



Role Clarity Worksheet

[illegible]



- Role/Position: Enter each unique role in your agency.
- Primary Responsibilities: List the top 3–5 responsibilities for each role.
- Desired Outcomes: Define what success looks like in this role (e.g., “Client retention rate of 90%”).
- Reporting Structure: Indicate where this role sits in the agency’s hierarchy (e.g., who they report to, if they supervise others).
- Notes for Improvement: Add any notes on changes or adjustments needed to clarify the role further.

Current Org Chart (Optional)

Purpose:

If there is no existing org chart or if clarity is needed around reporting lines, this section provides a visual representation of the agency structure to organize roles hierarchically before finalizing job descriptions.

Instructions:

1. Sketch out the current hierarchy, starting with leadership roles at the top and working down to frontline positions.
2. Connect lines to indicate reporting relationships.
3. Bring this chart to the meeting to discuss any changes or restructuring needed.