approve timelines, and approve project benchmarks.
* **Project Management Office (Staff/Employees) -** This committee looks at the project management structure within your organization. Their tasks include sharing project resources, tools, techniques, and successful case studies to strengthen all future projects.
 | Project Leader |