TOOL 1

LEVELS OF AUTHORITY

Every delegated task gets a level, stated out loud before work starts. Most delegation frustration comes from the leader assuming one level and the team member assuming another.

EMPOWERMENT

Providing the right **information**, **training**, **resources**, and **leadership** for people to make the right decisions within the culture and policies of the organization.

	LEVEL	THE LEADER SAYS	THE TEAM MEMBER	CHECK IN
1	**do as directed**	*"Here's exactly what to do."*	Follows the plan as given. Asks before changing anything.	before and after
2	**research and recommend**	*"Look into it and bring me options."*	Lays out 2–3 options and recommends one. Leader decides.	before deciding
3	**decide and inform first**	*"Make the call, but tell me before you act."*	Decides, shares the decision, and waits a short window before acting.	before acting
4	**act and report after**	*"Handle it and let me know how it went."*	Decides and acts, then reports results.	after acting
5	**full ownership**	*"This is yours."*	Owns the area completely, including its goals and check-ins.	agreed rhythm

HOW TO USE THE CARD

01 **Name the level every time.** "I'm handing you the weekly schedule at Level 3." One sentence prevents most misunderstandings.

02 **Match the level to the person, not the task.** The same task can be Level 2 for a new team member and Level 4 for a veteran leader.

03 **Empower to the level you give.** Higher levels need more information, training, resources, and leadership. Level 4 without them sets people up to fail.

04 **Move up deliberately, and down without shame.** Raise the level after a few successful handoffs. Dropping a level for a high-stakes moment is support, not punishment.

05 **Don't snatch it back.** Giving Level 4 and then overriding the decision erodes trust faster than never delegating.

TOOL 2

DELEGATION HANDOFF BRIEF

Fill this out together in a 15-minute conversation, not by email. If a box can't be filled in, the task isn't ready to hand off.

THE TASK

TASK OR AREA BEING HANDED OFF

DELEGATED BY

DELEGATED TO

HANDOFF DATE

THE OUTCOME: WHAT SUCCESS LOOKS LIKE

MISSION CONNECTION: WHY THIS MATTERS

AUTHORITY LEVEL (SELECT ONE)

- ☐ **level 1** — do as directed
- ☐ **level 2** — research & recommend
- ☐ **level 3** — decide & inform first
- ☐ **level 4** — act & report after
- ☐ **level 5** — full ownership

EMPOWERMENT CHECKLIST

- ☐ **information** — background, history, contacts, where files live
- ☐ **training** — skills, systems, or processes to learn first
- ☐ **resources** — budget, tools, space, volunteers, and time
- ☐ **leadership** — who they go to when stuck, and how fast they'll hear back

TOOL 2, CONTINUED

BOUNDARIES AND RHYTHM

Name the guardrails and the check-ins so the person can act with confidence.

BOUNDARIES: CULTURE AND POLICIES

VALUES THAT SHOULD GUIDE DECISIONS

POLICIES THAT APPLY (BUDGET LIMITS, APPROVALS, SAFETY)

NON-NEGOTIABLES: DECISIONS THAT STAY WITH THE LEADER

WHO ELSE NEEDS TO BE INFORMED, AND HOW

RHYTHM

CHECK-IN DATES OR RHYTHM

DUE DATE

DEBRIEF DATE

WHAT "DONE" LOOKS LIKE

AGREEMENT

- [ ] We agree on the outcome and why it matters.
- [ ] We agree on the authority level.
- [ ] All four parts of empowerment are in place, or there is a date for each.
- [ ] We know when we'll check in and when we'll debrief.

LEADER

TEAM MEMBER

TOOL 2, CONTINUED

AFTER THE HANDOFF: DEBRIEF

A 10-minute debrief turns one delegated task into growth for the next one. Ask these in order.

01 what happened?

Compare the result with the outcome on the brief.

02 which part of empowerment was missing?

Information, training, resources, or leadership. The gap is usually here, not in the person.

03 was the level right?

Too high, too low, or about right?

04 what will we change next time?

Pick one thing to adjust.

05 where is the level going next?

Stay, move up, or move down for now, and say why.

READY TO MOVE UP A LEVEL?

- [ ] 2–3 handoffs at this level with the outcome met
- [ ] Decisions reflect the organization's values without reminders
- [ ] More "here's what I'm thinking" than "what should I do?"
- [ ] Informs the right people without being prompted