

DELEGATION FIELD TOOL

Delegation Clarity Worksheet

Transfer responsibility, authority, and accountability without becoming the bottleneck.

Use this before assigning significant work. Complete it together, then keep a copy for each scheduled check-in.

1. Name the assignment

ASSIGNMENT	OWNER
DELEGATING LEADER	COMPLETION DATE

Desired outcome *What must be true when this assignment is complete?*

Why this matters *How does this support the church's mission, people, or priorities?*

2. Choose the authority level

☐ LEVEL 1

Gather information. Bring facts and options; the delegating leader decides.

☐ LEVEL 2

Recommend a decision. Explain the recommendation and reasoning; the delegating leader approves.

☐ LEVEL 3

Decide with approval. Develop the decision, then receive approval before acting.

☐ LEVEL 4

Decide and report. Act within the agreed boundaries and report at the scheduled check-in.

THE SIX-PART AGREEMENT

Make the handoff explicit

A clear conversation now prevents repeated approvals, missed expectations, and anxious follow-up later.

#	Element	Agreement
1	Outcome	The result we are responsible for producing is: _____ _____
2	Owner	The person with primary responsibility is: _____
3	Authority	The agreed authority level is: ☐ 1 ☐ 2 ☐ 3 ☐ 4 _____
4	Boundaries	Decisions that require consultation or approval: _____ _____
5	Resources	Budget, people, information, and tools available: _____ _____
6	Check-ins	Dates, measures, and information to bring: _____

Boundary check

May decide independently

Must consult first

May not change

Confirm the handoff

Owner signature / date

Delegating leader signature / date

THIRTY-MINUTE RESET

Repair a delegation assignment that has stalled

Use this reset when responsibility is unclear, approvals are slowing the work, or either leader has lost confidence in the handoff.

Time	Focus	Question
0-5 min	Name the assignment	What result are we actually trying to produce?
5-10 min	Define success	What must be true when this is complete?
10-15 min	Reset authority	Which decisions can the owner make without returning for approval?
15-20 min	Clarify boundaries	What requires consultation, and what cannot change?
20-25 min	Set the check-in	When will we review progress, and what information will be brought?
25-30 min	Confirm the handoff	What will each person do next, and by when?

Use these questions at every check-in

- [] What has changed since the last check-in?
- [] What decisions have been made within the agreed authority?
- [] What risk, obstacle, or relationship needs attention?
- [] What help is needed - and what does the owner still need to solve?

After-action review

What worked	What created confusion	What we will change next time