

DEPARTMENT ORG DESIGN & ROLES TEMPLATE

Complete this template to define your department's structure, roles, capacity, and hiring plan.

Department / Business Unit	<i>[Enter department name]</i>
Document Owner	<i>[Enter name, title]</i>
Version	<i>[v1.0]</i>
Date	<i>[Enter date]</i>
Status	<i>[Draft / In Review / Final]</i>

Designed for Director / VP completion · Est. 60–90 minutes

01 DEPARTMENT OVERVIEW

i Provide a snapshot of the department's purpose, outputs, and success criteria. Aim for clarity a new stakeholder could understand in under 2 minutes.

1.1 Basic Information

Department Name: [Enter department name]

Business Unit / Division: [Enter business unit]

Department Head: [Name, Title]

Direct Report To: [Name, Title]

1.2 Department Mandate

i Write 2–3 sentences describing why this department exists and what it is uniquely responsible for delivering.

[Enter mandate – e.g., 'The X department is responsible for ... It ensures ... and enables the organization to ...']

1.3 Key Deliverables / Service Outputs

i List the primary products, services, or outcomes this department is accountable for producing.

- [Deliverable 1 – e.g., monthly financial close reports, workforce plan, approved budgets]
- [Deliverable 2 – e.g., monthly financial close reports, workforce plan, approved budgets]
- [Deliverable 3 – e.g., monthly financial close reports, workforce plan, approved budgets]
- [Deliverable 4 – e.g., monthly financial close reports, workforce plan, approved budgets]
- [Deliverable 5 – e.g., monthly financial close reports, workforce plan, approved budgets]

1.4 Success Metrics (KPIs)

i List 3–5 measurable indicators used to assess department performance.

KPI / Metric	Target	Measurement Frequency
[KPI 1 – e.g., X% on-time delivery]	[Define target – e.g., ≥ 95%]	[Monthly / Quarterly / Annual]
[KPI 2 – e.g., X% on-time delivery]	[Define target – e.g., ≥ 95%]	[Monthly / Quarterly / Annual]
[KPI 3 – e.g., X% on-time delivery]	[Define target – e.g., ≥ 95%]	[Monthly / Quarterly / Annual]
[KPI 4 – e.g., X% on-time delivery]	[Define target – e.g., ≥ 95%]	[Monthly / Quarterly / Annual]
[KPI 5 – e.g., X% on-time delivery]	[Define target – e.g., ≥ 95%]	[Monthly / Quarterly / Annual]

02 ORG STRUCTURE – CURRENT VS. TARGET

i Map all roles in the department. Add rows as needed. Use the Gap column to identify net shortfall (-) or surplus (+).

2.1 Current vs. Target Headcount

Role Title	Reports To	Team / Sub-Function	Employment Type	Current HC	Target HC (6–12 mo)	Gap (+/-)
[Role Title 1]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]
[Role Title 2]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]
[Role Title 3]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]
[Role Title 4]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]
[Role Title 5]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]
[Role Title 6]	[Reports To]	[Sub-function]	[Full-time / Part-time / Contract]	[#]	[#]	[+/-]

2.2 Org Chart Notes

i Attach or sketch an org chart, or note key structural observations (e.g., dual reporting, matrix roles).

[Attach org chart image or describe structure here. Note any dual-reporting, shared resources, or matrix arrangements.]

03 ROLE DEFINITIONS

i Copy the role block below for each position in the department. Complete one block per role.

◆ ROLE 1: [Role Title – copy this block for each role in the department]

Purpose (1–2 sentences)	Employment Type
<i>[Describe why this role exists and what it is uniquely accountable for.]</i>	<i>[Full-time / Part-time / Contract / Secondment]</i>

Key Responsibilities

i List 5–7 responsibilities. Start each with an action verb.

- [Key Responsibility 1 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 2 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 3 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 4 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 5 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 6 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 7 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']

Key Outputs / Deliverables

i List the tangible outputs this role produces (reports, decisions, processes, etc.).

- [Deliverable 1]
- [Deliverable 2]
- [Deliverable 3]

Decision Rights

i Clarify what this role owns outright vs. what requires escalation.

Owns / Decides Independently	Escalates To Manager / Leadership
<i>[Decision 1]</i>	<i>[Decision requiring escalation 1]</i>
<i>[Decision 2]</i>	<i>[Decision requiring escalation 2]</i>
<i>[Decision 3]</i>	<i>[Decision requiring escalation 3]</i>

Key Stakeholders

Internal Stakeholders	External Stakeholders
<i>[Dept, Team, or Role – e.g., Finance, HRBP]</i>	<i>[Vendors, Regulators, Partners, Clients]</i>
<i>[Add more as needed]</i>	<i>[Add more as needed]</i>

Required Skills & Competencies

Technical / Functional	Leadership / Behavioural	Qualifications / Certifications

[Technical skill 1]	[Leadership competency 1]	[Credential / Cert 1]
[Technical skill 2]	[Leadership competency 2]	[Credential / Cert 2]
[Technical skill 3]	[Leadership competency 3]	[Credential / Cert 3]

Capacity Assumptions

i Estimate how this role's time is distributed. Percentages must total 100%.

Activity / Work Type	% Time Allocation
[Activity / Work Type 1]	[%]
[Activity / Work Type 2]	[%]
[Activity / Work Type 3]	[%]
[Activity / Work Type 4]	[%]
Total	100%

Throughput Expectation: [e.g., 15 cases/week, 2 projects/quarter, 1 plan/month]

◆ ROLE 2: [Role Title 2]

Purpose (1–2 sentences)	Employment Type
[Describe why this role exists and what it is uniquely accountable for.]	[Full-time / Part-time / Contract / Secondment]

Key Responsibilities

i List 5–7 responsibilities. Start each with an action verb.

- [Key Responsibility 1 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 2 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 3 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 4 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 5 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 6 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']
- [Key Responsibility 7 – begin with an action verb, e.g., 'Develop', 'Manage', 'Review']

Key Outputs / Deliverables

i List the tangible outputs this role produces (reports, decisions, processes, etc.).

- [Deliverable 1]
- [Deliverable 2]
- [Deliverable 3]

Decision Rights

i Clarify what this role owns outright vs. what requires escalation.

Owns / Decides Independently	Escalates To Manager / Leadership
[Decision 1]	[Decision requiring escalation 1]
[Decision 2]	[Decision requiring escalation 2]
[Decision 3]	[Decision requiring escalation 3]

Key Stakeholders

Internal Stakeholders	External Stakeholders
[Dept, Team, or Role – e.g., Finance, HRBP]	[Vendors, Regulators, Partners, Clients]
[Add more as needed]	[Add more as needed]

Required Skills & Competencies

Technical / Functional	Leadership / Behavioural	Qualifications / Certifications
[Technical skill 1]	[Leadership competency 1]	[Credential / Cert 1]
[Technical skill 2]	[Leadership competency 2]	[Credential / Cert 2]
[Technical skill 3]	[Leadership competency 3]	[Credential / Cert 3]

Capacity Assumptions

i Estimate how this role's time is distributed. Percentages must total 100%.

Activity / Work Type	% Time Allocation
[Activity / Work Type 1]	[%]
[Activity / Work Type 2]	[%]
[Activity / Work Type 3]	[%]
[Activity / Work Type 4]	[%]
Total	100%

Throughput Expectation: [e.g., 15 cases/week, 2 projects/quarter, 1 plan/month]

[Continue copying the role block above for each additional role in the department]

04 RACI MATRIX

i Assign one code per cell using the legend below. Every row must have exactly one A (Accountable). Add roles as columns and activities as rows.

4.1 RACI Legend

R	Responsible – does the work	A	Accountable – owns the outcome	C	Consulted – provides input	I	Informed – kept t
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4.2 Activity × Role Matrix

Key Activity	[Role 1]	[Role 2]	[Role 3]	[Role 4]	[Role 5]
[Activity 1 – e.g., Annual Workforce Plan]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 2 – e.g., Headcount Approval]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 3 – e.g., Performance Reviews]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 4 – e.g., Budget Submission]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 5 – e.g., Hiring Decisions]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 6 – e.g., Vendor Management]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
[Activity 7 – add more as needed]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]

05 CAPACITY & WORKLOAD PLANNING

i Quantify demand vs. supply for each work type. Highlight gaps for hiring or reallocation decisions.

5.1 Capacity Model

Activity / Work Type	Volume (Weekly or Monthly)	Effort per Unit (hrs)	Total Capacity Required (hrs)	Current Capacity Available (hrs)	Gap / Surplus (hrs)
[Activity / Work Type 1]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]
[Activity / Work Type 2]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]
[Activity / Work Type 3]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]
[Activity / Work Type 4]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]
[Activity / Work Type 5]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]
[Activity / Work Type 6]	[e.g., 120/mo]	[e.g., 0.5 hrs]	[Auto: Vol × Effort]	[e.g., 160 hrs]	[+/- hrs]

5.2 Assumptions & Notes

Productive hours per FTE per month: [e.g., 140 hours after meetings, training, etc.]

Leave / Overhead Buffer: [e.g., 15% applied to all capacity figures]

Key Assumptions: [e.g., volumes based on Q3 actuals; contractor hours excluded]

06 SPAN OF CONTROL & ORG LAYERS

i Document the structural design of the department. Industry benchmark: 5–8 direct reports per manager for professional roles; 8–15 for operational/frontline roles.

6.1 Structure Summary

Average Manager Span	Number of Org Layers	Total Department Headcount
[X : 1 – e.g., 6:1]	[# layers – e.g., 3]	[Total HC – e.g., 24 FTEs]

6.2 Span & Layer Risks / Notes

i Flag any structural inefficiencies, over-spans, or design risks below.

- [Span risk 1 – e.g., Manager X has 12 direct reports across 3 locations, reducing coaching capacity]
- [Layer risk 2 – e.g., 4 org layers for a 15-person team creates unnecessary hierarchy]
- [Other note – e.g., Single point of failure in [sub-function]; no successor identified]

07 HIRING & PHASING PLAN

i List every open or planned hire. Rank by priority and provide a clear business rationale for each position.

Role Title	Hiring Timeline	Priority	Type	Business Rationale
[Role Title 1]	[Q1 2026 / Jan 2026]	[High / Med / Low]	[New / Backfill]	[e.g., Required to close capacity gap in X]
[Role Title 2]	[Q1 2026 / Jan 2026]	[High / Med / Low]	[New / Backfill]	[e.g., Required to close capacity gap in X]
[Role Title 3]	[Q1 2026 / Jan 2026]	[High / Med / Low]	[New / Backfill]	[e.g., Required to close capacity gap in X]
[Role Title 4]	[Q1 2026 / Jan 2026]	[High / Med / Low]	[New / Backfill]	[e.g., Required to close capacity gap in X]
[Role Title 5]	[Q1 2026 / Jan 2026]	[High / Med / Low]	[New / Backfill]	[e.g., Required to close capacity gap in X]

7.1 Total Hiring Summary

Net New Hires	Backfills	Contract-to-Perm	Total Requisitions
[#]	[#]	[#]	[#]

08 RISKS & DEPENDENCIES

i Identify workforce risks that could affect delivery. Be specific — generic risks add no value.

8.1 Risk Register

Risk Description	Category	Likelihood	Impact	Mitigation / Owner
[Risk 1]	[People / Process / External / Dependency]	[High / Med / Low]	[High / Med / Low]	[Describe mitigation or owner]
[Risk 2]	[People / Process / External / Dependency]	[High / Med / Low]	[High / Med / Low]	[Describe mitigation or owner]
[Risk 3]	[People / Process / External / Dependency]	[High / Med / Low]	[High / Med / Low]	[Describe mitigation or owner]
[Risk 4]	[People / Process / External / Dependency]	[High / Med / Low]	[High / Med / Low]	[Describe mitigation or owner]

8.2 Key Dependencies

i List external factors or cross-functional dependencies that constrain this department's workforce plan.

- [Labour market constraint – e.g., Shortage of certified X professionals in Ontario]
- [Union / collective agreement – e.g., Job classification changes require CUPE consultation]
- [Contractor dependency – e.g., 30% of current capacity is contractors; risk if contracts end]
- [Technology dependency – e.g., Headcount plan contingent on SAP go-live in Q2]
- [Other dependency – e.g., Pending budget approval from Finance required before posting roles]

09 ROLE ARCHETYPES / JOB FAMILIES (OPTIONAL)

i Complete this section if the department has career levels or job families. Useful for workforce planning, succession, and compensation benchmarking.

9.1 Job Family Levels

Job Family	Level I	Level II	Level III	Level IV	Level V
[Job Family 1 – e.g., Data & Analytics]	[Level I – Analyst I]	[Level II – Analyst II]	[Level III – Senior Analyst]	[Level IV – Lead Analyst]	[Level V – Principal]
[Job Family 2 – e.g., Engineering]	[Level I]	[Level II]	[Level III]	[Level IV]	[Level V]
[Job Family 3]	[Level I]	[Level II]	[Level III]	[Level IV]	[Level V]

9.2 Key Level Differentiators

i Describe what distinguishes one level from the next in terms of scope, accountability, and capability.

Level Transition	Key Difference (Scope / Accountability)	Typical Qualifying Criteria
[Analyst I → Analyst II]	[e.g., Moves from task execution to independent analysis; owns one workstream]	[e.g., 2+ yrs experience; demonstrated delivery]
[Analyst II → Senior]	[e.g., Leads projects; mentors junior staff; presents to stakeholders]	[e.g., 4+ yrs; domain SME designation]
[Senior → Lead]	[e.g., Accountable for team output; influences strategy]	[e.g., PMP / CPA / designation as applicable]