

Role Clarity and Accountability Guide

A Self-Guided Capacity-Building Tool for Value-Driven Organizations

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This guide can help with:

- Role confusion
- Decision delays
- Hidden workload
- Internal friction

This guide cannot fix:

- Chronic underfunding
- Inadequate staffing levels
- Misaligned governance
- External policy constraints

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Section 1: How to Use This Guide

This guide can be utilized by:

- An executive director or senior leader
- A manager clarifying their own role
- A small leadership team
- A board seeking better understanding of operations

It works best when approached with curiosity, not judgment.

Time Expectations:

- 1-2 Hours
- Can be completed in multiple sittings
- Partial completion is still valuable.

Optional Team Input

To complement this guide, organizations are encouraged to conduct a short staff pulse analysis to better understand how roles, expectations, and workload are experienced across the team.

This optional step includes:

- A confidential survey distributed to staff by Praxis Development LLC
- Questions focused on role clarity, decision flow, workload, and psychological safety
- An executive-ready dashboard summarizing key patterns and pressure points

Results are used to identify structural themes rather than individual feedback, helping leaders prioritize role clarification and capacity improvements with greater confidence.

Participation in a staff pulse analysis is not required to benefit from this guide. It is offered as an additional support when organizations want a broader, data-informed view. Reach out to contact@praxisadvantage.org to learn more.

Section 2: Organizational Snapshot

1. Approximate size of organization:
 - ☐ Very small (1-5 people)
 - ☐ Small (6-15 people)
 - ☐ Medium (16-50 people)
 - ☐ Large (51-100 people)
 - ☐ Very large (100+ people)
2. Programs or core functions:
 - ☐ Single program or service line
 - ☐ 2-3 programs or service lines
 - ☐ 4-6 programs or service lines
 - ☐ 7+ programs or service lines
3. Number of paid staff:
 - ☐ 0 (volunteer-led)
 - ☐ 1-5
 - ☐ 6-15
 - ☐ 16-50
 - ☐ 51+
4. Use of volunteers or contractors:
 - ☐ No regular volunteers or contractors
 - ☐ Occasional volunteers or short-term contractors
 - ☐ Regular volunteers or contractors supporting operations
 - ☐ Heavy reliance on volunteers or contractors for core work
5. Who holds final decision authority?
 - ☐ Board of Directors
 - ☐ Executive Director or CEO
 - ☐ Shared between board and executive leadership
 - ☐ Senior leadership team
 - ☐ Unclear or varies by situation

6. How many layers exist between board and front-line staff?

- ☐ No layers (board directly involved in operations)
- ☐ One layer
- ☐ Two layers
- ☐ Three or more layers
- ☐ Not sure

7. Where do decisions most often stall?

- ☐ Board approval
- ☐ Executive leadership
- ☐ Management or supervisory level
- ☐ Cross-department coordination
- ☐ Decisions rarely stall

8. Funding stability:

- ☐ Stable and predictable
- ☐ Mostly stable with some uncertainty
- ☐ Frequently uncertain or short-term
- ☐ Highly unstable or crisis-driven

9. Regulatory and compliance requirements

- ☐ Minimal
- ☐ Moderate and manageable
- ☐ Significant and time-intensive
- ☐ Overwhelming or constantly changing

10. Community demand relative to capacity

- ☐ Demand is well aligned with capacity
- ☐ Demand occasionally exceeds capacity
- ☐ Demand regularly exceeds capacity
- ☐ Demand far exceeds capacity

11. Staffing and workforce stability

- ☐ Stable staffing with low turnover
- ☐ Occasional vacancies or turnover
- ☐ Frequent vacancies or turnover
- ☐ Chronic understaffing or burnout risk

Notes:

Section 3: Role Evaluation

Role Information

Role title: _____

Reports to: _____

Roles reporting to this position:

Role Purpose

In one or two sentences:

Why does this role exist?

What problem would emerge if this role did not exist?

Accountable Outcomes

What outcomes is this role responsible for delivering?

What success looks like when this role is working well:

Who Relies on This Role

Internal teams:

External partners:

Clients or community members:

Decision Ownership and Authority

Decisions this role can make independently:

Decisions directly tied to this role's outcomes:

Decisions this role influences (collaboration or input):

Advisory or consultative authority:

Decisions that escalate frequently:

Decisions that distract from core purpose:

Executive Reflection:

Which decisions slow work the most?

Where is authority unclear or avoided?

Role Boundaries

Select all that apply.

1. Boundary Challenges

- ☐ Frequent interruptions that disrupt planned work
- ☐ Responsibilities expanding beyond role intent
- ☐ Unclear or shifting expectations from leadership or board

2. Early Warning Signs

- ☐ Regular overtime or extended work hours
- ☐ Repeated urgency without resolution
- ☐ Growing frustration, disengagement, or role fatigue

3. Signals of Unsustainability

- ☐ Work cannot pause without immediate negative impact
- ☐ Decisions avoided due to risk or conflict

Notes:

Role Transition Snapshot

Who this role depends on:

What must happen before this role can succeed:

Who depends on this role:

What breaks when this role is overloaded:

Section 4: Reflection (Complete this section last.)

Identify the following:

One responsibility that could be clarified, shifted, or paused

One decision that could move closer to the work

One process that could reduce repeated strain

One boundary that needs clearer support

Avoid solutions that require new funding or staffing unless the necessary resources are already allocated.

Section 5: Optional Next Steps and Support

Self-guided use may be enough when:

- The organization is stable
- Leadership alignment is strong
- Issues are primarily structural

Additional support may be necessary when:

- Conflict is present
- Authority is contested
- Governance issues surface
- Changes stall repeatedly

Support is a tool, not a failure.

Final Reflection

- Clarity is king!
 - Clear roles protect people.
 - Clear structure protects the mission.
 - Clarity reduces burnout before resilience is required.
- Consider a staff pulse analysis to understand how your team perceives the organization
- Consider a consultant review of your findings. Let us know what kind of support you need.

Contact us at: contact@praxisadvantage.org

This guide is designed to help organizations get clarity with the need for a consultant. Leaders should utilize this guide to advance the organization's mission, not in response to urgent needs.

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